

The Next Generation of Canadian Giving

The Charitable Habits of Generations Y, X, Baby Boomers, and Civics

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AUTHOR:

MARK ROVNER, SEA CHANGE STRATEGIES

RESEARCH:

PAM LOEB, EDGE RESEARCH

EDITORS:

DENNIS MCCARTHY, TARGET ANALYTICS, A DIVISION OF BLACKBAUD, INC.

MICHAEL JOHNSTON, HJC

SHEETAL PERSAUD, HJC

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TABLE OF CONTENTS

INTRODUCTION 4

 Our Hope for This Study

SUMMARY OF KEY FINDINGS 6

GIVING ACROSS THE GENERATIONS 6

 Most Canadians Give

 Boomers Dominate Charitable Giving

 The Surprising Rise of Generation X

 What About Generation Y?

 Who Gets the Money?

 Does Money Matter Most?

 What Influences Giving?

TRANSACTION AND ENGAGEMENT CHANNELS 13

TRANSACTIONS 14

 Transaction Channels — Frequency of Use

 Methods of Giving

 What’s the Deal with Direct Mail?

 Sustainer Uptake Remains Steady

 Online Giving Continues to Gain Ground

 What Inspired the Gift?

PAYMENT OPTIONS 18

 Mobile as a Transaction Channel: A Mixed Bag

 What’s Okay and What’s Not?

 Workplace Giving Skews Young

 Marketplace Philanthropy

 Peer-to-Peer Fundraising

 Crowdfunding

TABLE OF CONTENTS (CONTINUED)

ENGAGEMENT24

 Favoured Engagement Paths

 Unpacking Online Engagement

 Evangelism

RECOMMENDATIONS.....30

ACKNOWLEDGEMENTS31

ABOUT THIS STUDY31

ABOUT BLACKBAUD32

ABOUT EDGE RESEARCH.....32

ABOUT HJC32

ABOUT SEA CHANGE33

PREFACE

This study was conducted in conjunction with a similar study in the United States. The initial drafts of this study and much of the final content are based on the U.S. version, authored by Mark Rovner of Sea Change Strategies. Many of the research questions were framed by Pam Loeb of Edge Research and used for the Canadian analysis. Credit should also go to hjc, who brought this study to Canada in 2010 and provided editorship and analysis for this edition, and to Stratcom, who contributed the initial research study in Canada in 2010 and a subsequent study in the United Kingdom. Finally, Blackbaud published the report and provided a key editorship role, ensuring integrity of the research and analysis.

INTRODUCTION

What's a fundraiser to do?

Just when it seemed like things could not possibly get more complicated, they did.

Not only are self-appointed heralds of the future announcing that direct mail is dead, they are also now making the same tendentious claims about email.

The advent of television didn't kill radio. Likewise, Pinterest® and Twitter® are hardly the slayers of direct mail.

But even if overstated, the changes overtaking the art and science of fundraising are tumultuous and expected to continue.

So, what's a fundraiser to do? Listen to your donors.



To help provide both strategic and practical guidance for fundraisers, we commissioned this study to look at the philanthropic habits of four generations of Canadians: Generation Y (or Gen Y, born between 1981 and 1995); Generation X (or Gen X, born 1965 – 1980); Baby Boomers (or Boomers, born 1946 – 1964); and Civics (born before 1945). Findings are based on an online survey of Canadian donors, excluding Quebec, conducted May 16-28, 2013.

In tandem with the Canadian study, we also conducted the same survey of American donors and a similar survey of British donors. Comparisons between Canada, the U.S., and the United Kingdom can be found throughout this report.

As is customary for research efforts like this, the data is based on self-reporting by the respondents, and should be interpreted accordingly.

We sought to answer a number of questions, including:

- What are the preferred giving channels of each generation?
- What are the preferred communications and engagement channels?
- What kinds of charities do people support?

What are the basic dos and don'ts for fundraisers in 2013?

The study builds on a similar inquiry we carried out in 2010. Where relevant, we spotlight trends that have emerged in recent years. For the most part, differences among the generations in their charitable behaviour are becoming clearer and better defined — and the differences are real.

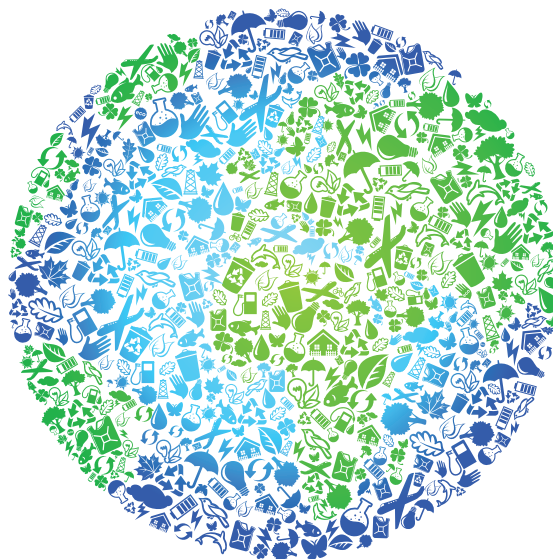
What can you do with this study? Use this report to answer the following key questions about your fundraising program:

1. Have I underinvested in fundraising to Gen X donors, who are a quickly rising force in philanthropic giving in Canada?
2. Have I completely ignored the up and coming younger generations, or relegated them to an un-strategic social media effort?
3. Does my fundraising channel mix include direct mail for younger donors and digital communications for older ones? (Hint: It should.)
4. Am I preparing for the future by addressing the cultural demands Generations X and Y are placing on institutions (such as transparency)?
5. Am I empowering my most enthusiastic supporters to fundraise and evangelize on my behalf?

Our Hope for This Study

There is a wealth of data supporting this study. Our hope is that you will continue to ask questions, and that other clever people will be able to find clues in the data for some time to come. Toward that end, we plan to make all of the survey data we collected publicly available upon request.

Raising money for good causes has never been more complicated and uncertain, and it certainly has never been more important. We dedicate this report to all those who work tirelessly to fund a better future.



SUMMARY OF KEY FINDINGS

1. Most Canadians give. Civics are the most generous generation. Almost 9 in 10 of Civics give, and they support a wider variety of causes than younger generations. On average, individual Civic donors also give more money than individual donors in other generations; however, the population is dwindling and their income is holding steady.
2. Baby Boomers will exert an outsize influence on charitable giving for the foreseeable future, but Generation X is quickly catching up. Gen X is certainly one to watch in the immediate term.
3. Most donors across all age groups do not plan to expand their giving in the coming year.
4. Multichannel is the new normal. While all generations are multichannel in their communications habits, the ideal mix varies from generation to generation.
5. Direct mail is far from dead, but it also won't last forever. Generations Y and X are far more likely to give online, and as many Baby Boomers say they give online as via direct mail.
6. Generation Y donors have distinct priorities and preferences with regard to causes they support. Notably, they are far more likely to demand accountability and transparency than older donors.
7. The value of some channels (e.g. social media), is undervalued if measured by transaction metrics, as opposed to by engagement.
8. Among transaction channels, the future looks cloudy for telemarketing and giving by SMS / text, but face-to-face and street funding is surprisingly strong.
9. Peer-to-peer fundraising and crowdfunding appear to have promising futures as fundraising strategies for younger generations.
10. Nearly half of those who give engage with causes in ways other than making donations.

GIVING ACROSS THE GENERATIONS



Generation Y

- Born 1981 – 1995 (age 18-32 as of 2013)
- Represent 15% of total giving
- 3.4 million donors in Canada
- 62% give
- \$639 average annual gift
- 4 charities supported



Boomers

- Born 1946 – 1964 (age 49-67 as of 2013)
- Represent 32% of total giving
- 5 million donors in Canada
- 78% give
- \$942 average annual gift
- 4.9 charities supported



Generation X

- Born 1965 – 1980 (age 33-48 as of 2013)
- Represent 27% of total giving
- 4.8 million donors in Canada
- 79% give
- \$831 average annual gift
- 4.5 charities supported



Civics

- Born 1945 and earlier (age 68+ as of 2013)
- Represent 25% of total giving
- 2.4 million donors in Canada
- 87% give
- \$1,507 average annual gift
- 7 charities supported

Generational groups, total Canadian population, and giving data (on average)

Most Canadians Give

A strong majority of Canadians say they have made some sort of donation to a cause or charity in the past year. The percentage generally rises with age, though somewhat surprisingly, Generation X and Boomers are about equally as likely to give. Roughly 62 percent of members of Gen Y say they have given, compared with 79 percent of Gen X, 78 percent of Baby Boomers, and 87 percent of Civics.

This squares with the conventional wisdom that Civics are the most likely to give and that giving in part reflects a donor's life-stage. Younger donors are presumably establishing careers and holding debt, reducing their propensity to give.

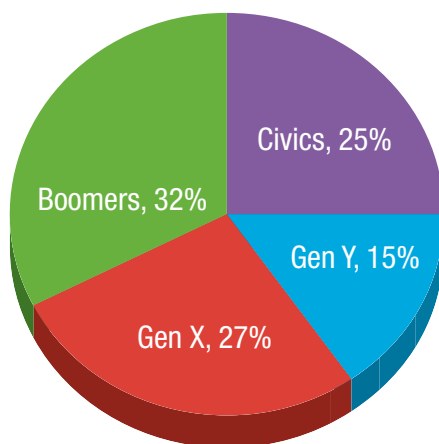
Boomers Dominate Charitable Giving

With five million individuals, Boomers are not only the largest donor group numerically, but also the largest contributors. More than 32 percent of all money donated (as reported by study participants)

comes from Canadians aged 49 to 67, while one-fourth of all money comes from Civics, just over one-fourth from Gen X, and one-sixth from Gen Y.

Generational Giving

Of the \$14.6 billion estimated annual contributions, each generation will contribute:



Generational contribution of total giving

Just consider:

- Boomer donors represent 32 percent of the entire donor base.
- Boomers give an estimated total of \$4.7 billion per year (32 percent of all individual giving).
- Boomers report donating an average of \$942 divided among four to five charities each year.

In every category, Boomers loom large. And as the youngest Boomers have yet to turn 50, there is every reason to expect things to remain largely as they are for the foreseeable future.

If you are following the money, make sure you know this generation well.

The Surprising Rise of Generation X

Comparison: United States and United Kingdom

The rise of Generation X in Canada is surprising, especially when compared to the United States and the United Kingdom. In the U.S., Civics are giving far more overall than Gen X. In the United Kingdom, however, Gen X and Boomers give the same amount, and Civics give slightly more than each of these generations. So why has the United Kingdom had a shift in Gen X giving, and the U.S. has not?

