



Charitable Donations & Christmas Appeals

National Quantitative Research

Prepared for  fundraising
ireland

In Association with  PERSUASION
REPUBLIC

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March 2013
J.4432



Research Background & Objectives



Introduction

- Report on a nationally representative market research survey conducted on behalf of Fundraising Ireland, in association with Persuasion Republic.

Objectives

- The key objectives of the study were as follows:
 - ❖ Provide an estimate of the average level of charitable donations made in the past three months
 - ❖ Assess the public response to Christmas Appeals from charitable bodies
 - ❖ Review the variety of channels used to donate to charity for both frequency and recency.
 - ❖ To evaluate the types of charities that Irish adults are more or less interested in donating to in the current environment.
 - ❖ Provide an analysis of public perceptions in relation to wage levels in the charity sector.

Methodology

- The report is based on a survey of 1002 adults aged 16 years+, representative of the adult population in the Republic of Ireland.
- The questionnaire was administered to respondents as an element of the Behaviour & Attitudes syndicated Telebarometer, with the sample tightly quota controlled in terms of geographic location around the country, as well as by respondent age, gender and socio-economic status. A further quota control is applied so that 30% of fieldwork is to mobile phones.
- Interviewing was conducted via telephone, in Behaviour & Attitudes CATI (Computer Assisted Telephone Interviewing) suite in Milltown House in Dublin 6.
- The survey data can be deemed to be accurate to within plus or minus 3.2 percentage points.
- Fieldwork was conducted from the 12th of February to the 25th February 2013.

Charitable Donations



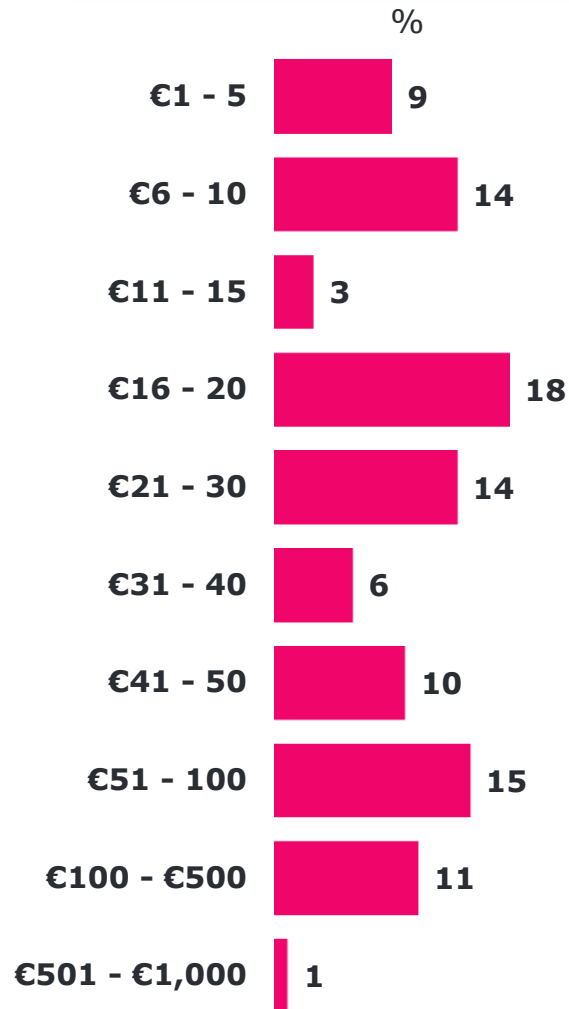
Charitable Donations

- 85% of Irish adults claim to have made a donation to a charity within the last 3 months. Almost two thirds (63%) claim to have donated within the past month.
- Donors claim to have contributed an average of €59 to charitable organisations over the past three months.
- The average amount of their most recent donations during this period was €31.
- Over the past three months donors appear to have been more focused upon donating to 'local' and intervention based charities, St Vincent de Paul in particular.
- The prioritisation of domestic charities is indicative of the current economic situation, and the much more inward focus of Irish people at present.
- Overseas charities (humanitarian & development aid) appear to be less in vogue at present with donors.
- There remains key interest in charities related to illness and disease (especially cancer) and these charities collectively accounted for over one quarter of all donors in the past 3 months.

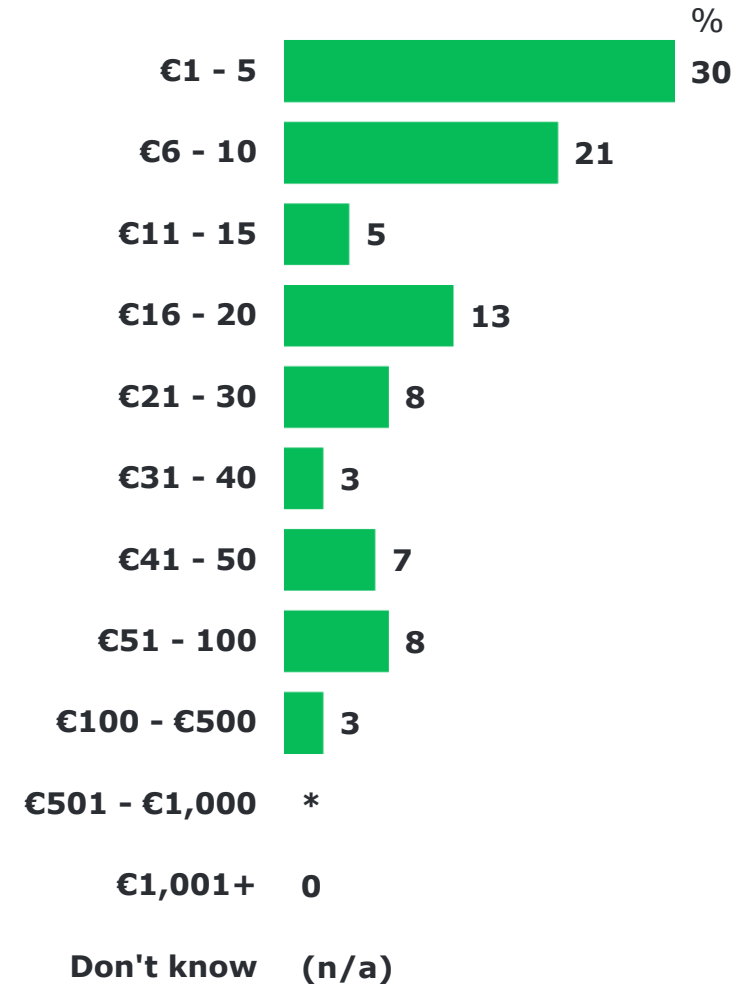
Average Donations in past 3 Months Vs most recent donations:

All donated in past 3 months 813/2,880,000)

All Donations Past 3 months



Most recent donation



Average (excl €1001+) = €59.31
Average (incl €1,001+) = €77.51

Average (excl €1001+) = €31.16
Average (incl. €1,001+) = €37.90

Average overall amount donated over past three months

Base: All donating in last 3 months 813/2,880,000

	Total	Gender		Age					Class			Region			
		Male	Female	U24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Lein-ster	Munster	Conn./Ulster
<i>Base:</i>	813	380	433	109	148	217	239	100	412	356	45	225	212	228	148
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
€1 to 5	9	10	8	24	12	4	6	8	7	10	14	9	7	9	14
€6 – 10	14	13	15	18	19	112	10	12	11	17	11	12	15	15	13
€11 – 15	23	2	4	6	4	3	1	5	2	5	-	5	4	2	2
€16 – 20	18	16	20	24	19	18	19	11	17	18	21	18	15	20	18
€21 – 30	14	15	12	11	15	17	10	13	14	13	13	12	17	13	11
€31 – 40	6	7	5	2	6	6	7	5	5	6	6	6	6	5	6
€414 – 50	10	12	9	5	8	12	12	12	11	9	11	10	8	11	13
€51` - 100	15	13	16	7	12	15	20	18	16	14	14	16	17	14	12
€101 – 500	11	10	11	1	4	13	15	17	14	7	10	11	10	10	11
€501 – 1,000	1	2	-	1	1	1	1	1	1	1	-	1	1	1	-
Average Donation	€59.31	€66.45	€53.04	€34.34	€37.69	€66.69	€70.50	€79.40	€70.82	€51.11	€49.35	€63.34	€64.69	€53.77	€53.74

As expected, the average claimed amount donated over the past 3 months increased in line with age and social class. Men claim to be the most generous over this time period.

Average amount of most recent donation

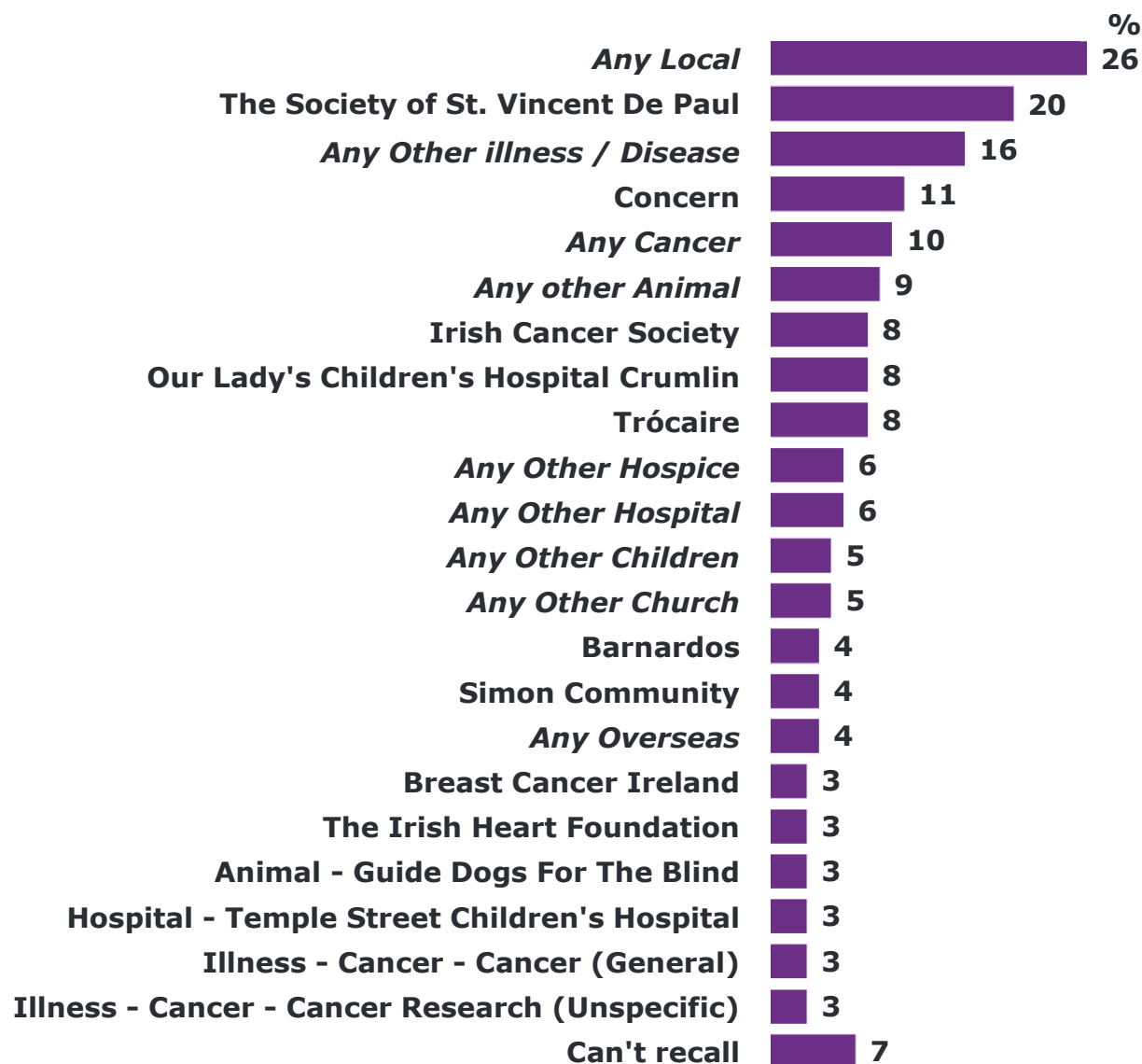
Base: All donated in past 3 months 813/ 2,880,000

