



## HOW DONORS EVOLVED IN 2020 AND WHAT IT MEANS FOR YOU IN 2021

**Blakely** | The ABER Group  
● ● ● ● SMARTER INTERNET MARKETING

With the global pandemic hitting it's first anniversary, there are a lot of discussions and reports on its overall impact. While understanding what happened and why is important to building future forward, so too, is understanding the intentions, motivations and worries of donors. With vaccines for the public now on the near horizon and discussions of life "after" the pandemic becoming more of the central focus, we will want to continuously monitor these donor attitudes to watch for shifting of priorities.

To support the need for understanding and knowledge, Blakely, in partnership with Aber Group, has conducted four waves of Donor Attitude research through a Google survey that has included 4,000 Canadians and 4,000 Americans. This paper is focused on the outcomes from the 4th wave of research conducted in February of 2021.

12 months into the pandemic, as the news is broadcasting the concerns of a significant 3<sup>rd</sup> wave in Canada, there is a mixed bag of information that Canadians and Americans are faced with. In both Canada (Chart 1a) and America (Chart 1b), we are seeing consumer confidence that the worst of the pandemic is over with a significantly higher level of optimism in America. This shift in attitude may coincide with a shift in consumer behaviour.<sup>1</sup>

## EVOLUTION OF THE COVID-19 PANDEMIC (CANADA)



CTC20: What statement best describes your personal opinion of the COVID-19 crisis for Canada ?

Base: All respondents

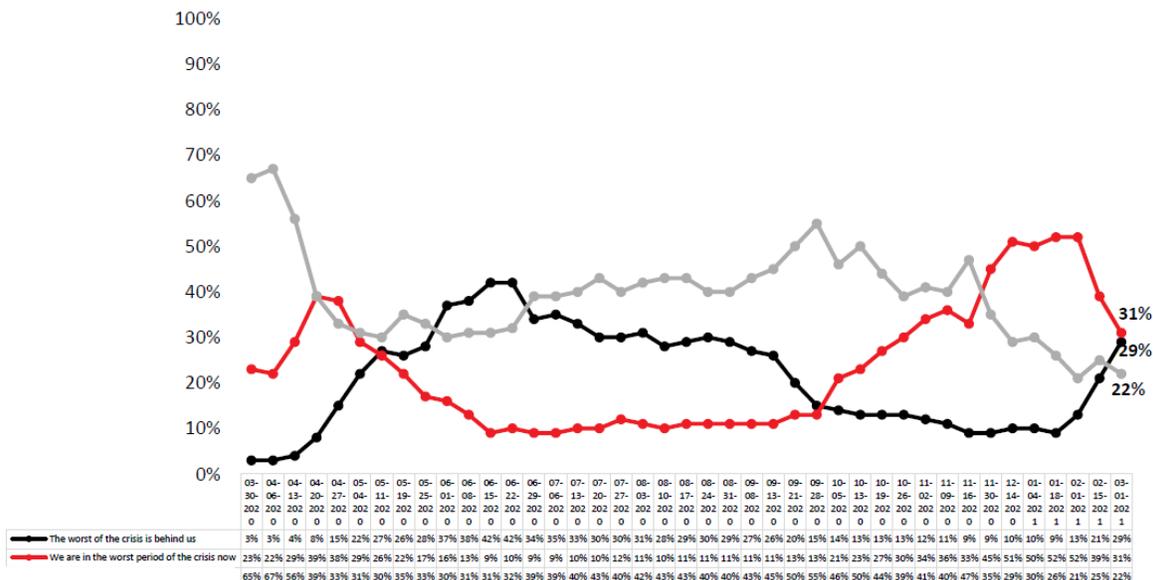


Chart 1a

<sup>1</sup> <https://leger360.com/surveys/legers-north-american-tracker-march-8-2021/>

# EVOLUTION OF THE COVID-19 PANDEMIC (UNITED STATES)



CTC20: What statement best describes your personal opinion of the COVID-19 crisis for The United States ?

