



2015 NMI Healthy Aging[®] Database
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STELTER

The Personal Philanthropy Company

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Introduction

The purpose of this report is to give planned giving professionals a new understanding of the preferences and priorities among donors to nonprofit organizations.

The new data from the Natural Marketing Institute's 2015 Healthy Aging Database® study can help shape donor-focused marketing and communications with more precision and insight, leading to better return on your communication investment. The Stelter Company's participation in this study has led to the capture of **powerful new data about the next wave of nonprofit donors on a scale, and with a level of detail, never before seen.**

The result is a volume of easy-to-understand data that illustrate the hopes, concerns, priorities and demographic dynamics among donors to specific nonprofit types. The data segment donor information into an array of statistical groups, from frequent and infrequent donors, non-donors, net worth groupings and age categories to charity preferences, depth of sentiment and motivation to give, even financial and health priorities.

No other planned giving marketing firm has captured this level of comprehensive data about nonprofit donor communities across the United States. This report provides valuable insight to create more strategic planned giving marketing communications for your organization.

About This Study

The findings in this report are based on a survey of 3,001 respondents to the 2015 Healthy Aging Database® study conducted by the Natural Marketing Institute. The Stelter Company acted as a consultant to the Natural Marketing Institute on core questions regarding charitable giving with the ability to embed proprietary questions.

The study was conducted in April 2015 of U.S. adults comprised of:

3,001 General Population sample

- 35% Millennials
- 20% Gen X
- 37% Boomers
- 8% Matures

The study was balanced to U.S. Census data across key demographics:

Gender, age, income, education, region and race

The study is statistically significant at the 95% confidence level to +/- 1.5%.

This means that if this survey was repeated using the same questions and the same methodology, 19 times out of 20, the findings would not vary from the percentages shown here by more than plus or minus 1.5 percentage points.

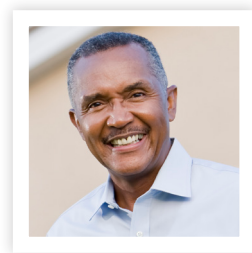
Definitions

**Millennials**

Born 1977-1998
(ages 18-38)

**Gen X**

Born 1965-1976
(ages 39-50)

**Boomers**

Born 1946-1964
(ages 51-69)

**Matures**

Born 1900-1945
(ages 70+)

GP: General population of U.S. adults

Donors: U.S. adults who have ever contributed to a charitable organization

Non-donors: U.S. adults who have never contributed to a charitable organization

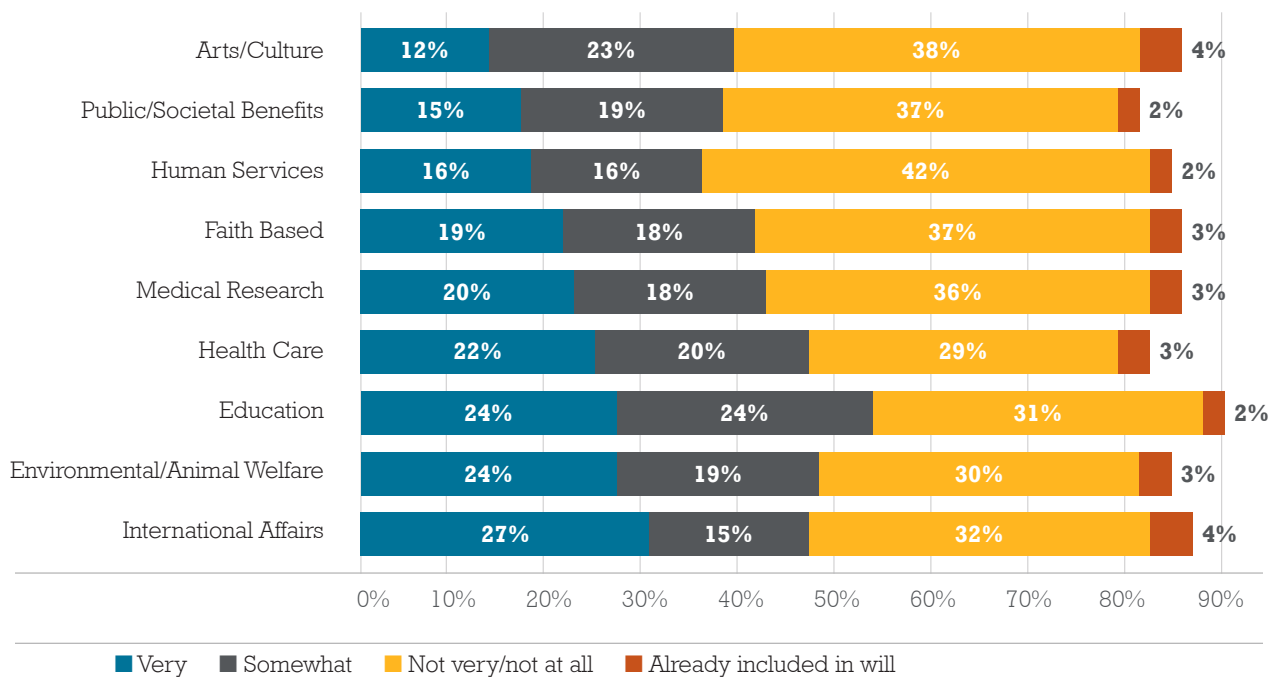
Caregivers: U.S. adults who indicate they currently provide medical/managed-care assistance or non-medical assistance for an aging loved one

