



Loyal supporters and occasional donors

Scenario and opportunities for Italian NPOs

Paolo Anselmi – Vice President GfK Eurisko

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RESEARCH PURPOSE

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Our survey investigated the following **thematic areas**:

- Regularly vs occasionally supported organizations
- Duration and frequency of support
- Donated money per year
- Preferred payment method
- Channels through which knowledge about supported organizations/causes was gained
- Motivations for choosing supported organizations/causes
- Overall judgment of supported organizations
- Willingness to continue to support the same organization
- Knowledge of projects undertaken by organizations and results
- Perception of quality and quantity of communication received
- Importance ascribed to a certifying body and its potential effects on donating behaviors.

METHODOLOGY

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UNIVERSE: **Regular or one-off donors** (aged 15 or more)

SAMPLE: **1,000 subjects who are representative of the donor universe** in terms of gender, age, geographic distribution, education and employment status

METHODOLOGY: **telephone interviews** (CATI method)

TIMING: **survey period lasted from July 7 to 25, 2008**

DEFINITIONS USED

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DONATIONS: money donations to charities or no-profit organizations, not including:

- money given to people in need (elemosina)
- money given to the Church during mass on Sunday
- contributions to political parties, trade unions, professional registers and associations
- 5 per thousand and 8 per thousand allocation from income tax returns

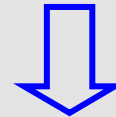
REGULAR DONORS People who donate money to the same organization at least once a year.

ONE-OFF DONORS People who have donated money sporadically - i.e., not every year - at least once in the past 5 years (regardless of whether donations went to the same organization or different ones).

HOW MANY DONORS THERE ARE

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ITALIAN ADULT POPULATION (aged 15+)
100% (= approx. 48 million)



DONORS
52% (= approx. 25 million)



REGULAR
33%
(approx. 16 million)



ONE-OFF
19%
(approx. 9 million)

**AVERAGE NUMBER OF SUPPORTED
NPOs/CAUSES**

TOTAL = 2.6

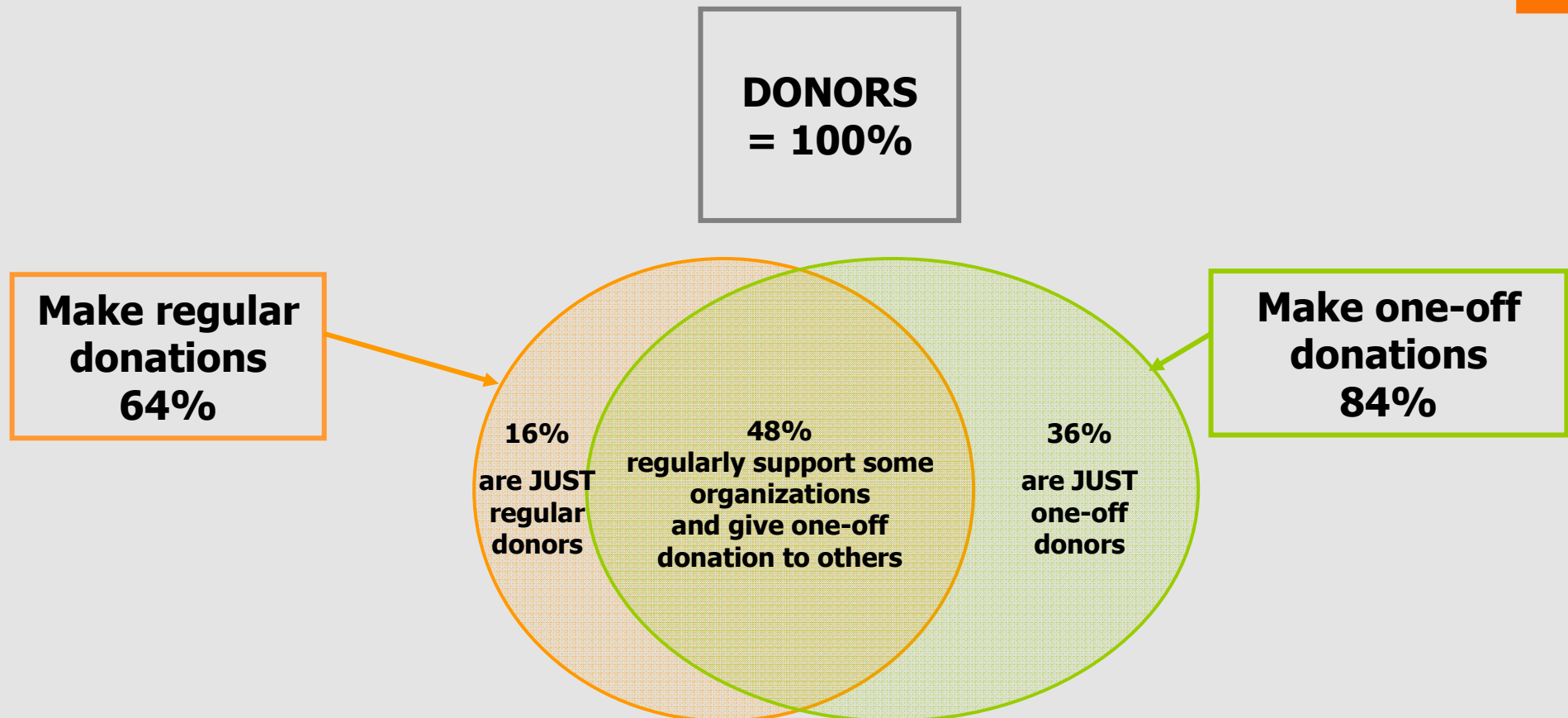
REGULARLY = 1.6

OCCASIONALLY = 1.0

**AVERAGE NUMBER OF SUPPORTED
NPOs/CAUSES
(OCCASIONALLY) = 1.5**

REGULAR DONORS ALSO MAKE ONE-OFF DONATIONS

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DONOR PROFILE

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Donors are significantly high in number among women in the 35-54 age bracket. They tend to live in Northern Italy and are usually people with a high-school or university degree.

There is a significant correlation with regular religious practice.

Regular donors tend to be mostly women over 45 years of age who live in large and medium-to-large cities and people with higher education - a pattern that is not consistently found among one-off donors.

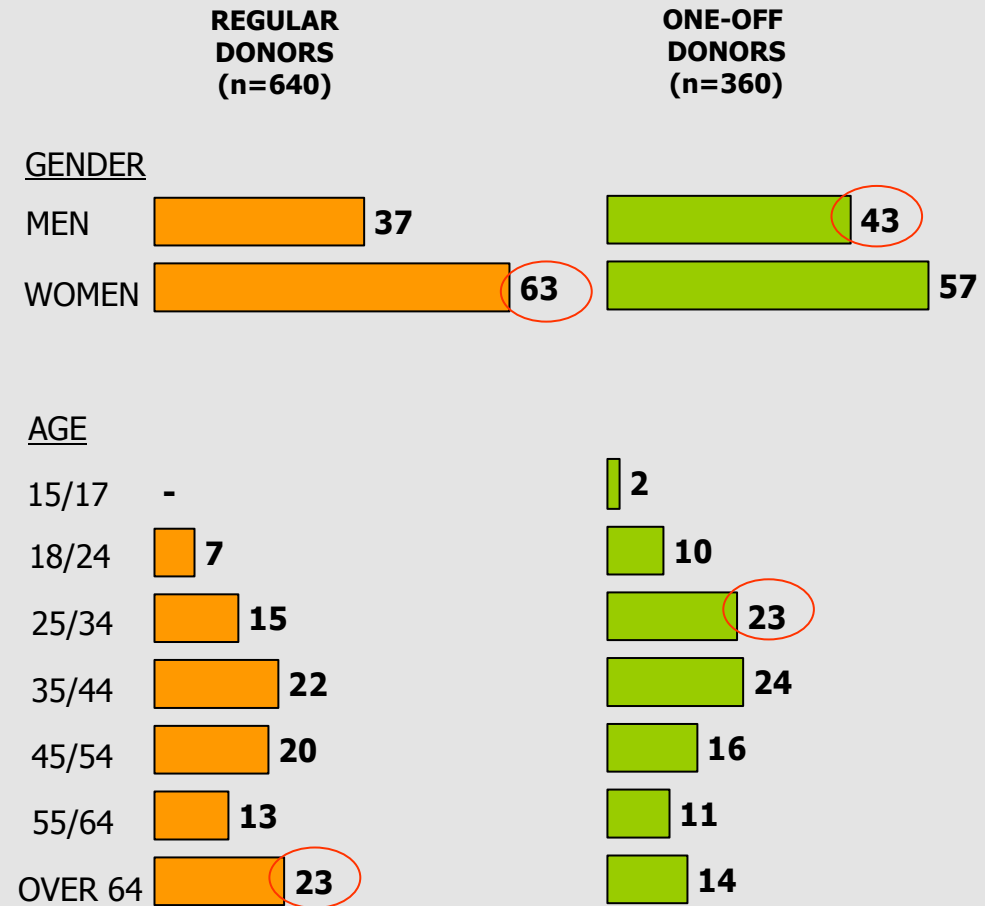
There is a subtle relationship between religious stance and donating: there are many donors among people who regularly go to church ('religious' component) but also among people who never go to church ('lay' component).

