Understanding Fundraising Trends During COVID-19

May 7th, 2020
Identify US & Canadian Donor Trends

• Google Survey methodology
• Targeted Google traffic aged 35+
• Ran in late March/early April 2020
• Partnered with Blakely – a leading fundraising consultancy & agency
• 1,000 respondents per question in USA & 825 in Canada
• Used responses/total responders as basis for “choose all that apply”
• Similar results across segments unless we highlighted them
• Second wave in-field now
Understand Donor Sentiment During COVID-19

• Should charities fund-raise during Covid 19?
• Have attitudes toward donating changed?
• What causes do people want to support?
• Will donors and non-donors donate and get involved more?
• What can charities do to raise awareness and promote their causes?
83% Think Brands Should Continue to Advertise

US Internet Users Who Agree that Brands Should Advertise as Normal During the Coronavirus Outbreak, March 2020

% of respondents

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neither agree nor disagree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>16%</td>
<td>22%</td>
<td>35%</td>
<td>15%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Note: ages 16-64; numbers may not add up to 100% due to rounding

254232 www.emarketer.com
Donation Intention Levels Remain Steady/Up

Do you plan to make the same level of donations in 2020 as you did in 2019? (Choose one)

**Canada**
- Yes 44%
- Will Try to Donate More 23%
- No 32%

**USA**
- Yes 46%
- Will Try to Donate More 26%
- No 27%
Donation Intention Correlates with Age

Do you plan to make the same level of donations in 2020 as you did in 2019? (Choose one)

- 35-44
- 45-54
- 55-64
- 65+

A very positive sign

Yes

Will try to donate more

No
With Minor Differences By Gender

Do you plan to make the same level of donations in 2020 as you did in 2019? (Choose one)

Male
- Yes: 43%
- No: 32%
  - Will Try to Donate More: 25%

Female
- Yes: 49%
- No: 26%
  - Will Try to Donate More: 25%
Americans Donate More Frequently

How often do you donate to your favorite charity? (Choose one)

- **Canada**
  - 2-4 Times Per Year: 22%
  - Monthly: 20%
  - Once per year: 18%
  - Do not donate regularly/Do not recall/None of the above: 41%

- **US**
  - 2-4 Times Per Year: 25%
  - Monthly: 23%
  - Once per year: 15%
  - Do not donate regularly/Do not recall/None of the above: 36%
Most Think Charities Should Continue Fundraising

Thinking about charities that do not deal directly with COVID-19, do you think they should:
(choose one)

- Continue Asking for Donations: 49%
- Fundraise for Larger Donations: 12%
- Fundraise for Smaller Donations: 10%
- Stop Asking for Donations for 3-6 Weeks: 15%
- Stop Asking for Donations for 3-6 Months: 15%
- Stop Asking for Donations for 3-6 Weeks: 7%
- Stop Asking for Donations for 3-6 Months: 7%

Male:
- Continue Asking for Donations: 49%
- Fundraise for Larger Donations: 12%
- Fundraise for Smaller Donations: 10%
- Stop Asking for Donations for 3-6 Weeks: 15%
- Stop Asking for Donations for 3-6 Months: 15%
- Stop Asking for Donations for 3-6 Weeks: 7%
- Stop Asking for Donations for 3-6 Months: 7%

Female:
- Continue Asking for Donations: 48%
- Fundraise for Larger Donations: 12%
- Fundraise for Smaller Donations: 10%
- Stop Asking for Donations for 3-6 Weeks: 16%
- Stop Asking for Donations for 3-6 Months: 16%
- Stop Asking for Donations for 3-6 Weeks: 7%
- Stop Asking for Donations for 3-6 Months: 7%
Donors Support More Fundraising

Thinking about charities that do not deal directly with COVID-19, do you think they should:
(choose one)