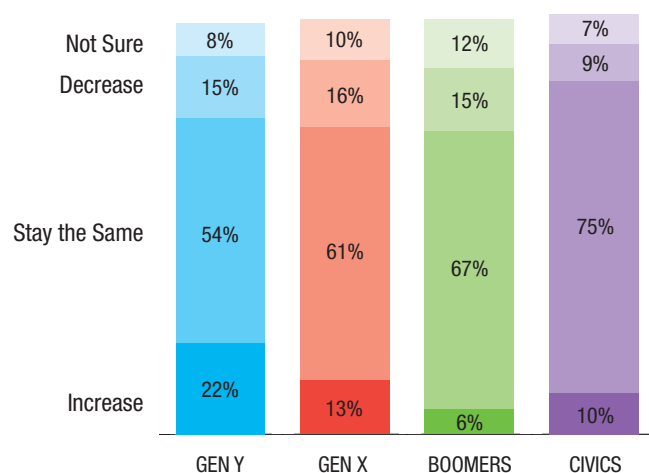
Both the United Kingdom and the United States have had greater economic downturns than Canada. Perhaps the rise of Gen X in Canada is indicative of the steadfast and increasing wealth of this generation throughout the global recession.

The data suggests that Civics, who dominated the giving landscape for decades, are declining in overall philanthropic influence and being overtaken quickly by Gen X. When we conducted the 2010 study, Gen X was giving less than Civics (but the results in 2013 do not include Quebec, which could skew the overall picture). Regardless, there is now a strong argument to test solicitation approaches geared directly at the Gen X population, given that their disposable income should be rising and they have many years left to give.

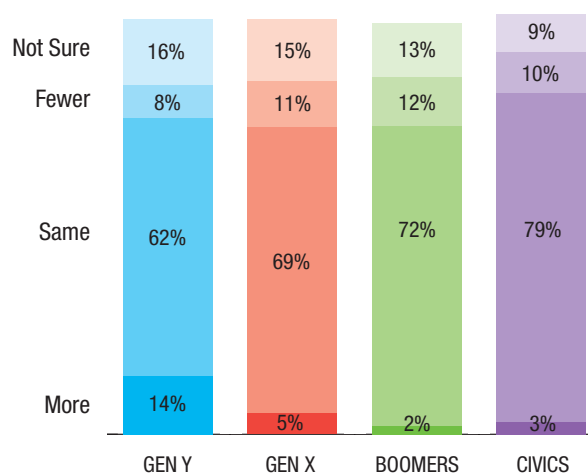
This point is more salient when you consider what donors have to say about future giving. The vast majority of donors across all four generations say they do not intend to add new causes to their giving portfolios in the coming year, and a majority of donors say their overall giving is unlikely to increase. Younger donors, however, are more likely than either Boomers or Civics to say they plan to increase their giving in the coming year: 22 percent of Gen Y and 13 percent of Gen X say they will give more, compared with 6 percent of Boomers and 10 percent of Civics.

Future Giving

Giving Intent by Generation over the Next 12 Months



Overall Dollar Amount of Charitable Donations



Number of Charities Supported

Total percentages may not add up to 100% due to rounding.

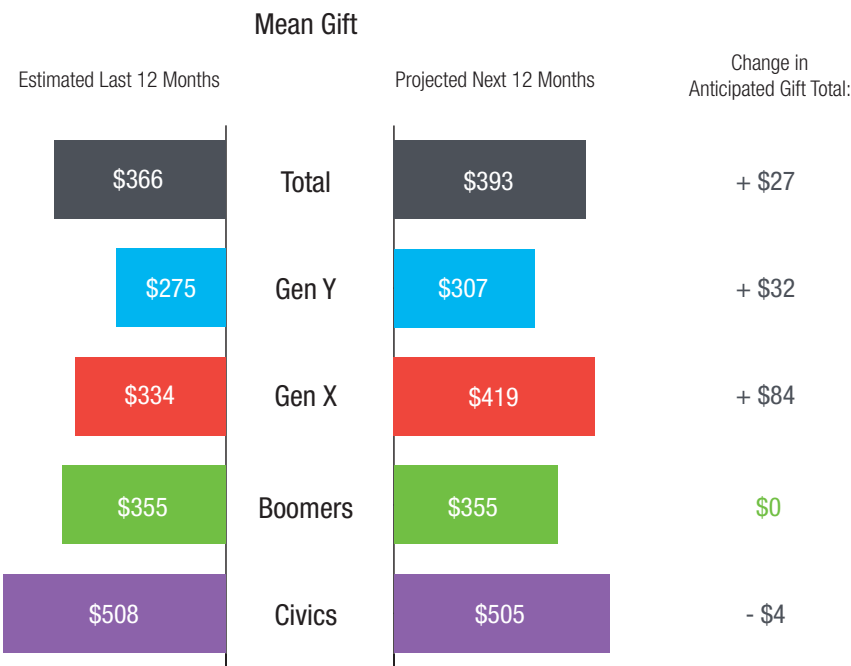
Generation X donors also predict their giving to their top charity will grow by an average of \$84 in the coming year, compared with a predicted average decline by Civics of \$4.

The debate is then whether Civics or Generation X is the more valuable generation. Civics are more likely to give and will give more when asked, so it may be easier and less costly to acquire a Civic donor. On the other hand, Gen X could potentially stay on the file

longer and increase giving at a much faster rate. This debate may be one about short-term versus long-term goals. Perhaps this isn't a debate at all. Maybe we just need to find a balance between Gen X and Civic donor acquisition to create equilibrium between both short-term and long-term priorities.

Donation to Top Charity

Reported Giving History and Intent by Generation



What About Generation Y?

Speculation abounds about the Gen Y *zeitgeist* and how that will affect fundraising. Some things we know: Generation Y is more multicultural, more internationalist in outlook, and more socially tolerant overall than older cohorts. They are growing up in a world boiling with uncertainty – economic, political, and social — and more than prior generations, they are placing greater demands on major public and private institutions for accountability, transparency, and fairness.

We believe these factors are not transitory. Much as Trudeau-mania, Watergate, and the Vietnam War defined worldviews among Boomers, Generation Y is growing up in a world defined by 9/11, downward economic mobility, and globalization.

Will these propensities affect charitable habits? We believe they already do and will cast an even greater shadow over philanthropic habits in years to come.

That said, it's equally important to remember that the primacy of Generation Y in the donor marketplace is decades away. The study helps guide the way to a workable middle ground strategy, one

that maximizes income from Boomers, Gen X, and Civics for now, but begins to build an expandable welcome mat for Generation Y.

Who Gets the Money?

Comparison: Canada and United States

Support for advocacy organizations in the U.S. is approximately double what it is in Canada, and support for military troops and veteran organizations is about three times greater in the United States. Canadian donors, however, are far more likely to support health and children's charities than Americans.

These differences might be cultural, as in the case of veteran support. They may also be rooted in the way that Canada defines charity: Advocacy organizations are explicitly noted as non-charitable in the Canadian landscape, and the political and cultural distaste for advocacy in Canada seems more pronounced.

Donors name health charities, local social service charities (like homeless shelters or soup kitchens), children's charities, and places of worship as the types of causes they are most likely to support.

Among those causes receiving the least support are trade unions, advocacy organizations, and organizations that support military troops or veterans. (See "Causes," next page.)

We also asked participants what causes they would support if they had to cut their overall charitable giving by half. Health charities remained in the top spot, but social service organizations fell to third place, overtaken by children's charities, suggesting donors are more strongly attached to children's charities than social service charities.

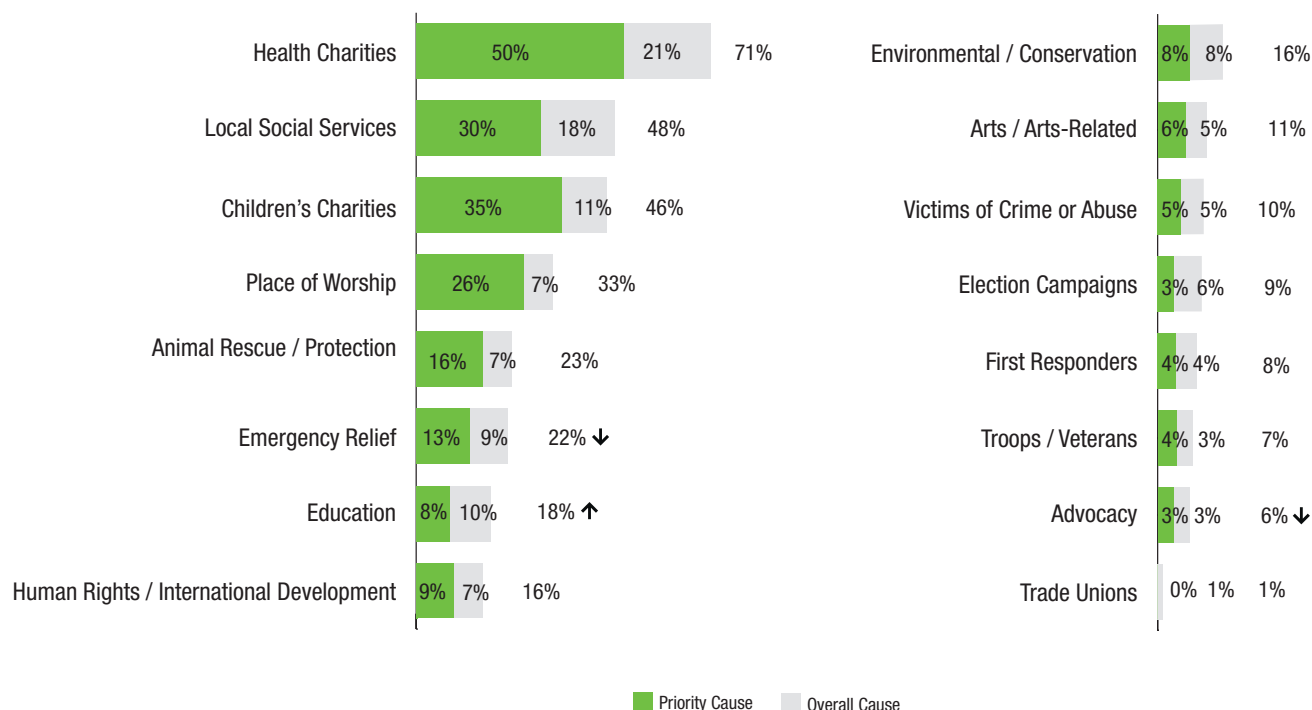
In 2010, the year of the earthquake in Haiti, we asked the same question; at that time, a far higher percentage of donors indicated support for charities that provide emergency relief efforts. Fortunately, there has not been a major international crisis through 2012 and 2013 to inspire philanthropic giving the way Haiti did. The lower percentage of donors giving to emergency relief efforts may be indicative of the fact that support for emergency relief organizations falls when there are fewer high-profile disasters. Declines in giving do not indicate donor fatigue with "crisis giving."