Base: All respondents

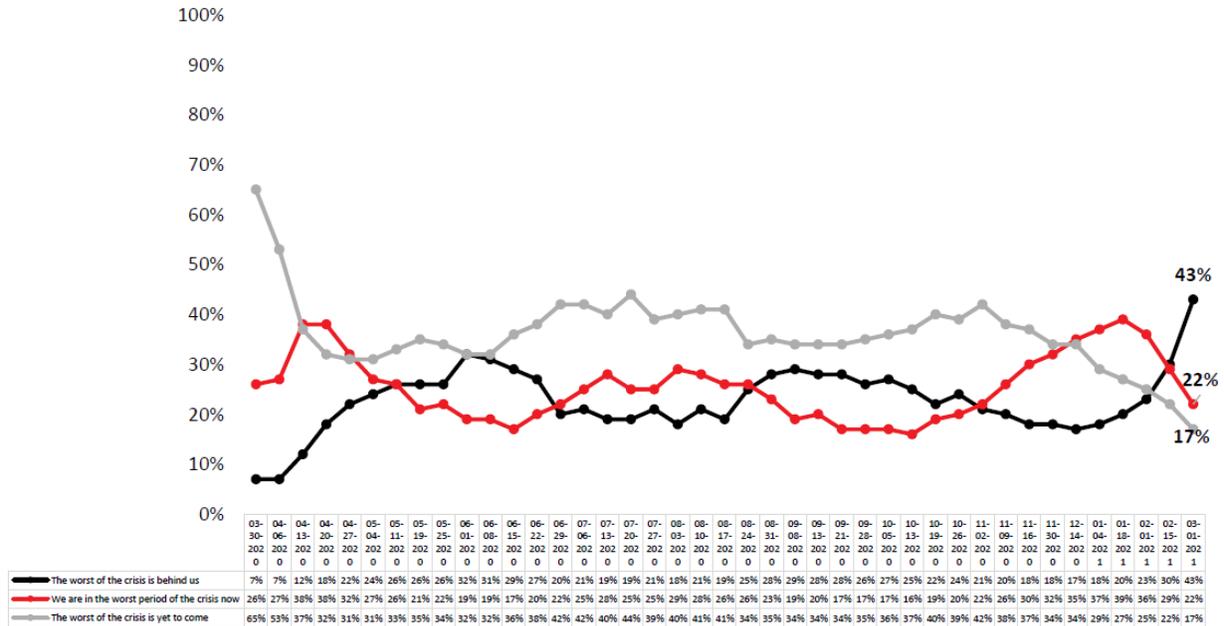


Chart 1b

2

Our four-wave research study underpins the shifting attitudes across the last 12 months – initially people demonstrated increased concern for neighbours, local impact charities and giving as much as they can to health care. There was a shifting focus in the Wave 2 survey, slightly away from health care but still focused on local food banks. There was an increased focus on organizations that people had already supported which was amazing to see. Then in Wave 3, pandemic fatigue was clear. There was still focus on organizations dealing with Covid-19 and local, frontline charities, but increased focus on charities people love had increased.

In Wave 4 there is a renewed vigour for charitable giving specifically by those who gave in 2020. With most respondents indicating that they would give at the same level or more in 2021. (Chart 2)

<sup>2</sup> <https://leger360.com/surveys/legers-north-american-tracker-march-8-2021/>

## Most Will Give the Same or More in 2021 as They Did in 2020

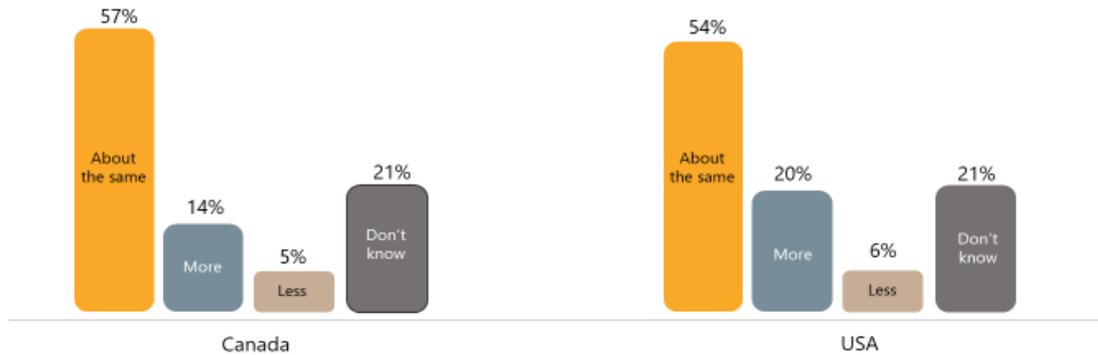


Chart 2

Age appears to impact propensity in America where the older age brackets were more likely to give the same or more than they had in 2020. Contrary to that in Canada, we saw very little variation based on age. (Chart 3)