SAMPLE PROFILE (I)

Gender and age

8

TOTAL POP.	TOTAL DONORS
48	39
52	61
4	1
9	7
17	18
19	23
15	19
14	12
22	20



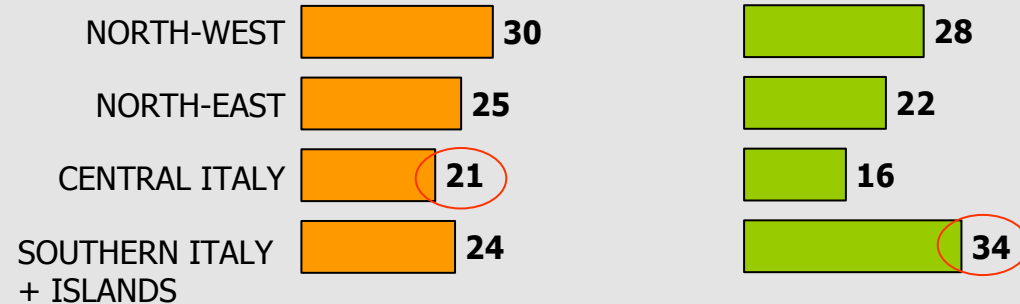
SAMPLE PROFILE (II)

Geographical area and size of cities

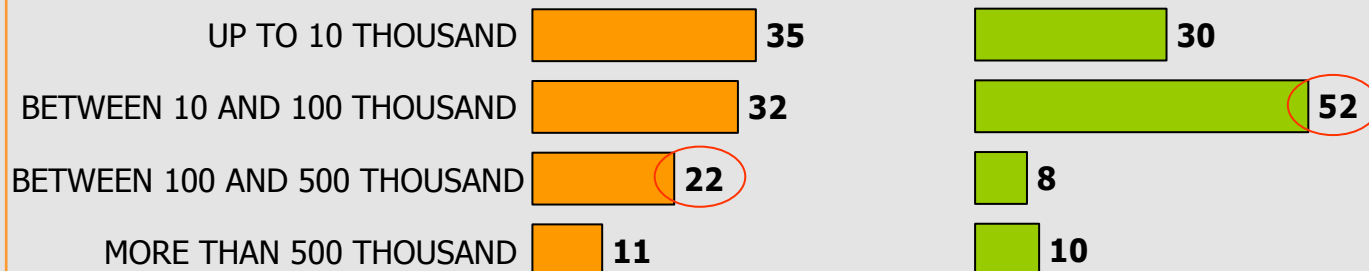
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TOTAL POP.	TOTAL DONORS
27	30
19	24
19	19
35	27

GEOGRAPHICAL AREA



SIZE OF CITIES



SAMPLE PROFILE (III)

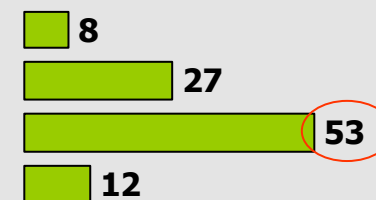
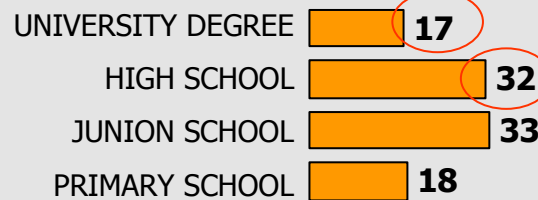
Education and religious practice

TOTAL POP.	TOTAL DONORS
8	14
27	30
39	40
26	16
2	8
14	20
8	10
7	15
44	25
24	17
1	5
13	24

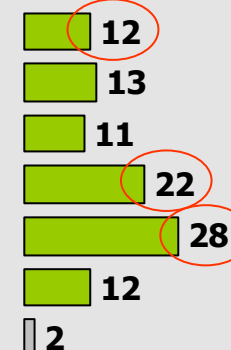
REGULAR DONORS (n=640)

ONE-OFF DONORS (n=360)

EDUCATION



RELIGIOUS PRACTICE



AVERAGE FREQUENCY 23 TIMES A YEAR

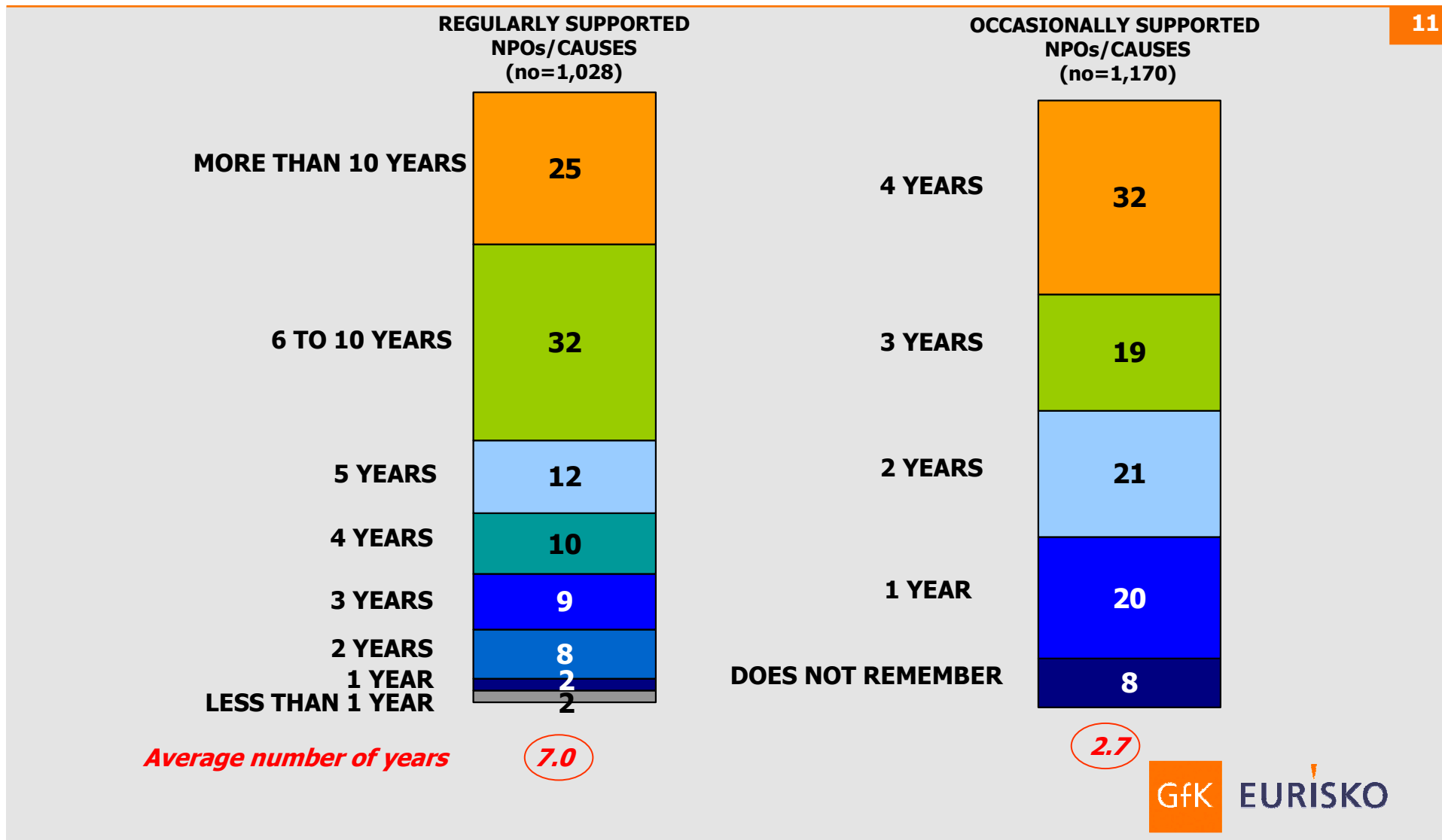
25 TIMES A YEAR

FREQUENCY/DURATION OF SUPPORT

Q. 4 - How many years have you regularly supported this organization?

Q. 7bis - How long have you supported this association in the span of the last 5 years?

(BASELINE = TOTAL SUPPORTED ORGANIZATIONS)



REASONS FOR IRREGULAR SUPPORT

Q 30 - Now I will read you a list of reasons provided by other respondents who were asked to explain why they did not give regular support. Can you tell me which of them are also reasons why you do not give regularly support?

(BASELINE= OCCASIONALLY SUPPORTED ORGANIZATIONS – n=962)