Some interesting generational differences emerged regarding priority giving:

- Generation Y donors are more likely to support human rights and international development organizations than Generation X, Boomers, and Civics.
- Gen X donors are more likely to support children's charities — perhaps because they are the most likely to have children young enough to be supported by the mission of children's charities.
- Civics are three times more likely to support arts-related organizations than Gen Y.
- Health is an issue that resonates deeply with older generations: 75 percent of Boomer donors and 73 percent of Civic donors have made a gift to a health charity in the last 12 months.
- Support for environmental and animal welfare causes follows no clear generational pattern: Both Boomers and Gen Y are less likely to support environmental causes than Gen X and Civics.

Causes

Percent Donating to Causes (Overall)



Arrows indicate statistical significance between 2010 and 2013.

Causes

Priority Cause (by Generation)

	GEN Y	GEN X	BOOMERS	CIVICS
Health Charities	45% ↓	50%	50%	55%
Local Social Service	21%	31%	31% ↓	36% ↓
Children's Charities	32%	40%	38% ↓	28% ↓
Place of Worship	18%	25%	23%	40%
Animal Rescue / Protection	15%	17%	17%	14% ↓
Emergency Relief	12% ↓	14% ↓	11% ↓	14% ↓
Education	10%	8%	6%	10%
Human Rights / International Development	13%	8%	6%	9%
Environmental / Conservation	6%	8%	8%	10%
Arts / Arts-Related	3%	3%	7%	10%
Victims of Crime or Abuse	6%	5%	6%	4%
Election Campaigns	2%	3%	2% ↓	6%
First Responders	4%	4%	3%	4%
Troops / Veterans	2%	3%	2%	7%
Advocacy	3% ↓	4%	2% ↓	3%
Trade Unions	0%	–	0%	–

Bolding indicates statistical significance among audiences. Arrows indicate statistical significance between 2010 and 2013.

Does Money Matter Most?

We asked donors which forms of support they feel makes the biggest difference for the causes they support. Choices included monetary donations, volunteering, promoting causes by word of mouth, in-kind donations, policy advocacy, and fundraising on the causes' behalf.

According to Boomers, Civics, and Generation X, money matters most. Strong pluralities of Civics (55 percent) and Boomers (56 percent) say that monetary donations make the biggest difference. The focus on money declines with age: Only 43 percent of Generation X and 30 percent of Generation Y think they can make the most difference by donating money.

Conversely, Gen Y donors believe they can make the biggest difference by volunteering (36 percent) and by spreading the word to others about the charity and its work (14 percent). But while they value volunteering, Gen Y donors are actually less likely than Civics to say they have actually volunteered for a cause in the past two years.

Advocacy was among the actions donors were least likely to say makes a difference. Across all generations, two percent or fewer said that participating in advocacy actions would make the biggest difference.

Despite its steady growth, donors are not inclined to assign great value to fundraising on behalf of a cause or charity. Only between four percent (Civics) and nine percent (Gen Y) say this makes the biggest difference. On the other hand, strong majorities of donors are highly receptive to “friends asking friends” types of pitches, and significant numbers of donors say they have raised money for one cause or another.

Charities seeking to raise substantial amounts through peer-to-peer campaigns might do well to invest resources in educating donors about the value and importance of the strategy. (See “Making a Difference,” next page.)



To the extent that courting younger donors is a priority, charities need to take greater pains to show where the money goes and how it makes a difference.

What Influences Giving?

“How is my money actually making a difference?”

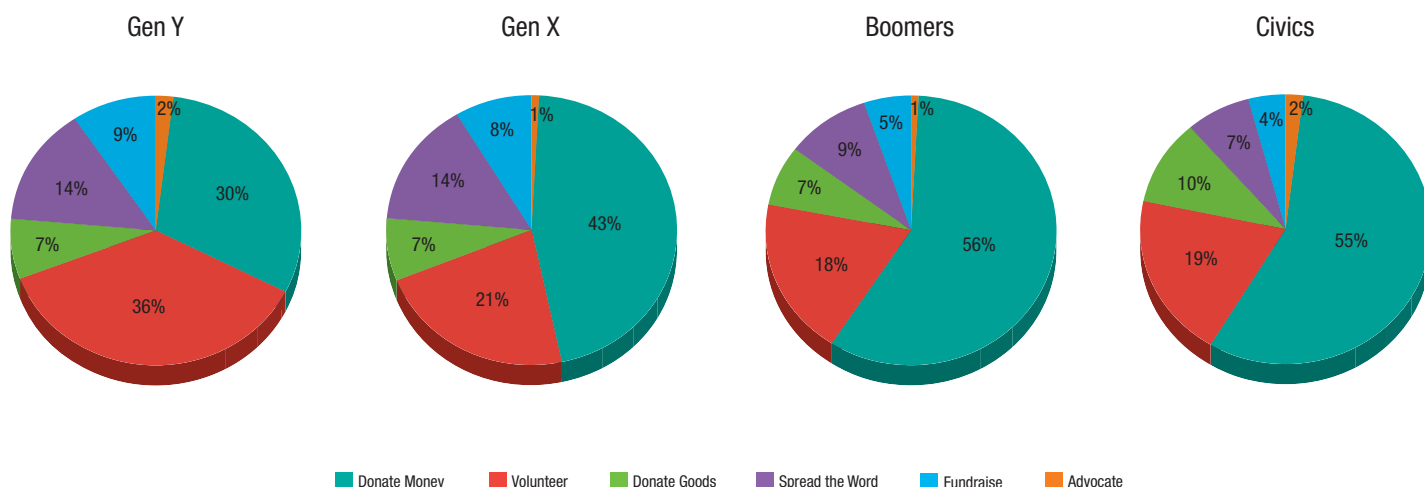
That’s a question many donors ask, and the younger they are, the more likely they are to be asking. Nearly 55 percent of Generation Y and 44 percent of Generation X say the ability to directly see the impact of their donation would have a significant bearing on their decision to give. Only about one-third of Civics (34 percent) and Boomers (28 percent) say the same. Along similar lines, younger donors are more likely to say the ability to restrict their gift to a specific project might matter to them.

This has important messaging — and possibly wider — implications. To the extent that courting younger donors is a priority, charities need to take greater pains to show where their money goes and how it makes a difference. Younger donors are more likely to ask pointed questions about return on investment (ROI) and reject superficial answers. On the other hand, marketing experts who specialize in communicating with Boomers and older audiences argue these generations are more responsive to an emotional appeal, and more concerned about the charity’s overall reputation¹.

Few donors rated thank you gifts and public recognition as important factors in making a giving decision.

¹ <http://www.mediapost.com/publications/article/190455/marketing-to-baby-boomer-and-senior-customers-pa.html#reply>

Making a Difference



TRANSACTION AND ENGAGEMENT CHANNELS

Direct marketers had a good thing going before the Internet came along. Fundraisers could tie nearly every gift that came in to a specific direct mail piece, phone call, or street encounter. Measuring ROI was straightforward.

Fast-forward to 2013 and nothing is straightforward. Donors routinely respond to direct mail pieces by making online donations. Online donors switch back and forth between the Internet and direct mail. Time-honoured practices such as door-to-door canvassing and peer-to-peer fundraising are resurging. The explosion of social media, and questions about what impact it has, is yet another confounding variable. And it's not just the multiplicity of channels making this confusing; it's the spider web of interdependencies, the ways communicating via one channel influence behaviours via another.

Here's what we know:

- Engagement channels may or may not be transaction channels, and vice versa, but both matter. Social media is a case in point: There is little evidence that social media is growing as a transaction channel, that is, people are not donating on social networks (i.e., Facebook®, Twitter, or Pinterest) in significant numbers. On the other hand, there is growing evidence that social media plays an important stewardship role. Studies of Facebook and Twitter users suggest a large percentage of

these individuals are already highly committed to their causes, and seeking more contact with the associated organizations. In an era where direct mail is simply too expensive to use as a cultivation vehicle, online engagement is growing in importance.

- Channel-by-channel income attribution is nearly impossible. Donors' choice of transaction point — a website, a check in the mail, a credit card handed over to a street canvasser — may or may not be the same channel that induced the gift. This means looking at income channel-by-channel does not reflect the importance of each channel to fundraising. In the face of this uncertainty, bitter debates routinely erupt within organizations about who gets credit for which dollars. These debates tend to discourage fundraisers from coordinating across teams and running truly multichannel fundraising campaigns.

For purposes of this study, we have sought to analytically separate transaction (points of donation) from engagement (the moments and places where donors connect and converse with your organization and with each other).

Obviously most channels play both roles to some extent, and the distinction between transaction and engagement can be fuzzy. But the distinction can also help fundraisers allocate both cultivation and solicitation resources wisely, and apply the appropriate metrics to the right investments.



TRANSACTIONS

Transaction Channels — Frequency of Use

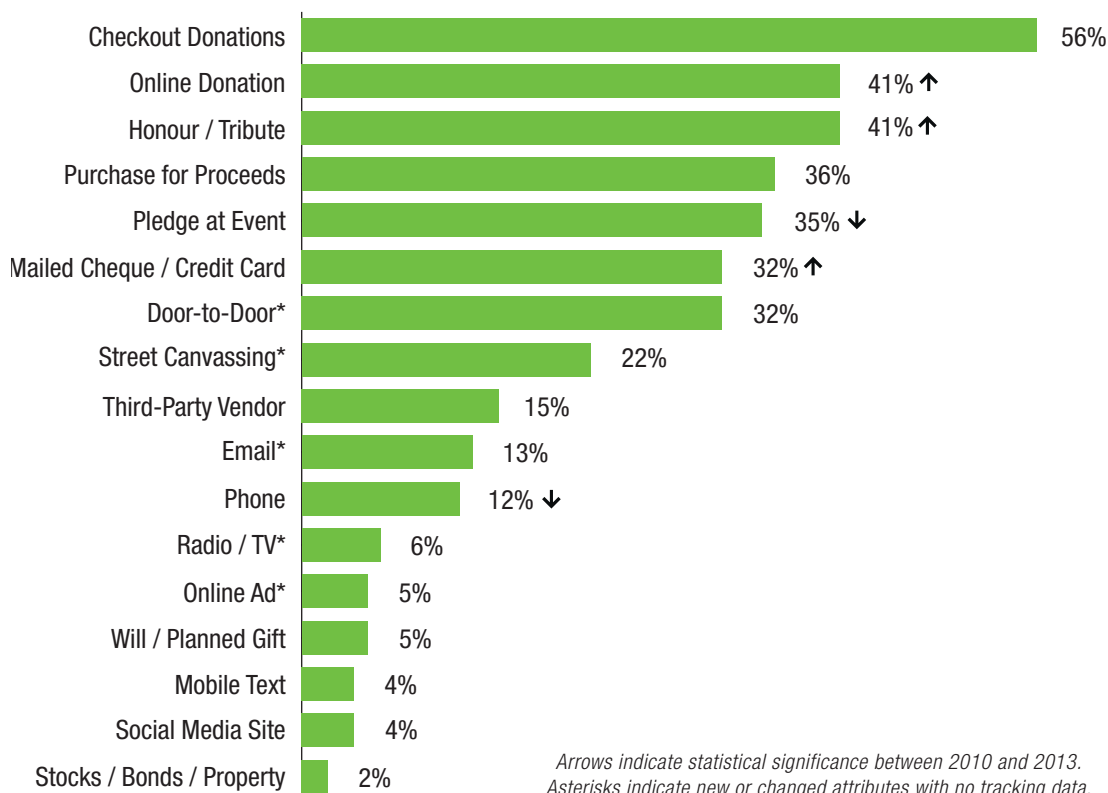
We asked participants to indicate which of 18 different giving methods donors had used within the past two years. Top answers included small donations at the grocery store checkout counter, honour / tribute gift, and online donations.