Planned Gifts

Donors who are more likely to leave a gift to a nonprofit at the time of their death

A planned gift at the time of death is “very” or “somewhat likely” for 35% to 48% of donors. However, very few have already included such a gift in their wills. Education nonprofits rank higher than other types of organizations for likelihood of receiving a planned gift. Human Services organizations rank at the bottom of the list.

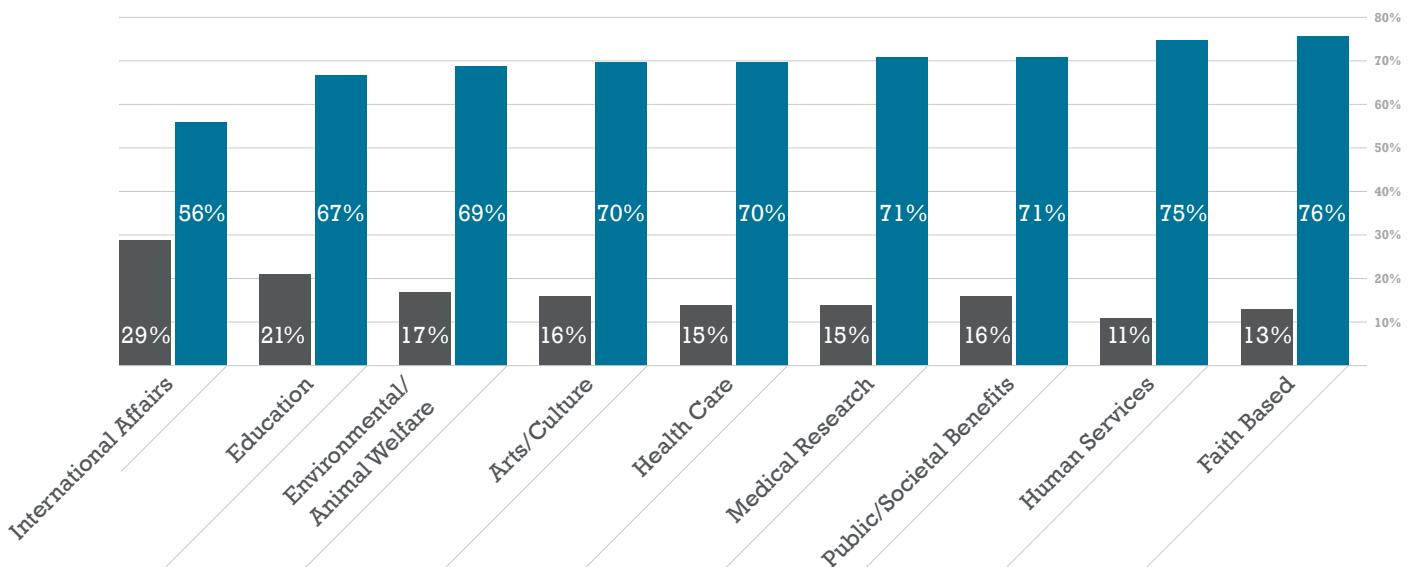
Percentage of donors indicating how likely they would be to donate a charitable gift to their preferred organization at the time of their death:



Restricted vs. Unrestricted Gifts

Large majority of donors give unrestricted gifts across all nonprofit types.

■ Donors who give restricted \$ ■ Donors who give unrestricted \$



Unrestricted Gifts the Norm

Most donors give unrestricted gifts to the nonprofits of their choice. The highest percentage of restricted gifts can be found in donations to international affairs organizations. Negative publicity regarding stolen gifts and misuse of gifts in some unstable parts of the world may be to blame for higher rates of restricted gift giving.

Donors and Donor Types

The numbers indicate 83% of U.S. adults have donated to a charitable organization, while 17% have not.