## "Age" Impacts Propensity To Give In USA

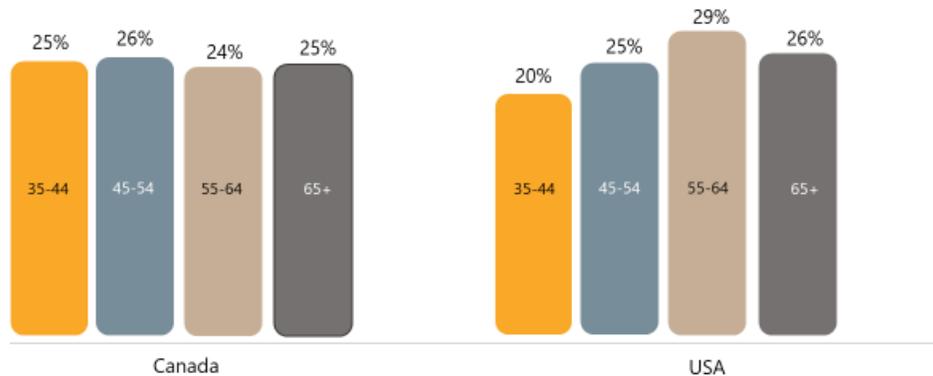


Chart 3

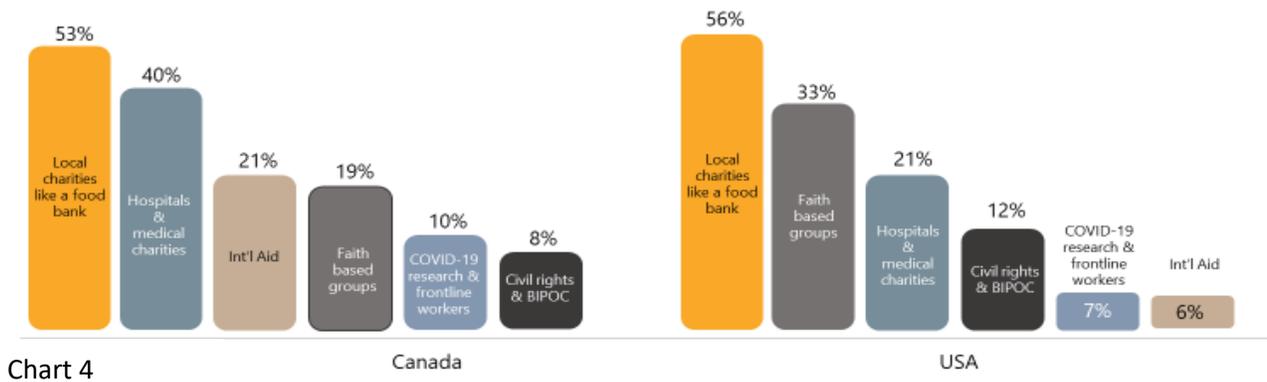
Digging into the rationale behind those who said they would not give in 2021 we found that the vast majority, 72%, indicated that it was driven by their own budget, "I can't afford to give more this year." This finding is consistent with other research in the market, where respondents indicated that "lack of

disposable income” and “helping family & friends” were prioritized over donations.<sup>3</sup> Keeping this in mind while projecting future revenue will be key as philanthropy will take a back seat to practical life concerns. Counteracting that concern, is the fact that those with disposable income through the pandemic were in a strong position to save where they may have spent on things like travel, some of that saved income may be allocated to their philanthropic giving.

Where donors did give, they had preferences to whom they donated and how, with the primary focus on charities they already supported vs new to them, and One Time Gifts (OTG) versus monthly giving.

Further, as we had seen in the previous waves of the Donor Attitudes surveys donors universally preferred to give locally to charities such as food banks. However, the priorities between the 2 nations vary from there with faith-based groups having a much more significant presence in the minds of American donors and hospitals remaining the priority for Canadians (Chart 4)

## Local Causes Receive Strong Support



<sup>3</sup> State of Charitable Giving In America Amidst COVID-19 – Study DealAid.org

Digging deeper to better understand why local mattered to donors, we saw from the respondents that the connection and passion for the cause and the causes' importance to society were driving donations. Ultimately, donors were motivated by individual core beliefs rather than the general goodwill or gratitude. (Chart 5)