<table>
<thead>
<tr>
<th></th>
<th>Donors</th>
<th>Non-Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue Asking for</td>
<td>55%</td>
<td>Fundraise for</td>
</tr>
<tr>
<td>Donations</td>
<td></td>
<td>Larger Donations</td>
</tr>
<tr>
<td>Stop Asking for</td>
<td>13%</td>
<td>15%</td>
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<td>Donations for 3-6</td>
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<td></td>
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<tr>
<td>Weeks</td>
<td>16%</td>
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<tr>
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<td>Smaller Donations</td>
</tr>
<tr>
<td>Months</td>
<td>16%</td>
<td>11%</td>
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<td></td>
</tr>
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<td></td>
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<td>20%</td>
<td></td>
</tr>
<tr>
<td>Months</td>
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</tr>
</tbody>
</table>

Thinking about charities that do not deal directly with COVID-19, do you think they should:
(choose one)
Attitudes Toward At-Risk Charities
Some Want To Hear From At-Risk NFPs

What types of charities are you most open to hearing from over the next 3 - 6 months? (select all answers that apply)

- Those That Deal Directly With COVID-19
  - Canada: 37%
  - US: 31%

- Charities That Are At Risk of Closure
  - Canada: 40%
  - US: 41%

- None/Other
  - Canada: 40%
  - US: 41%
Under 55 Most Open To Hearing From Charities

What types of charities are you most open to hearing from over the next 3 - 6 months? (select all answers that apply)

- **Those That Deal Directly With COVID-19**
  - 35-44: 35%
  - 45-54: 38%
  - 55-64: 28%

- **Charities That Are At Risk of Closure**
  - 35-44: 38%
  - 45-54: 38%
  - 55-64: 32%
  - 65+: 31%

- **None/Other**
  - 35-44: 38%
  - 45-54: 36%
  - 55-64: 41%
  - 65+: 47%
Existing Donors Want to Hear From At-Risk NFPs

What types of charities are you most open to hearing from over the next 3 - 6 months? (select all answers that apply)

- Those That Deal Directly With COVID-19: 40% Donors, 25% Non-Donors
- Charities That Are At Risk of Closure: 43% Donors, 22% Non-Donors
- None/Other: 29% Donors, 58% Non-Donors
Some Interest In Becoming A Monthly Donor

If a charity you normally support requires more financial stability this year, would you consider becoming a monthly donor? (Choose one)

- Canada
- US

Already a Monthly Donor:
- Canada: 21%
- US: 19%

Yes:
- Canada: 20%
- US: 25%

No:
- Canada: 58%
- US: 55%
Might Be Right Time For Monthly Donor Pitch

If a charity you normally support requires more financial stability this year, would you consider becoming a monthly donor? (Choose one)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Already a Monthly Donor</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>35-44</td>
<td>20%</td>
<td></td>
<td></td>
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<tr>
<td>45-54</td>
<td>21%</td>
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<tr>
<td>55-64</td>
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<td></td>
</tr>
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<td>65+</td>
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<td>56%</td>
</tr>
<tr>
<td>65+</td>
<td>59%</td>
</tr>
</tbody>
</table>
Increased Focus on Local Giving
Many Plan to Donate More & “Locally”

Have your attitudes changed towards charitable giving because of the current pandemic? (select all answers that apply)

- Not Really
- I plan to give more locally
- I do not donate very often
- I plan to give more to medical research
- I plan to give more to international aid

<table>
<thead>
<tr>
<th>Country</th>
<th>Not Really</th>
<th>I plan to give more locally</th>
<th>I do not donate very often</th>
<th>I plan to give more to medical research</th>
<th>I plan to give more to international aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>48%</td>
<td>26%</td>
<td>22%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>USA</td>
<td>50%</td>
<td>30%</td>
<td>17%</td>
<td>4%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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SMarter INTERNET MARKETING
Giving Locally Trend Strong Across All Ages

Have your attitudes changed towards charitable giving because of the current pandemic? (select all answers that apply)

- Not Really
  - 35-44: 47%
  - 45-54: 53%
  - 55-64: 52%
  - 65+: 43%

- I plan to give more locally
  - 35-44: 30%
  - 45-54: 30%
  - 55-64: 28%
  - 65+: 26%