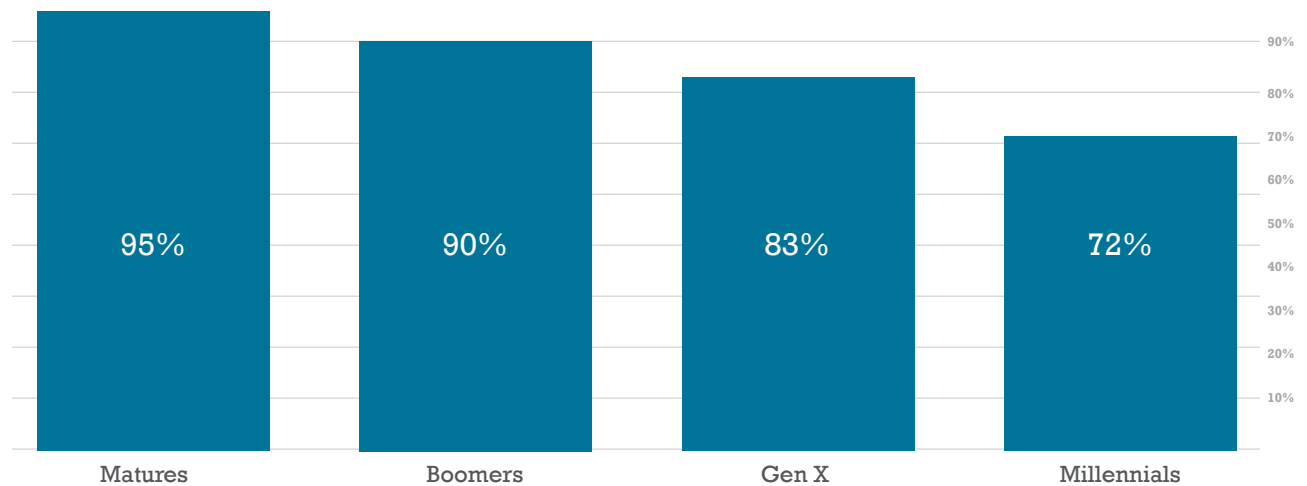
Donors to charities tend to be older, white and more affluent, and are more likely to be married. Here are some basic demographic comparisons:

	DONORS	NON-DONORS
Male	47%	52%
Female	53%	48%
Millennials	30%	56%
Gen X	21%	20%
Boomers	40%	22%
Matures	10%	2%
Average Age	48	38
Median Income	\$60.5K	\$37.7K
Child in Household	39%	32%
White	80%	70%
Hispanic	13%	22%
Black/African-American	12%	15%
Asian	4%	5%
Married	56%	35%
Median Net Worth	\$74.8K	\$35.9K

■ = Significantly higher than corresponding group

Who Are the Donors?

Donors by Age Group

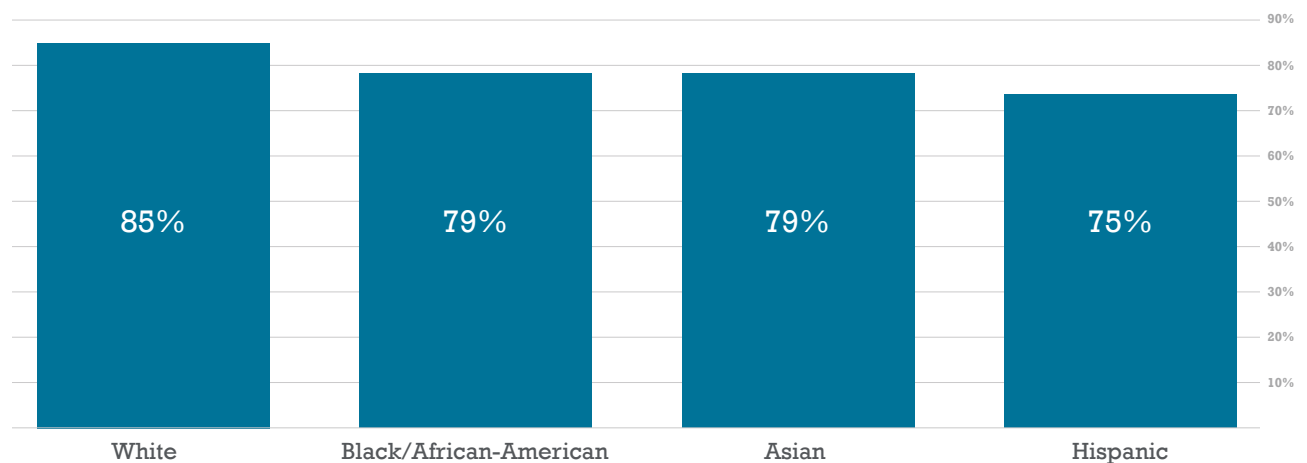


Donors and Age

More Matures and Boomers say they have donated to a nonprofit than Gen X or Millennials. However, when looking at donations for the 12 months ending in April 2015, significantly more Millennials and Gen X donors have donated to Education and International Affairs nonprofits than older age groups.

Who Are the Donors?

Donors by Ethnic Group



Donors and Ethnicity

Donors can be found in similar proportions across ethnic backgrounds. Some differences do exist by type of nonprofit, but can be explained by other variables. For example, Asian populations donated significantly higher to International Affairs nonprofits in 2014-15. This may be related to the number of natural disasters occurring in Asian countries during the time period.

How Donors and Non-Donors Describe Themselves

Donors and non-donors describe themselves similarly in many areas, but also have unique characteristics they identify with. (Ranked in order by volume of chosen responses.)