	Total	Gender		Age					Class			Region			
		Male	Female	U24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Lein-ster	Munster	Conn./Ulster
<i>Base:</i>	808	380	428	105	139	219	242	103	407	357	44	218	212	228	150
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
€1 to 5	30	32	29	50	36	24	28	22	29	32	27	31	24	34	18
€6 – 10	21	20	22	25	25	21	22	14	19	22	28	17	25	23	4
€11 – 15	5	6	4	3	8	6	1	7	4	6	5	7	4	5	11
€16 – 20	13	13	14	7	8	22	11	13	13	14	12	15	15	12	7
€21 – 30	8	8	9	4	7	11	9	9	10	7	6	8	12	7	5
€31 – 40	3	3	3	4	3	1	3	5	3	3	3	3	3	3	9
€41 – 50	7	7	7	2	5	4	9	16	7	6	12	5	7	8	9
€51` - 100	8	7	8	5	5	8	11	8	9	7	5	9	7	7	4
€101 – 500	3	4	3	-	1	3	5	6	5	2	2	5	3	2	-
€501 – 1,000	-	1	0	-	1	-	-	1	1	-	-	1	-	-	-
Average Donation	€31.16	€31.53	€30.83	13.43	24.16	30.63	37.61	44.97	37.41	27.42	22.16	38.35	30.00	26.96	27.78

The average value of donations made recently, as expected, increases in line with age and social class. Regionally, donations appear to be notably higher in Dublin

Charities Donated to in Past 3 Months

Base: All donated in past 3 months 851/3,021,000



All other answers 2% or less

One quarter (26% of all donors) made a contribution to a 'local' charity in the past 3 months.

1 in 5 donors (20%) made a contribution to St. Vincent De Paul.

Charities related to illness (non cancer) received contributions from one sixth of all donors.

1 in 10 donor's gave to a cancer charity in the past 3 months

Christmas Appeals



Give a Gift!

RTÉ 2fm **TOY APPEAL**
for St. Vincent de Paul

This year Aircoach are supporting the RTÉ 2fm Toy Appeal for St. Vincent de Paul. Bring your gifts to your nearest Aircoach bus stop, where they will be collected.

PLUS come join us on the 6th December to see our Aircoach Santa's and Elves pull an Aircoach bus from **Stillorgan Shopping Centre** all the way to Dublin City Centre

Any toy big or small is greatly appreciated.

aircoach
TRAVEL IN LUXURY

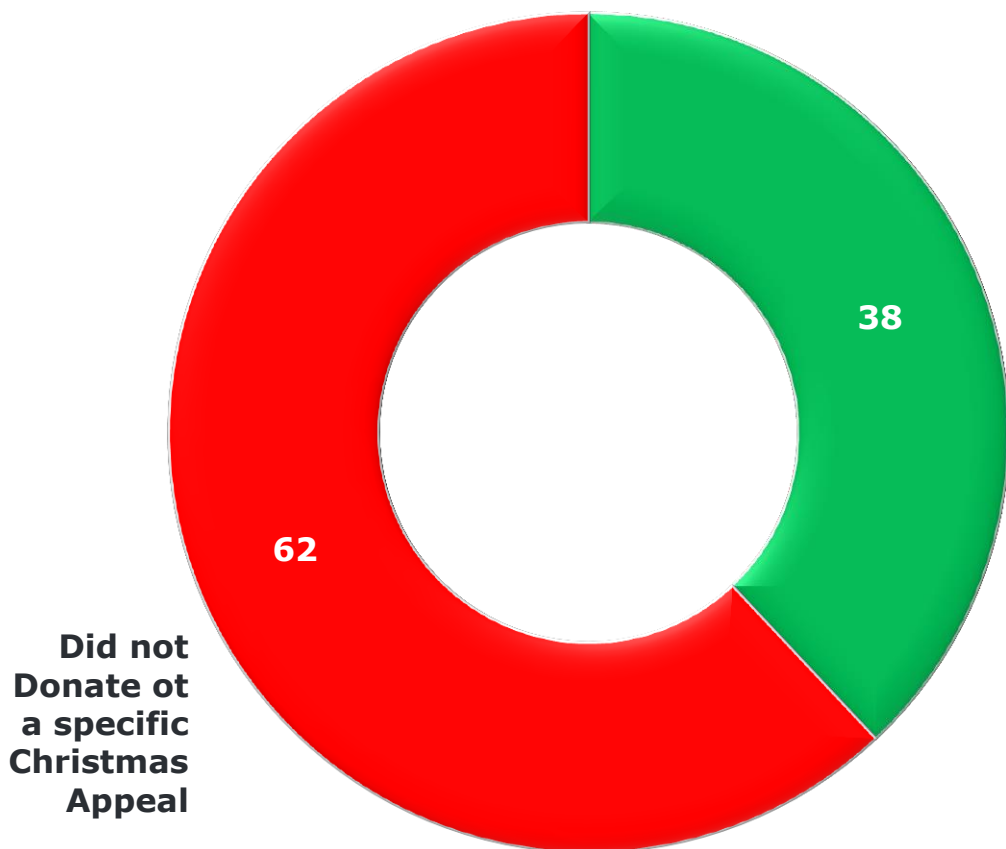


Christmas Appeals

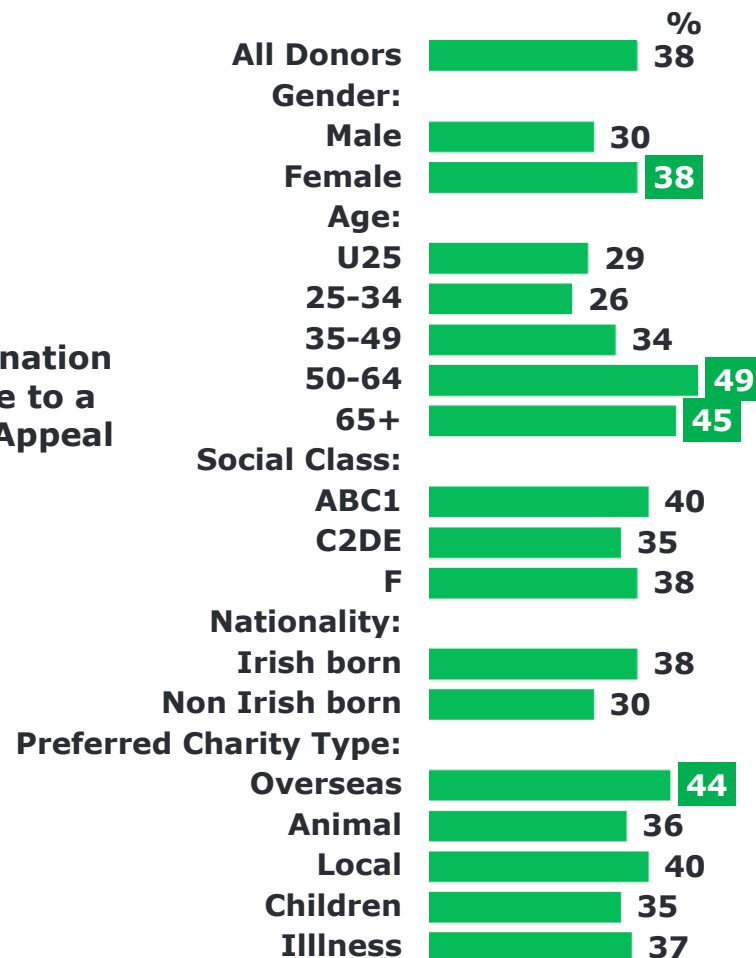
- Almost two fifths (38%) of adults who donated to charities in the last 3 months made a specific donation to a charity due to a public Christmas appeal.
- In general women and older adults were the most responsive during the Christmas appeals period.
- 'Local' & domestic intervention based charities, in particular St. Vincent de Paul, were the key recipients of donations resulting from a specific Christmas appeal.
- Public Christmas appeals appear to have a direct impact on both the number of donations achieved and the value of individual donations.
- One quarter of donors to Christmas appeals (24%) claim they would not have donated at all, were it not for public prompting and awareness raising campaigns. This equates to 8% of the full adult population (or 273,000 individual donors).
- A further one in seven (15%) claim they would have donated less without the prompting of the public appeal.

Specific Donation in Response to a Christmas Appeal

Base: All donated in past 3 months 851/3,021,000



Specific Donation in Response to a Christmas Appeal



Over one third of donors in the past three months, made a donation in response to a charity Christmas appeal. Women and older adults appear to have been the most responsive. Donors with a preference for either overseas or local charities were the most likely to respond positively.