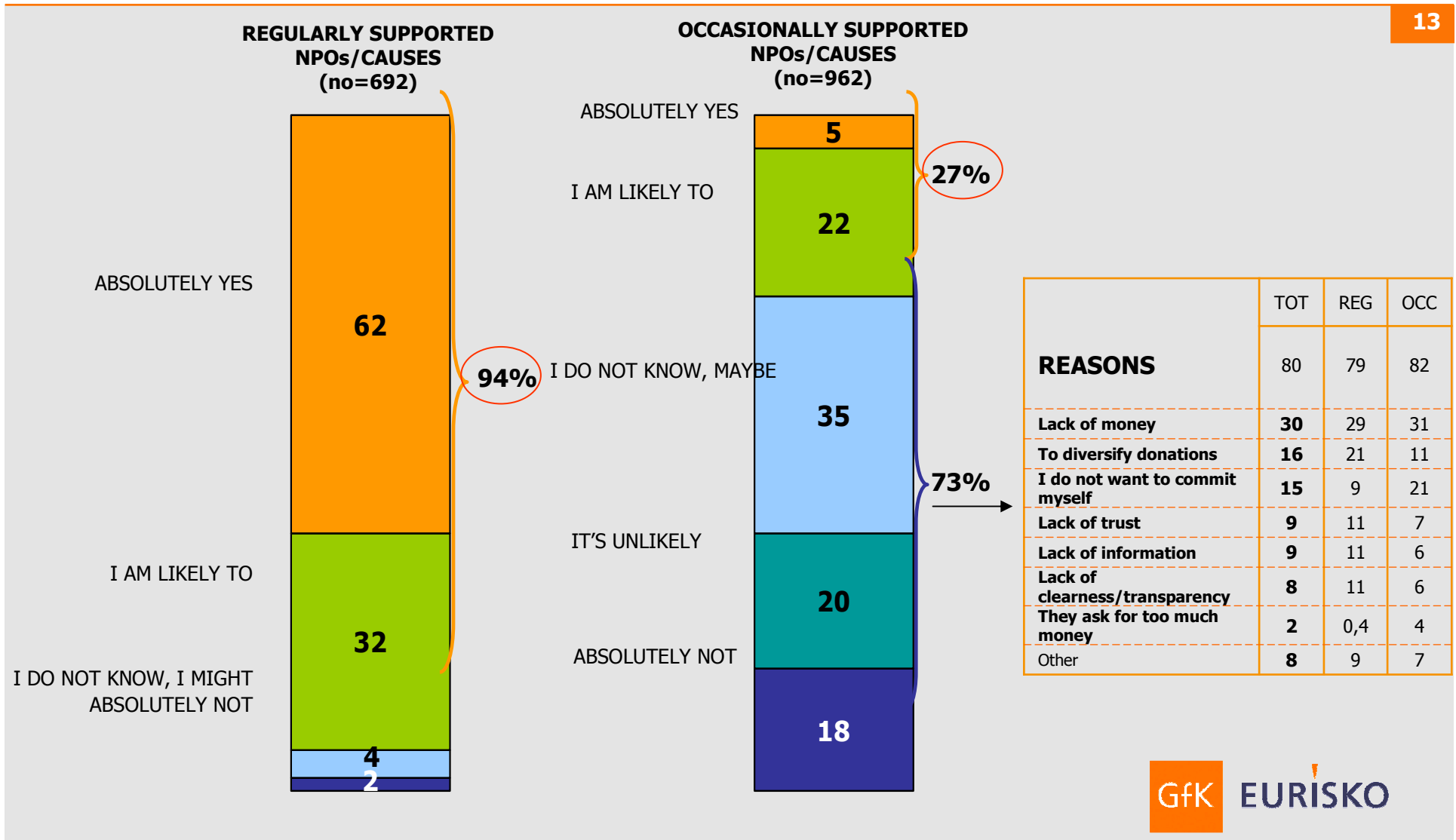
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OCCASIONALLY SUPPORTED NPOs/CAUSES (no=962)



WILLINGNESS TO SUPPORT THE SAME ORGANIZATION GOING FORWARD

Q. 26/46 - Going forward, do you think you will continue to support this organization/cause?
 (BASELINE= TOTAL SUPPORTED ORGANIZATIONS)



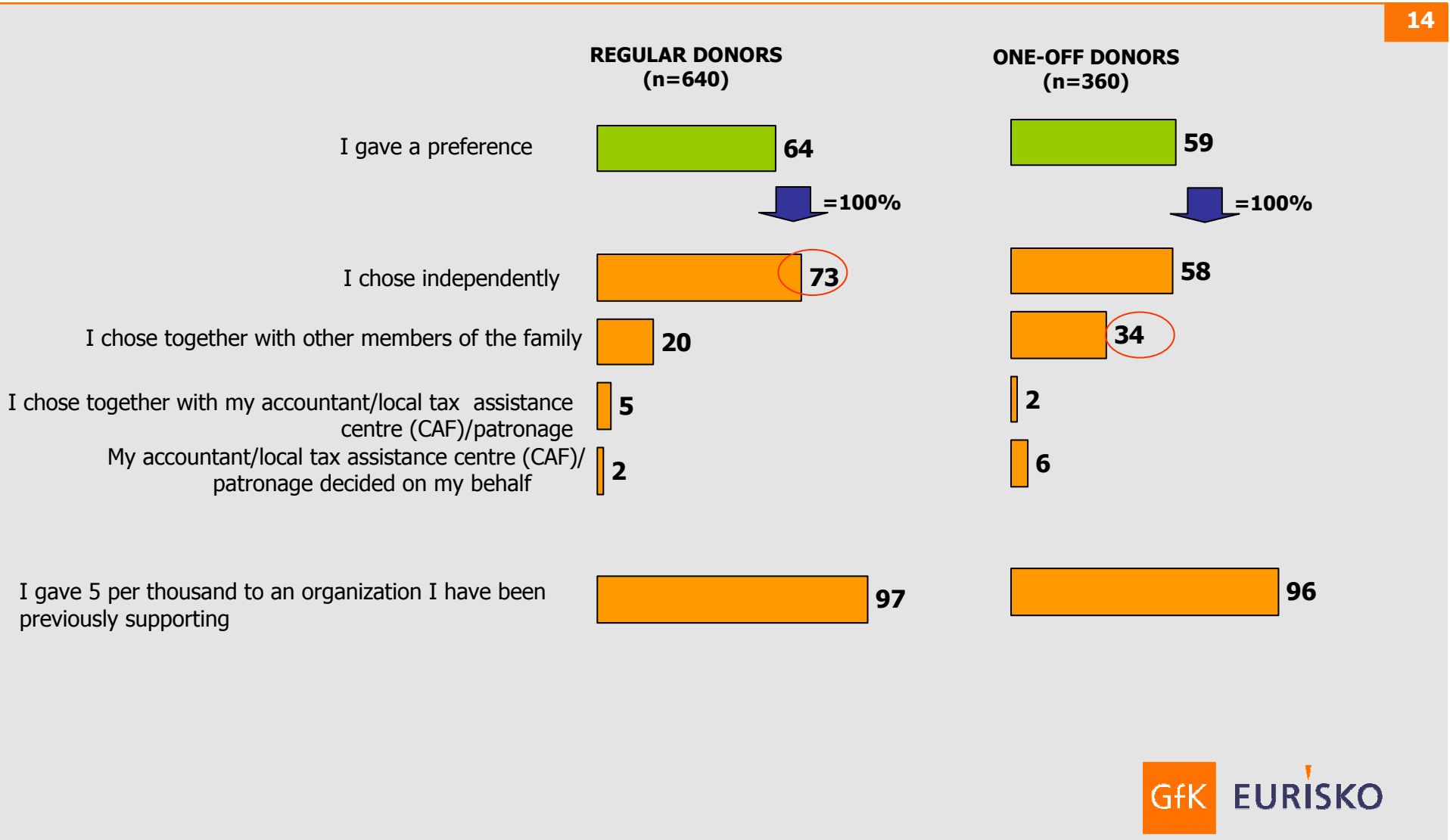
5 PER THOUSAND ALLOCATION FROM INCOME TAX RETURNS

Q 53. - When filing your taxes did you specify which organization you wanted to allocate 5 per thousand of your income tax returns to?

Q 54. - Did you choose independently or did others influence your decision?

Q 55. - Did you allocate 5 per thousand from your income tax returns to one of the organizations we discussed or to another organization/cause?

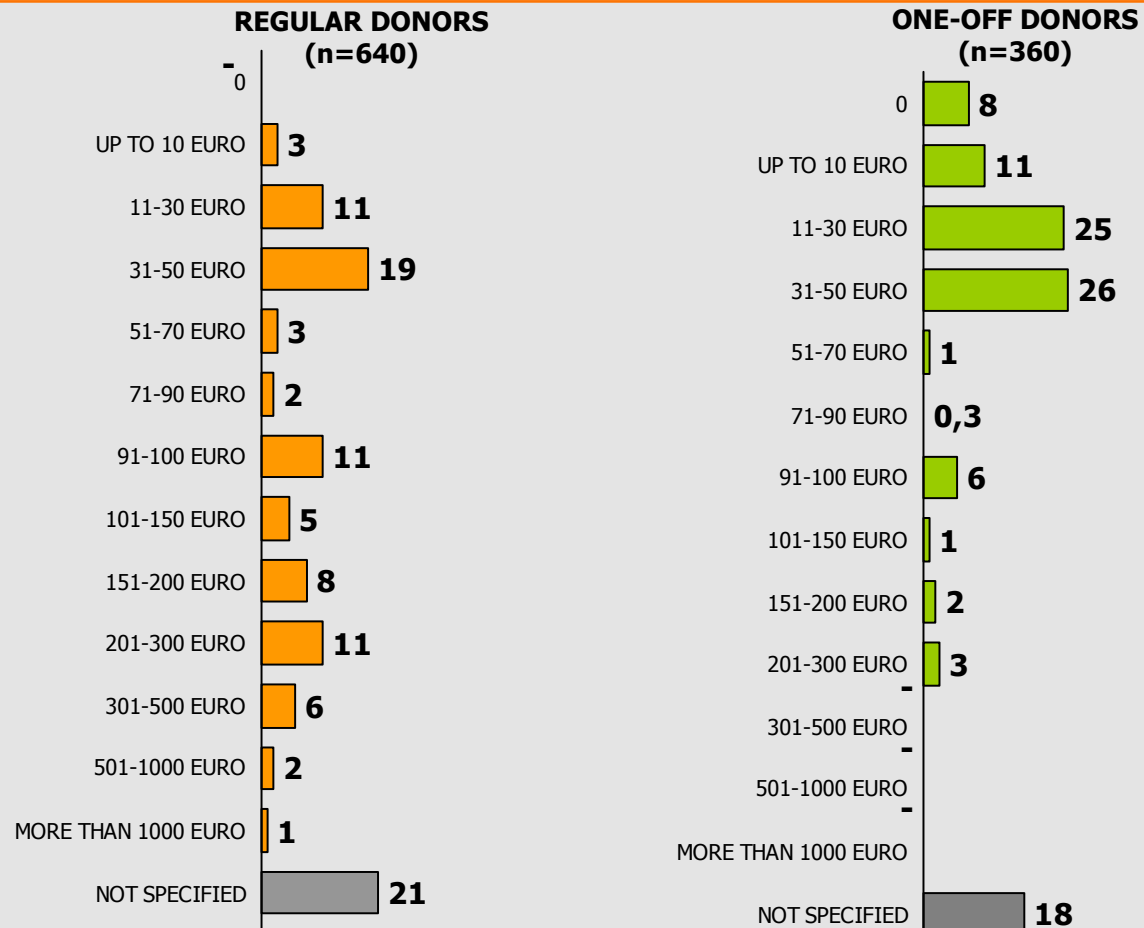
(BASELINE= ENTIRE SAMPLE)