DONORS		NON-DONORS
Family Person	1	Loving
Loving	2	Family Person
Independent	3	Independent
Home Body	4	Home Body
Optimistic	5	Stressed
Satisfied With My Life	6	Fun-Seeking
Spiritual	7	Tired
Fun-Seeking	8	Optimistic
Healthy	9	Satisfied With My Life
Social	10	Worrier

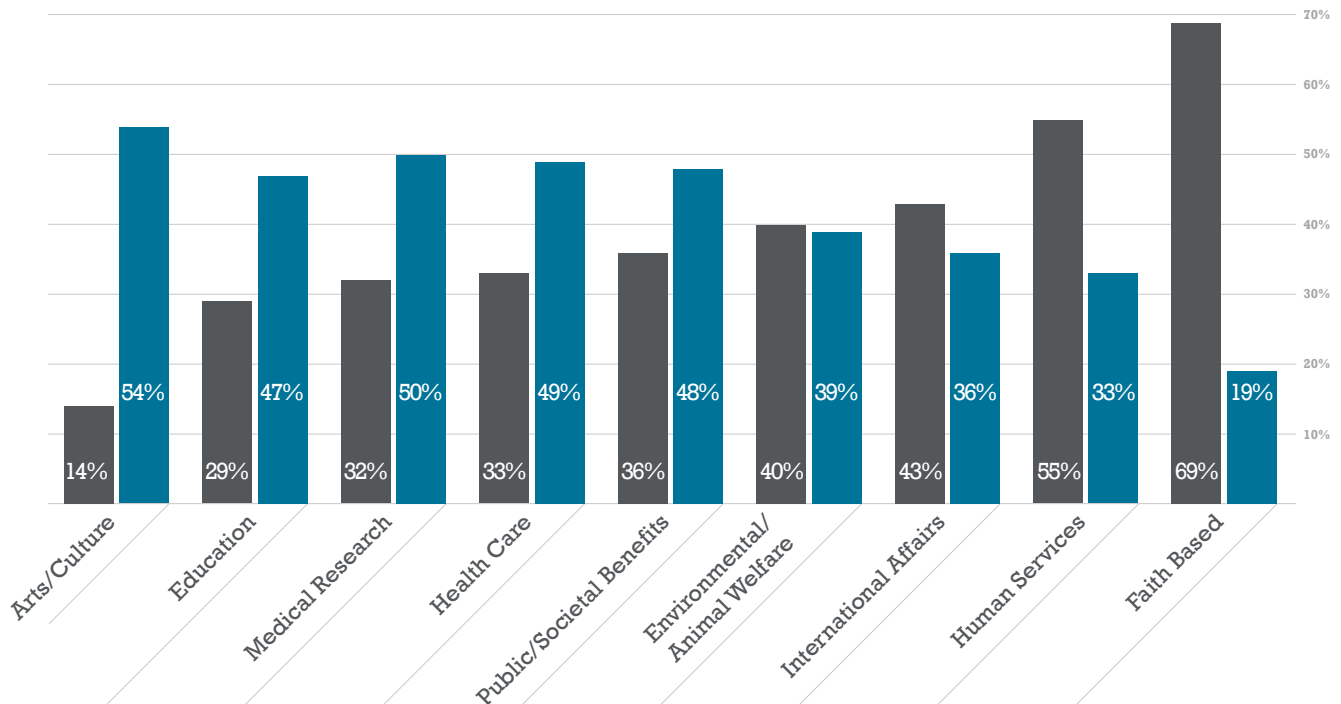
■ = Descriptor is unique to the list

Characteristics of Frequent and Infrequent Donors

Certain nonprofit categories appear to attract more repeat donors during a given year, while others receive funding from a higher proportion of once-a-year donors. For some nonprofits, focusing on characteristics of frequent donors may lead to identifying better qualified planned giving prospects earlier in a donation pattern.

Donation Frequency

■ Several times a year ■ About once a year



Differences Between Frequent and Infrequent Donors

	FREQUENT DONORS	INFREQUENT DONORS
Male	45%	50%
Female	55%	50%
Average Age	49	47
Child in Household	44%	34%
Median Income	\$68.5K	\$53.2K
Median Net Worth	\$104.1K	\$47.6K
College	36%	28%
White	81%	78%
Black/African-American	11%	12%
Hispanic	14%	12%
Asian	3%	4%
Describes Self as Extremely/Very Social	42%	32%