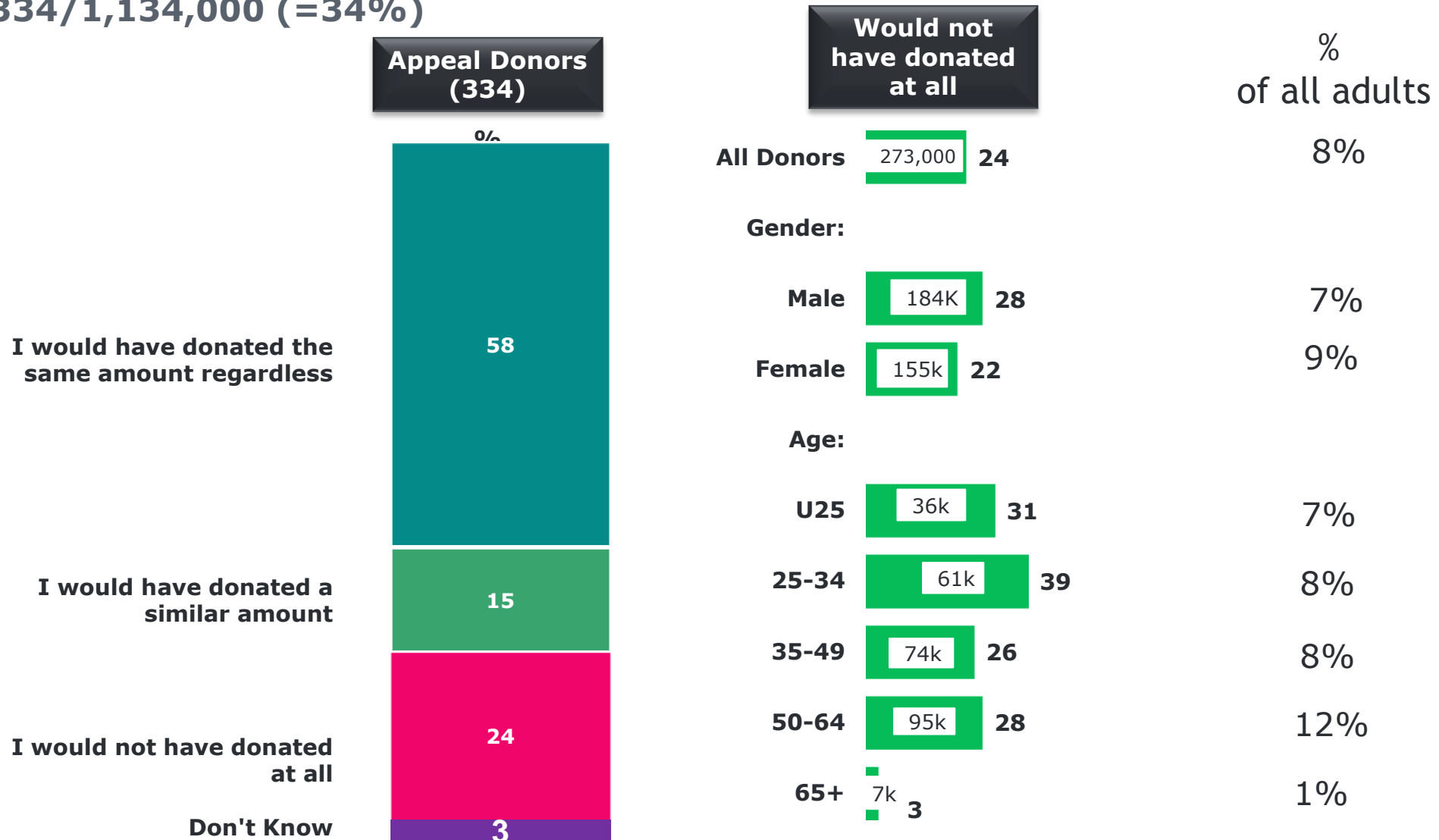
Q.2b

Did you make a specific donation, in response to an appeal, at Christmas 2012?

The impact of Public Christmas Appeals

Base: All made a specific donation in response to a Christmas appeal

334/1,134,000 (=34%)



One quarter of all specific donations made at Christmas would not have been made but for the public awareness raised by Christmas appeals. This equates to additional specific donations from 8% of the Irish adult population or 273,000 individual donors.

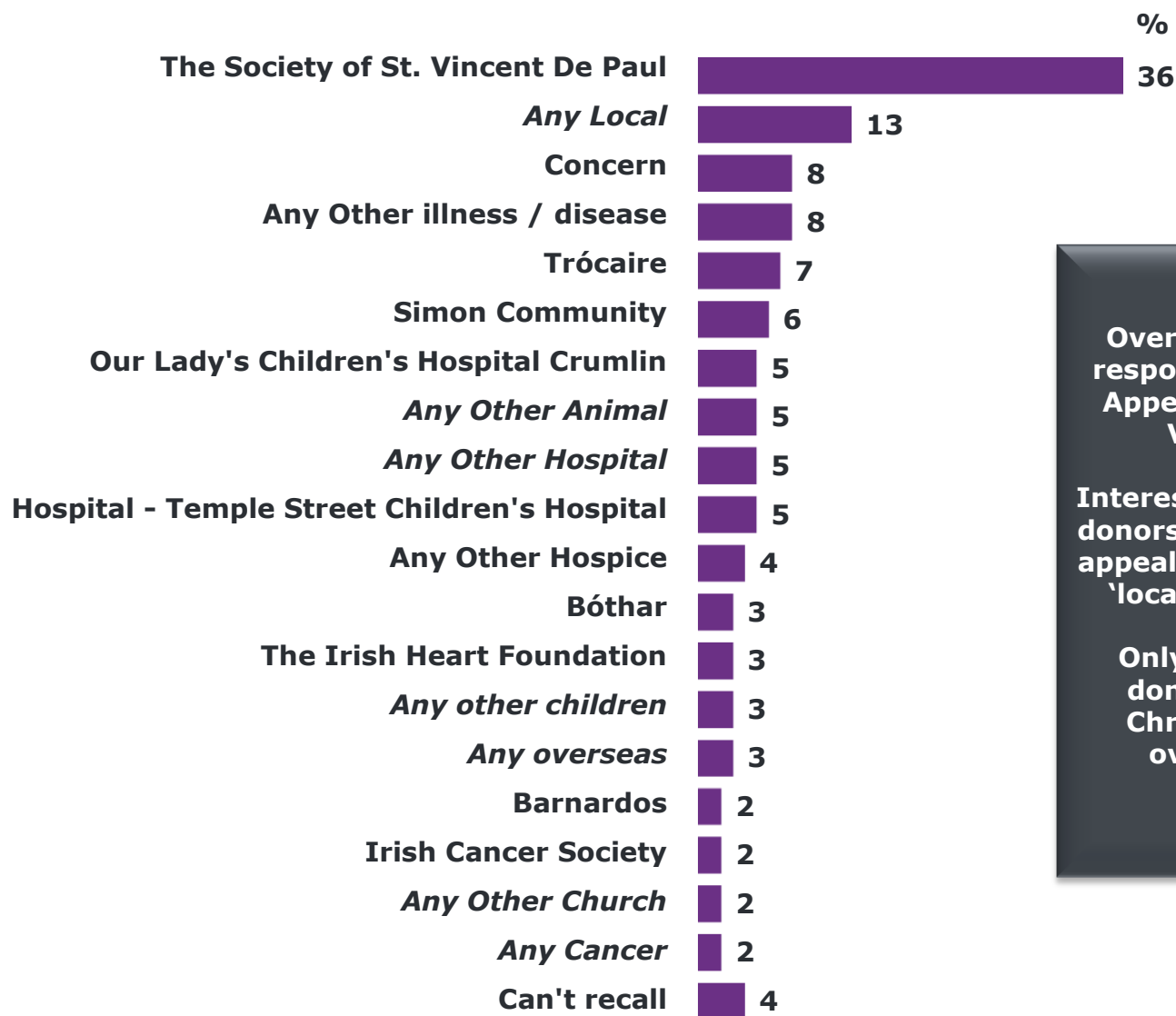


Q.2d

If you had not been asked or prompted in one way or another to donate, what would you have done?

Charities Donated to in Response to a Christmas Appeal

Base: All donated in response to a Christmas Appeal 334/1,134,000



All other answers 1% or less

Over one third of donors responding to a Christmas Appeal contributed to St. Vincent De Paul.

Interestingly the majority of donors to specific Christmas appeals contributed to more 'local' charitable bodies.

Only one in five (20%) donors contributed to Christmas appeals for overseas charities.



How we donate to charity



How We Donate to Charity

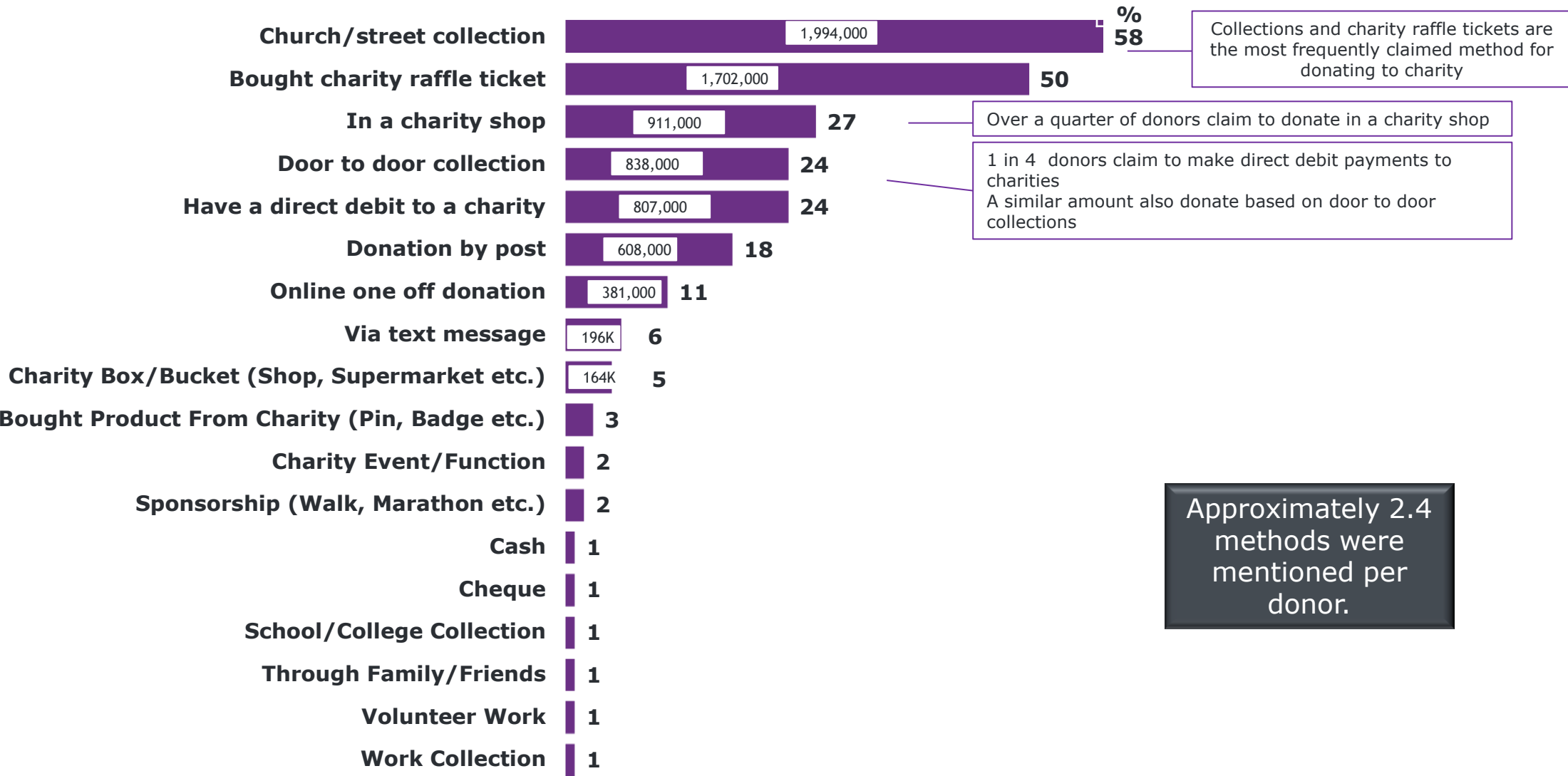
- Almost three in five donors (58%) give to church and on-street collections.
- Half of all donors (50%) purchase charity raffle tickets.
- Charity raffle tickets and donations through charity shops are higher among younger adults (under 34's).
- Almost one quarter of adults (24%) normally donate to charities via door to door collections. This appears to be marginally more common for women and blue collar workers.
- 1 in 4 (24%) claim to donate by a direct debit to a specific charity.
- As expected, direct debit donation is higher among middle class adults.
- Younger adults are the most likely to have made one off online donations and to have donated by text message.