TOTAL DONATED MONEY - BY DONOR TYPE

Q. 9 - How much money have you donated over the past 12 months?

(BASELINE= ENTIRE SAMPLE)



15

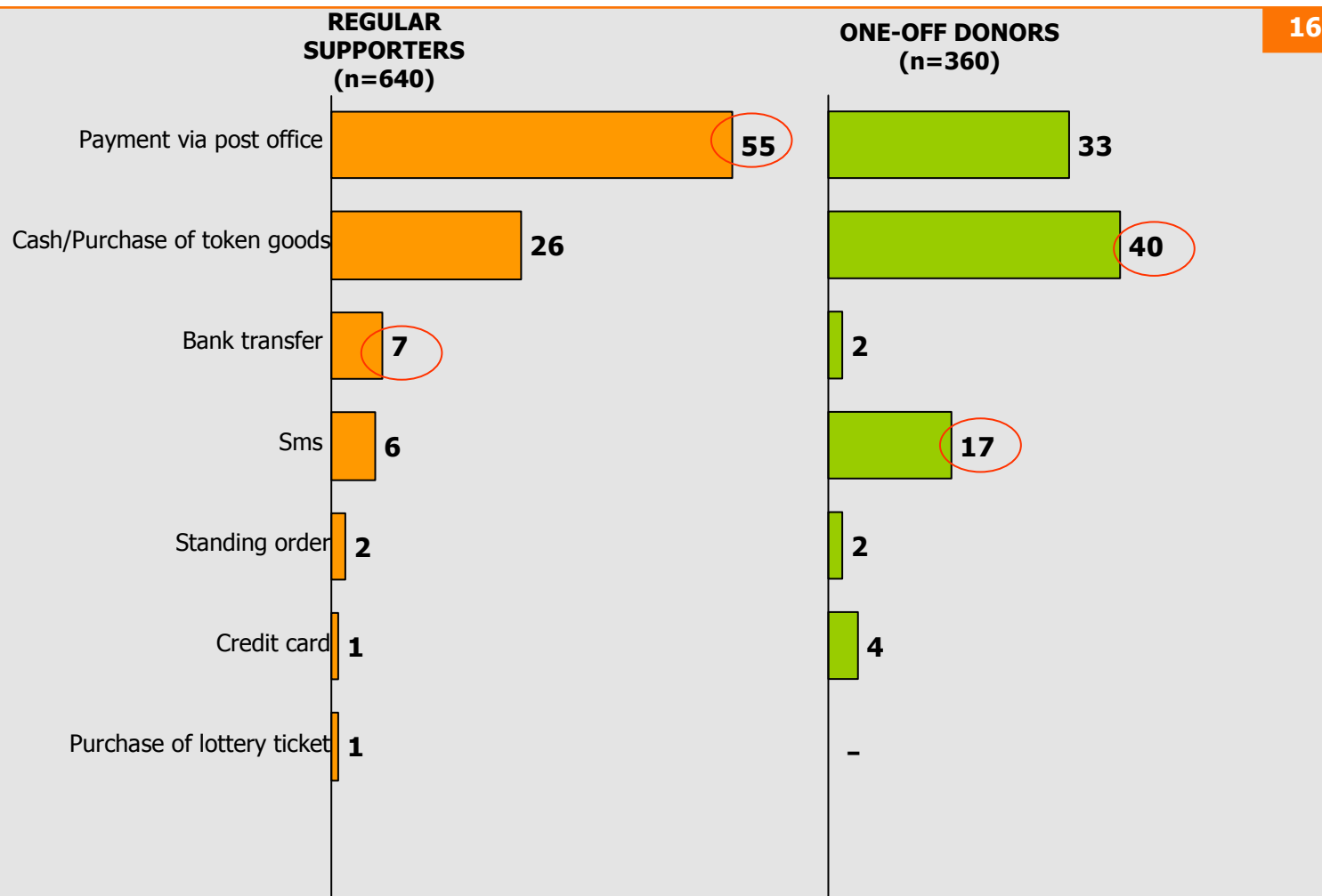
AVERAGE 180 Euro
107 of which were allocated to the regularly supported NPO(s)

48 Euro

PREFERRED PAYMENT METHOD

Q. 52 - What payment mode do you prefer when giving money to no-profit organizations?

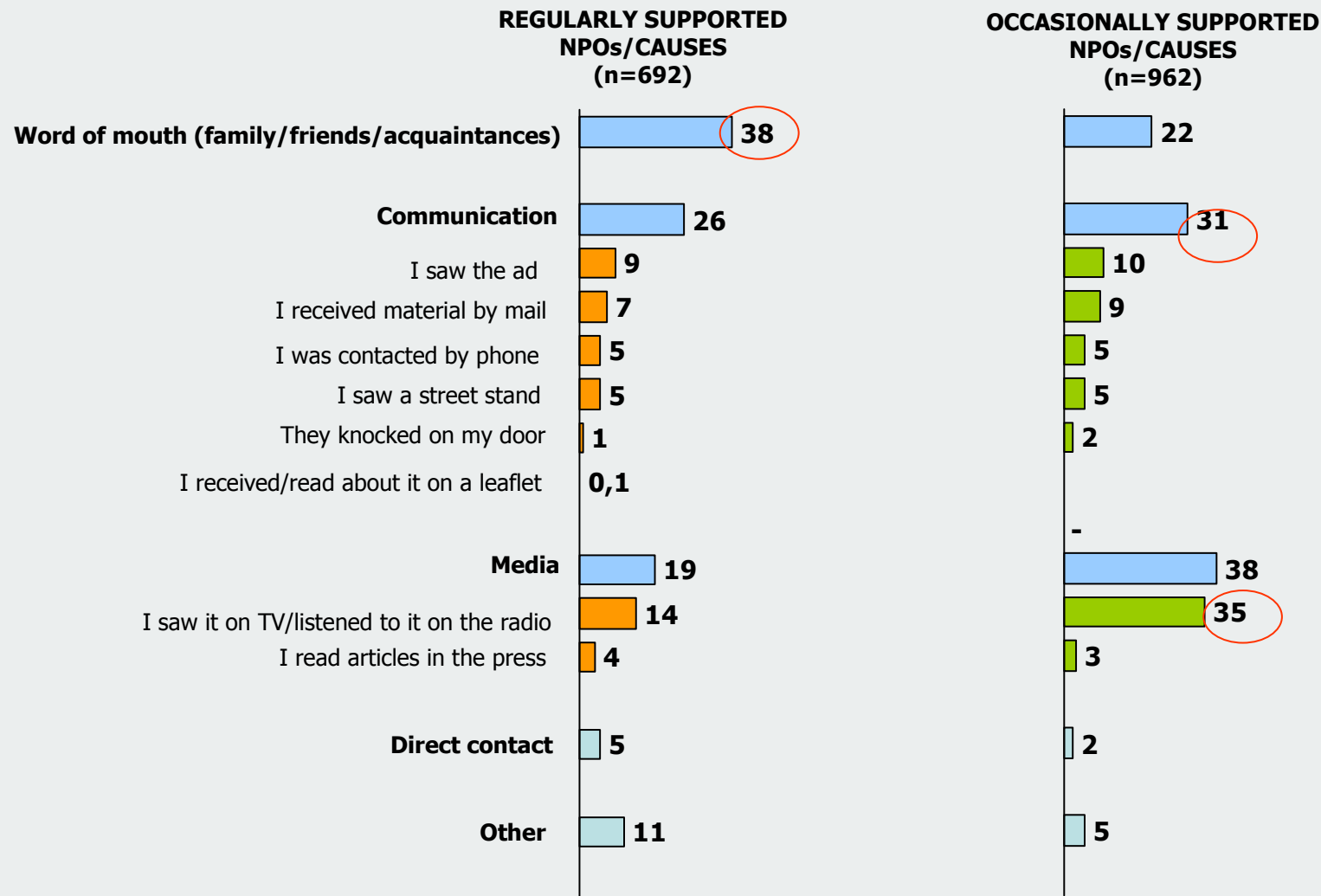
(BASELINE = ENTIRE SAMPLE)



HOW KNOWLEDGE OF SUPPORTED ORGANIZATIONS WAS GAINED

Q. 11/31 - How did you first learn about this organization?

(BASELINE= TOTAL SUPPORTED ORGANIZATIONS)

