

The Giving Report: Generational Trends, Pandemic Uncertainties and Unprecedented Strain on Charities



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Introductions

Hi, I'm Jacob



Senior Vice President, Charity Engagement

- Joined CanadaHelps in 2016
- On a mission to help Canada's charities thrive in the digital age

Hi, I'm Jennifer



Director, Business Development & NFP Lead

- Joined EA in 2014
- Marketer, Consultant and Data Geek
- On a mission to help not-for-profits maximize their constituent data by providing useful insights

About CanadaHelps

CanadaHelps is a public foundation advancing philanthropy through technology.

For **charities**, CanadaHelps builds effective and affordable fundraising technology, and provides free training and education so that all charities, regardless of size, have the capacity to increase their impact.

For **Canadians**, www.CanadaHelps.org is a convenient, safe and trusted, one stop destination for donating to (once, monthly, or gifts of securities), fundraising for, or learning about any charity in Canada.

\$2.1 BILLION
RAISED OVER 22 YEARS

3.4 MILLION
CANADIANS DONATED

25,000
CHARITIES REGISTERED

About Environics Analytics

We help organizations achieve their business objectives by delivering actionable constituent and market insights grounded in data and analytics.

- Established: 2003
- Acquired by **Bell** in December 2020
- 250+ employees, including:
 - Business Strategists
 - Marketers
 - Geographers
 - Statisticians
 - Mathematicians
 - Modellers



Agenda

1. About The Giving Report 2022
2. 4 Key Findings From The Giving Report 2022
3. Deep Dive Into Donor Segments
4. Tips Your Charity Needs to Know
5. Questions and Answers

About The Giving Report 2022

- CanadaHelps created The Giving Report in 2017 to help Canadians understand the profile, the trends, and issues affecting the charitable sector.
- Each year the report offers new and updated insight delving into new areas of giving, new data sets and/or through completion of new proprietary research.

We are thankful for the contributions of our partners:

Environics Analytics is a partner on the Giving Report, providing analysis for insights into demographic, financial, psychographic, and behavioural trends in CanadaHelps data.

Imagine Canada has been a partner on the Giving Report since 2018, providing deeper analysis of various data from Canada Revenue Agency & data verification.





4 Key Findings From The Giving Report 2022

Key Finding #1: -12% Decline in Total Giving Projection



One in four Canadians (25%) expect to give less in 2022 than they did in 2021.



One in four Canadians (26%) expect to use or are already using charitable services in 2022 for basic necessities.