## Passion For The Cause Drives Donations

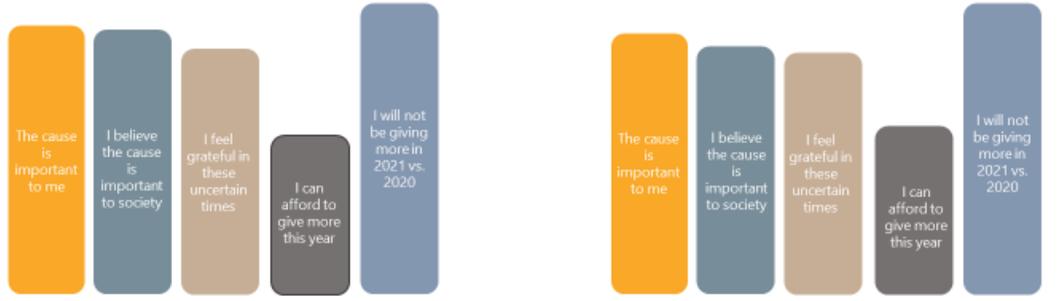


Chart 5

In addition to the pandemic, 2020 saw a lot of societal change which was heavily covered in the news, this drove some concern that giving may be sporadic and reactionary rather than more planful and intentional. This concern was well founded with some giving shifting through the year to different types of organizations. However, there was a solidity in the priority order with Food banks and hospitals remaining the key focus but with spikes in giving to other areas when there was a higher concentration of focus in the news on those areas. (Chart 6 & Chart 7). This is an interesting consideration for those working front lines in social change and social justice. When prominently featured in the news, finding ways to capitalize on the collective consciousness will generate more revenue.



