

## Donor Confidence Report

Issue 29, April 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 April 2014 poll is 511. Details about the study methodology and audience are found on the final page of this report.

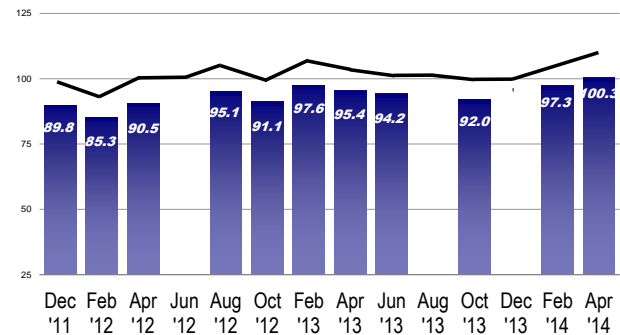
### Donor Confidence Exceeds 2008 Benchmark

The DCI has increased by 3.0 points since February to 100.3.

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	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14	2-Mo Chg
<b>Overall</b>	<b>97.6</b>	<b>95.4</b>	<b>94.2</b>	<b>92.0</b>	<b>97.3</b>	<b>100.3</b>	<b>▲ 3.0</b>
Int'l Relief and Development	103.6	104.2	98.3	98.0	100.4	106.8	▲ 6.4
Hospitals & Hosp. Fnd.	100.4	95.4	96.1	94.3	96.8	102.9	▲ 6.1
Place of Worship	99.4	96.9	96.4	91.9	99.0	104.8	▲ 5.8
Political and Advocacy	96.9	99.1	92.2	94.2	99.1	104.8	▲ 5.7
Health and Medical	101.5	93.4	95.1	95.5	94.6	100.1	▲ 5.5
Environmental	99.6	99.2	99.8	97.1	99.0	100.9	▲ 1.9
Education	101.4	94.6	96.0	94.6	100.8	102.2	▲ 1.4
Animal Rights	100.5	98.3	92.4	90.9	96.8	97.8	▲ 1.0
Faith-based	104.0	97.2	94.9	96.5	102.5	103.3	▲ 0.8
Arts, Culture & Humanities	105.1	101.6	98.5	97.5	103.8	103.3	▼ 0.5
Social Service	100.6	95.5	96.8	94.0	101.1	100.1	▼ 1.0

Index scores are currently above 100 for all but one sector. (Opinions from a donor alter the Index for any sector they recall supporting.)



### Donor Confidence Rising in 2014

By Dirk Rinker

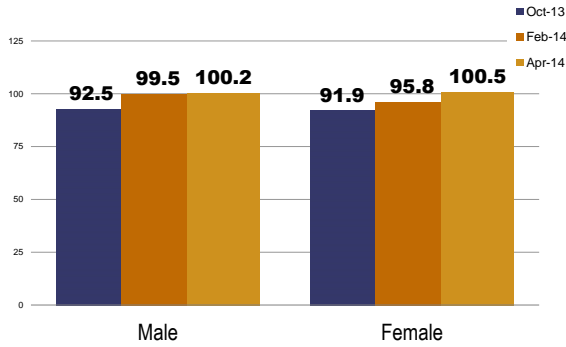
This month, the Donor Confidence Index marks its highest point since February 2008 when the index was initiated with a survey of 2,300 US donors. In the months after that poll, the country slipped into recession. This edition shows that – at least from a donor perspective – the recession appears to be over.

Among groups that make up the majority of donors, the Donor Confidence Index stands at 100.5 among women, 101.7 among pre-Boomers, and about 106.7 among households that report earning over \$100K annually.

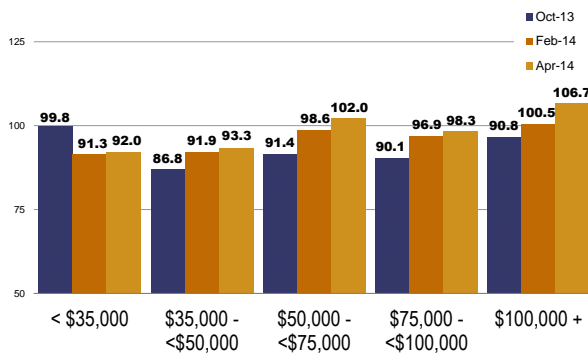
The proportion of donors who expect the economy to decline in the coming year continues to fall, and the proportion who think it will improve or remain the same is now a strong 72%.