How We Donate to Charity

- Church and on-street collections were responsible for the largest single share (30%) of all most recent donations.
- Direct debits account for 1 in 8 (12%) of all most recent donations.

Normal Manner of Charity Donation

Base: All ever donate 967/3,422,000



Collections and charity raffle tickets are the most frequently claimed method for donating to charity

Over a quarter of donors claim to donate in a charity shop

1 in 4 donors claim to make direct debit payments to charities
A similar amount also donate based on door to door collections

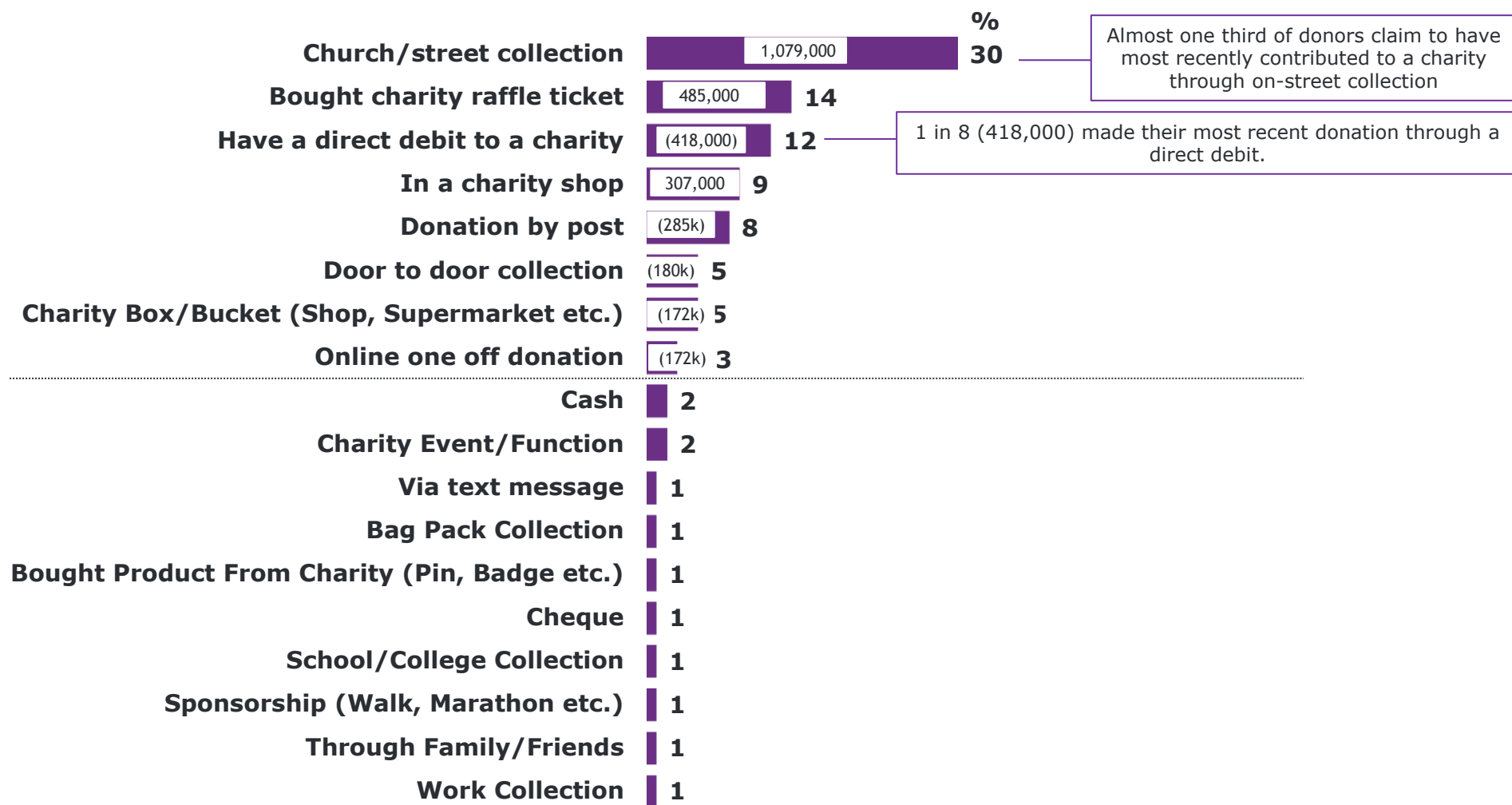
Approximately 2.4 methods were mentioned per donor.

All other answers less than 1%



Method of Charity Donation on Last Occasion

Base: All adults 16+ 967/3,422,000



All other answers less than 1%

Normal Donation Channels - Donor Profiles



Church/Street Collection 58% of Adults

1.9 million claim to use

Donors are more likely to be:-

- **Mid life stage and older (35+)**
- **More blue collar**
- **From urban areas**
- **Preference for charities that focus on illness and local intervention**
- **1 in 3 respondent to charities appeal.**



Charity Raffle Ticket 50% of all Adults

1.7 million adults claim to use.

Donors more likely to be:-

- **Female**
- **Mid lifestage and older (35+)**
- **More blue collar**
- **From urban areas**
- **Less likely in Conn/Ulster**
- **Prefer charities that focused on illness and location intervention**



In a Charity Shop 27% of Adults

911,000 adults claim to use

Donors more likely to be:-

- **Female**
- **Younger and mid-life stage adults**
- **Blue collar**
- **From urban areas**
- **Prefer that charities focus on illness and local intervention.**

Normal Donation Method – Donor Profiles



Direct Debit to Charity 24% of all adults

807,000 adults claim to use.

Donors more likely to be:-

- Mid-life stage and older (35+)
- Urban
- White collar
- Dublin/Leinster based
- Preference for charities focussed on illness and local intervention

Door to Door Collection 24% of all adults

838,000 adults claim to use.

Donors more likely to be:-

- Female
- Mid life-stage (35-64)
- Blue collar
- Strongest in Munster & Leinster
- Urban based
- Preference for charities that focus on illness and local intervention

Postal Donations 18% of all adults

608,000 adults claim to use.

Donors more likely to be:-

- Female
- Older adults (55+)
- More blue collar (pensioners)
- Strong in Leinster and Dublin
- Preference for charities that focus on illness and local intervention

Normal Donation Method – Donor Profiles



Online One Off Donation 11% of all adults

381,000 of adults claim to use.

Donors more likely to be:-

- Female
- Young adults (under 34)
- White collar
- Urban
- Dublin based
- Have highest regard for overseas charities



Text Message 6% of all adults

196,000 adults claim to use.

Donors more likely to be:-

- Female
- Younger (under 34)
- No social class difference
- Distinctly urban (Dublin) based