Among the notable findings:

- Among Gen X and Gen Y, more donors report giving online than via postal mail in the past two years. As donors get younger, the gap between online and direct mail giving grows significantly. Boomers are about as likely to give online as they are through the mail, while Civics are significantly more likely to give in the mail, although one-third of Civics still report donating online in the last two years. Online giving has grown for all generations, but the increase in online giving from Gen X donors since 2010 is dramatic, growing from 37 percent who gave online in 2010 to 55 percent who made gifts online in 2012.
- Telemarketing responsiveness declines sharply with younger donors. While 18 percent of Civics say they have responded to a phone solicitation, only 5 percent of Generation Y and 9 percent of Generation X donors say they have done so.
- Giving via social networks is low. Four percent of donors overall have given by Facebook, Twitter, or another social medium versus three percent in 2010, with a clear skew toward younger donors. Even among Generation Y donors, giving via social networks is nearly the last giving channel a donor will choose.
- Generation Y, Generation X, and Boomers seem to favor giving methods that tie into a normal commercial retail experience such as purchases where a portion of the proceeds help the organization (e.g., the Raising the Roof Toque campaign), an additional gift at the time of checkout, or shopping with a third-party vendor where a portion of sales goes to a charity (e.g., Amazon.ca®).
- Door-to-door and street canvassing are popular across all ages, and street fundraising is more popular with younger donors. Those nonprofits who are not using these channels should think carefully about how they can use them, including volunteer or paid campaigns, monthly gifts, or products.
- Younger donors are more likely than older generations to have bought a retail item on Amazon.co or at a local store whose proceeds go to a cause or charity (e.g., Livestrong™ or The (RED)™ campaign). A majority of Generation Y donors and 38 percent of Gen X donors say they have done this, compared with just 29 percent of Boomers and 19 percent of Civics.

Giving Channels

Respondents Donated This Way in the Last Two Years



	GEN Y	GEN X	BOOMERS	CIVICS
Checkout Donation	55%	54% ↓	58%	55%
Online Donation	45%	55% ↑	35%	31%
Honour / Tribute	21%	35% ↑	47% ↑	56%
Purchase for Proceeds	36% ↑	39%	38%	30%
Pledge at Event	29%	33% ↓	40%	37%
Mailed Cheque / Credit Card	11%	23%	36%	58% ↑
Door-to-Door	22%	29%	37%	34%
Street Canvassing	24%	20%	25%	20%
Third-Party Vendor	25%	19%	11%	9%
Email	15%	14%	12%	14%
Phone	5%	9%	15%	18%
Radio / TV	7%	5%	4% ↓	9%
Online Ad	4%	9%	4%	4%
Will / Planned Gift	5%	8%	4%	3%
Mobile Text	12%	4%	2%	–
Social Media Site	6%	4%	3%	2%
Stocks / Bonds / Property	1%	2%	3%	2%

Asterisks indicate new or changed attributes with no tracking data. Bolding indicates statistical significance among audiences.
Arrows indicate statistical significance between 2010 and 2013.

Methods of Giving

Donors give in a variety of ways to their top charity, including gifts of time, talent, and treasure. As the graph below shows, donations of cash dominates the picture here.

Participation via almost all of these avenues rises steadily with age. For instance, 50 percent of Gen Y donors say they make cash donations, while 77 percent of Civics say the same. Civics and

Boomers are more than twice as likely as Gen Y to say they receive information in the mail.

The likelihood of leaving a gift in a will increases with age, although Gen X is certainly more active than expected in this area.

Transaction Channels

	GEN Y	GEN X	BOOMERS	CIVICS
Make monetary donations	50%	69%	69%	77%
Support friends who are fundraising	37%	45%	46%	47%
Make a donation in honour of, in memory of, or as tribute	13%	22%	35%	51%
Buy products that support them	27%	30%	26%	20%
Include in will	0%	4%	5%	8%

Bolding indicates statistical significance among audiences.

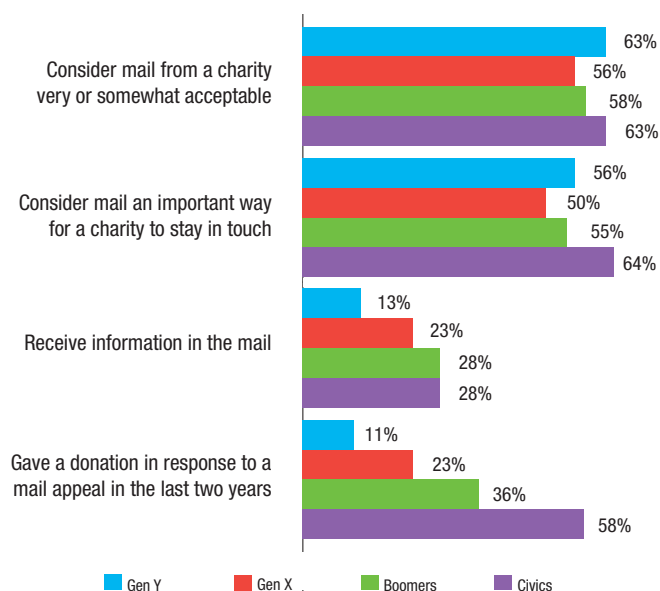
What's the Deal with Direct Mail?

In small dollar fundraising driven by direct marketing (sometimes called database marketing), direct mail continues to be the workhorse. That's not going to change overnight.

Longer term, direct mail partisans argue that younger donors will eventually "age into" direct mail responsiveness. There's good news and bad news on that front, but unfortunately, there's more bad than good.

On the one hand, Gen X and Gen Y say that direct mail is a perfectly acceptable medium of communication. In fact, Generation Y donors are as likely to think direct mail is acceptable as Civics. On the other hand, of those who have actually given as a result of a direct mail piece, the difference between Civics and Gen Y is dramatic. A majority (58 percent) of Civics says they have given via direct mail in the past two years, while only a fraction (11 percent) of Gen Y says the same. Among Gen X donors, 23 percent have given via direct mail and among Boomers, 36 percent say the same.

Direct Mail



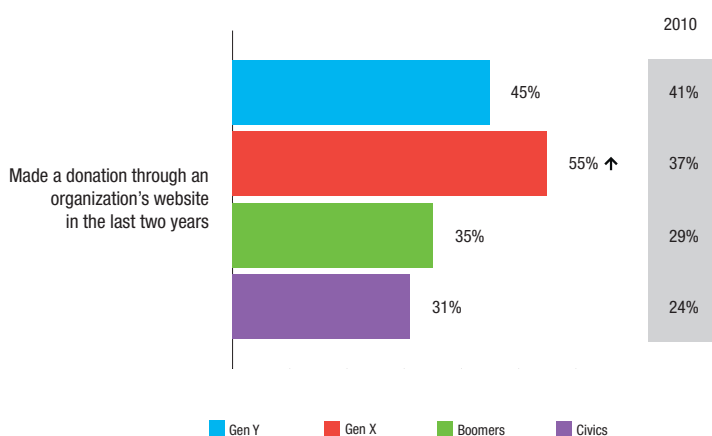
There are a few theories as to why younger donors say they find direct mail acceptable, yet respond to it in extremely low numbers. The first is that direct mail is easy to ignore, and therefore Gen Y doesn't find it intrusive. The more charitable (pun intended) interpretation is that Gen X and Gen Y donors do not yet receive large amounts of direct mail, so they have less to respond to, but value what they do get. Or it could be that they view direct mail as a way of keeping in touch with a cause, but simply not as a solicitation channel. Finally, something

Sustainer Uptake Remains Steady

Monthly giving is relatively popular in Canada.

As was the case in 2010, monthly giving is certainly more popular in Canada than in the U.S.: 20 percent of Canadian donors said they have given a monthly gift in the last two years versus 18 percent of American donors. There is still room to grow, however; in the United Kingdom, 36 percent of donors have given a monthly gift in the last two years. A question all fundraisers should consider is: "How can we embed monthly giving better into our giving culture to ensure it grows further in Canada?"

Online Giving

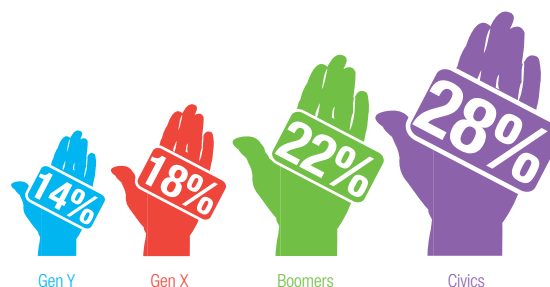


The Next Generation of Canadian Giving

can be said for the style of the majority of direct mail: While most good practitioners of this art form are diligent at testing (window versus no window, two pages versus four pages, etc.), many nonprofits are too budget-conscious or risk-averse to test something radically different from what works for the Civic audience.

Testing direct mail strategies with Generation Y, both as solicitation and as cultivation vehicles, should be high on fundraisers' priority list over the next five years.

Currently Giving in a Monthly Program



Online Giving Continues To Gain Ground

Across all four generations, donors are giving online in greater numbers than ever before. Nearly half of Gen Y and over half of Gen X say they have given online in the past two years, all considerable increases from our 2010 study.

Even though Civics lag in this regard, with 31 percent saying they have given online in the past two years, that percentage is also up slightly since 2010.