# News Cycles May Impact Charity Support

Changes in Support for Causes Over the Four Research Waves

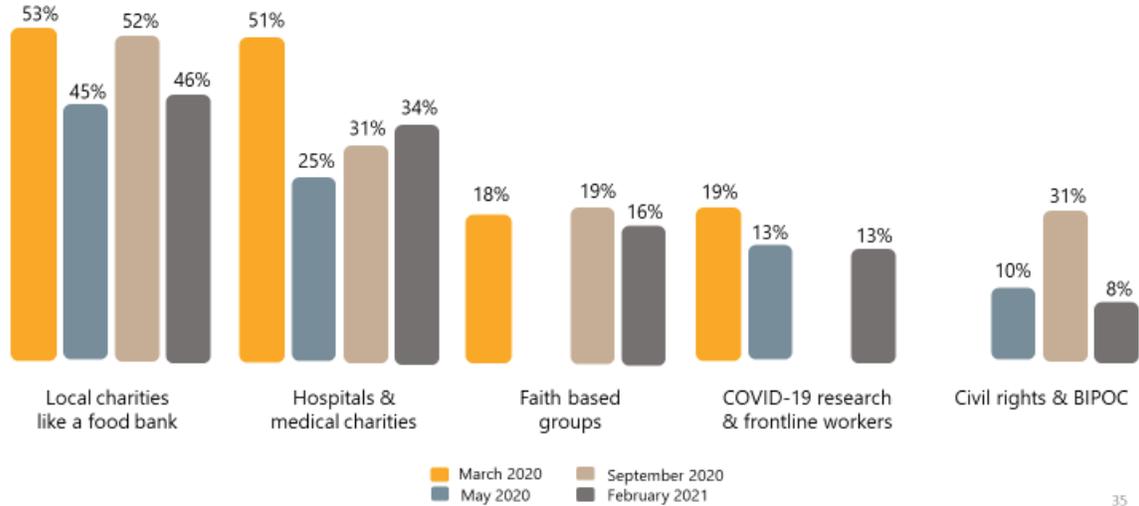


Chart 6



# News Cycles May Impact Charity Support

Changes in Support for Causes Over the Four Research Waves

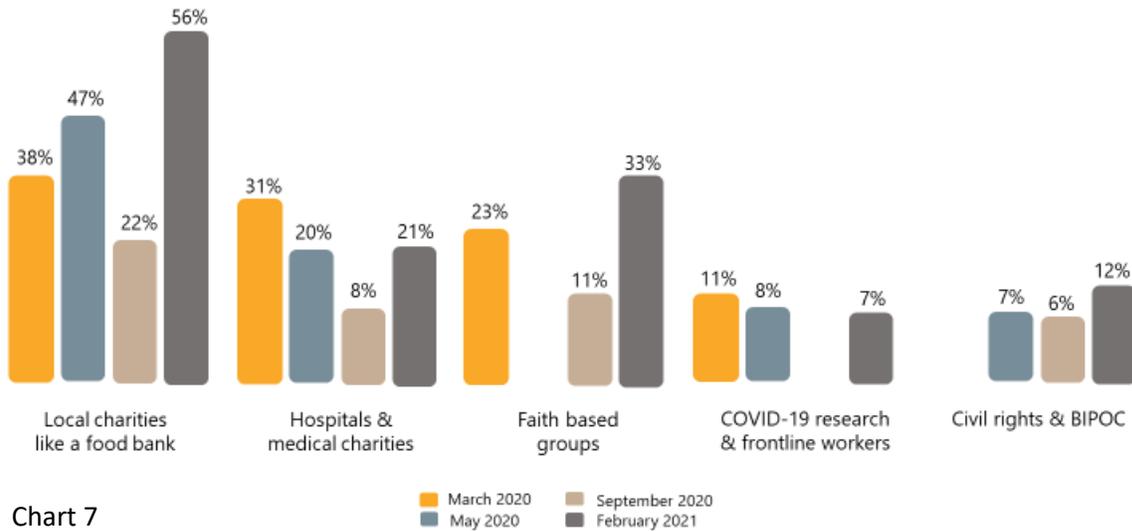


Chart 7

Prompting the news cycle question was, in part, the trouble that the charitable sector faced in 2020, specifically the ongoing WE Charity scandal. That scandal brought to the forefront on donors minds, the question of how trustworthy and transparent charitable organizations actually were. We had also

uncovered, in previous surveys, that transparency was important to donors. What wasn't clear in those results was whether the donors all meant the same thing by "transparency."

What was uncovered in asking this question was that the donors are looking to outside arbiters to understand if a charity is transparent. Ranking lowest in donors minds for understanding transparency, in both Canada and the USA, were documentation and updates generated by the charities themselves. There was also a strong response to understanding the finances of the charity, as donors become more and more savvy this is likely to continue to be more important. (Chart 8)