Charity Types

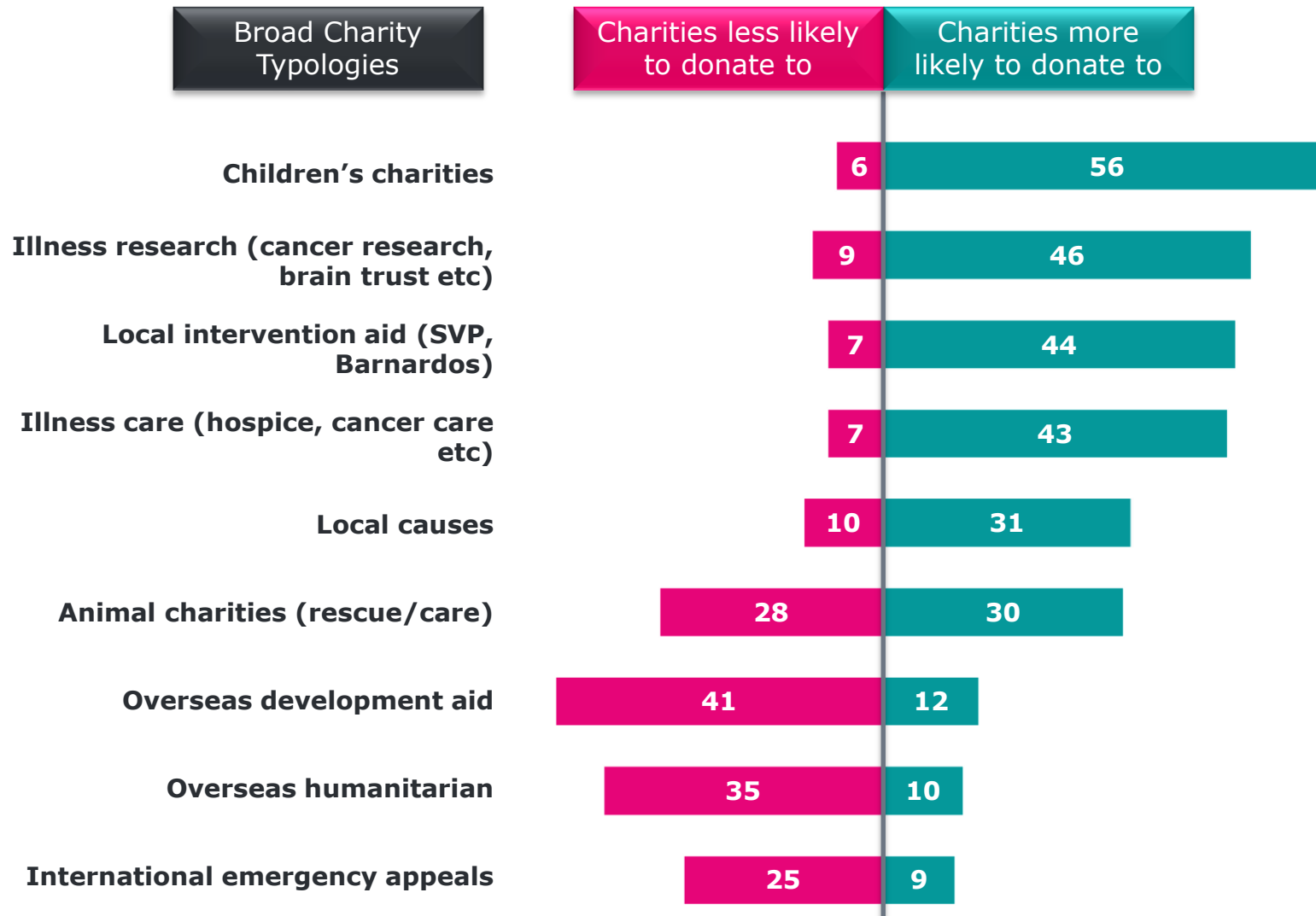


Charity Types

- When asked to indicate the types of charities they are more or less likely to donate to at present, a distinct preference for local, illness and children's charities was expressed.
- At present, there appears to be considerably less interest in donating to overseas aid and humanitarian charities.
- There is definitely a 'charity begins at home' ethos emerging, which is unsurprising given the state of the Irish economy.

Charities More/Less Likely to Donate to

Base: All adults 16+ 1,002/3,551,000



Primary interest in children's charities, illness charities and local concerns.

There appears to be less immediate appeal in donating to international charities at the present time (particularly development aid charities).



Q.5

I am going to read a number of charity types, can you please select the three that you are more likely to donate to these days?

Q.5a

Are there any specific charities or types of charities that you are less inclined to donate to these days?

Professionals & Wages in the Charity Sector



Professionals and Wages in the Charity Sector

- There are somewhat contradictory views in relation to wages in the charity sector: charities should have the best staff, but equally those staff should expect less compensation than their contemporaries in the private sector.
- The vast majority agree that charities are generally well run and equally that it is important that charities are good at what they do.
 - ❖ Relatedly, most feel that “charities should get the best professionals possible to work for them”.
 - ❖ However, some are clearly sensitive about pay levels: “the amount that senior managers are paid makes me less likely to donate” (52% agree) and that senior management should be paid less than similar grades in the private sector (44% agree)

Professionals and Wages in the Charity Sector

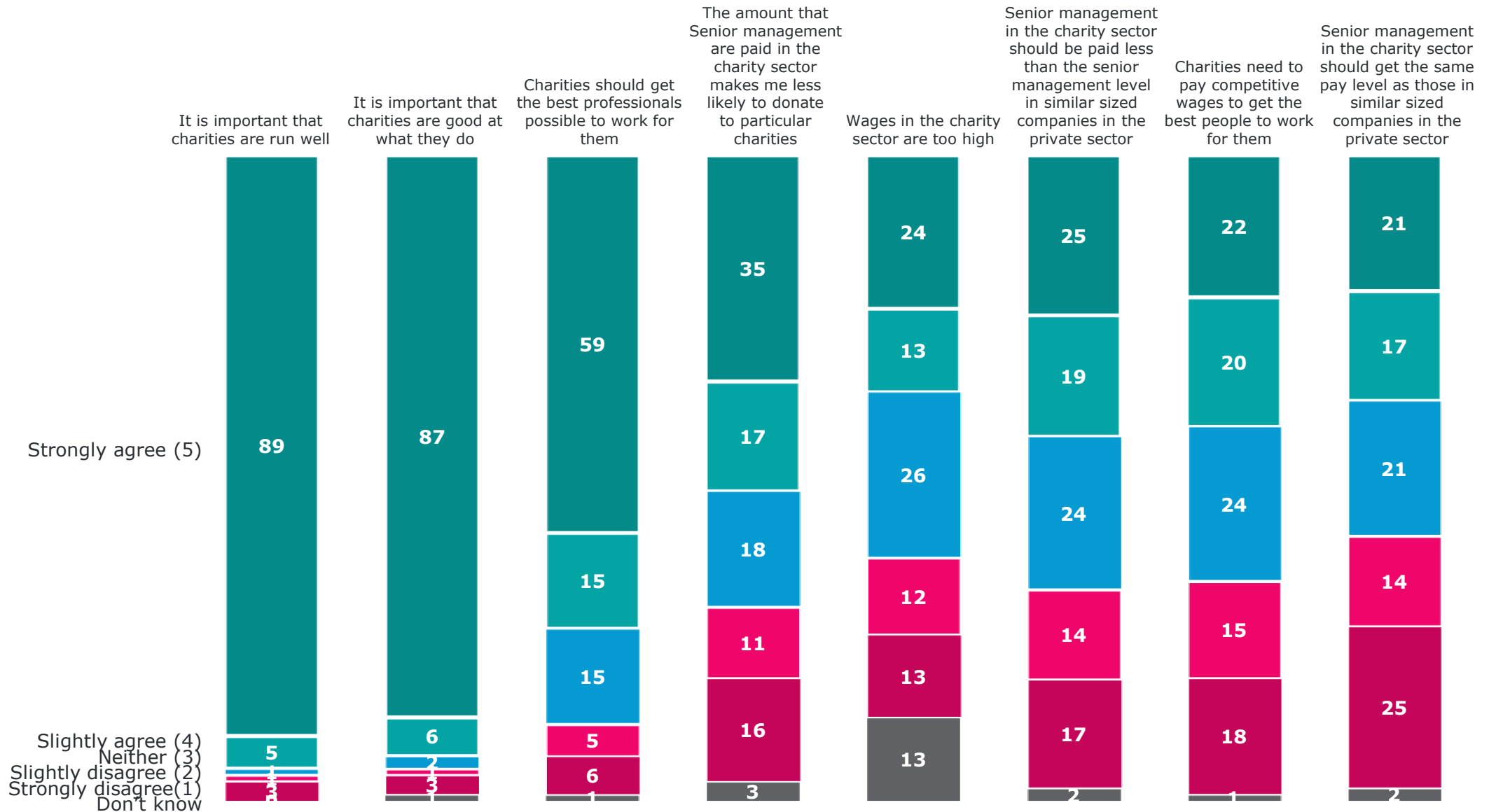
- This is evidently a difficult area for people, and there is a broad spread and polarisation of opinion as to whether charity managers should be similarly paid to the private sector or not.
 - ❖ It is clearly contradictory that charities should retain the best people but, simultaneously that they should have a lower expectation of financial reward.
 - ❖ It seems that they would be expected to be motivated by altruism more so than by financial rewards
- A generous interpretation would be that people may be open to persuasion in relation to the possible requirement to pay properly to get good managers in the sector. A perhaps more blunt interpretation is that some clearly have an expectation that charities would be staffed by those motivated by duty more so than by money.

Professionals and Wages in the Charity Sector

- There is no substantial evidence that senior employees in the sector are negatively regarded. Less than two in five are of the view that wages in the sector are probably too high, with the balance uncertain or disagreeing.
- Ultimately it is probably important that charities exhibit an over riding concern for the use and administration of funds. It is important to focus on the perceived need to have high standards and to attract individuals capable of running them well.

Charity Priorities

Base: All adults 16+ 1,002/3,551,000



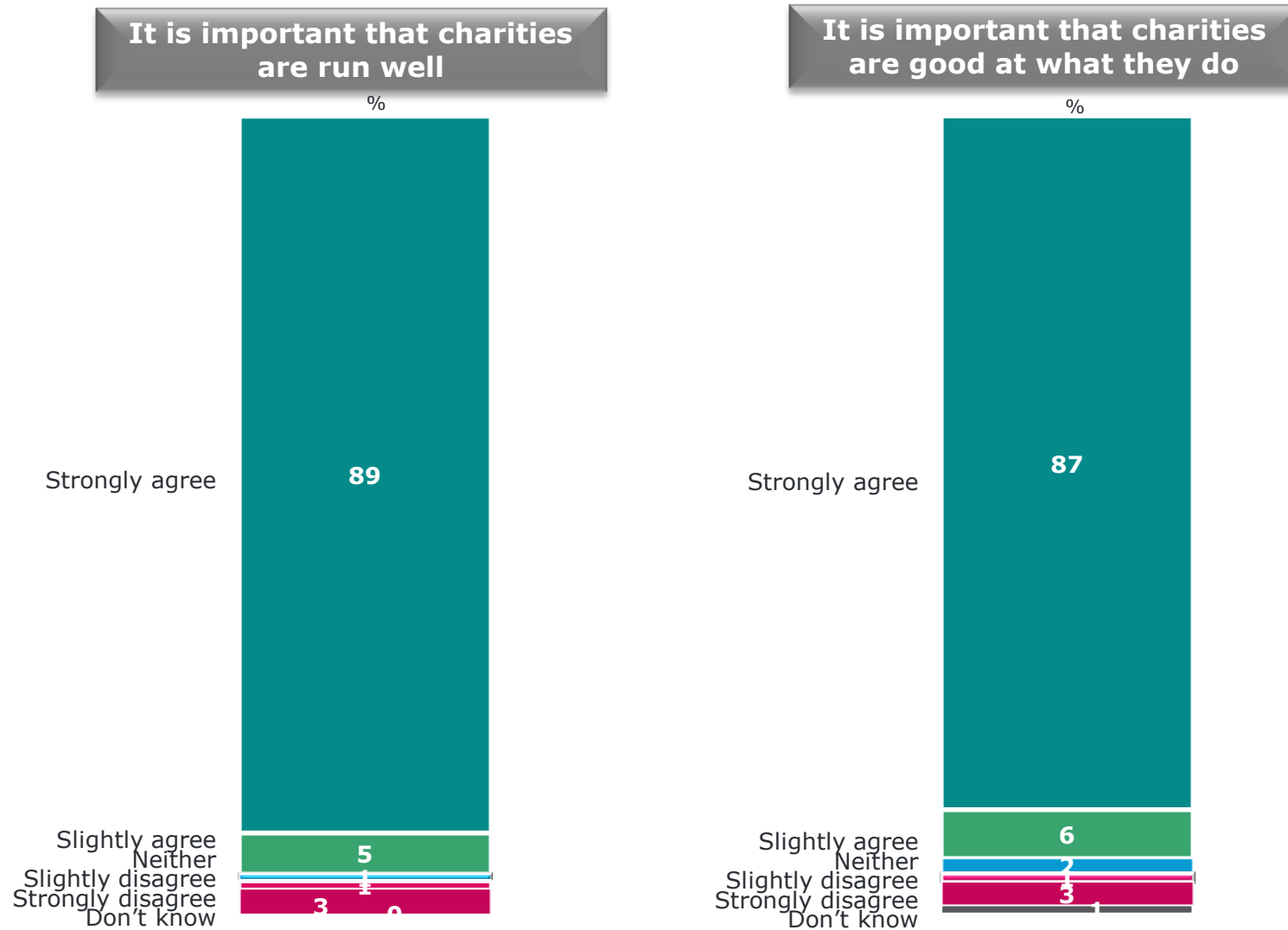
Q.6

I am going to read out a number of statements related to those who work for or run charitable organisations. For each statement please indicate how much you agree or disagree on a scale of 1 to 5 where 5 means you strongly agree and 1 means you strongly disagree.