Two caveats: First, online giving appears to be more substitutional than additive. All evidence points to flat growth in overall giving for the near future at least.

Second, donors use organizations' websites for transactions, not so much for engagement. While 35 percent of Boomers say they have given online in the last two years, only 25 percent report visiting the website of charities that they support in order to stay connected.

What Inspired the Gift?

Unlike direct mail, online fundraisers often struggle to tie their online income to specific outbound solicitations. In the heyday of direct mail, unattributable income was called “white mail,” and never represented more than a fraction of income. In the web world, it is common for half or more of online income to be unattributable.

Email appeals are the primary vehicle for soliciting online donations, but, according to participating donors, generate well under half of online transactions. 41 percent of all donors say they have given online, but only 13 percent say they have done so in response to an email appeal. Older donors are almost as likely as younger donors to say they have responded to an email appeal.

This squares with other data we have gathered. *The Blackbaud 2013 Online Marketing Benchmark Study for Nonprofits* found that email performance in North America has changed dramatically in the

last couple of years. While open rates remained steady from 2011 to 2012, click-through and response rates continued to decline. Response rates on appeals had an overall decline of more than 18 percent from the previous year²; possibly a symptom of a saturated channel with undifferentiated messaging. Despite this decrease, online giving rates have continued to grow. So, if email is not the source of most online gifts, what is?

Social media, online advertisements, third-party websites, and offline media could be driving online gifts — nine percent of Generation X indicated they have donated through an online advertisement in the last two years — but none of these alone can account for the majority of online gifts. Discovering the drivers of online gifts is beyond the scope of this study, but it is an important research subject for future inquiry.

PAYMENT OPTIONS

Online donors are overwhelmingly credit card donors. Over 90 percent say credit cards are their preferred payment method, but a hefty percentage (38 percent) say they would use PayPal™ if it were an option.

Mobile as a Transaction Channel: A Mixed Bag

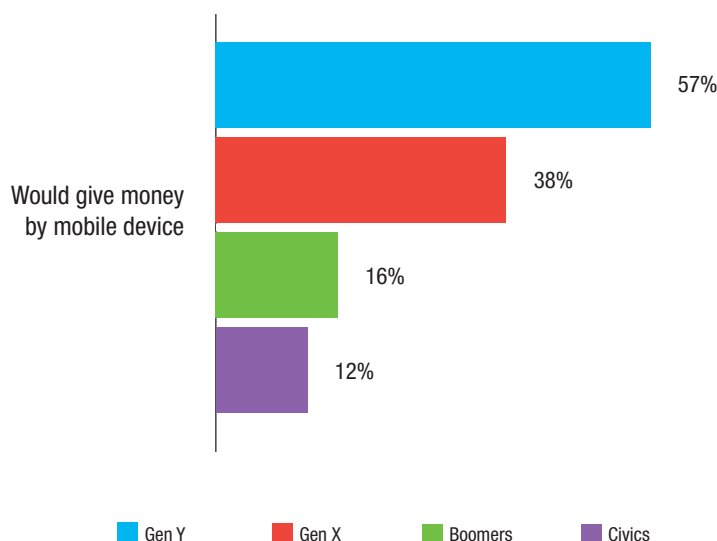
As the Internet continues its rapid progression from something that sits on your desktop to something that lives in your pocket or purse, what are the implications for charitable giving? One recent study suggests that as much as 20 percent of online donations come from mobile devices, notably smartphones and tablets.³

Participating donors provide a glimpse of present practices.

First, giving by text appears to be going nowhere. The numbers in 2010 and now are both minuscule. Only Gen Y reports a significant proportion (12 percent) of gifts through this medium, but when you consider that most of these gifts will have been for \$5 to \$10, the footprint is tiny.

Mobile Giving

Respondents Who Would Give Money by Mobile Device



² <https://www.blackbaud.com/nonprofit-resources/online-marketing-study>

³ <http://www.thirdsector.co.uk/news/1188581/half-people-give-when-trying-donate-mobile>

Giving via smartphone or tablet is another matter. Fifty-seven percent of Gen Y and 38 percent of Gen X say they would consider giving via a “small screen,” while only 16 percent of Boomers and 12 percent of Civics say they are open to giving this way. So, while resistance to mobile or tablet giving rises with age, older generations are increasingly open to it. As tablets gradually replace laptops and desktops as leisure

devices, we are likely to see these percentages increase.

In short, SMS giving may represent an evolutionary dead end as the daily reality of having constant Internet access through mobile devices continues to take shape.

What's Okay and What's Not?

Donors often complain that some kinds of charitable solicitations are unacceptably intrusive or bothersome. We presented a range of hypotheticals, and asked how acceptable each was as a solicitation approach.

Approaches that are generally acceptable to most donors include:

- A friend approaching you on behalf of a cause or charity
- A friend's child or grandchild approaching you on behalf of a cause or charity
- A direct mail appeal from a cause you know personally
- An email appeal from a cause you know personally
- An infomercial or public service announcement on television or the radio
- A check-out option to add a donation when purchasing a concert ticket or recording

Other approaches proved problematic with some groups:

- An appeal via social media from a group you follow is somewhat acceptable to Generation X and Generation Y, but

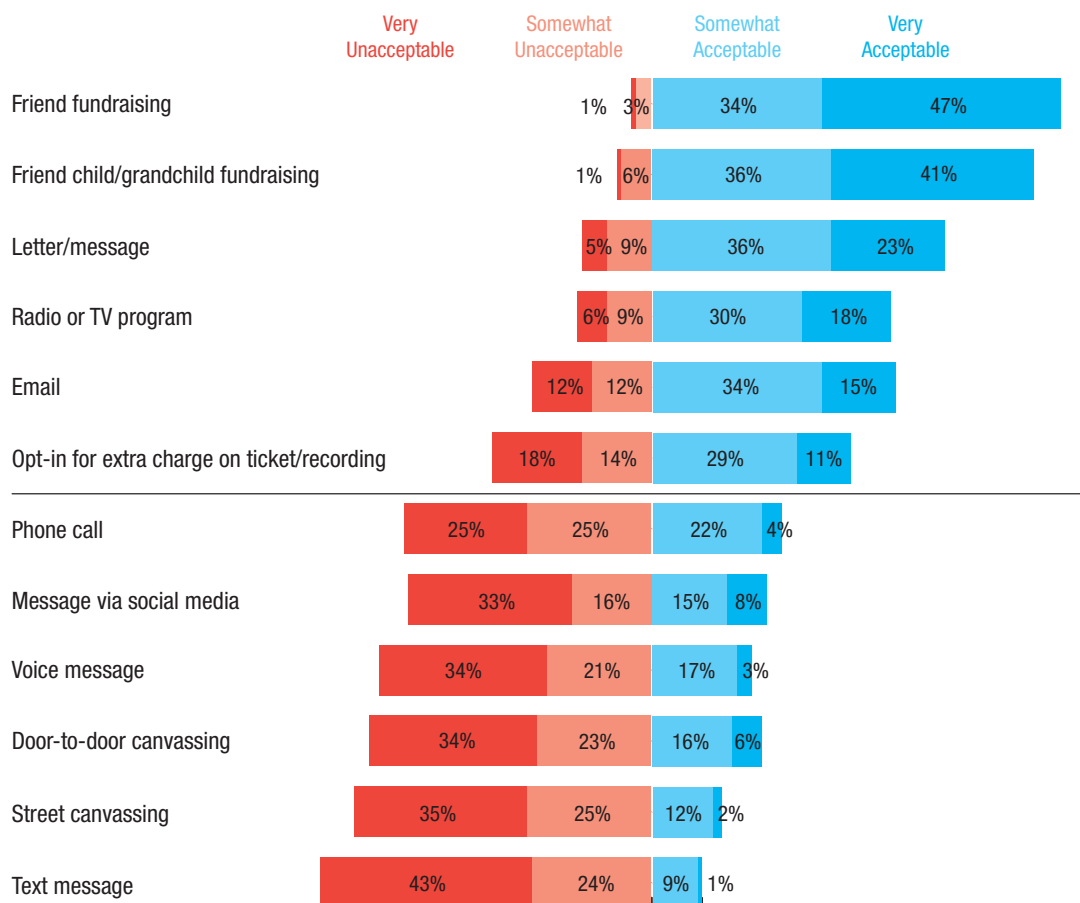
not acceptable to a majority of Boomers or Civics. Even among younger donors, roughly one-fourth say this is unacceptable.

- Direct mail and email from an unfamiliar cause is not acceptable to most donors.
- Telemarketing solicitations and robotic phone call solicitations are, on balance, unacceptable to all members of all generations.
- Text or SMS solicitations are unacceptable to a majority of all generations, even if you have subscribed to get text updates from the cause.
- Street or door-to-door fundraising is disliked across all generations, but more so among Boomers and Civics.

As every fundraiser will immediately note, many of the “unacceptable” approaches are nonetheless successful fundraising tactics, notably telemarketing and direct mail prospecting. The lesson here is not to abandon or adopt certain practices, but to recognize that some carry an invisible cost. The money may come in, but you may be degrading your relationship with other donors in ways that are difficult to measure or track. This is one of many arguments for introducing donor satisfaction metrics, such as net promoter score (NPS), among your key performance indicators.

Acceptable Solicitation Channels

From Organizations with an Established Relationship



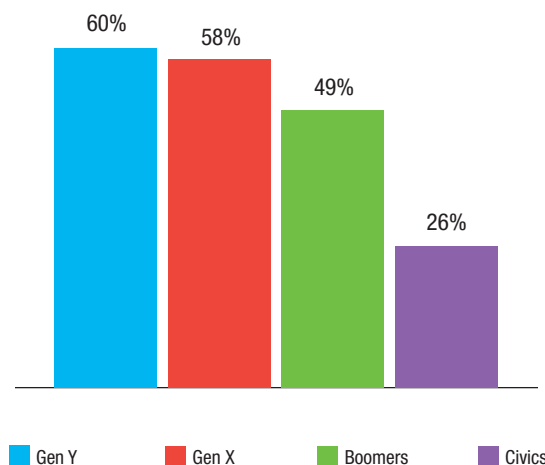
Workplace Giving Skews Young

Younger donors are significantly more likely to say they have given in the workplace. Nearly 60 percent of Generation Y and 58 percent of Generation X say as much, compared with 49 percent of working Boomers and only 25 percent of working Civics.

Generations X and Y and Boomers participate in near equal numbers in workplace fundraisers. Gen Y is somewhat more likely to get involved in volunteer opportunities through the workplace or running, walking, or similar event, but Boomers are more likely to give via payroll deductions.

Workplace Giving

Have Given in the Workplace



Filtered among respondents who are employed or student.