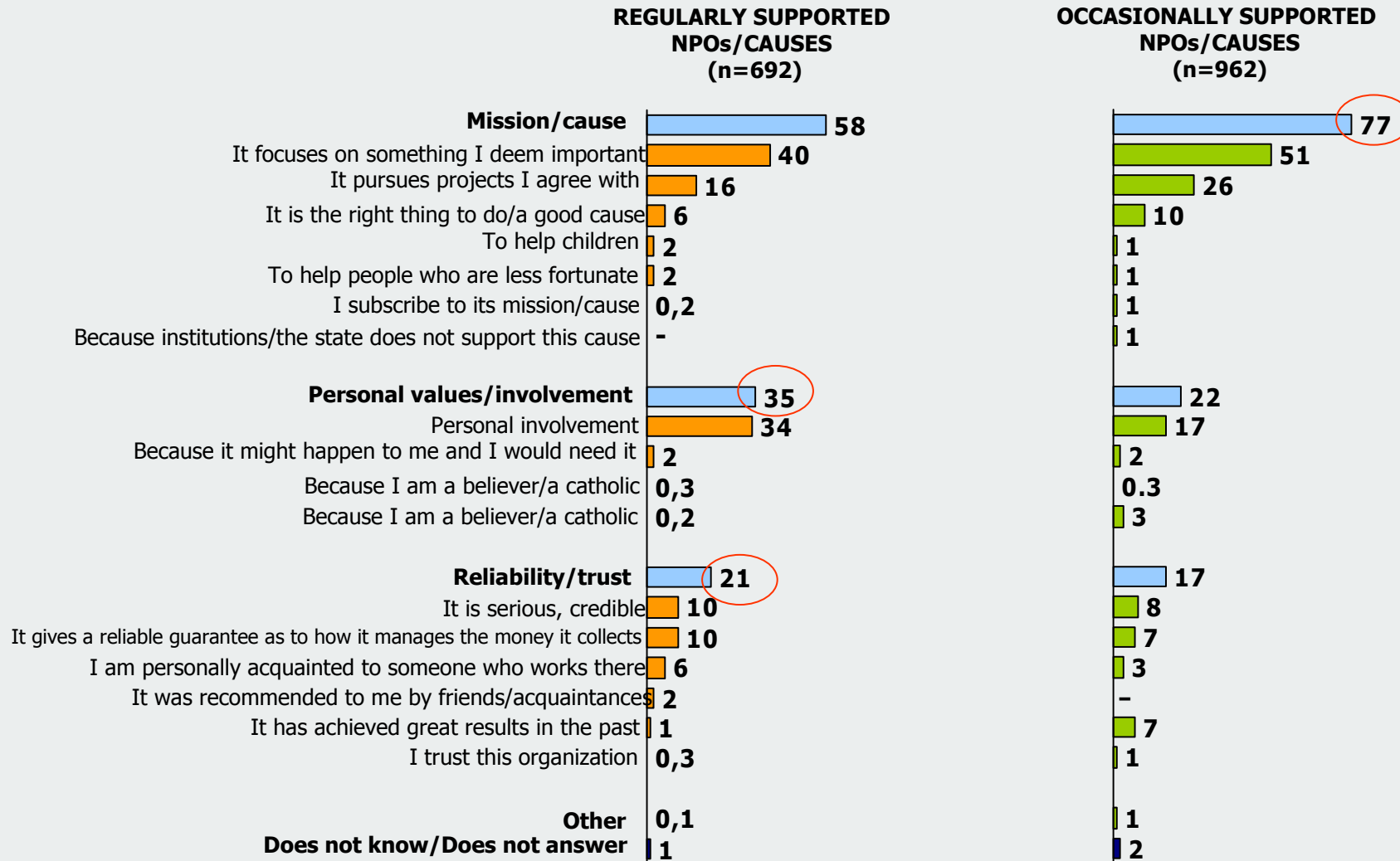


CHOICE MOTIVATIONS

Q. 12/32 - Why did you decide to support this organization?

(BASELINE= TOTAL SUPPORTED ORGANIZATIONS)

18

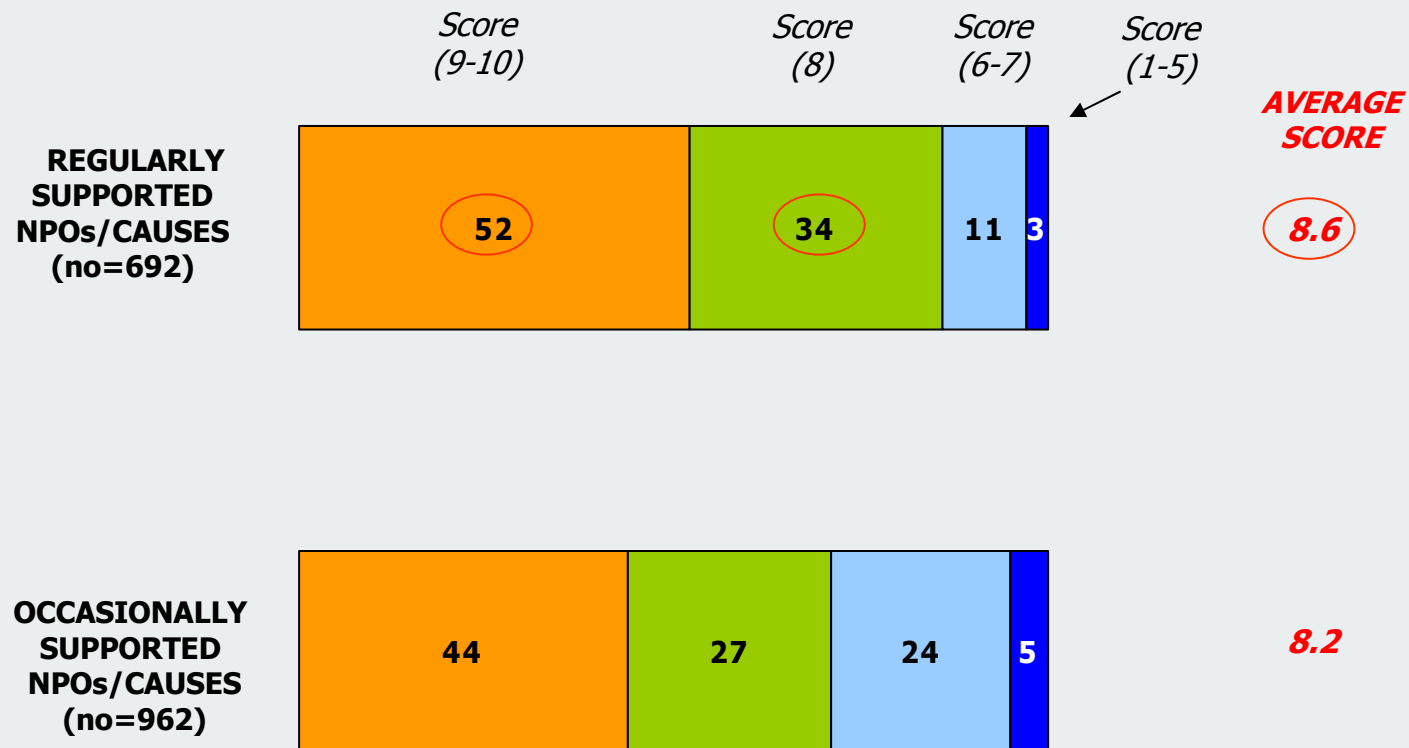


OVERALL JUDGMENT OF ORGANIZATIONS

Q. 19/39 - What is your overall judgement of this organization? Please give a score between 1 and 10, where 10 means totally positive and 1 totally negative.

(BASELINE = TOTAL SUPPORTED ORGANIZATIONS)