### Donor Confidence by Gender, Age and Income

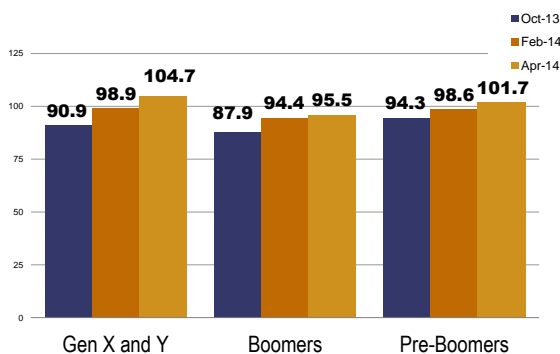
Since February, the DCI among women has increased by 4.7 points to a high point of 100.5, and by .7 points among men to a score of 100.2.



Interestingly, confidence is up among donors from households with incomes in all ranges. Confidence has risen the most (6.2 points) among those earning \$100,000+.



Index scores have also increased among Boomers, Pre-Boomers, and Gen X & Y donors. Gen X & Y scores have seen the greatest change, scoring 7.8 points higher since February.

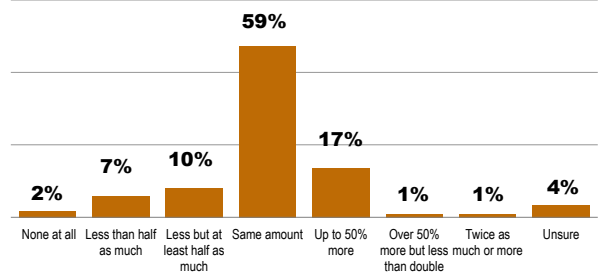


## Expectations for Giving in 2014

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 April, approximately three in five U.S. donors (59%) plan to give the same amount to charity this year. One in six plan to give less (17%) and 19% plan to give more.

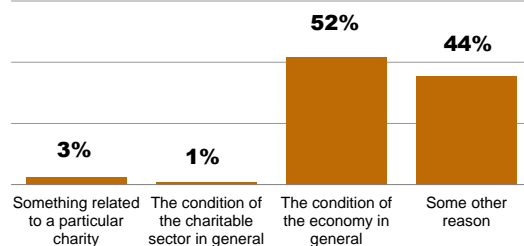
### Expected Giving (April 2014)



## Reasons for Giving Less

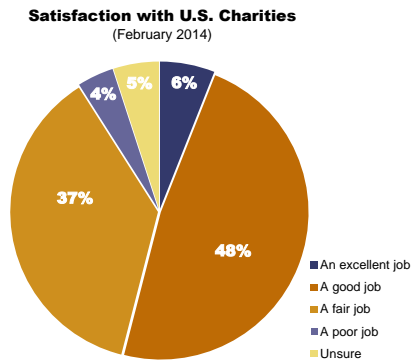
Half of all donors who plan to give less (52%) point to the economy as the reason for their decreased giving. More than two in five (44%) report giving less due to reasons not listed.

### Reasons for Donating Less in 2014



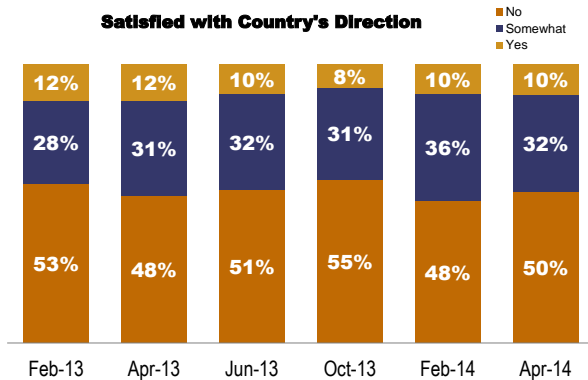
### U.S. Nonprofit Approval Ratings

Currently, 48% of donors say U.S. charities are doing a *good* job. Thirty-seven percent say they are doing a *fair* job.

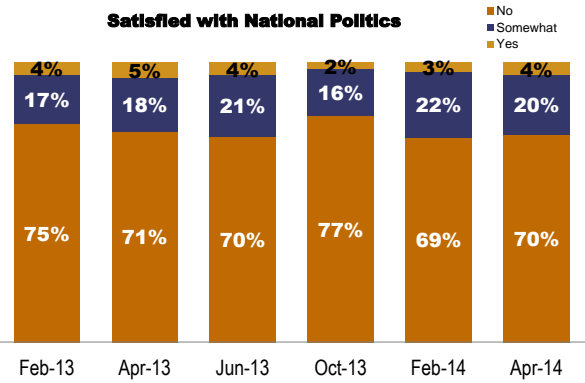


### Donors Dissatisfied with Government

Half of all donors (50%) express dissatisfaction with the country's direction.