■ = Significantly higher response than corresponding group

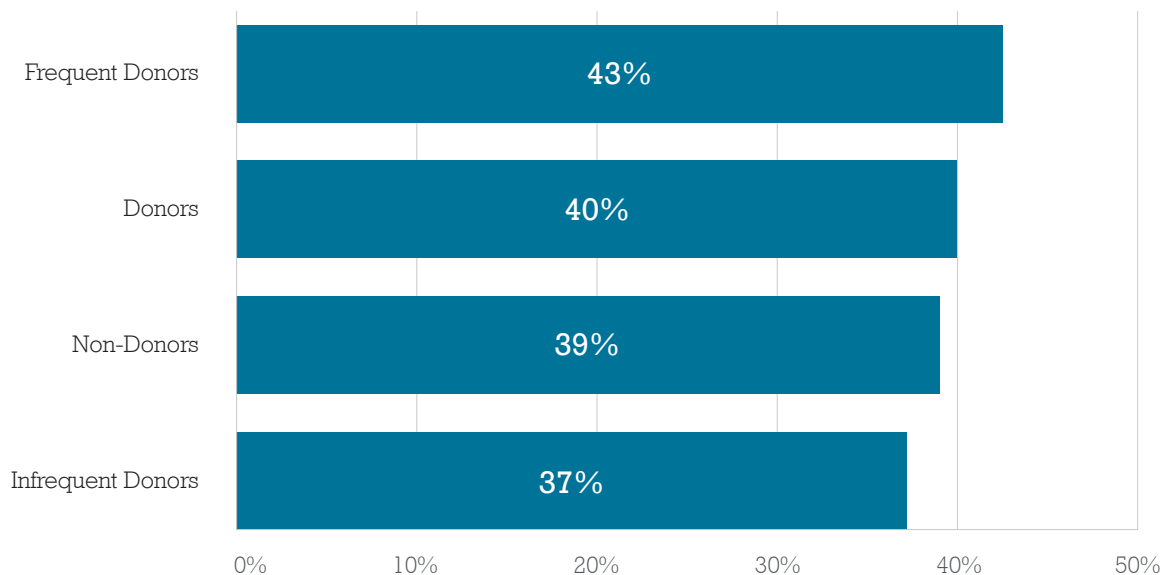
Frequent Donors

Compared to infrequent donors, frequent donors are more likely to be female, older, college educated and affluent; have a child in the household; and describe themselves as “social.”

Frequent Donors Are More Likely to Try New Things

“I am usually one of the first to try new products and services.”

Percentage of donors who agree with that statement:

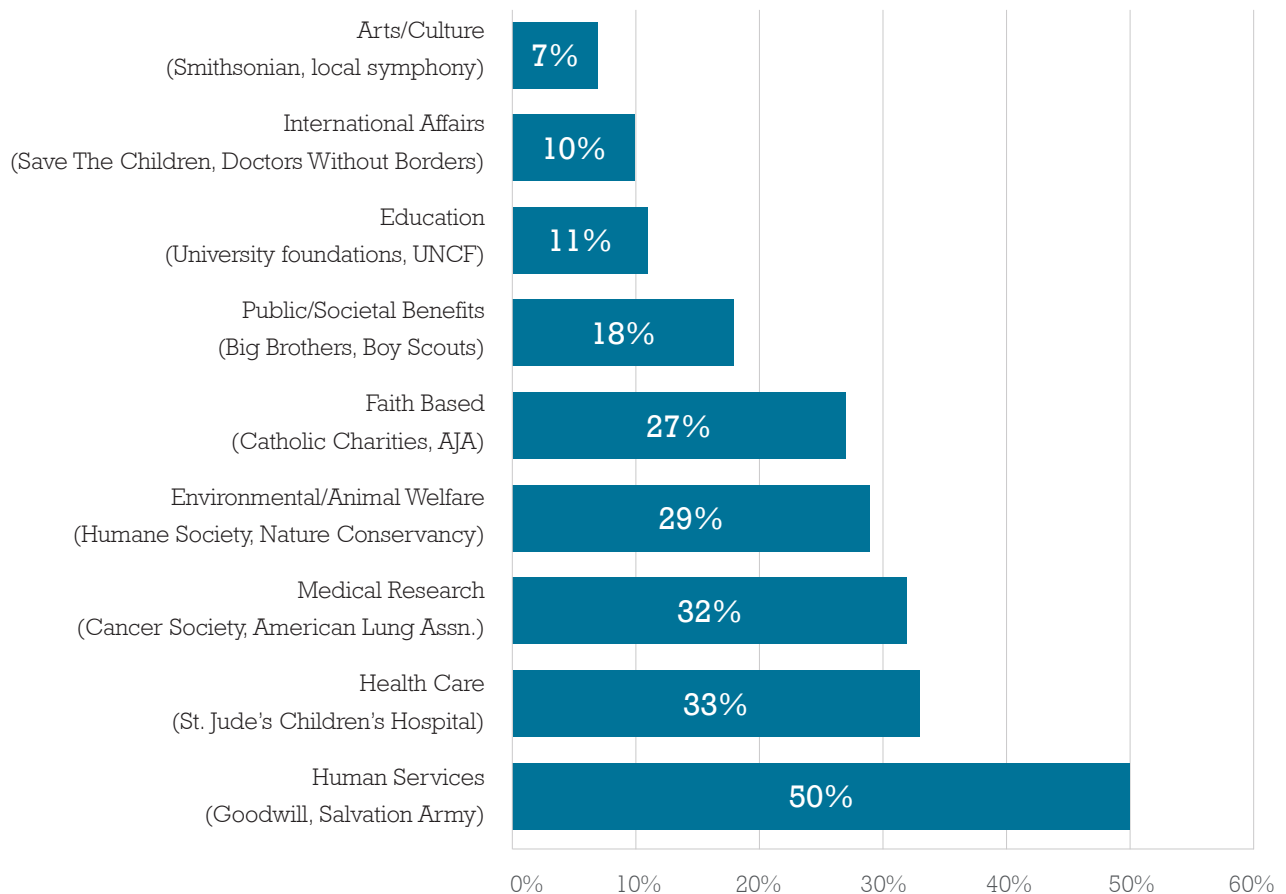


For nonprofits launching new planned giving communication programs—or testing new delivery channels—it may be wise to pay special attention to first responders. Not only are they likely to continue contributing to your organization, but they also are more likely than other donors to act as “ambassadors” for your organization through social contacts.