## Transparency = Third Party Reviews

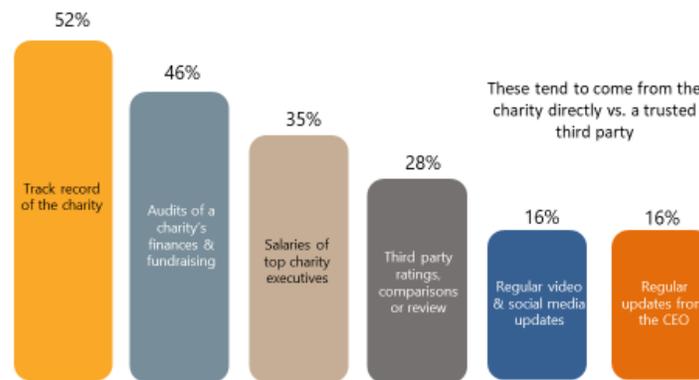


Chart 8

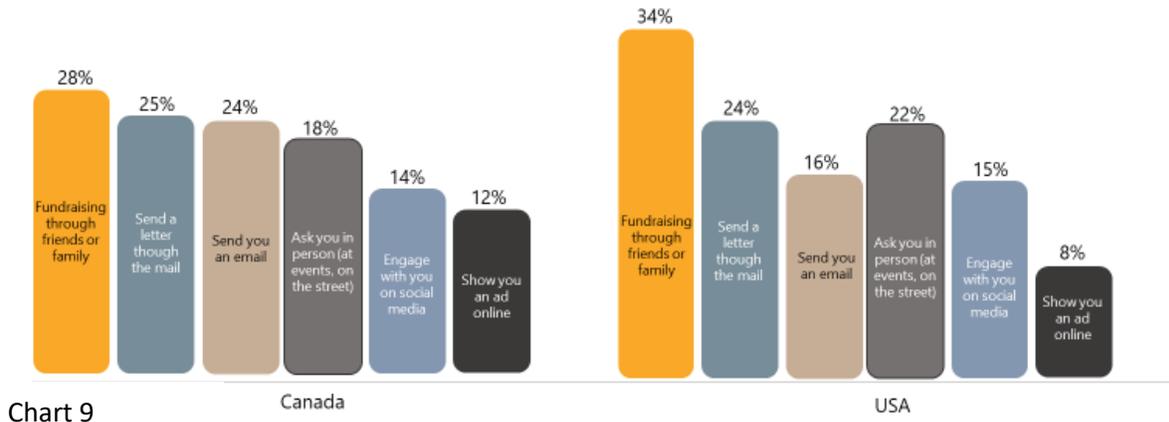
Canada

As the WE scandal continues to dominate headlines, it will be important to follow up on this question to understand what more organizations can be doing to showcase transparency and build trust. By having conversations with donors, as they organically happen, to understand what they are thinking about and what they might be looking from your organization you can begin to improve this trust. Further, asking your donors the questions in a more formalized survey can help to understand where the best investment can be made to maximize the return.

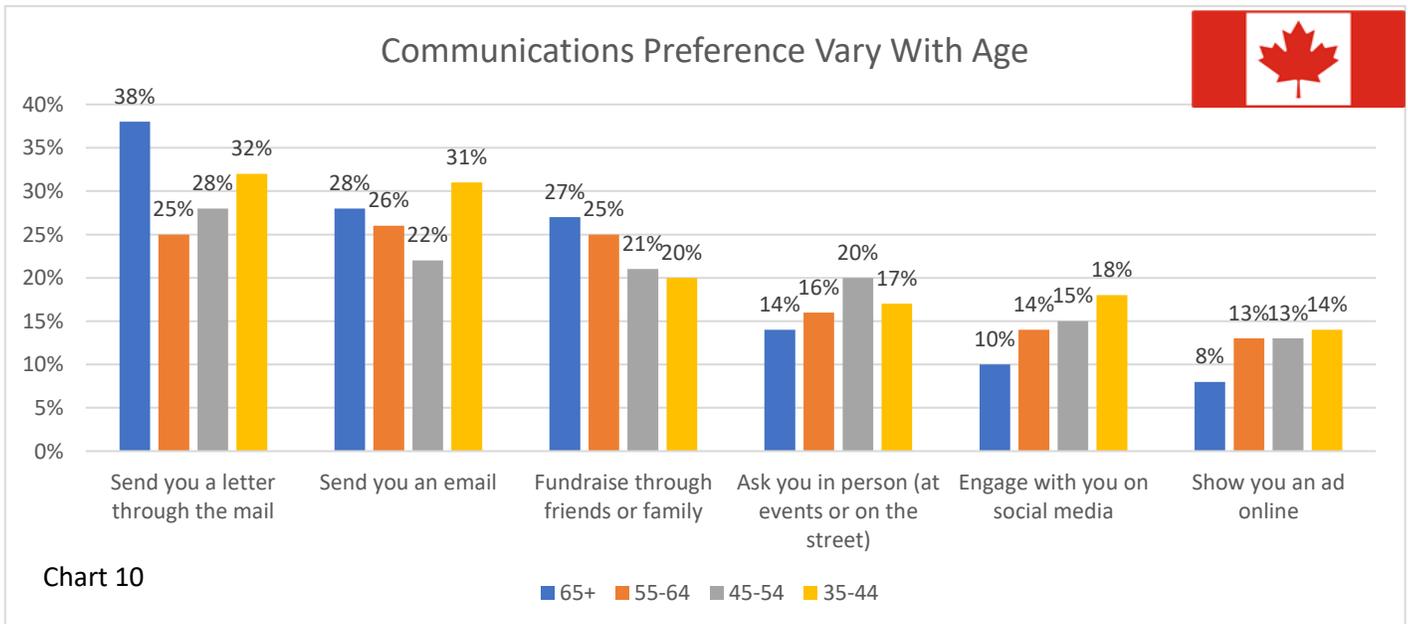
Another trend and question that came up in the first three waves of the survey was some directional evidence that donors have strong preferences for the channel within they want to be spoken. While P2P, defined here as fundraising through friends and family, remains popular the time tested methods of mail and email also rank reasonably high. While in America there is a reasonable level of desire to engage with digital ads, in Canada there is a drop off on the newer digital and social media channels. (Chart 9). What this indicates is that continuing to speak to donors in a multichannel way and showcase the message across channels is key, it will increase likelihood of finding donors where they are, and inspiring people to take action in the form of giving.