Workplace Giving

	GEN Y	GEN X	BOOMERS	CIVICS
Participated in a workplace fundraiser	30%	33%	30%	13%
Made a one-time donation through the workplace	24%	16%	20%	4%
Made a donation through payroll deduction	11%	18%	24%	4%
Volunteered through the workplace	19%	12%	16%	4%
Made a donation where the employer matched the gift	15%	15%	11%	4%
Participated in a workplace walk / run / challenge	15%	11%	13%	8%

*Filtered among respondents who are employed or student.
Bolding indicates statistical significance among audiences.*

Participation in match programs (programs in which one's employer matches an employee's gift) is quite low. 15 percent of Boomers, Gen X, and Gen Y have their donations matched

by their employers. There may be an opportunity for many organizations to revisit the possibilities for workplace giving.

Marketplace Philanthropy

Fundraising initiatives that blend shopping with doing good are especially attractive to younger donors. 54 percent of Gen Y and 38 percent of Gen X say they have purchased a commercial product whose proceeds (or part of the proceeds) go to a cause or charity. (The (RED)[™] campaign is a recent visible example.) By comparison, only 29 percent of Boomers and 19 percent of Civics say they have done so.

In practice, shop-to-give opportunities do not appear to give rise to long-term giving relationships. While 64 percent of donors stated that when engaging in this kind of giving they are primarily supporting the cause versus wanting the product, only 28 percent say they will give directly to the charity in the future. There are some clues as to why in the emerging field of behavioural economics. In his groundbreaking work *Predictably Irrational*, behavioural scientist Dan Ariely argues that people operate under two parallel value systems.⁴ He describes

these as “social norms” and “market norms.” Social norms operate in our everyday relationships, while market norms drive our consumer behaviour.

For instance, Ariely argues, one would not attend a dinner party with friends and then offer the host a cash tip.

Most charitable giving falls within the world of social norms, which are driven by ideals of being a good person and in good standing of one's tribe. Shopping, on the other hand, is the canonical market norm activity with the goal of maximizing self-interest. Empirically, Ariely argues that where the norms mix, market norms take precedence.

That's a very wonky, long-winded way to say that “retail philanthropy” may be inherently transactional and quite difficult to convert to a more socially-based charitable relationship.

⁴ Ariely, Dan. *Predictably Irrational*, Chapter Four.

Motivators for Retail Giving

	TOTAL	GEN Y	GEN X	BOOMERS	CIVICS
To support the cause	97%	95%	97%	98%	95%
To own an appealing product	77%	87%	77%	76%	58%
To promote the cause to others	71%	76%	73%	64%	66%
To be recognized as a supporter	40%	49%	40%	34%	34%

*Respondents selecting single most important reason, very important, or somewhat important.
Bolding indicates statistical significance among audiences.*

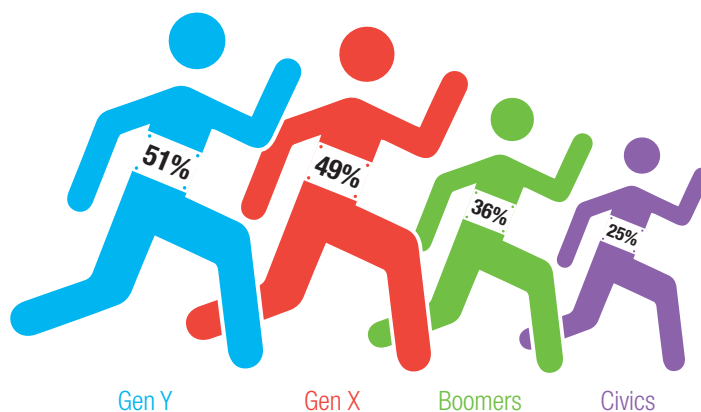
Peer-to-Peer Fundraising

As noted, the vast majority of donors say they do not mind being approached by friends (or their kids) to support a charity. Eight in ten donors have supported someone else raising money for charity. Younger donors are especially likely to take advantage of this receptivity, with 51 percent of Gen Y donors and 49 percent of Gen X donors saying they have fundraised directly on behalf of a cause or charity in the past year. (Further, nearly seven percent of Gen Y respondents say they have done so three or more times in the past 12 months alone.)

By contrast, only 36 percent of Boomers and 25 percent of Civics have fundraised in the past year. Note that the question was not limited to online fundraising. Presumably, many of the efforts by Civics may have been more traditional offline projects.

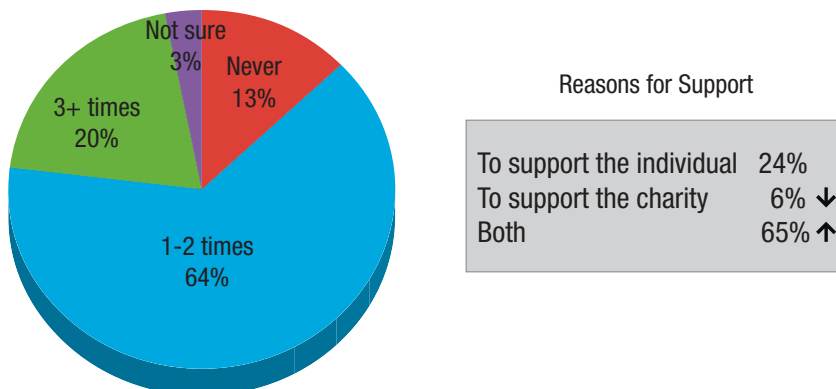
Across all generations, a strong majority (84 percent) of donors say they have given at least once to a friend's cause in response to a personal ask in the past year. Furthermore, 20 percent say they have done so three or more times.

Fundraised on Behalf of an Organization or Participated in a Run or Event to Raise Money



Peer-to-Peer Fundraising

Supported Someone Else Raising Money on Behalf of a Charity



Arrows indicate statistical significance between 2010 and 2013.

One cause of lower participation rates among older donors may be discomfort with the idea of advocating on behalf of a cause. Where only 14 percent of Gen Y respondents say they are uncomfortable with the idea, Civics are more than twice as likely to express some hesitation or concern.

While younger donors are more likely to be willing to promote a cause or actively fundraise with friends, as noted, they also have higher expectations in terms of understanding where their money goes and how it makes a difference. Meeting donors' expectations about documenting impact should be seen as integral to any expanded peer-to-peer efforts.

The flip side of a willingness to promote a cause, especially online, is a willingness to criticize a cause or institution that betrays trust.

Crowdfunding

A relative newcomer to the fundraising scene, community fundraising projects (via platforms like Kickstarter and Indiegogo) are already gaining traction, especially with younger donors.

Specifically, 12 percent of Gen Y donors say they have given in the past to a crowdfunding campaign, and 44 percent said they would

There is plenty of anecdotal evidence that negative campaigns attract more fervor than positive ones.⁵ So, while peer-to-peer fundraising appears to have a bright and growing future, charities need to understand the underlying trust relationship with their volunteer fundraisers, and the potential consequences of violating it.

The other yet-to-be-resolved issue surrounding peer-to-peer fundraising is the relatively low rate at which sponsors of fundraising participants go on to become direct donors to the cause. The initial donation is usually given as a favour to the participating friend; transferring those donors' loyalties to the institution remains a work in progress.

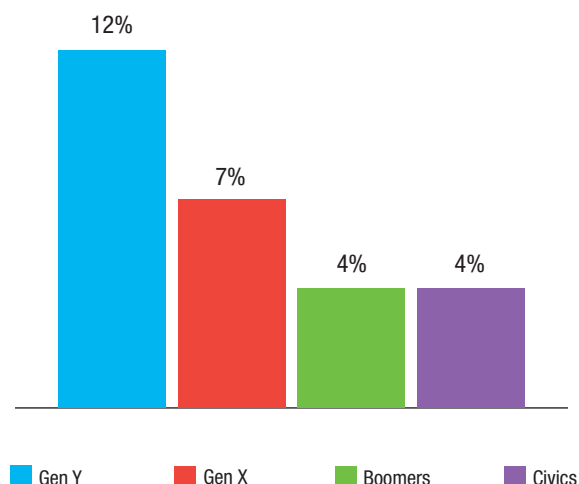
consider doing so in the future. At this writing, both current usage of and enthusiasm for crowdfunding decline with age. Among Civics, only four percent say they have participated in the past, and only five percent say they would consider doing so in the future. Gen X donors appear persuadable, but Boomers may be a tough sell⁶.

⁵ Blackshaw, Pete. *Satisfied Customers Tell Three Friends, Angry Customers Tell 3,000*, 2008.

⁶ Note: This study was conducted before the high-profile usage of crowdfunding during the Rob Ford crack video scandal, which may have accelerated usage or enthusiasm.

Crowdfunding

Have given through crowdfunding



The appeal of crowdfunding appears to align well with many of the values that set Gen Y apart: Its roots are in young musicians and artists seeking peer funding, so it clearly has been pitched at this demographic. It's also social and, more importantly, establishes a direct link between the giver's gift and a concrete charitable outcome. Furthermore, there is often a t-shirt or some other gift involved.

Crowdfunding does have its downsides, too. First, it has yet to catch on with Boomers, which means its potential for significant infusions of cash in the near term may be limited. It's too early to tell, however, whether Boomers and Gen X will adopt this particular tactic in significant numbers.

Second, it is difficult to carry out a crowdfunding campaign for unrestricted donations; we have yet to see even one example. Given younger donors' concerns about demonstrating impact, the future of unrestricted fundraising may be up for debate.

Finally, while there are some up and coming Canadian crowdfunding tools such as Giveffect and Fundrazr, the major platforms are based in the U.S. and have only recently lifted restrictions on Canadian-based organizations using these tools.

ENGAGEMENT

Direct marketers talk a good game when it comes to stewardship and donor relationship building, but the reality is often something else entirely. Most fundraisers are under constant pressure to deliver a growing pot of income, and are often operating with severe budget constraints. A growing litany of studies suggests the frustrations of reconciling the almost irreconcilable demands of CEOs, boards, and the donors themselves are leading to widespread job disillusionment.⁷

As a result, good intentions about stewardship give way to the short-term exigencies of making monthly or quarterly budget projections, while cultivation investments get set aside as unaffordable luxuries.

Short-term decisions have long-term consequences. Donors cite the unending ask and lack of any kind of follow-up communication as major reasons why they stop supporting a cause.⁸

Engagement has become the *mot du jour* referring to contact with donors and prospects outside of direct solicitations. In this context, it is roughly synonymous with cultivation or stewardship. Because there is growing anecdotal evidence that many donors' engagement expectations are not being met, we devoted part of the study to that critical subject.