Donor Preferences and Challenges

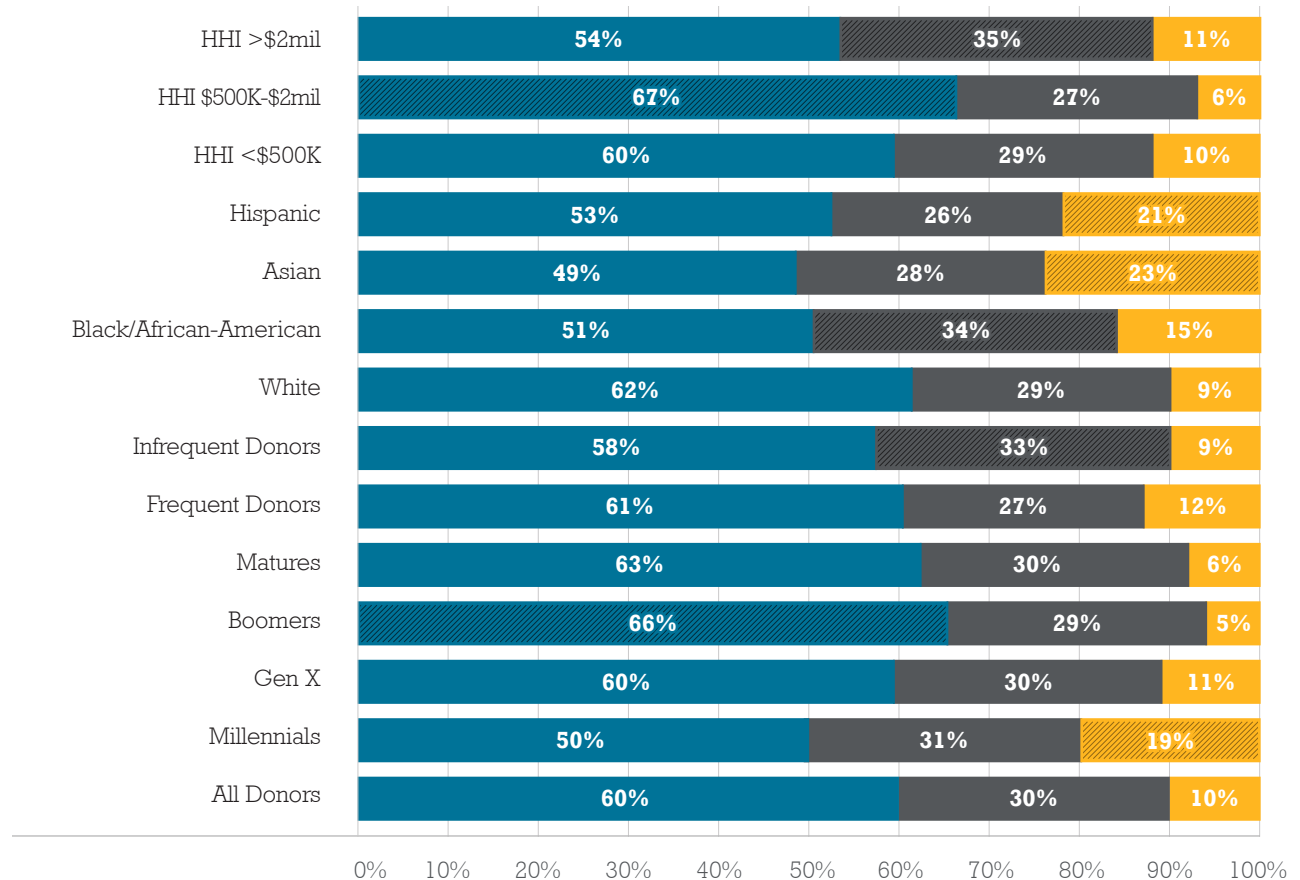
More donors give to human service charities than other types of nonprofits.

Percentage of donors indicating which type of organization they have donated money to in the past year:



Donors Prefer to Keep It Local

Donors of all ages, ethnic backgrounds, household income and net worth prefer to give to local charities over national or global organizations.