19

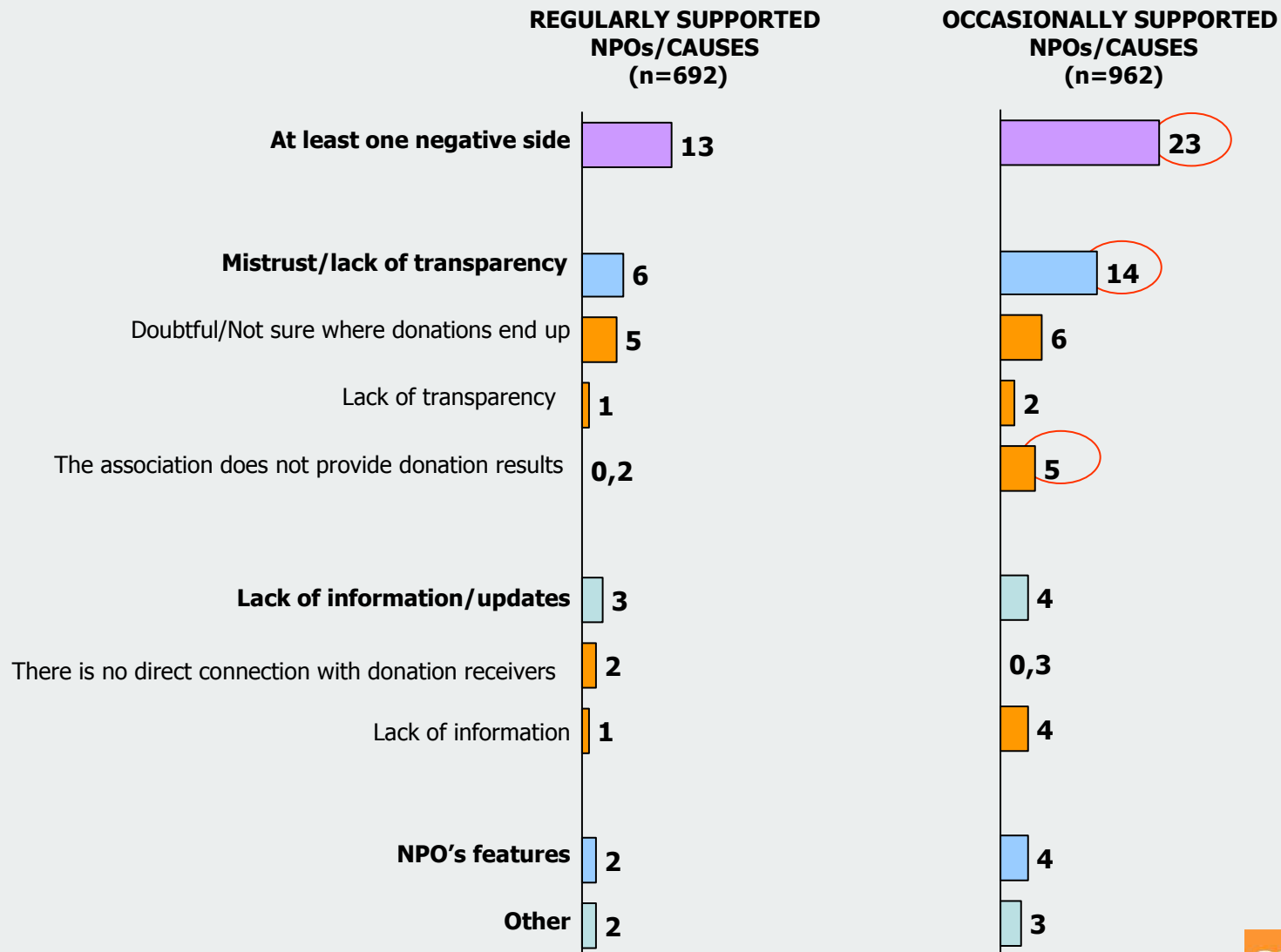


NEGATIVE SIDES OF SUPPORTED NPOs

Q. 18/38 - Is there anything you find unconvincing about this organization/cause?

(BASELINE= TOTAL SUPPORTED ORGANIZATIONS)

20



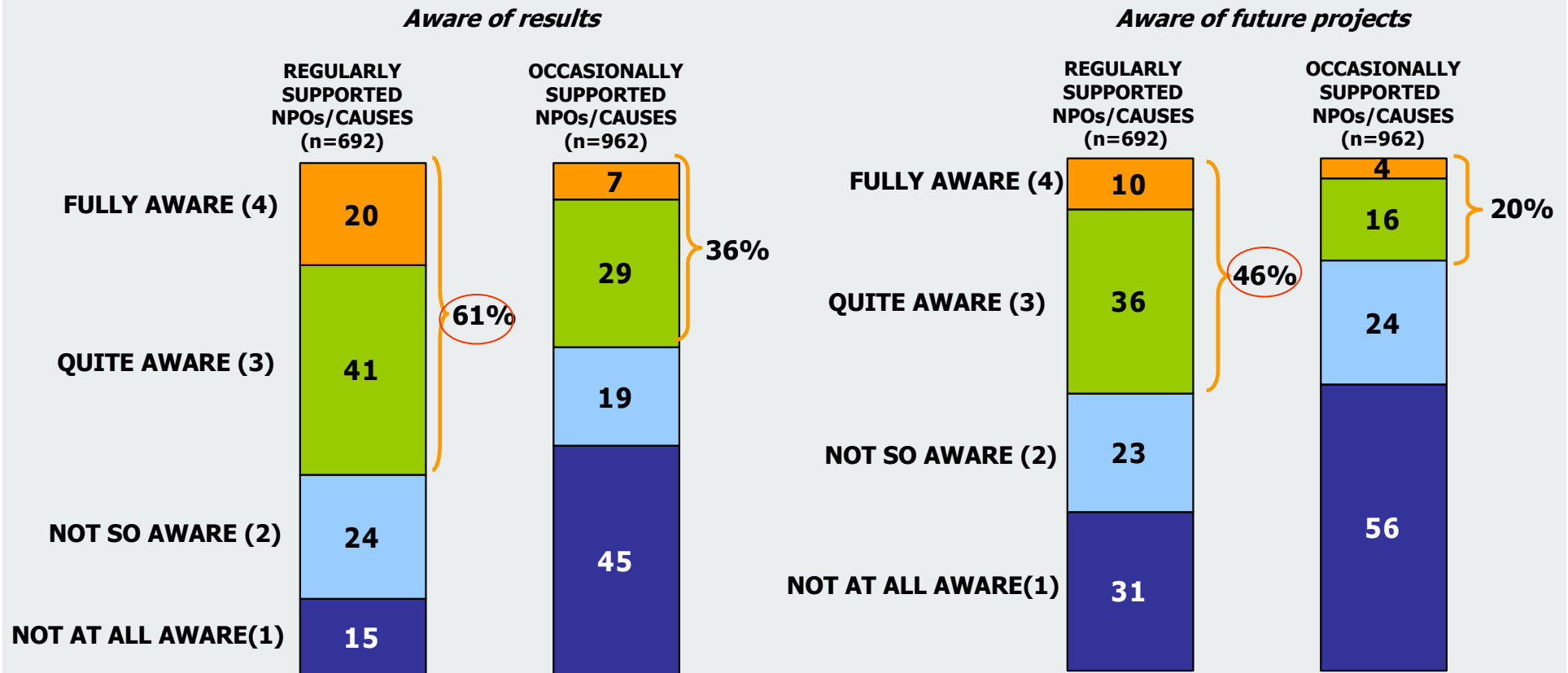
AWARENESS OF NPO RESULTS AND FUTURE PROJECTS

Q. 23/43 - Are you aware of the results obtained by this organization thanks to its supporters' contribution?

Q. 24/44 - And are you aware of the future projects this organization is planning to undertake ?

(BASELINE = TOTAL SUPPORTED ORGANIZATIONS)

21

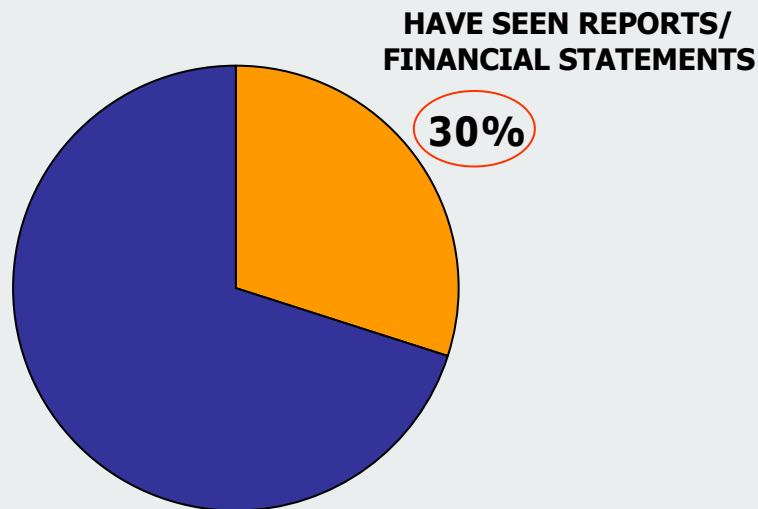


AWARENESS OF REPORTS/FINANCIAL STATEMENTS

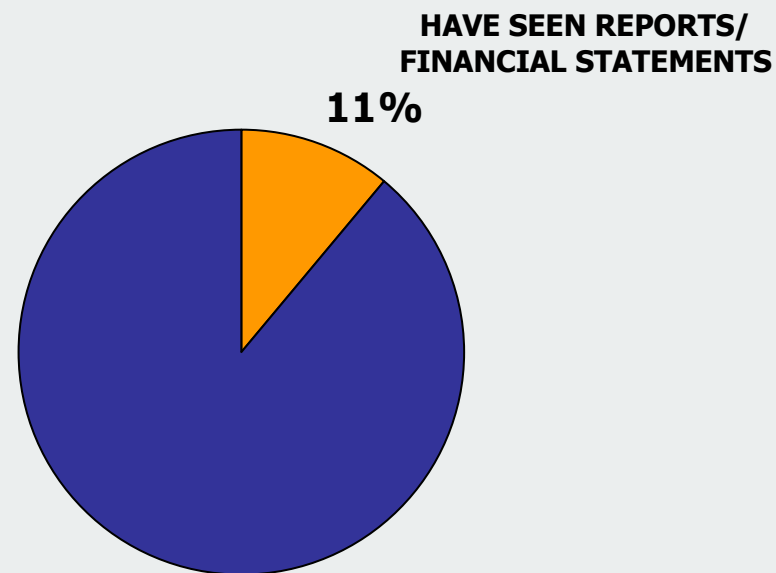
Q. 25/45 - Have you ever seen a report or financial statements by this organization/cause; have you otherwise been informed in detail as to how collected funds have been used?