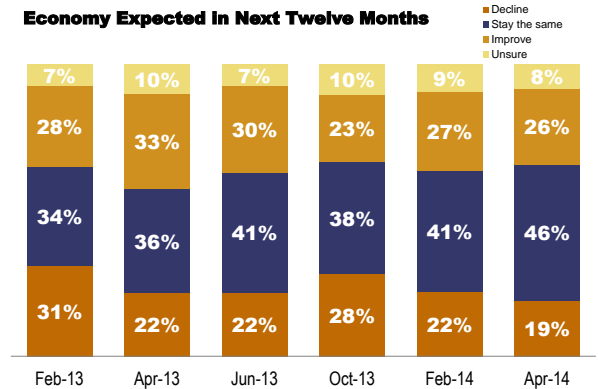


Seven in ten donors say they are unhappy with politics at the federal level.

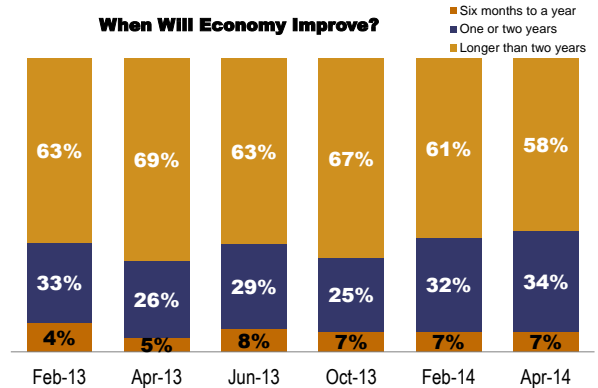


### Economic Outlook

At present, 46% of donors expect the economy to remain the same over the next year. One in four (26%) believe it will decline.

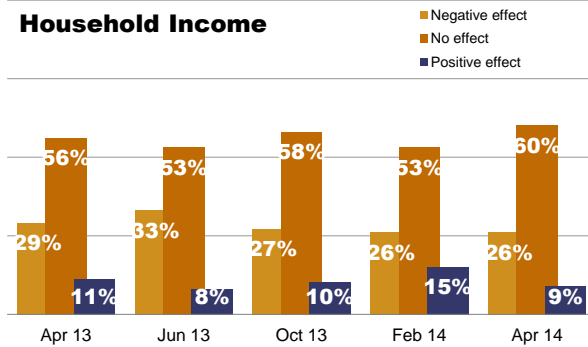


Almost three in five donors (58%) expect the economy to improve in more than two years.

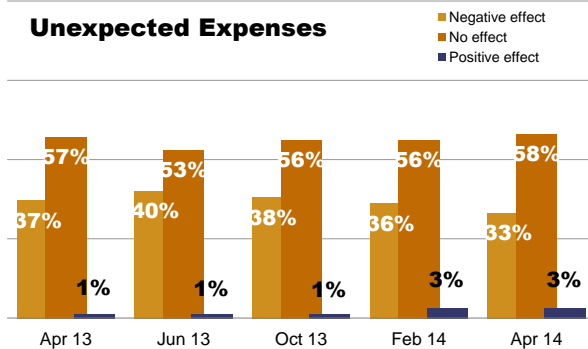


### Impact of Income and Expenses

Since February, 26% of donors continue to report that change, or lack of change, in household income has a negative effect on their giving.



One third (33%) 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:

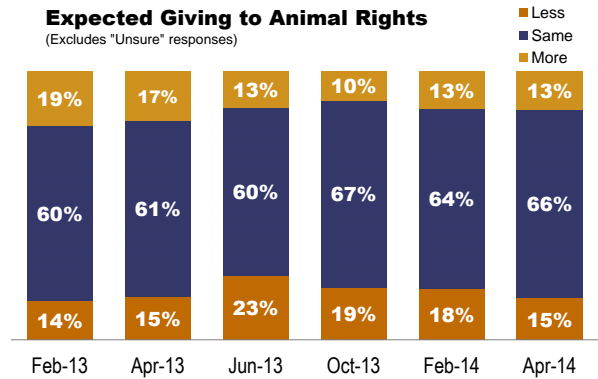
- > Animal rights, protection, and training
- > Arts, culture, and humanities
- > Educational institutions and programs
- > Environmental protection and preservation
- > Faith-based charities, excluding places of worship
- > Health and medical charities

- > International relief, education, and sponsorship
- > Not-for-profit hospitals and hospital foundations
- > Places of worship
- > Political organizations
- > Social service organizations

### Animal Rights & Protection

Since February, the DCI for Animal Rights charities has increased by one point to 97.8.