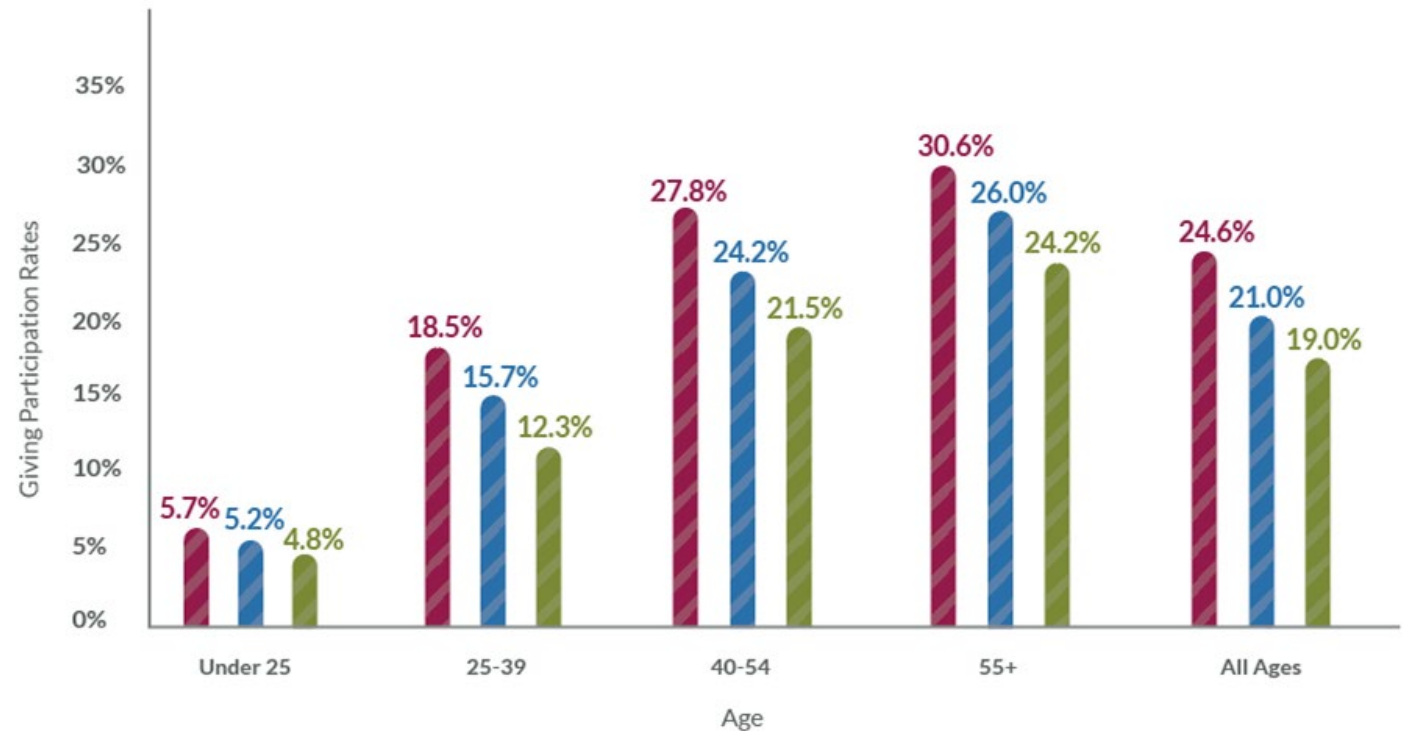


11% of Canadians currently rely on charities to meet their basic needs such as food and housing.

Giving Participation Rates on the Decline ↓

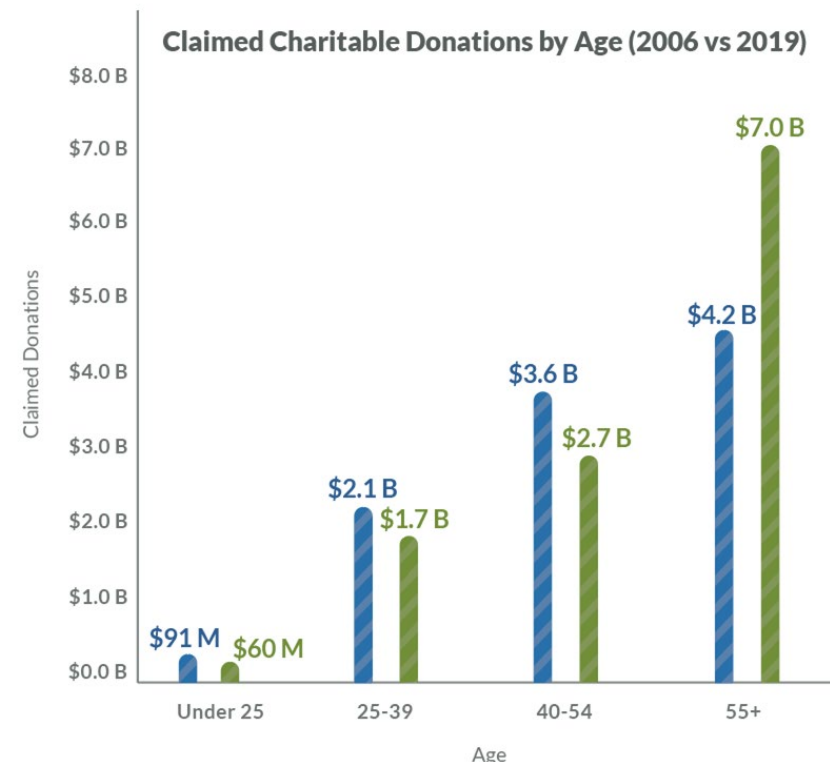
Giving participation rates have declined from 24.6% in 2006 to 19% in 2019. That's a **5.6 point drop**.

Giving Participation Rates in 2006, 2015, and 2019
Based on Personal Income Tax Filings