(BASELINE= TOTAL SUPPORTED ORGANIZATIONS)

**REGULARLY SUPPORTED
NPOs/CAUSES
(n=692)**



**OCCASIONALLY SUPPORTED
NPOs/CAUSES
(n=962)**

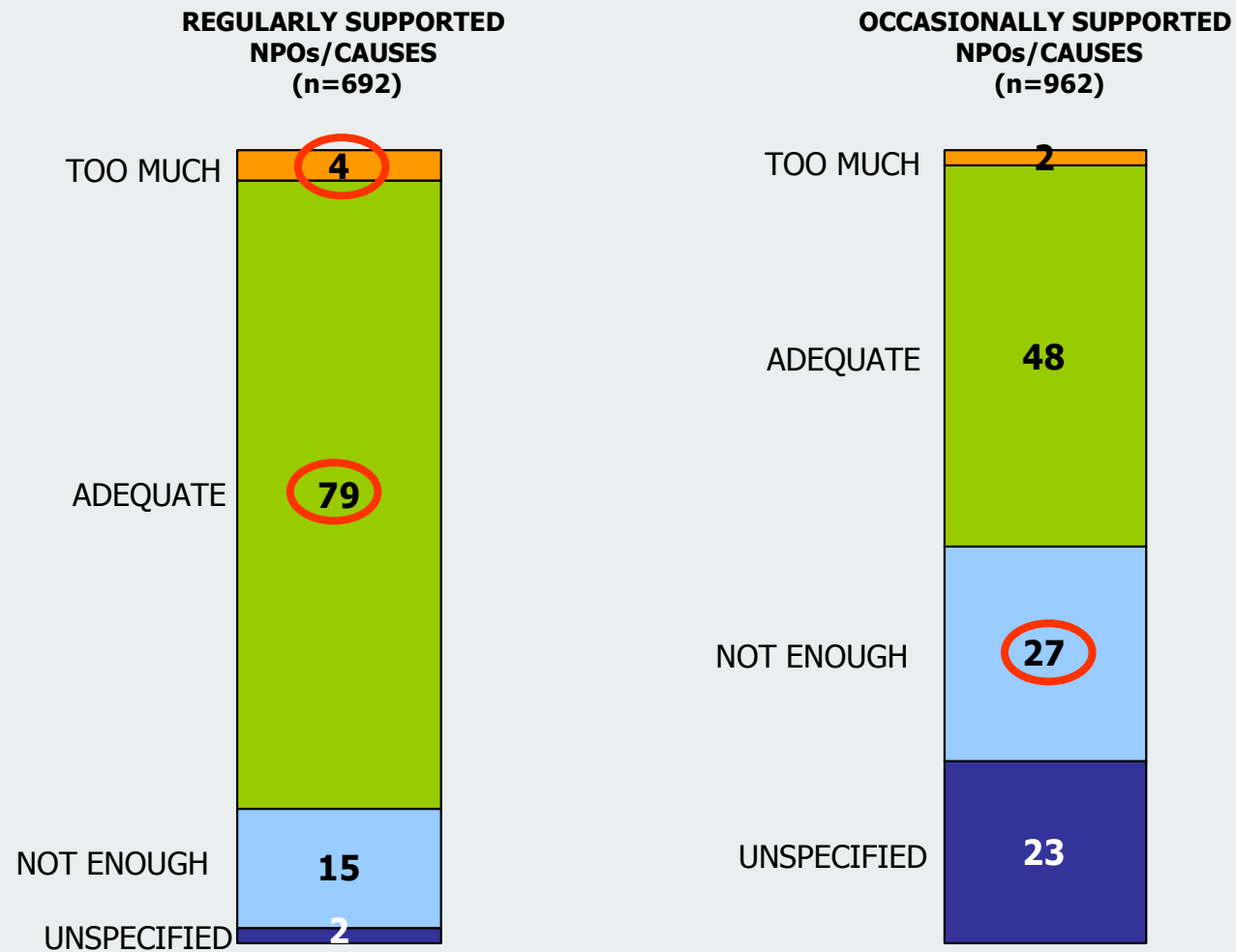


JUDGEMENT OF THE 'QUANTITY' OF INFORMATION MATERIAL RECEIVED

Q. 20/40 - Let us focus on the information material you receive from this organization or you had the opportunity to read or leaf through. How do you judge this information material in terms of quantity?

(BASELINE = TOTAL SUPPORTED ASSOCIATIONS)

23

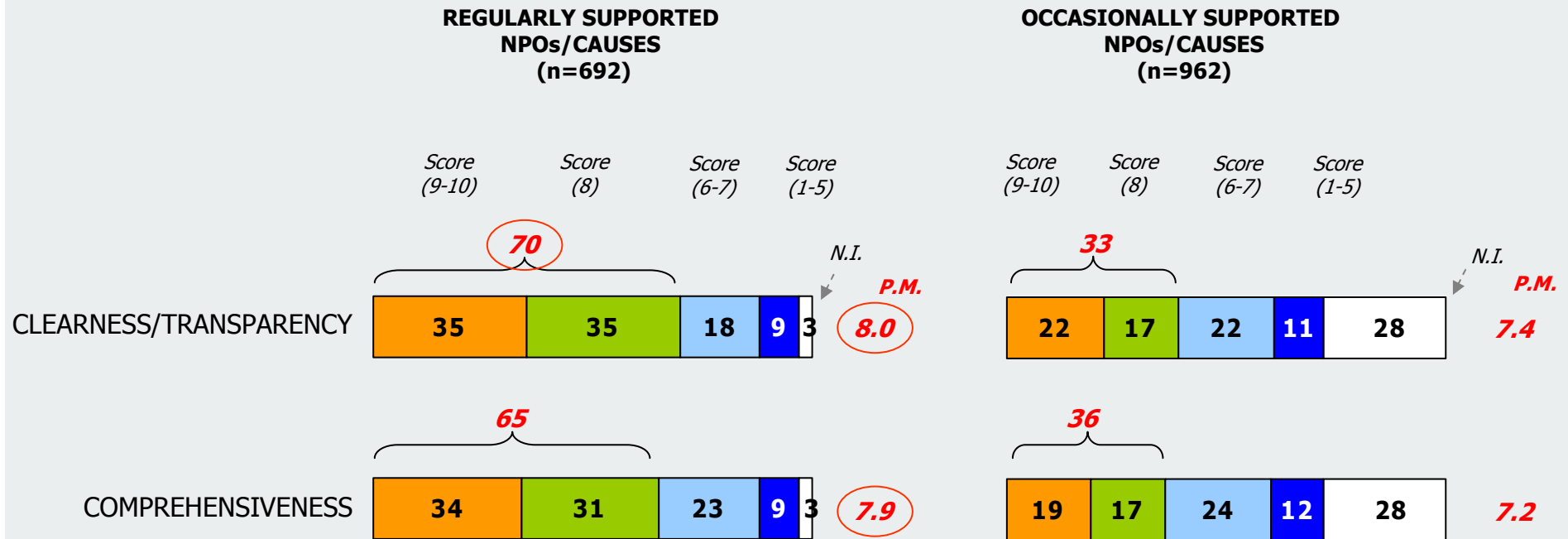


JUDGEMENT OF THE 'QUALITY' OF INFORMATION MATERIAL RECEIVED

Q. 21/41 - And how do you judge the clearness/transparency of this information material?

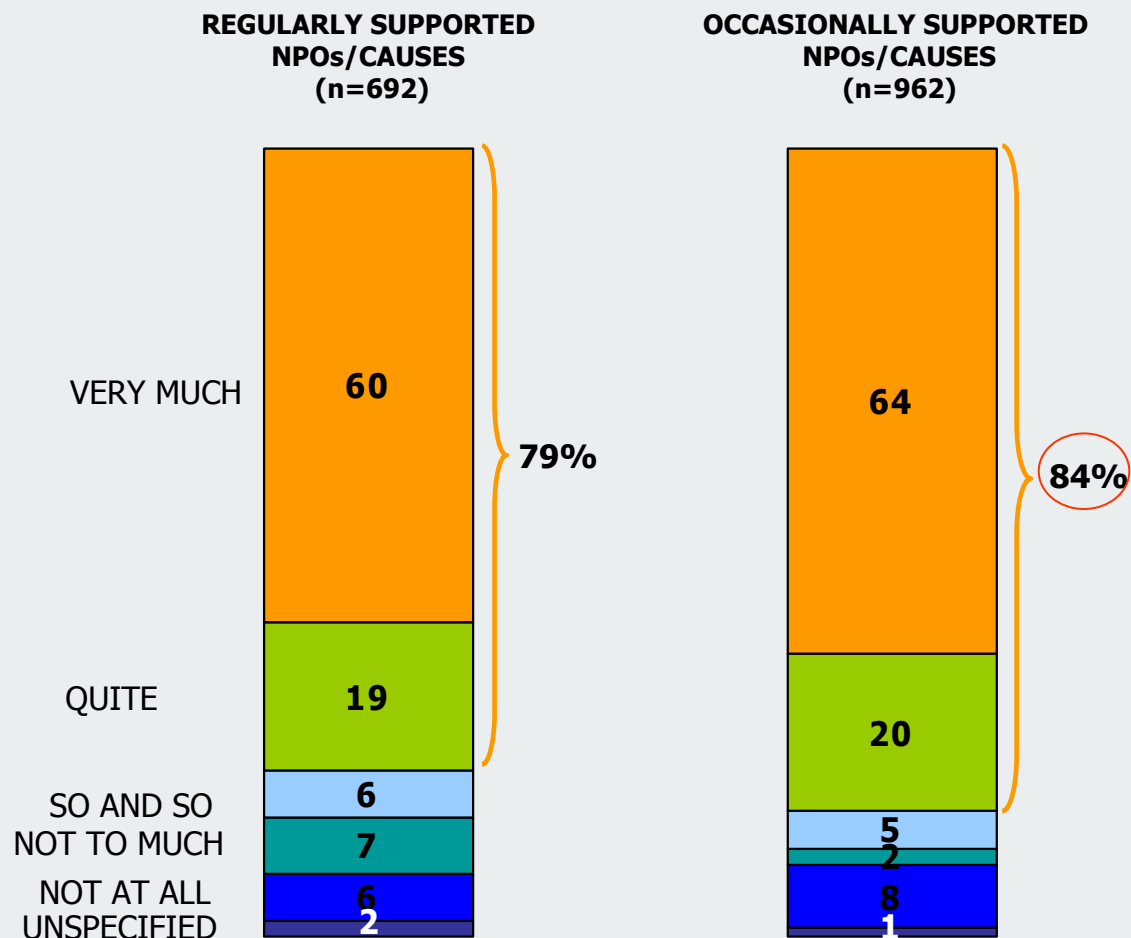
Q. 22/42 - And how do you judge the comprehensiveness of this information material?