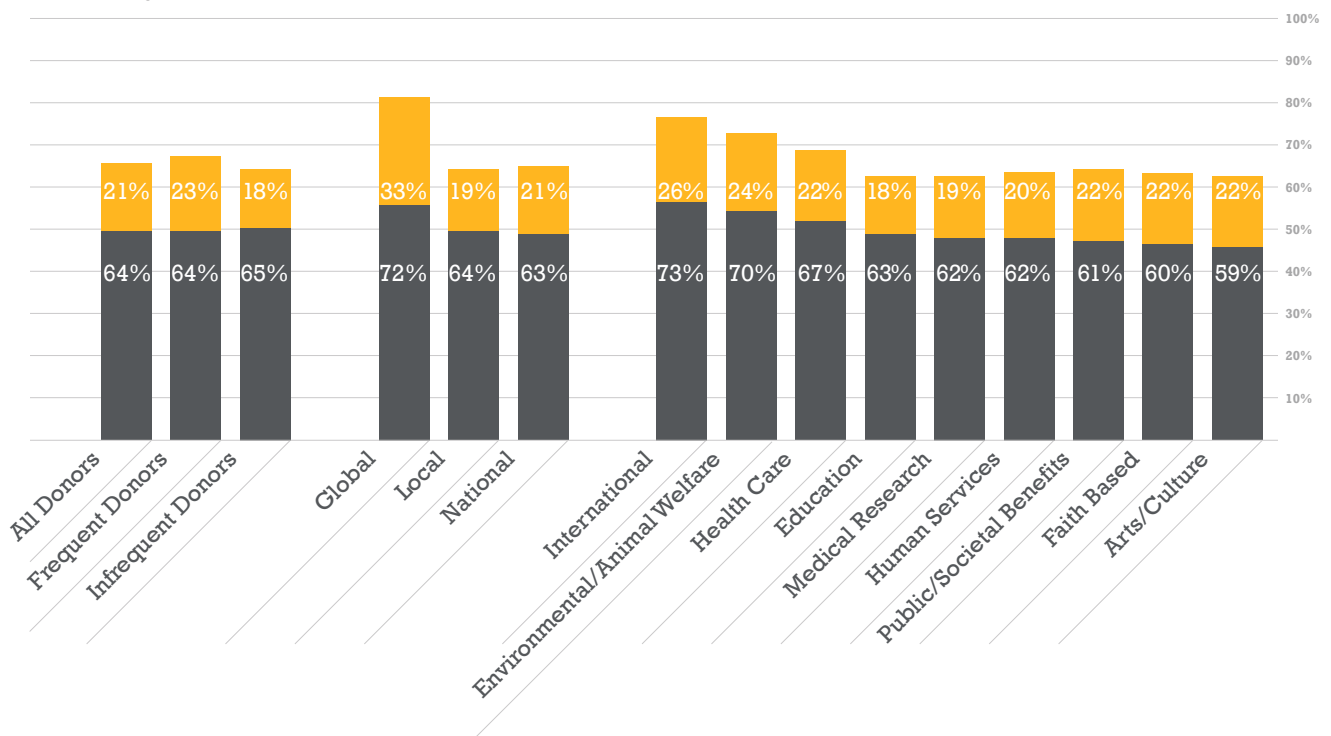


▨ = Outline highlights the groups that are high across the types of preferred organizations

Donor Challenges: A Trust Gap Exists

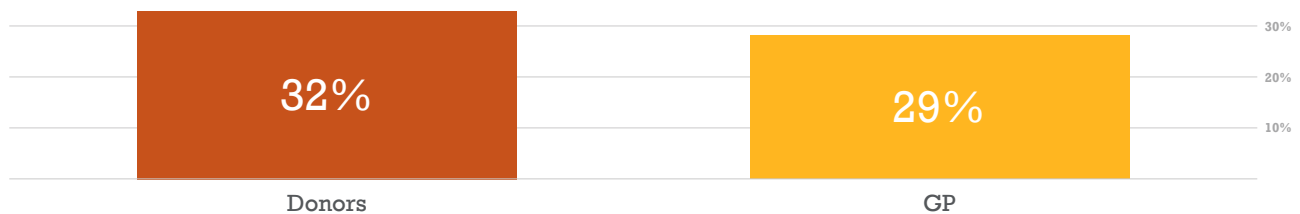
Most donors say they donate only to organizations that distribute 100% of their funds directly to an actual cause. However, only 1 in 5 donors trust an organization to actually do this.

- I donate only to organizations that give 100% of my donation to the actual cause.
- I trust organizations to put 100% of my donation toward the actual cause.