The importance of charities being run well.

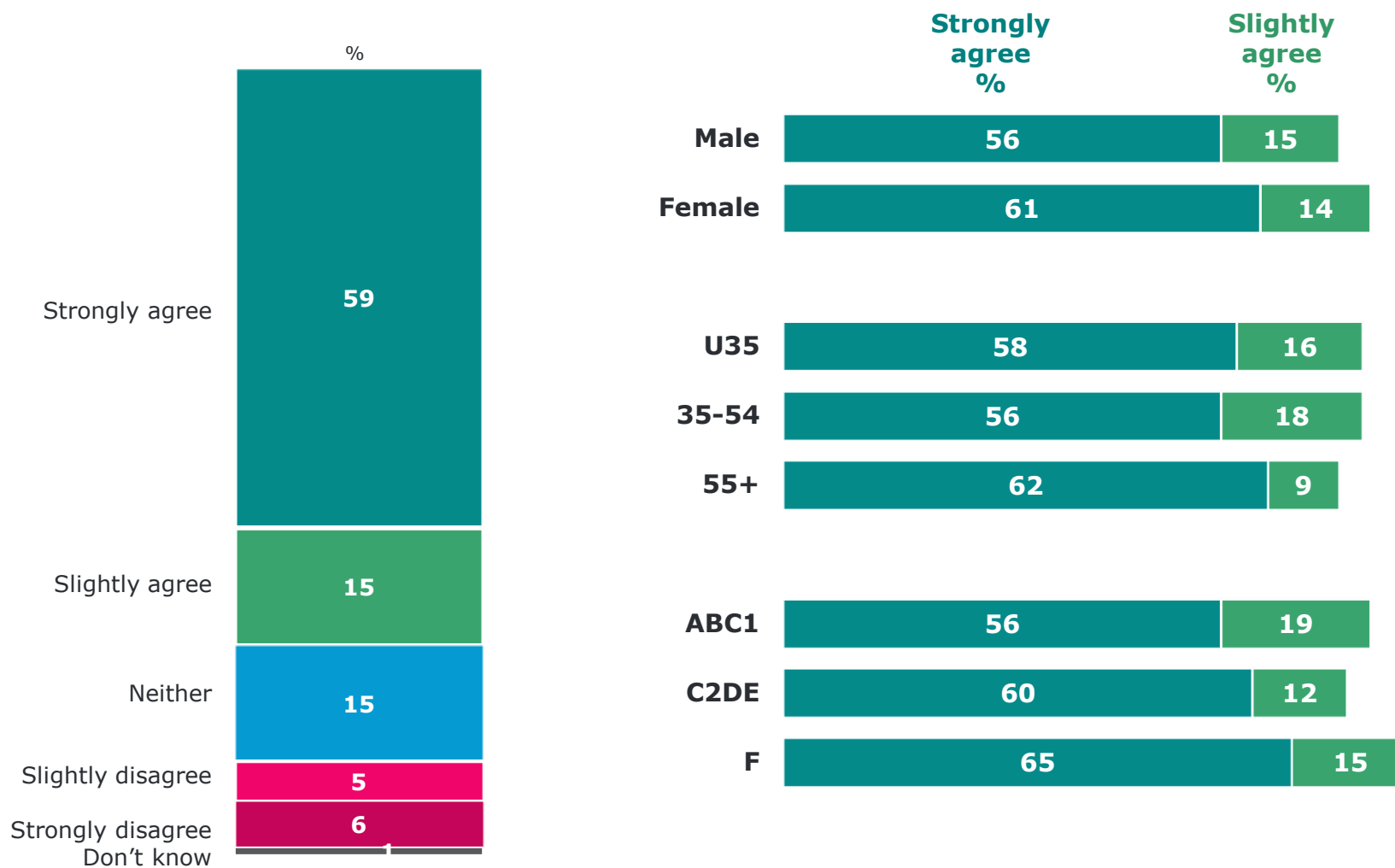
Base: All adults 16+ 1,002/3,551,000



The vast majority (94%) agree that it is vital that charities are well run and need to be good at what they do (93%)

Charities should get the best professionals possible to work for them

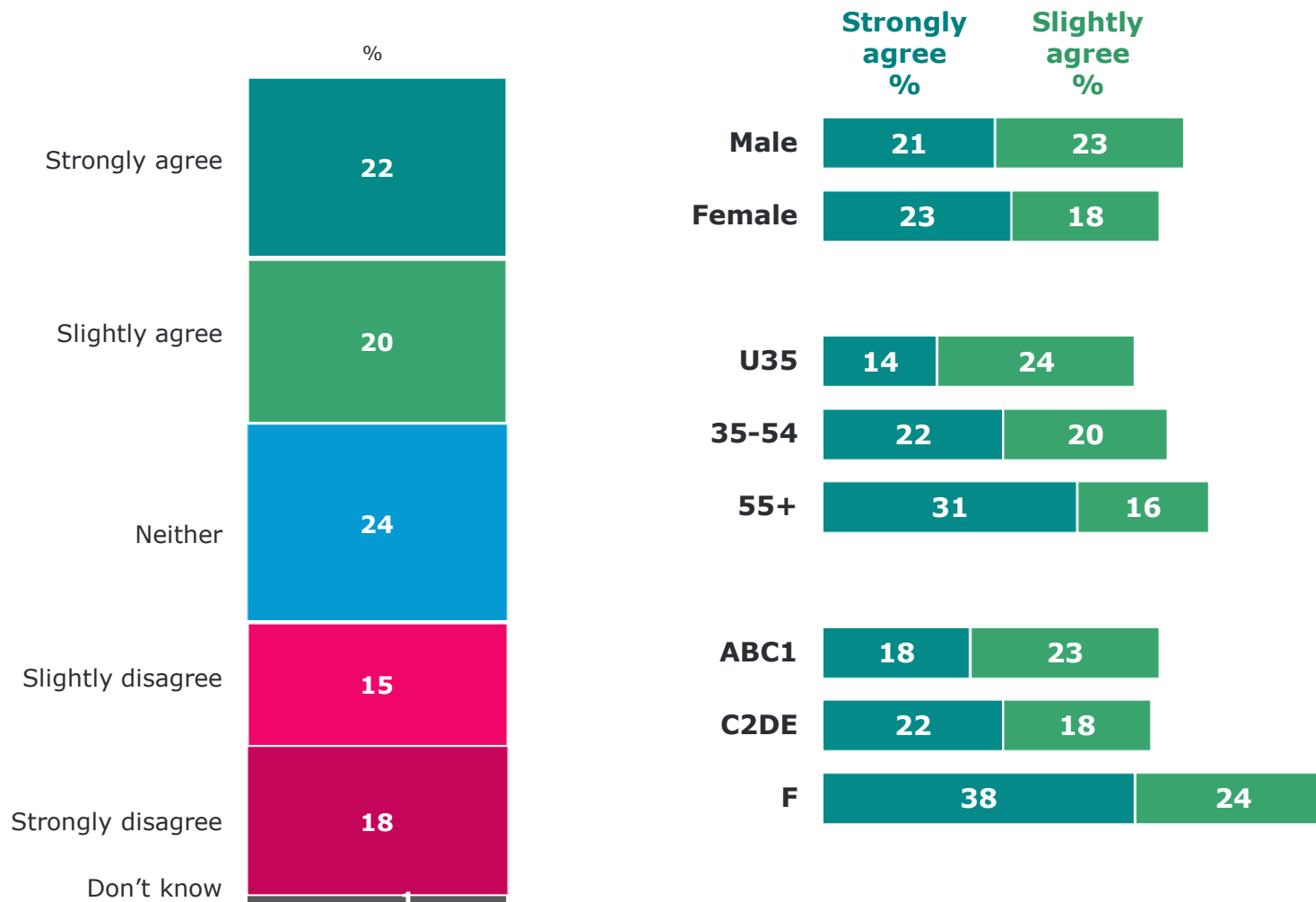
Base: All adults 16+ 1,002/3,551,000



Almost three quarters of adults (74%) agree that charities should be staffed with the best professionals, with 6 in 10 (59%) strongly in favour of this. Women and older adults feel slightly more strongly about this.