⁷ "Half of Fundraisers in the Top Job Would Like to Quit," *The Chronicle of Philanthropy*, January 13, 2013.

⁸ "Donors Who Stop Giving to a Charity Feel Disconnected, Survey Finds," *The Chronicle of Philanthropy*, November 27, 2008.

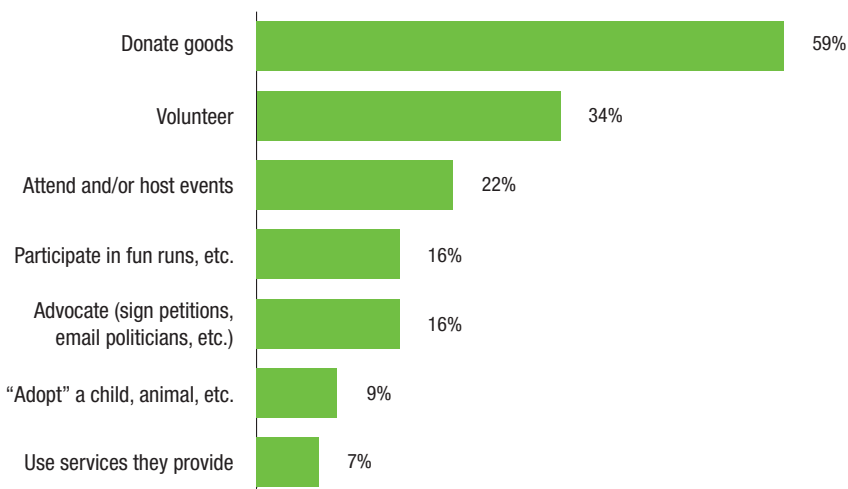
Favored Engagement Paths

Donors involve themselves in the life of favorite causes in a variety of ways. Here are some highlights:

- Nearly 59 percent of donors say they donate clothes, food, and other items to a cause they support. Donations of “stuff” increase with donors’ age. 41 percent of Gen Y donate goods, compared with 75 percent of Civics.
- Almost half of donors give time as well as money, by volunteering for one or more causes. As noted earlier, Gen Y donors are especially likely to place a high value on contributions of time, though their elders are more likely to actually follow through. 39 percent of Civic donors say they are currently volunteering for causes, compared with 37 percent of Gen Y donors. Canadians are just as likely to volunteer as Americans.
- Approximately one-fifth of donors, without generational variation, say they attend or host in-person events for a cause or charity.
- Roughly one-fifth of Gen Y and Gen X participate in advocacy actions such as signing petitions and sending emails to elected officials, but the proportion declines with age; Boomers are the least likely to participate in advocacy actions.
- Overall, 63 percent of donors engage online with causes in one way or another. This is including using the Internet as a transaction device. The next section takes a closer look at various forms of online communication.

Engagement Channels

Responders Are Currently Involved in This way



	GEN Y	GEN X	BOOMERS	CIVICS
Donate goods	41%	59%	60%	75%
Volunteer	37%	31%	33%	39%
Attend and/or host events	21%	23%	21%	21%
Participate in fun runs, etc.	28%	20%	12%	8%
Advocate (sign petitions, email politicians, etc.)	18%	18%	14%	16%
“Adopt” a child, animal, etc.	8%	9%	9%	13%
Use services they provide	6%	8%	7%	6%

Bolding indicates statistical significance among audiences.

Unpacking Online Engagement



One generalization that deserves to be laid to rest is the notion that digital is for young people and offline engagement is for old people.

Donors give online in growing numbers, but they also turn to cyberspace more and more to stay connected with their preferred causes.

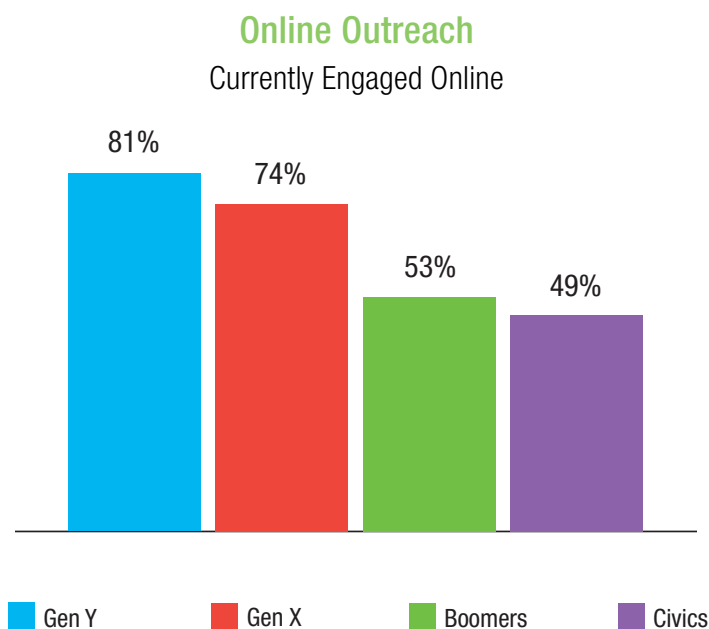
One generalization that deserves to be laid to rest is the notion that digital is for young people and offline engagement is for old people. The truth is, all generations value a mix of online and offline. The precise types of online engagement donors prefer does differ from generation to generation, especially in regards to social media and engagements requiring content creation by the donors.

Nonetheless, the Internet is a critical part of the mix for Boomers and some number of Civics as well.

Here are some highlights of key findings related to web-based engagement:

Websites

Asked how important various forms of contact are to them as donors, a majority of respondents place a high value on the website.

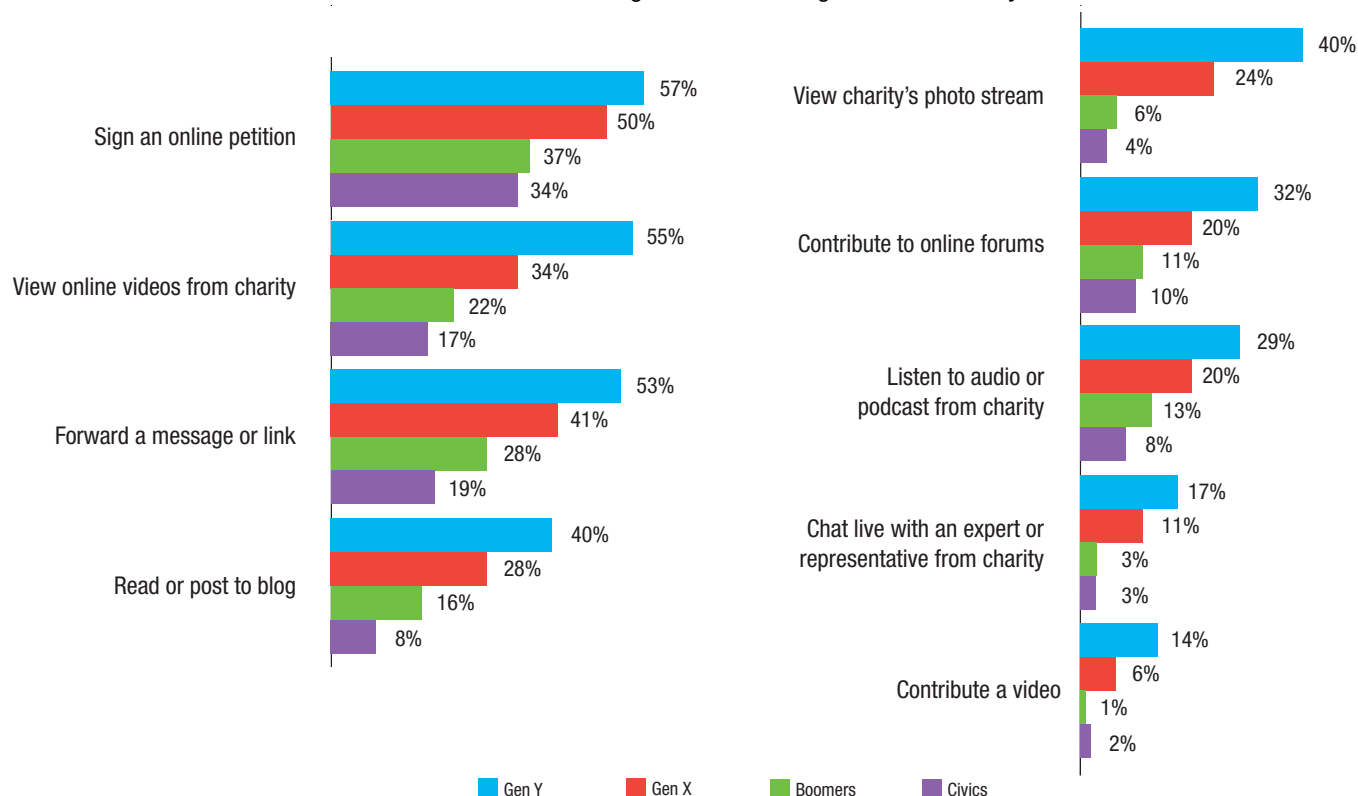


Asked about a range of specific web-based opportunities, younger donors are almost across-the-board more likely than older donors to

have engaged in one or multiple web-based engagements:

Online Activities

Activities Conducting Online with Organizations Today



Email

Donors say they value receiving email from causes; overall, 59 percent say getting email updates is important. As with the Internet, Gen Y donors are more likely to value email communications than their elders.

This seems to conflict with evidence that email performance in general has declined in recent years. Those declines may be less a product of the medium itself and more a symptom of a “one size fits all” approach to email still commonly used by many charities today.

Like any other content strategy, the quality and relevance of the content matters more than the delivery vehicle.

Also, the line between desktop and mobile continues to blur as a rapidly growing proportion of emails are opened and read on smartphones, tablets, and other mobile devices.⁹



...the quality and relevance of the content matters more than the delivery vehicle.

⁹ See e.g. <http://www.returnpath.com/wp-content/uploads/resource/email-mostly-mobile/Return-Path-Email-Mostly-Mobile1.jpg>

Social

Social media presents the starkest intergenerational variations in donor interest. Nearly one-quarter of Gen Y (23 percent) say social media sites are extremely or very important ways to stay in touch, compared with zero percent of Civics! Similarly, nearly 10 percent of Gen X says the same, but only three percent of Boomers concur.