- I do not donate very often
  - 35-44: 25%
  - 45-54: 18%
  - 55-64: 17%
  - 65+: 16%

- I plan to give more to medical research
  - 35-44: 5%
  - 45-54: 4%
  - 55-64: 4%
  - 65+: 8%

- I plan to give more to international aid
  - 35-44: 3%
  - 45-54: 2%
  - 55-64: 1%
  - 65+: 3%
Local Support Can Mean Many Different Things

Are you spending time helping others during this pandemic? (Select all answers that apply)

- Buy from local stores & businesses if I can
- Check In on Neighbours, Friends/Family Daily
- Buy Groceries for Elderly/Sick Neighbours
- Volunteer with a Local Charity
- Fundraise for Charities
- No, Not Really

Canada
- 35%
- 36%
- 19%
- 7%
- 4%
- 34%

US
- 38%
- 37%
- 16%
- 8%
- 5%
- 28%
Have your attitudes changed towards charitable giving because of the current pandemic? (select all answers that apply)

- Not Really
- I plan to give more locally
- I do not donate very often
- I plan to give more to medical research
- I plan to give more to international aid
Women Driving “Local” Support

Are you spending time helping others during this pandemic? (Select all answers that apply)

- Buy from local stores & businesses if I can
- Check In on Neighbours, Friends/Family Daily
- Buy Groceries for Elderly/Sick Neighbours
- Volunteer with a Local Charity
- Fundraise for Charities
- No, Not Really

Male vs Female Percentages:
### Food Banks & Hospitals Should See More Support

As a result of the COVID-19 pandemic, which organizations are most likely to receive a donation from you? (select all answers that apply)

<table>
<thead>
<tr>
<th></th>
<th>Canada</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food Banks</strong></td>
<td>40%</td>
<td>38%</td>
</tr>
<tr>
<td>Local hospitals</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>&amp; medical charities</td>
<td></td>
<td>31%</td>
</tr>
<tr>
<td>Faith-Based Groups</td>
<td>13%</td>
<td>23%</td>
</tr>
<tr>
<td>Senior Support</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>Mental Health Support</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td><strong>COVID-19 Cure Or Vaccine Devt</strong></td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
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<td>8%</td>
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</table>
Women Support Food Banks

As a result of the COVID-19 pandemic, which organizations are most likely to receive a donation from you? (select all answers that apply)

<table>
<thead>
<tr>
<th>Category</th>
<th>Male</th>
<th>Female</th>
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<tbody>
<tr>
<td>Food Banks</td>
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SMAC ERMER SNT MCAMKETING
Some Are Interested in Virtual Fundraising Events

How interested are you in taking part in a virtual fundraising opportunity like a step challenge or a virtual run? (five-star scale from not interested to extremely interested)

- **Not Very Interested**
  - Canada: 84%
  - USA: 81%

- **Neutral**
  - Canada: 11%
  - USA: 12%

- **Somewhat/Very Interested**
  - Canada: 5%
  - USA: 7%
So What Did We Learn . . .
Donation Intention Levels Remain Steady/Up

Do you plan to make the same level of donations in 2020 as you did in 2019? (Choose one)

Canada:
- Yes: 44%
- Will Try to Donate More: 23%
- No: 32%

USA:
- Yes: 46%
- Will Try to Donate More: 26%
- No: 27%
So What Did We Learn . . .

- People want charities & not for profits to continue to fundraise AND most plan on giving at the same levels or higher than last year.
- There are few meaningful differences in attitudes towards charitable giving between men and women, Americans and Canadians.
- Most people are focusing on their local areas: supporting businesses, neighbours, friends/family . . .
- People are in a serious mood; they don’t seem to be too excited by participating in virtual fundraisers – although the right kind of event tailored to your donors – might have more appeal.
- Stay tuned for second wave research results, in early June.
Thank You!

For More Information
Please Contact: jay@abergroup.com