Charities need to pay competitive wages to get the best people to work for them

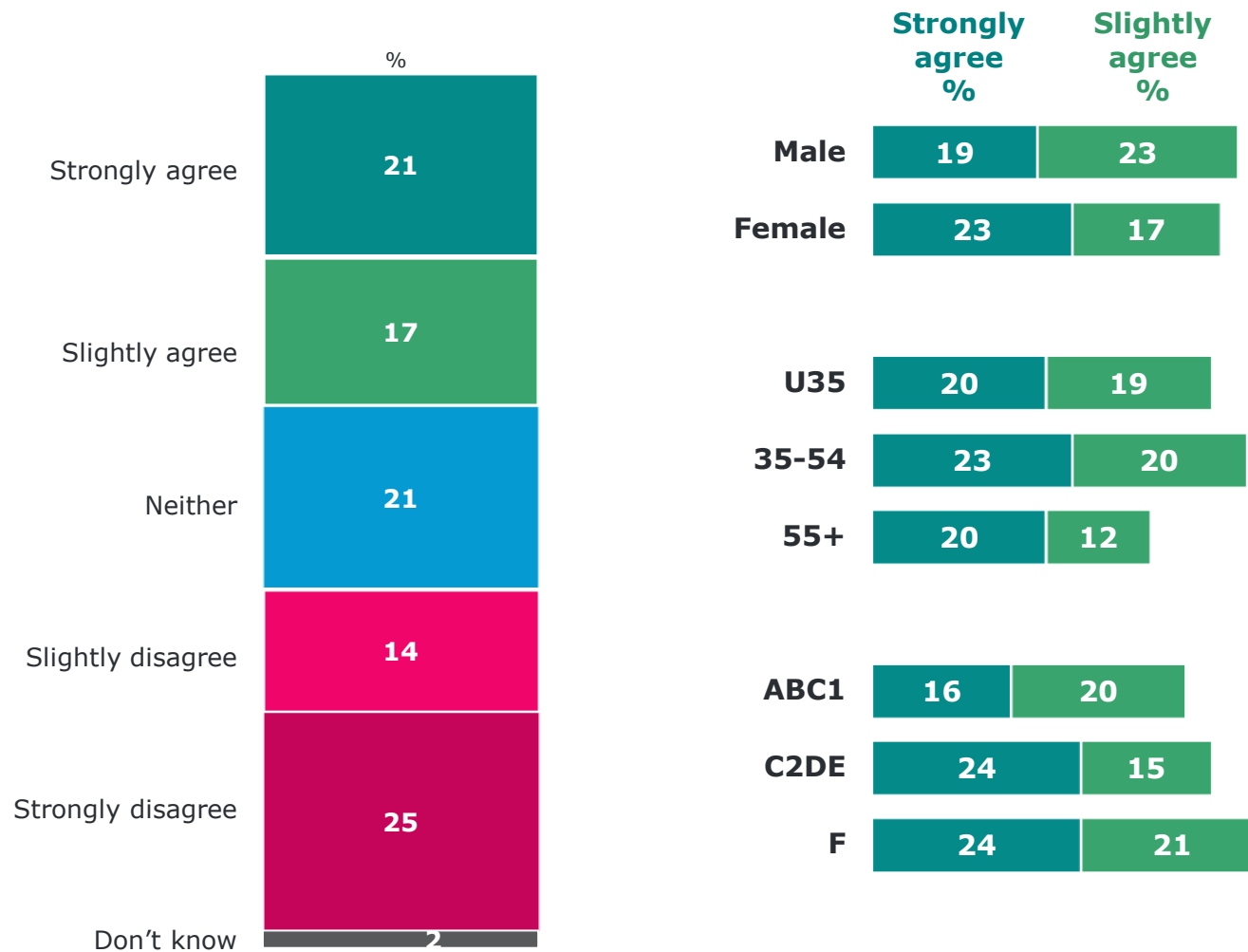
Base: All adults 16+ 1,002/3,551,000



Less than half of adults agree with this statement and only 1 in 5 strongly agree (22%). There is evidently a view among some that working for a charity should have a vocational or altruistic quality and therefore employees cannot expect the same level of remuneration.

Senior management in the charity sector should get the same pay level as those in similar sized companies in the private sector

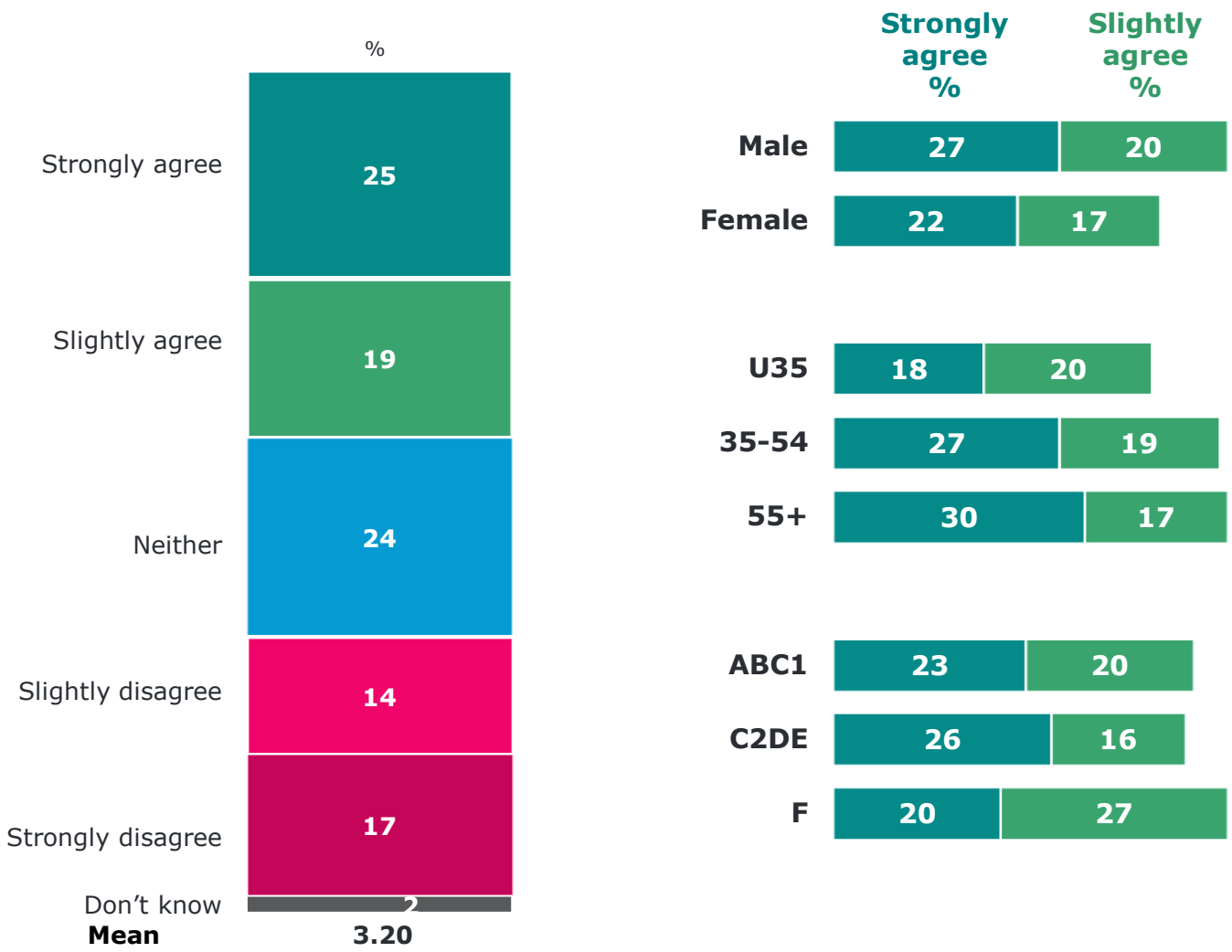
Base: All adults 16+ 1,002/3,551,000



Just over one third of adults (38%) believe that senior management should receive comparable pay to that in similar sized companies in the private sector, with a similar percentage disagreeing.

Senior management in the charity sector should be paid less than the senior management in similar sized companies in the private sector

Base: All adults 16+ 1,002/3,551,000

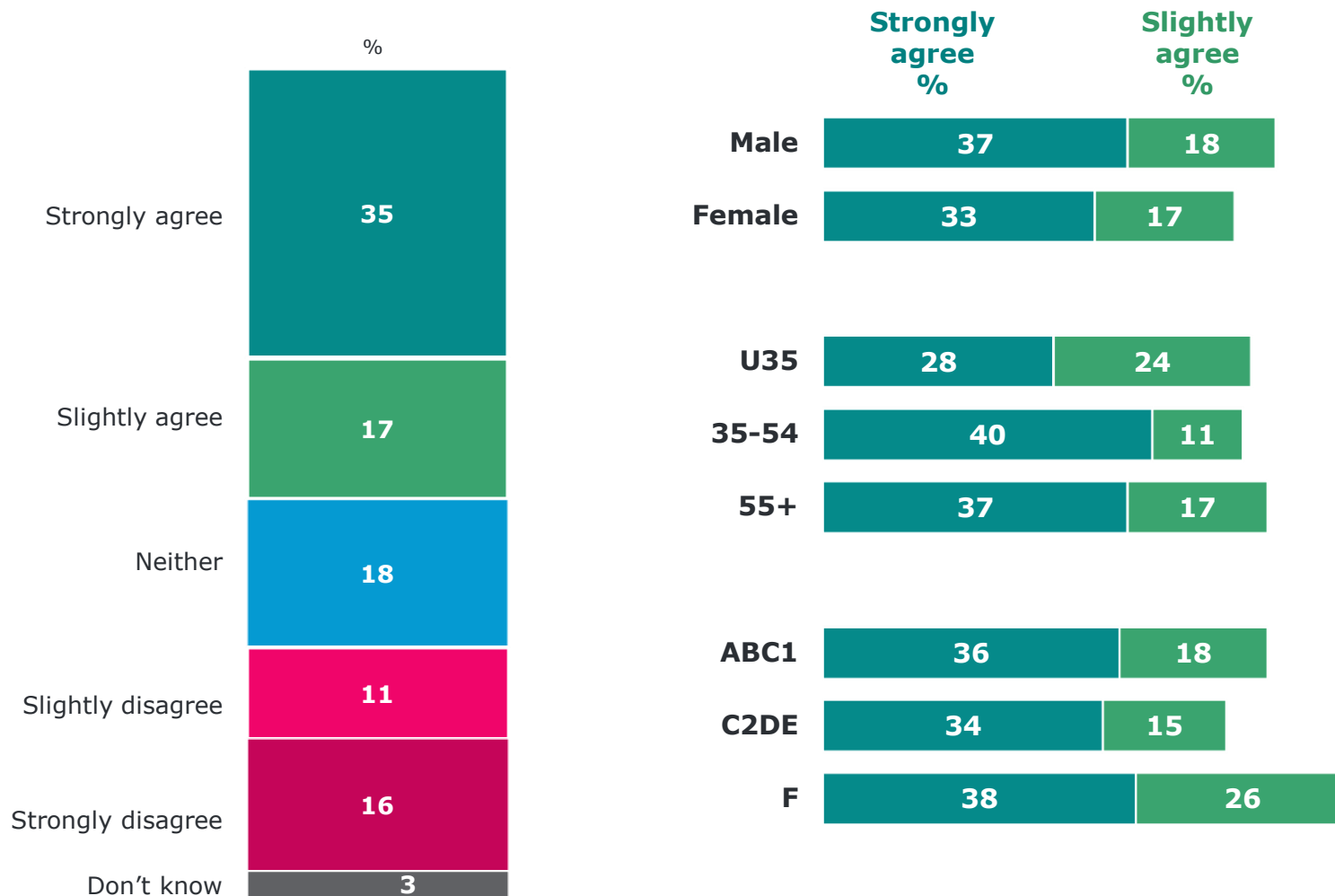


Almost half of all adults (44%) indicate that senior management in charities should be paid less than comparable employees in the private sector; less than one third disagree with this statement. This is a difficult issue but needs to be traded off against the need to secure the best employees.