Sector	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14
Animal Rights	100.5	98.3	92.4	90.9	96.8	97.8
6-mo Avg.	94.0	96.5	97.1	93.9	93.4	95.2



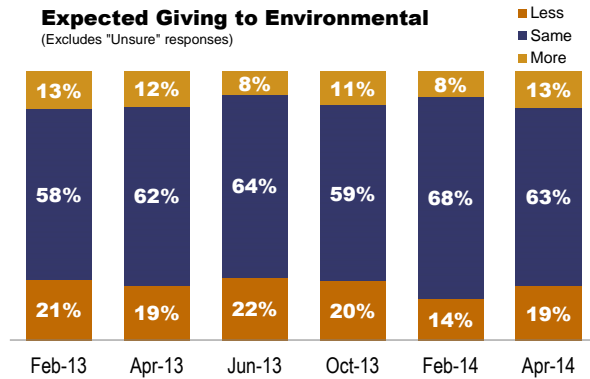
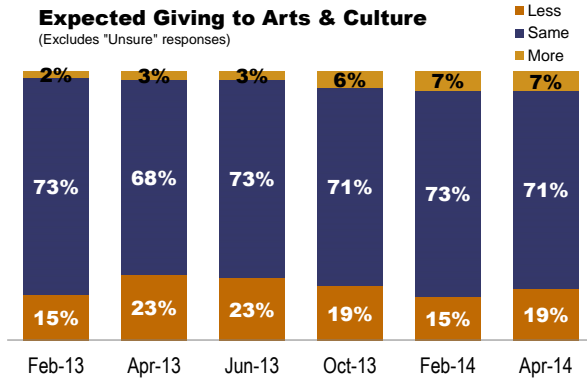
Currently, 66% of Animal Rights donors plan to give the same amount to this sector throughout 2013, while 15% plan to give less and 13% plan to give more.

### Arts, Culture, and Humanities

The Index for Arts organizations has remained stable since last issue, falling only .5 points since February. Its April score (103.3) and 6-month rolling average (101.5) remain quite high.

Sector	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14
Arts & Culture	105.1	101.6	98.5	97.5	103.8	103.3
6-mo Avg.	101.4	101.6	101.7	99.2	99.9	101.5

Nearly three in four donors to Arts & Culture (71%) expect to give the same amount to the sector in 2014 as they did in 2013.

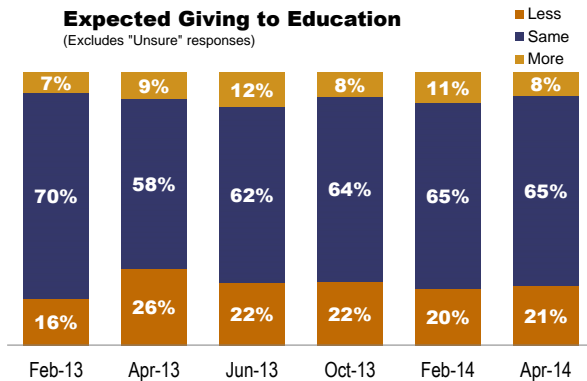


**Educational Institutions & Programs**

The DCI for Educational Institutions has also seen growth, rising 1.4 points since April to 102.2.

Sector	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14
Education	101.4	94.6	96.0	94.6	100.8	102.2
6-mo Avg.	98.3	97.2	97.3	95.1	97.1	99.2

Today, 65% of donors plan to give the same amount to Education this year. About one in five (21%) plan to give less.



**Environmental Protection**

The DCI for Environmental organizations has remained mostly stable this year, reaching its highest score this April at 100.9.