Key Finding #2: The Giving Gap is Widening

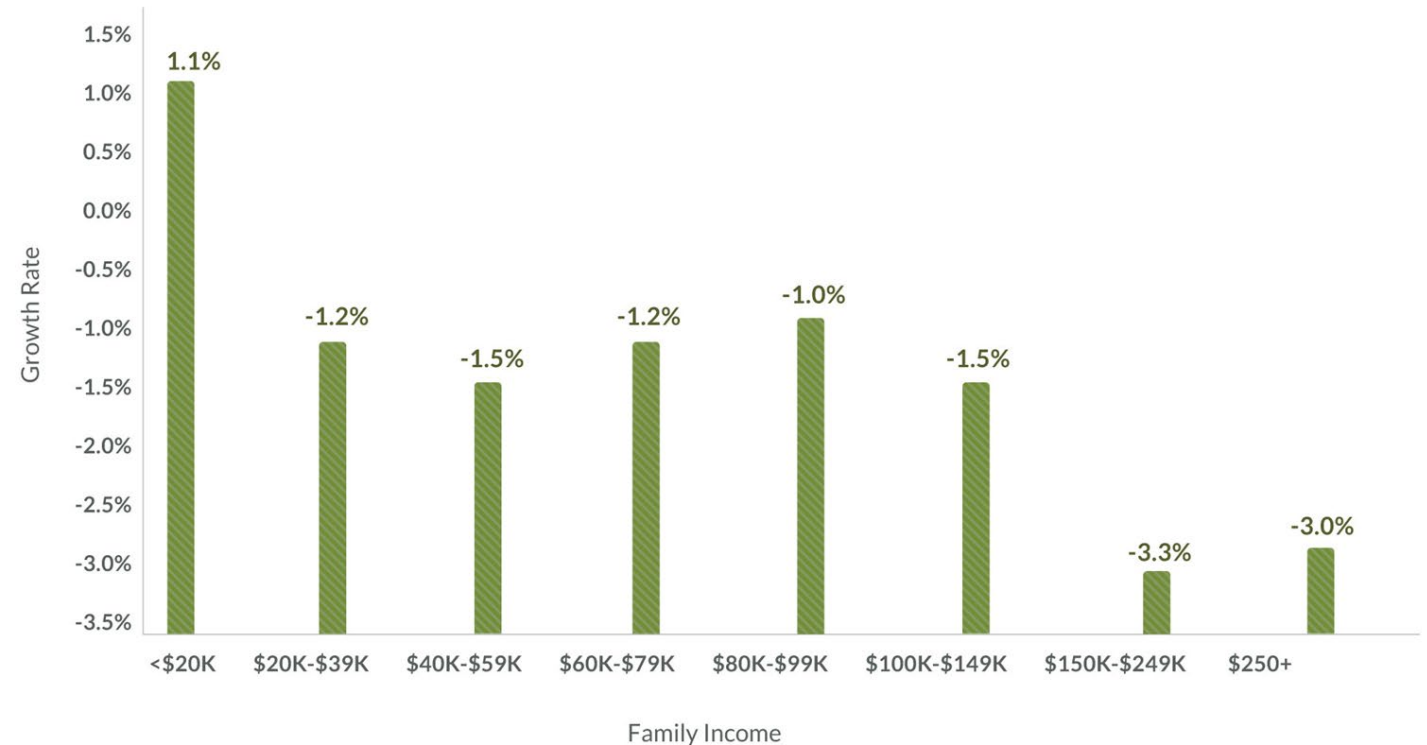
- Among Canadians, older donors aged 55+ are giving at a higher rate than younger donors.
- Once older Canadians are no longer able to give and if younger Canadians do not increase their giving, this will further widen the gap in funding for charities, known as the *giving gap*.
- Canadians aged 40-54 had the largest drop, decreasing their giving by -3.1%.
- Canadians aged 50+ were the only group to increase their giving from \$4.2 billion in 2006 to \$7 billion in 2019.



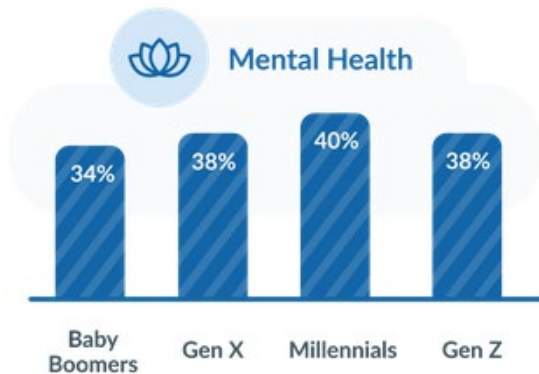
The Decline in Amount Given is Steepest Among Families with Higher Income

Average Annual Percent Change in Donation Amount by Family Income (2006 through 2019)

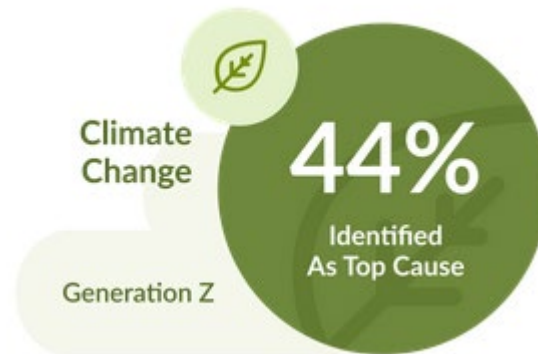
Based on Personal Income Tax Filings



Key Finding #3: Generations Think and Support Charities and Causes Differently



Generation Z (38%), Millennials (40%), Generation X (38%) and Baby Boomers (34%) all ranked mental health support in their list of top five causes.