The amount that senior management are paid in the charity sector makes me less likely to donate to particular charities

Base: All adults 16+ 1,002/3,551,000



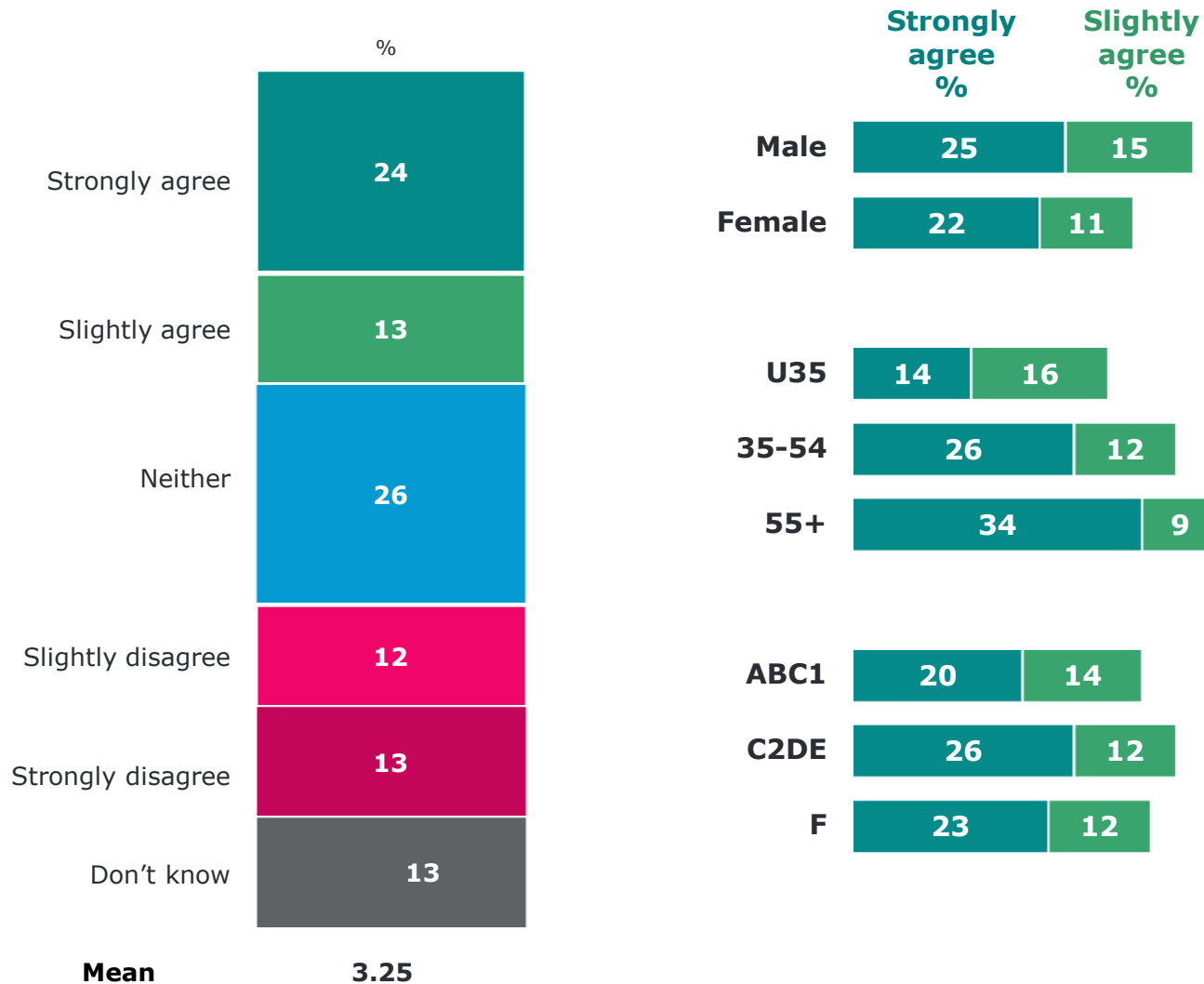
Just over half of all adults indicate that the level of wages paid to senior management in charities could have an impact on their likelihood of donating.

Q.6

How strongly do you agree or disagree that...

Wages in the charity sector are too high

Base: All adults 16+ 1,002/3,551,000



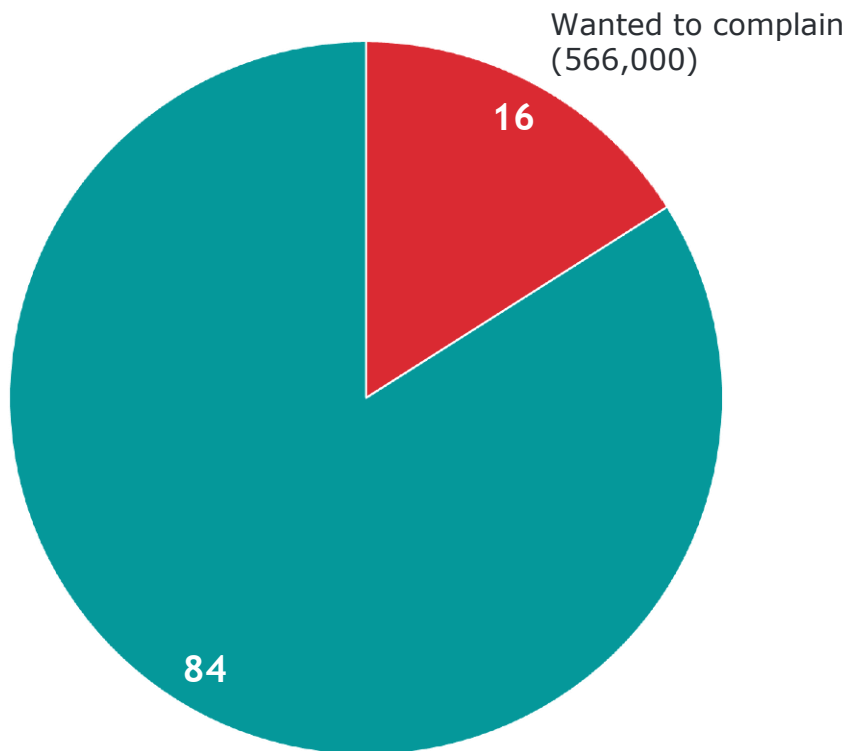
Just over one third indicate that perceived wage levels in charities are too high (37%). A similar proportion (38%), either disagree or don't know. This indicates that there may be limited understanding overall of wage levels in the industry. Older adults identify more strongly with this view but remain the most frequent donors nonetheless.



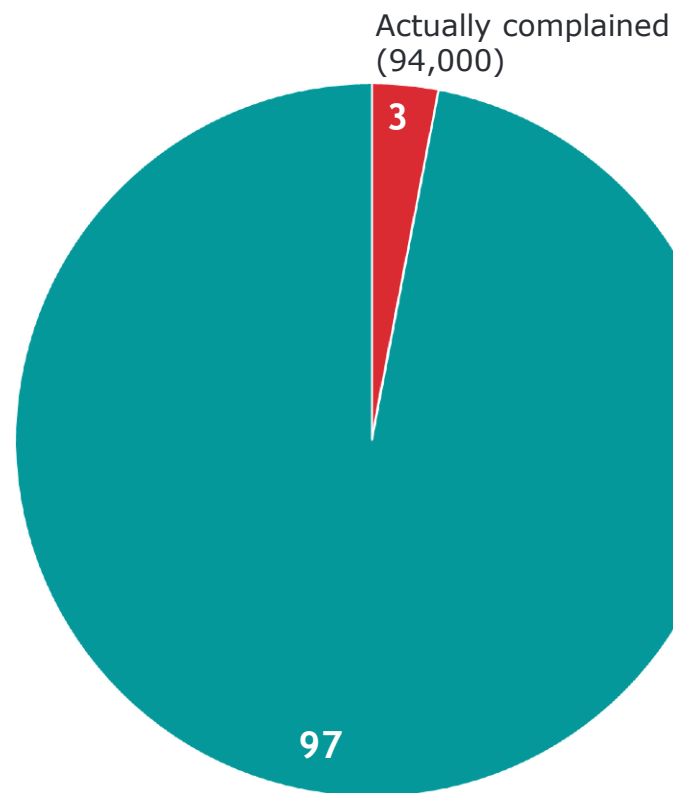
Inclination to Complain about a Charity

Base: All adults 16+ 1,002/3,551,000

Ever wanted to complain about a charity



Ever actually complained about a charity



While one in six adults have ever indicated they have wanted to make a complaint, less than one in five of these have every followed through.

Q.7
Q.7a

Have you ever wanted to make a complaint about a charity?
Have you ever made a formal complaint about a charity?

Inclination to Complain about a Charity

Base: All adults 16+ 1,002/3,551,000

	Total	Gender		Age					Class			Donor		
		Male	Female	U24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Low	Medium	High
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Wanted to Complain	16	16	16	14	14	15	19	18	14	16	18	16	11	21
Actually Complained	3	3	3	1	2	3	3	6	1	3	4	3	3	5

Older adults, particularly those 50+ are the most inclined to make a complaint about a charity They are also the most likely to actually make a complaint by a considerable margin.



Q.7 Have you ever wanted to make a complaint about a charity?
 Q.7a Have you ever made a formal complaint about a charity?

Reasons for Complaint

Base: All considered complaining/complained 170/584,000



Made a Complaint

The area adults most frequent consider complaining about is the inappropriate use of funds (29% of all possible complaints), followed by harassment and on street collectors.

Salaries are responsible for about 1 in 7 (14%) complaints.



Behaviour & Attitudes

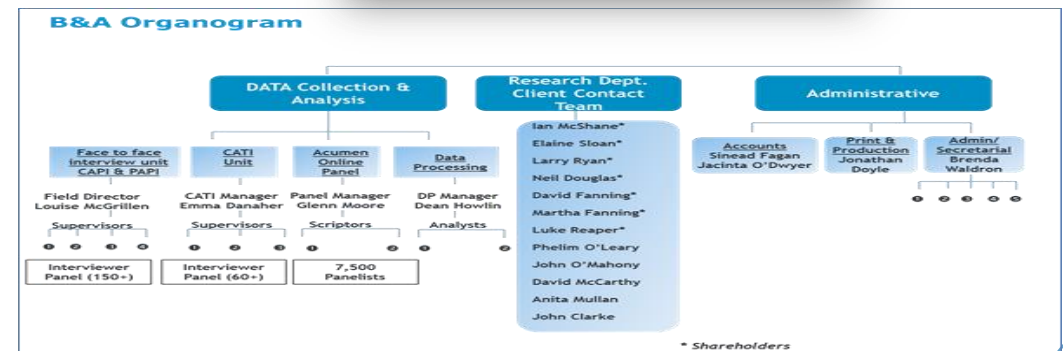
- Ireland's leading independent marketing research agency.
- Owned by current directors: a very experienced team.
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- 34 employees, 200 interviewers, 150,000 interviews & 1,000 groups/400 depths p.a. 40 Station phone unit in Milltown, Dublin 6.
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