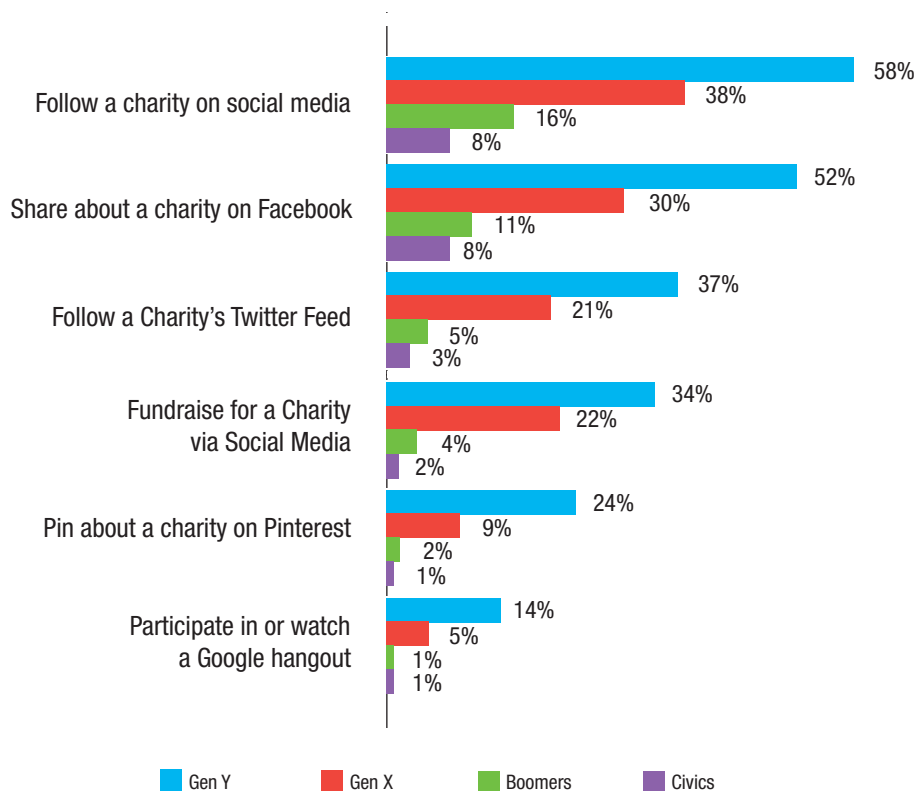
In that regard, social media may be more of an investment in the future than in the present. Studies suggest, however, that social media, and Facebook in particular, is an important gathering place

for donors who have already established a high level of interest in or commitment to your cause. So it may be that while great numbers of Boomers are not connecting with you via social, the ones who are matter a lot.

As noted earlier, while Generations X and Y place significant value on social media contact with the causes they support, that value does not extend to direct solicitation via those channels.

Social Media Activities

Activities Conducting via Social Media with Organizations Today



Mobile

Mobile applications received low rankings from donors as a communications priority; only three percent overall — with no discernible generational differences — rated engagement via mobile application as extremely or very important. Text messages receive comparably low scores.

It is fashionable to talk about apps in nonprofit marketing circles. Given the cost and complication of development and lack of an apparent market for them among even younger donors, any investment in mobile applications should meet a high standard of usefulness and appeal. The mere fact that it is an app appears to carry little, if any, persuasive weight.

Evangelism

Many Internet marketers treat word of mouth as a sacred tool; the words “viral video” are often uttered in hushed, reverent tones. Never mind that word of mouth is the oldest form of marketing, likely pre-dating writing.

Worshippers at the altar of word of mouth marketing may have a point: Donors *are* receptive to appeals from friends, arguably more than any other source of solicitation. Behavioural economists call this “social proof,” and believe it is a powerful motivator in marketing.

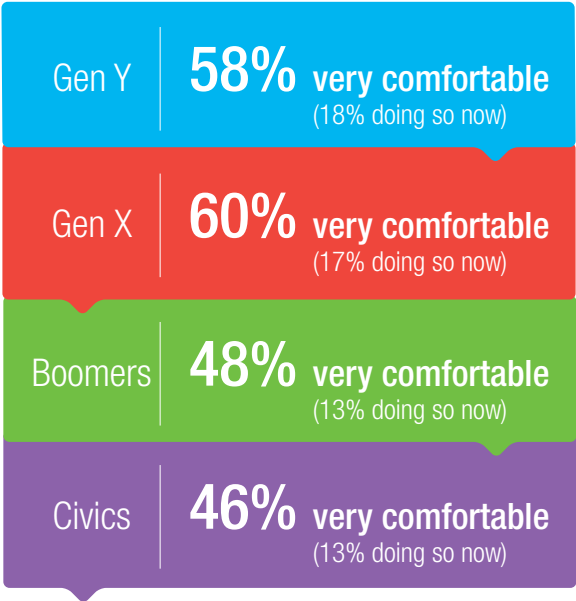
While even Gen Y looks askance at fundraising appeals from groups via Facebook or Twitter, there is broad tolerance for information shares and tweets coming from a friend or family member.

Younger donors are more likely to spread the word about a charity’s cause than their elders either offline or online. Roughly one-fifth of Generations X and Y say they are completely comfortable sharing information about their causes, and they do it often. Only 13 percent of Boomers and Civics say the same.

An additional 40 percent of Gen Y and 43 percent of Gen X say they are comfortable sharing information, but do so only if asked. Again, the proclivity to do this declines with age.

Word of Mouth

Comfort Level Sharing Information
about Charities Donors Support



The caveat we raised earlier remains; the generation that is most likely to promote your cause also has the highest expectations in terms of transparency and impact. Addressing those expectations should be an integral part of any word of mouth strategy.

RECOMMENDATIONS

- 1. Keep your eye on the bouncing red ball.** Boomers are highly likely to be the dominant source of income at least for the next decade, perhaps longer, but Civics and Gen X are not far behind. Civics are slowly passing from the scene and already behind Gen X. For a long-term donor strategy, Gen X may be a better place to focus.
- 2. Multichannel marketing and fundraising is for everyone, but the optimal mix varies by cohort.** Everyone values direct mail to one extent or another. Everyone values face-to-face contact. Nearly everyone is engaged online. The trick will be to optimize the mix for Boomers, the source of most donor income today, while opening the door for Gen X.
- 3. Prepare for the future today.** There are things organizations can and should do to attract younger supporters and a share of the roughly \$6.2 billion they give each year. Recognizing the full pay-off may take years, but peer-to-peer fundraising, designated giving opportunities, and crowdsourcing stand out as important opportunities, and will generate at least some income from Generation X and Boomers.
- 4. It's not just about tweaking the tactics.** Many of the biggest impediments to effective multichannel fundraising are organizational and political. Internal wrestling matches over attribution of channel income are commonplace and lethal to your efforts. Moreover, to meet the expectations of Generation Y, successful fundraising organizations are going to need to be far more transparent in their finances and far more serious about demonstrating effectiveness than they have been previously.
- 5. Know your donors' birthdays.** Not only can you send them a birthday card, which would be a smart move, but you can also begin to understand and track how your file is behaving generationally.
- 6. Don't phase out direct mail now, but do have a "succession plan" for the mail channel.** It is declining as the dominant source of direct marketing income, and there is no indication that the trend will reverse itself. In fact, the data suggests the declining trend may accelerate, as even Boomers and Civics shift to giving online. Finally, changes in delivery services from Canada post may make it harder to reach people through direct mail.
- 7. Make donors happy.** Many of the tactics fundraisers find themselves using (such as heavy solicitation schedules) are taking a toll. Now is the time to create and track donor satisfaction metrics, and closely track retention by channel and generation. It's also time to pay more attention to inbound communications by donors. Responding to member mail is often a lowly position, and that person is rarely given a voice at the strategy table. The commercial sector has long ago learned that if they listen carefully, their customers are voicing their interests and concerns everyday. Charities should adopt similar listening strategies.

Remember, in applying this report, your mileage may vary. For every rule there are five exceptions. You may be the one cause in a thousand that is raising millions on Twitter. An arts charity probably needs to worry less about Gen Y today than an international relief group. *Your* experience with *your* file should guide *your* strategic and tactical fundraising decisions, not the broad findings from studies like this. Our goal is to get you into the best practices ballpark. The rest is up to you.

ACKNOWLEDGEMENTS

We are indebted to the colleagues who supported this work. In addition to Michael Johnston, Sheetal Persaud, Mark Rovner, Pam Loeb, and Dennis McCarthy, who penned this report, we extend our sincere gratitude to the following team members. Without their support, this paper would not be what it is today.

Thank you to Gayle Vogel of Edge Research who, as our data guru, contributed her great expertise to the analysis and interpretation of the findings. Thank you to Emily Hahn of Edge Research for sharing her time and positive insights, essentially driving a multitude of the compelling points within. Finally, we'd like to extend our thanks to Ashley Thompson for being the wrangler of cats, production manager, and thought provoker.

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ABOUT THIS STUDY

Commissioned by Blackbaud, Edge Research conducted an online survey of 809 Canadian donors, excluding Quebec. A sample of adults aged 18+ was drawn from a national survey panel. The deployed and incoming sample was controlled to be Canadian Census representative, and qualifying participants reported that they had made a monetary donation to at least one nonprofit organization/charitable cause within the last 12 months (excluding trade union, children's school, alma mater, and place of worship). The survey was in the field May 16-28, 2013. The survey instrument was developed and refined from a similar survey conducted in 2010; however, that survey was conducted in Quebec and comparison between the two reports should take that into account.

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ABOUT BLACKBAUD

Serving the nonprofit and education sectors for 30 years, Blackbaud combines technology and expertise to help organizations achieve their missions. Blackbaud works with more than 28,000 customers in over 60 countries that support higher education, healthcare, human services, arts and culture, faith, the environment, independent K-12 education, animal welfare and other charitable causes. The company offers a full spectrum of cloud-based and on-premise software solutions and related services for organizations of all sizes.

ABOUT EDGE RESEARCH

Edge Research is a premier marketing research firm servicing nonprofits, associations, and corporations. Over the past 20 years Edge has helped dozens of nonprofits move to a donor-centric mindset. Research insights guide clients on how to communicate with their audiences more effectively, retain and grow their donor base, and make the changes needed to cultivate the next generation of supporters.

ABOUT HJC

hjc specializes in integrated fundraising, brand building, and campaigning. Since 1992, hjc has worked with nonprofits to bring online and other channels together for successful acquisition, retention, reinstatement, and advocacy campaigning. Their strategic consulting team brings together innovative thinkers in the nonprofit sector and an in-house production team of designers, programmers, and copywriters deliver complete programs to engage constituencies.

ABOUT SEA CHANGE STRATEGIES

Sea Change Strategies is a boutique consulting practice recognized for helping remarkable causes raise more money by building better donor relationships. They have been honoured to serve causes including the National Audubon Society, Defenders of Wildlife, International Rescue Committee, Monterey Bay Aquarium, Southern Poverty Law Center and Amnesty International USA.

Learn more about hjc ►

Learn more about Blackbaud's fundraising solutions ►