## P2P Fundraising Remains Very Popular

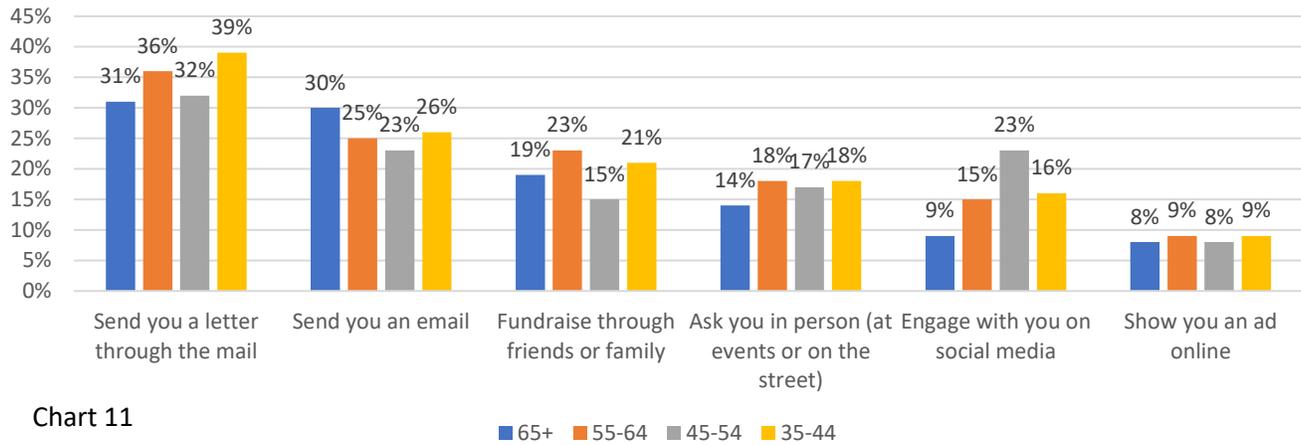
Which of the following is best way for a charity to ask you to donate? (Select all that apply)



It is easy to assume that these preferences would be split along the generational lines but in digging deeper into the respondents we find that that is not the case. In Canada, The 65+ group preferred the traditional direct mail appeal (Chart 10) in the US (Chart 11) that opposite was true. Further, online advertising appeals to all age groups at nearly the same rate. This speaks to the proliferation of online advertising and is on the rise in donor’s psyches as a method of communication.



## Communication Preferences Vary With Age



With the above in mind, the question as to how the donors prefer to transact was also posed and interestingly the vast majority noted that they prefer to transact online or through social media. This was true across all age groups polled in Canada, 35- 65+. This is further evidence that donors are experiencing organizations in a multichannel way and ensuring there are many channels, but a shared message can help to improve overall results.

In America, digital uptake appears to be lagging slightly with most groups aligning with the Canadians in preferring to transact online or through social except for the 65+ group, who indicated that they still prefer the mail. As the population ages and people continue to feel at ease with online transactions, it would not be a stretch to imagine that the USA will align with the Canadian preferences.

Another age-based finding from this research, one that also forced some challenging of assumptions, was that those who indicated that their preferred way to donate was via legacy giving. In Canada the segment responding the most strongly to this channel was ages 45-54, (Chart 12) and in the US it was ages 35-44. This finding is important to keep in mind when planning a legacy program as some of the best prospects may not be the more obvious older donors.

## Legacy Prospects Are Younger Than The Typical 65+ – 45-64

How do you prefer to donate?

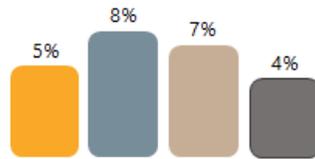


Chart 12

Canada

Given the strength of many organizations acquisition rates last year and the desire by organizations to maintain this growth, it is important to understand where people are learning about organizations. Word of mouth, conversation with friends and family, remains the number one way to learn about causes but in both the US and Canada that is followed by the news and social media/online advertising. This preference for word of mouth is more pronounced in the US. Both workplace initiatives and cold emails from organizations ranked quite lowly overall. (Chart 13)

## Top Ways to Learn About Causes By Country

How do you learn about new charities & causes? (Select all that apply)