44% of Generation Z identified climate change as the top cause they care about, while Generation X respondents ranked the cause in sixth place in their list of top causes.



Social justice causes ranked higher among younger generations as nearly 30% of Generation Z and 17% of Millennials placed the cause in their top five, while 11% of Generation X and 9% of Baby Boomers did.

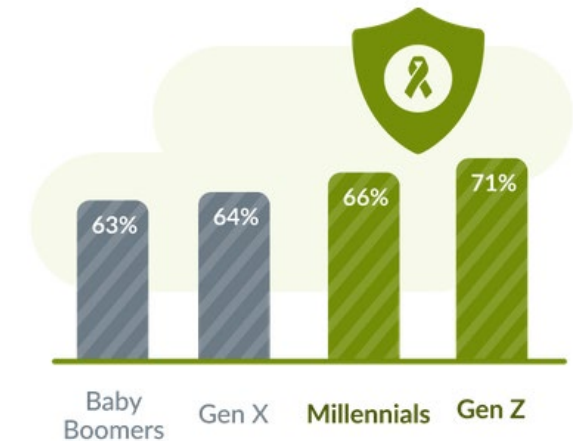
Key Finding #4: Among Younger Canadians, There is Hope



6.1% of Generation Z and 4.5% of Millennials have made donations of cryptocurrency compared to just 0.3% of Generation X and less than 0.1% of Baby Boomers.



Millennials in particular hold a strong affinity for securities donations with 13% having donated securities, making them more than 2x as likely to donate securities than Baby Boomers.