Sector	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14
Environmental	99.6	99.2	99.8	97.1	99.0	100.9
6-mo Avg.	96.7	97.8	99.5	98.7	98.6	99.0

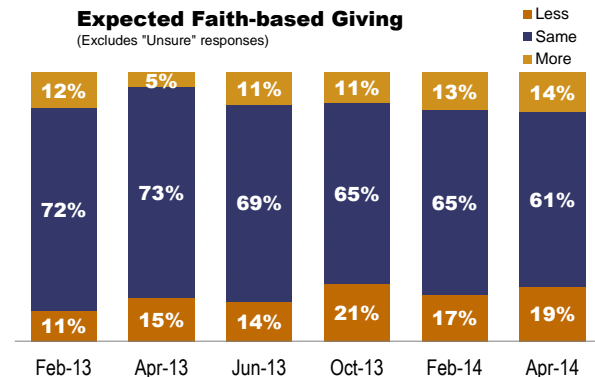
Nearly two in three donors to Environmental charities (63%) report plans to give the same dollar amount to the sector this year. One in five (19%) report plans to give less.

**Faith-based Charities**

Climbing steadily since June, the DCI among donors to Faith-based charities has risen 8.4 points to a total score of 103.3 in April.

Sector	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14
Faith-based	104.0	97.2	94.9	96.5	102.5	103.3
6-mo. Avg.	99.2	98.1	98.7	96.2	98.0	100.8

Of donors to Faith-based organizations, 61% report planning to give the same amount to the sector in '14. Nineteen percent plan to give less and 14% plan to give more.



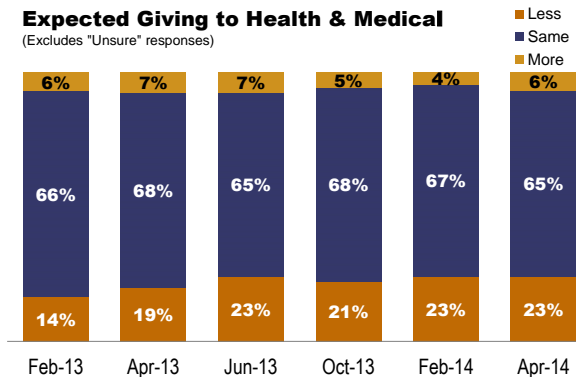
### Health and Medical Charities

Up 5.5 points this issue, the Index for Health and Medical charities stands at 100.1.

Sector	Feb '13	Apr '12	Jun '13	Oct '13	Feb '14	Apr '14
Health & Med.	101.5	93.4	95.1	95.5	94.6	100.1
6-mo. Avg.	95.4	95.0	96.7	94.7	95.1	96.7

Approximately two in three donors to Health-related charities (65%) report plans to give the same amount during 2014 as they did in 2013.

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



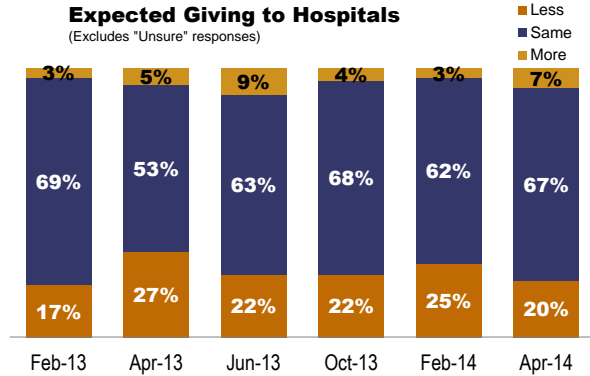
### Hospitals & Hospital Foundations

The DCI for Hospitals and Hospital Foundations increased 7.5 points since April 2013 to 102.9 today.

Sector	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14
Hospitals	100.4	95.4	96.1	94.3	96.8	102.9
6-mo. Avg.	96.1	95.9	97.3	95.3	95.7	98.0

Sixty-seven percent of donors expect to give the same dollar amount to Hospitals & their Foundations throughout 2013. One in five (20%) plan to give less, while seven percent plan to give more.

**Expected Giving to Hospitals**  
(Excludes "Unsure" responses)

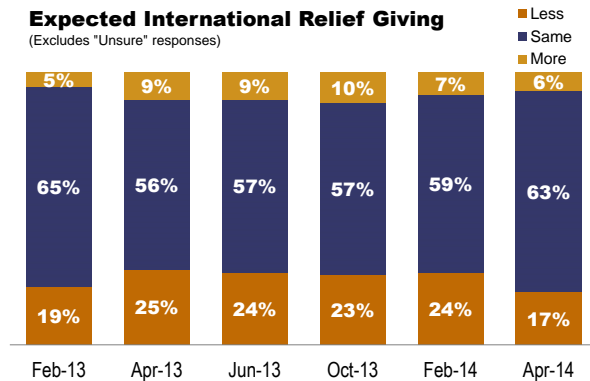


### Int'l Relief & Sponsorship

The Index for International Relief charities has increased by 6.4 points since February to 106.8.