(BASELINE= TOTAL SUPPORTED ASSOCIATIONS)



IMPORTANCE OF CERTIFICATION

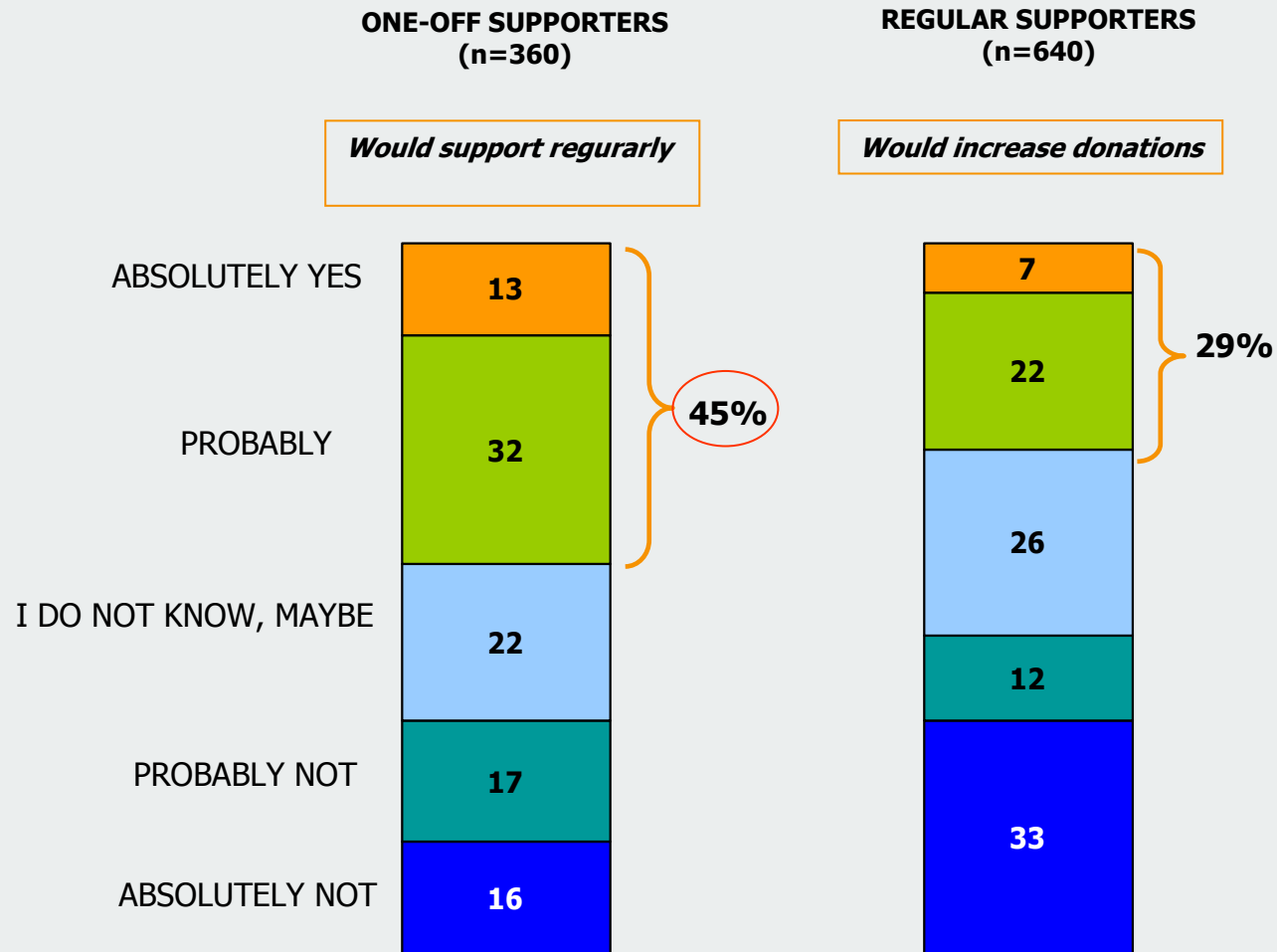
Q. 48 - Would it be important to you if there was an independent certifying authority providing guarantee that no-profit organizations use their supporters' money correctly, transparently, efficiently and professionally?



POTENTIAL EFFECTS OF CERTIFICATION

Q. 49/50 - Do you think such guarantee might cause you to regularly support an organization/cause you have supported in the past, but only occasionally? Do you think that such guarantee might cause you to donate more money to ...

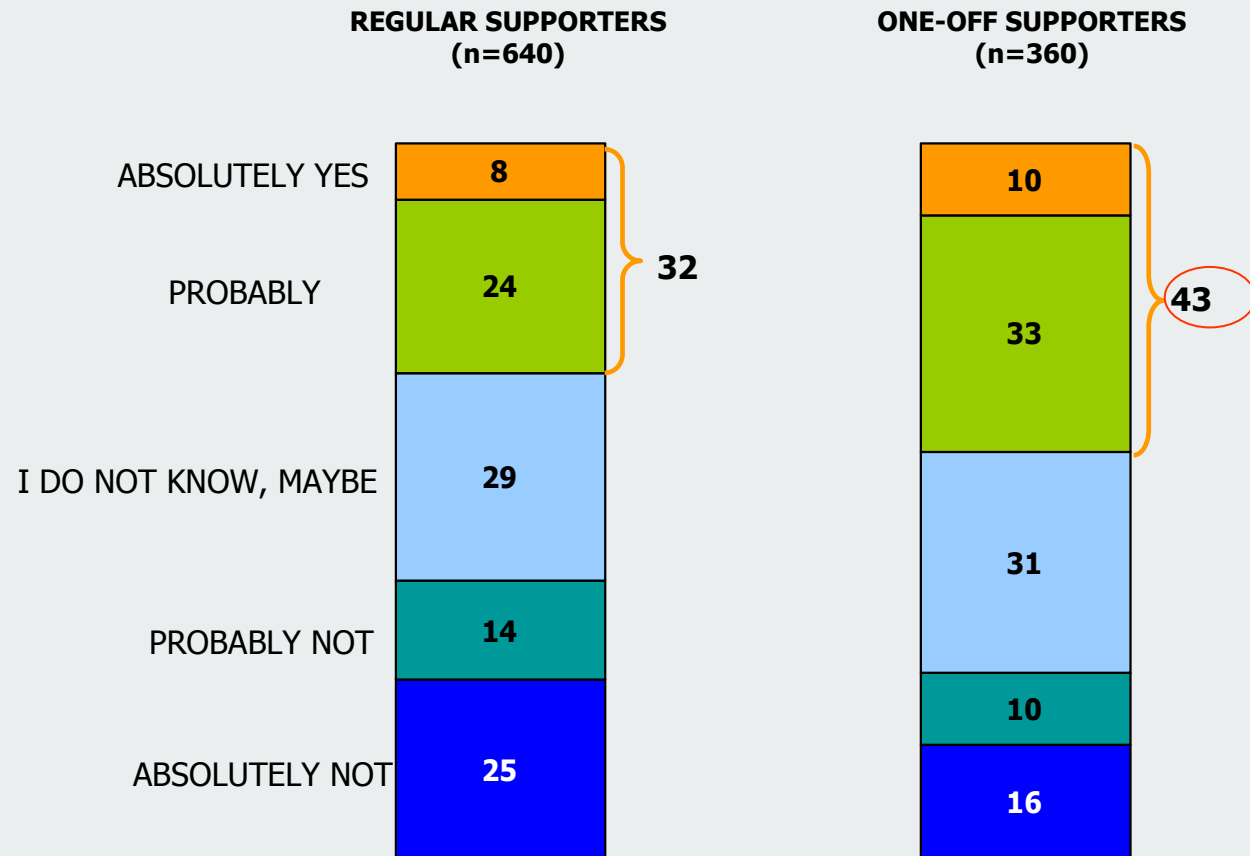
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LIKELYHOOD OF CONSIDERING A NEW ORGANIZATION

Q. 51 - Do you think that such a guarantee might cause you to consider supporting another organization?

27



Summary (1)

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The survey identified the size (25 million) and features of the Italian donor base.

“Regular” donors are an extraordinary pool that should not be wasted: they are generous, loyal over time, and willing to do multiple donations.

Their profile offers precious suggestions as to which is the segment with the highest potential for donations (the ‘primary target’ of NPOs):

- middle-aged and older individuals (over 45)
- high status and education level
- more rationally than emotionally motivated
- highly sensitive to their ‘cause’ and deeply trusting in the organizations they support.

Summary (2)

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The 'one-off' donor segment - which deserves to be further developed- can be broken down into at least three components of equal weight:

- one-off donors by 'distraction'
- one-off donors by 'choice'
- one-off donors by 'need'

Each of these components requires a specific communication approach with a view to 'consolidating' their donating behaviour:

- regular relationships/communication with 'distracted' donors
- highlighting the relationship between consistent donating behaviour and effectiveness of donations for those who like choosing from one year to the next which organization to donate money to
- enhancing the value of small donations for those who are in 'financial straits'.

Summary (3)

30

All donors - whether regular or one-off - share a requirement for reliable guarantees of the correctness and efficiency of the supported organizations.

Therefore, it is key to pursue a communication strategy that should be focused on:

- reliability (= knowledgeable, professional, well-organized and 'honest') of the organization;
- regular updates on results and projects;
- being extremely clear and transparent on how donations are used (visibility/accessibility of financial statements).

Since it is not possible to establish a 'personal relationship' to all donors, certification by an independent body appears to be a key reassuring element that can positively affect donor attitudes and behaviours.