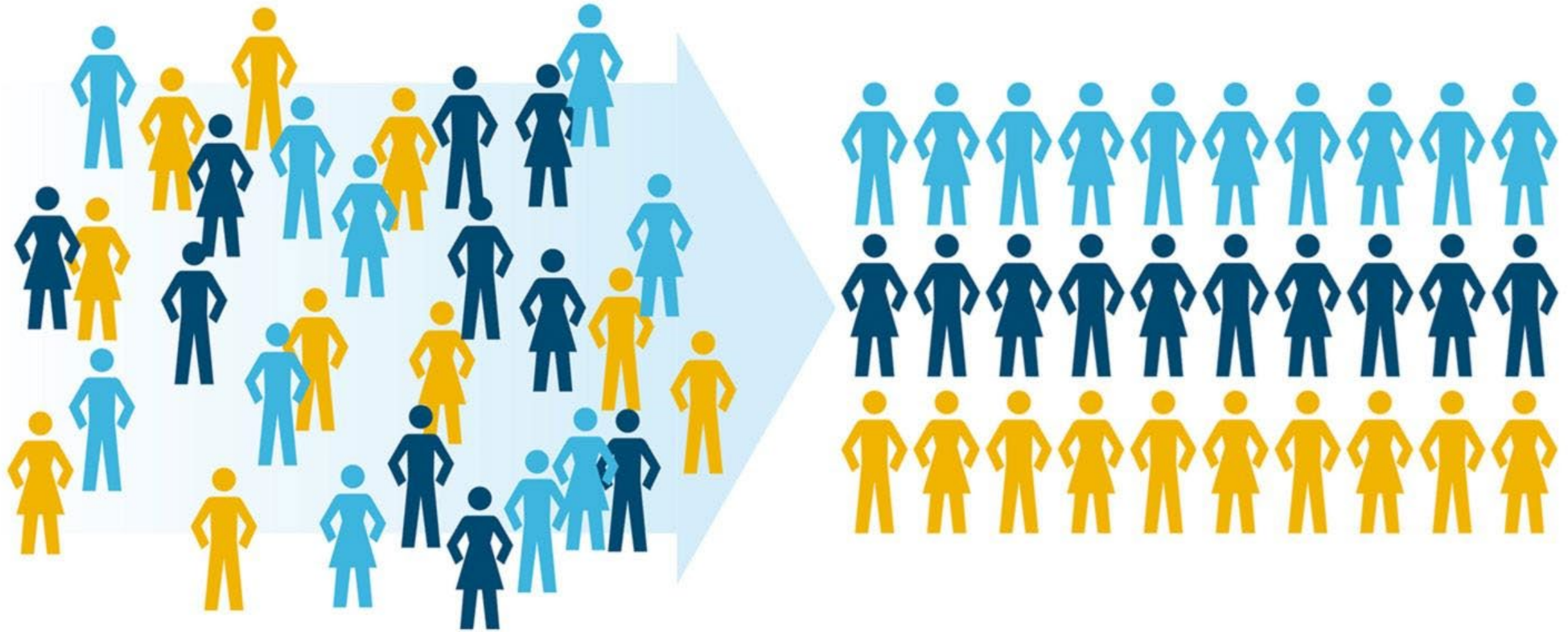


71% of Generation Z and 66% of Millennials strongly agree that they trust charities. 63% of Baby Boomers and 64% of Generation X strongly agree that they trust charities.

Meet the Digital Donor



Not all Digital Donors are the Same



Meet Three of the Donor Groups

Downtown Donors



Maturing in Suburbia



Older Diverse Households



Demographic Characteristics

Downtown Donors



Maturing in Suburbia



Older Diverse Households



AGE



HOUSEHOLD STRUCTURE



HOME OWNERSHIP



HOUSING



URBANITY

Under 45 years old

Singles & Couples

Renters

High-rise apartments

Urban City Centres

55+ years old

Singles & Couples

Owners

Single-detached houses

Suburban
Neighbourhoods

55+ years old

Multi-Gen Families

Mix

Mix

Urban City Centres

Demographic Characteristics

Downtown Donors



Maturing in Suburbia



Older Diverse Households



AVERAGE HOUSEHOLD INCOME 2021



EDUCATION



EMPLOYMENT



TRANSPORTATION TO WORK

\$130,311

University Degree

White Collar

Transit

108,083

College or Trades

Blue Collar

Car

\$100,171

University Degree

Grey Collar

Mix

Source: Environics Analytics PRIZM 2021, DemoStats 2021

10% or more below the Canadian average, 10% or more above the Canadian average

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Giving Behaviours

Downtown Donors



Maturing in Suburbia



Older Diverse Households



Average Dollars Given to Charitable Organization [Past Year]

\$762

\$621

\$505

Charitable Category of Choice

- Arts & Culture
- Environment
- Indigenous

- Animals
- Environment

- International
- Religious

Given to a COVID-19 Fund

Given to a Social Justice Fund

Source: Environics Analytics PRIZM 2021, GivingBack 2021, CanadaHelps 2021

10% or more below the Canadian average, 10% or more above the Canadian average

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Reasons for Giving

Downtown Donors



Maturing in Suburbia



Older Diverse Households



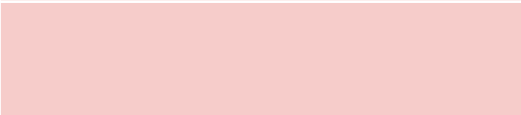
Cause



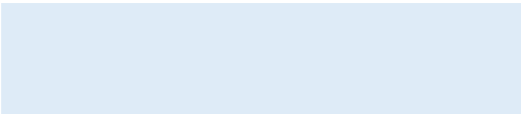
Compassion



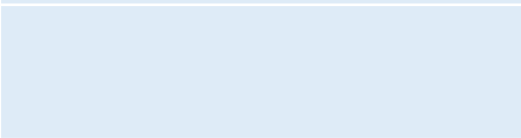
Community Contribution



Personally Affected



Asked by someone you know



Source: Environics Analytics PRIZM 2021, GivingBack 2021

Social Media

Downtown Donors



Maturing in Suburbia



Older Diverse Households



Facebook

46.1

51.2

50.4

Twitter

17.9

14.4

18.2

Instagram

28.7

25.6

32.0

LinkedIn

15.8

9.9

14.2

Snapchat

12.1

13.7

15.0

Source: Environics Analytics PRIZM 2021, Opticks Numeris 2021: Used Online Social Networks in the Past Week)

10% or more below the Canadian average, 10% or more above the Canadian average

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Top Values

Downtown Donors



Rejection of Authority

Effort Towards Health

Global Consciousness

Maturing in Suburbia



Confidence in Small Business

National Pride

Personal Control

Older Diverse Households



Need for Status Recognition

Advertising as Stimulus

Attraction for Crowds

Tips for Your Charity

1. Engage New Ways of Giving:

Include ways to give monthly, cryptocurrency, securities, and more! Donors want to engage in different ways. Make it easy and available to them.

2. Don't Forget Small Donors:

Steward them, communicate with them, and bring them along.

3. Segmentation is Critical:

Your donors are different and they should be treated differently. It's never been more important to leverage a Donor Management System to organize and engage your supporters.

Questions?



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