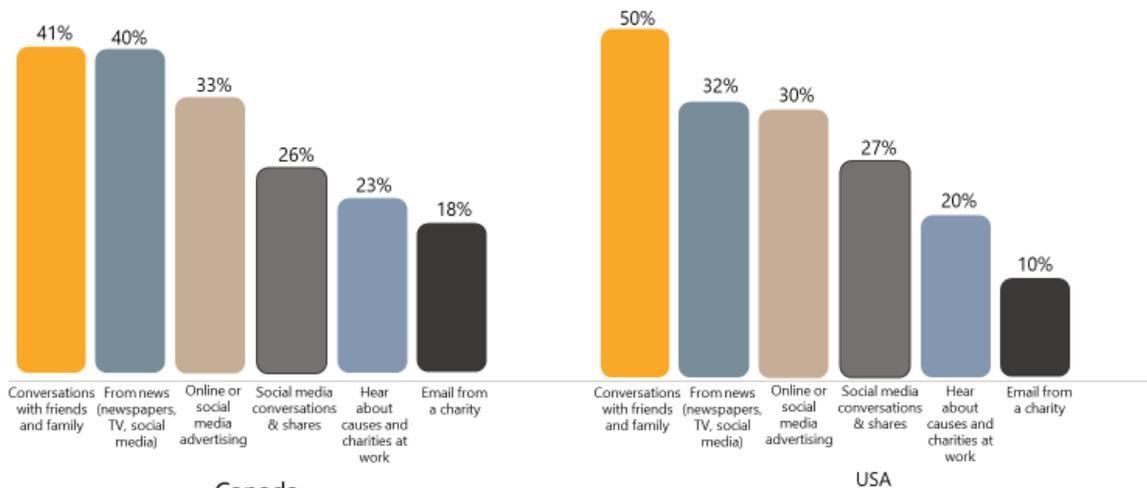


Chart 13

Canada

USA

As we move into Q2 of 2021 these findings can help organizations plan and continue to adapt the to the changing fundraising landscape. Adaptability will be as key as things “return to normal” as it was with the onset of COVID and understanding the metrics and what donors are looking for will be important to ensure that they stay engaged.

The next survey will help to further understand the donor intentions as the world begins to reopen and options for spending disposable income re-emerge.

For more information on the 4 Wave Donor Attitude surveys, how you can move your digital fundraising to the next level, or to discuss your biggest fundraising challenges – don’t hesitate to reach out to Amy Pawluk, COO at Blakely at [Amy@blakelyjourney.com](mailto:Amy@blakelyjourney.com).

## Appendix & methodology

### **Methodology:**

We employed Google’s survey approach, randomly selecting online Americans and Canadians, aged 35+ to complete the questionnaire. For presentation purposes, we used a ratio of responses/total responders as the basis for “choose all that apply” questions. Unless we found meaningful differences between men and women, Canadians and Americans, or age groups, you can assume answers between segments were similar.

Blakey and The Aber Group have conducted four waves of this survey to build an understanding of shifting attitudes towards giving and the impact COVID-19 has on giving, particularly as we moved through 2020 and now in 2021. We believe that COVID-19 has changed donor attitudes permanently, and how we engage and connect with donors throughout this pandemic will drive your ability to survive and thrive. We look forward to sharing the learning and the applications with you along the way.

### **About The Aber Group Inc.**

The Aber Group is an independent, digital media and search engine marketing firm that specializes in NFP and NGO direct response and brand-building campaigns. We develop hundreds of digital media campaigns each year and know first-hand about the ever-changing digital marketing landscape – search engine marketing and optimization, online and mobile media, programmatic media, native ads, content partnerships, mobile apps, video, social network advertising and beyond. Our staff members are Google Partners certified in Search, Display, Video, Google Analytics, and are Facebook and Microsoft Ads certified as well. As an agency, we are a Google Premier Agency Partner and Facebook Marketing Pro Partner. In addition, we are a Google Ad Grants Certified Professional agency which provides our clients with access to betas, experiments, and the latest best practices. For more information about how we can help make your next digital campaign even more successful, please send us an email at [learnmore@abergroup.com](mailto:learnmore@abergroup.com).

### **About Blakely**

If you are looking for a true partner to help you uncover and apply insights into your donor communications and fundraising, Blakely is here to assist. We can work with you as a true extension of your team to ensure your campaigns and messaging are relevant and executed in a timely fashion during this continuing crisis and set you up for recovery and growth in the future. Our goal is to support you in understanding your donor needs and help you align messages that will make a difference in your retention of donors through this crisis and into recovery. To have a conversation please reach out to: [amy@blakelyjourney.com](mailto:amy@blakelyjourney.com) – we look forward to connecting.