Sector	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14
Int'l Relief and Development	103.6	104.2	98.3	98.0	100.4	106.8
6-mo. Avg.	99.0	100.8	102	100.2	98.9	101.7

**Expected International Relief Giving**  
(Excludes "Unsure" responses)



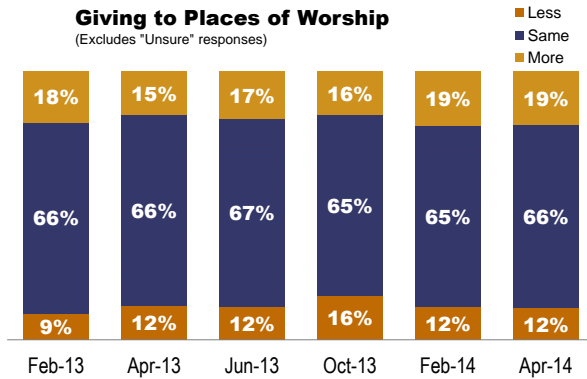
As of April, 63% plan to give the same amount to International Relief charities this year as last. One in six (17%) plan to give less.

### Places of Worship

The Confidence Index for Places of Worship has risen steadily, increasing by 5.8 points to 104.8 this month.

Sector	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14
Places of Worship	99.4	96.9	96.4	91.9	99.0	104.8
6-mo. Avg.	95.3	95.6	97.6	95.1	95.8	98.6

Two in three donors to Places of Worship (66%) expect to give the same amount throughout 2014 as they did in 2013. One in five (19%) plan to give more.

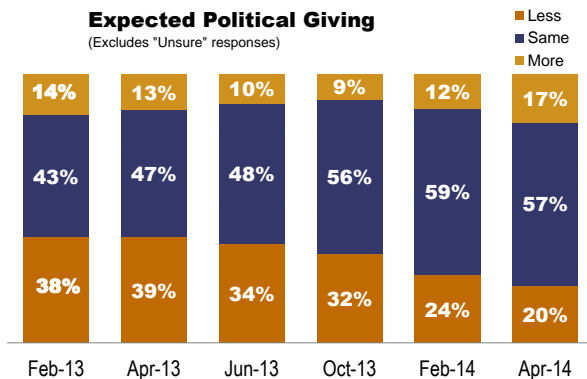


**Political & Advocacy**

The DCI for the Political sector has increased by 5.7 points since last issue to 104.8.

Sector	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14
Political and Advocacy	96.9	99.1	92.2	94.2	99.1	104.8
6-mo. Avg.	98.8	98.1	96.1	95.2	95.2	99.4

Today, 57% of Political donors plan to give the same amount to the sector this year, while one in six (17%) plan to give more.

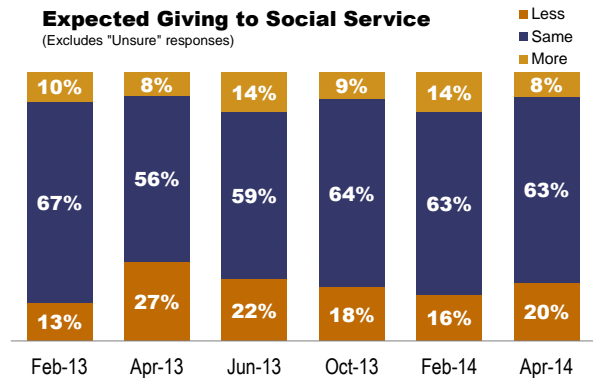


**Social Service**

The Index for Social Service charities has dropped by one point since February to 100.1.

Sector	Feb '13	Apr '13	Jun '13	Oct '13	Feb '14	Apr '14
Social Svcs	100.6	95.5	96.8	94.0	101.1	100.1
6-mo. Avg.	98.9	97.7	97.6	95.4	97.3	98.4

Nearly three in five Social Service donors (63%) plan to give the same amount to this sector in 2014. One in five donors (20%) plan to donate less.



**Methodology**

This Donor Confidence Report poll was conducted April 2014 among 511 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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