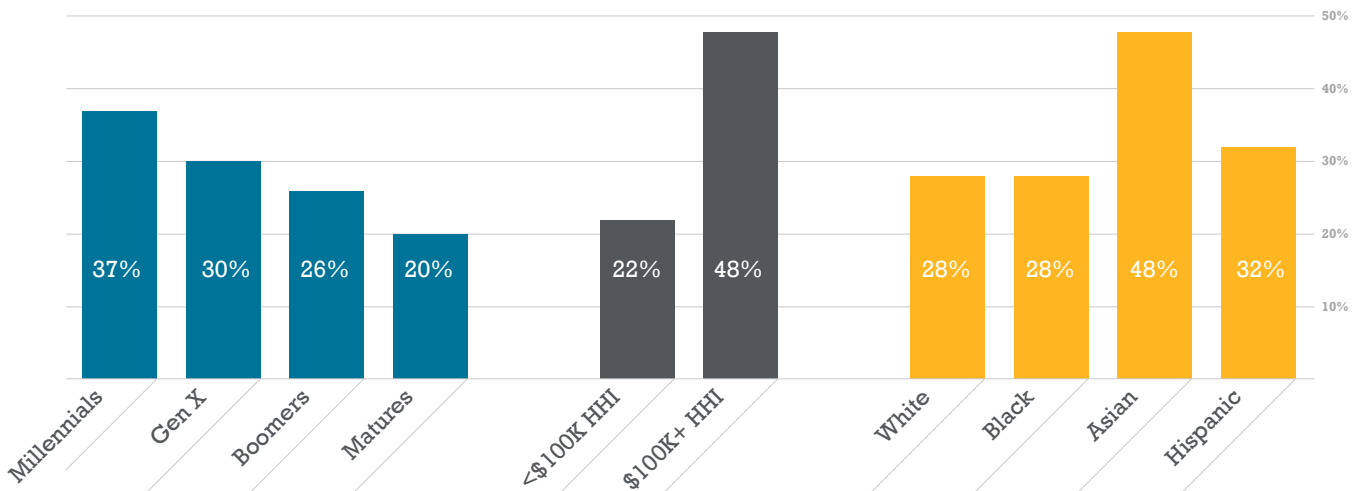


Ability to Donate Today: Notable Demographic Segments

One-third of donors are in a better position to donate to charities today than they were 10 years ago. That is slightly better than the general population (GP).



Percentage of consumers indicating their ability to donate to charities is better today compared to 10 years ago:



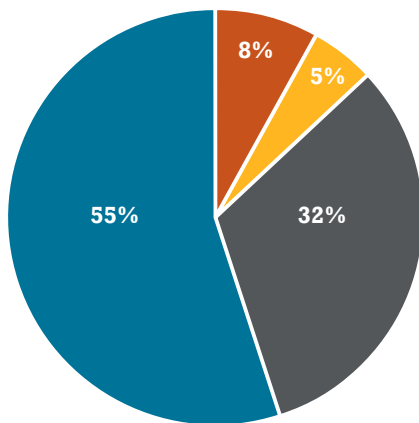
Millennials and those with higher household incomes (HHI) are significantly more likely to respond positively regarding their ability to donate to charitable organizations.

Changing Family Dynamics Present a Challenge to Charitable Giving

Providing care and/or financial support for an adult child or adult family member impacts ability to give.

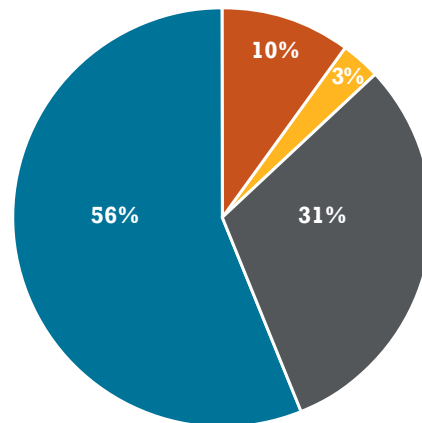
These obligations impact some donors' ability to give to nonprofits.

Of the 14% of donors financially supporting adult child



- = Donate the same as before
- = Donate less than before
- = Donate more than before
- = Did not answer/not sure

Of the 13% of donors in caregiver role



- = Donate the same as before
- = Donate less than before
- = Donate more than before
- = Did not answer/not sure

Generational Unmet Needs

A number of factors that contribute to quality of life are important across all age groups. At the same time, many of these important factors are not working to satisfaction levels leaving big gaps or “unmet needs.” The chart below lists the largest **“importance vs. satisfaction”** gaps for each age group. Notice several of these “needs gaps” are common across multiple age groups.

Of particular note are the differences in unmet need rankings between Matures and Boomers with the latter most concerned with financial issues surrounding retirement from the workforce. These financial issues may impact the size of future charitable gifts or delay gift-making decisions.



Millennials

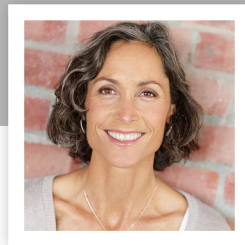
Having enough energy to do what I want to do

Mental/brain health

Having enough money to retire

Financial health

Getting enough sleep



Gen X

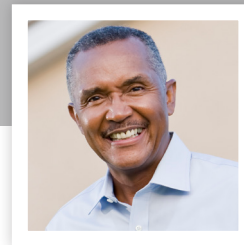
Having enough money to retire

Financial health

Having enough energy to do what I want to do

Having enough money for health care expenses

Getting enough sleep



Boomers

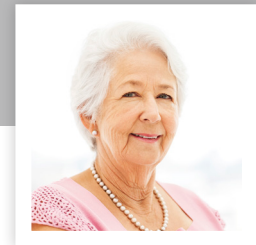
Having enough money to retire

Having enough energy to do what I want to do

Having enough money for health care expenses

Preventing certain diseases or health conditions

Mental/brain health



Matures

Government programs such as Social Security and Medicare

Having enough energy to do what I want to do

Having enough money to retire

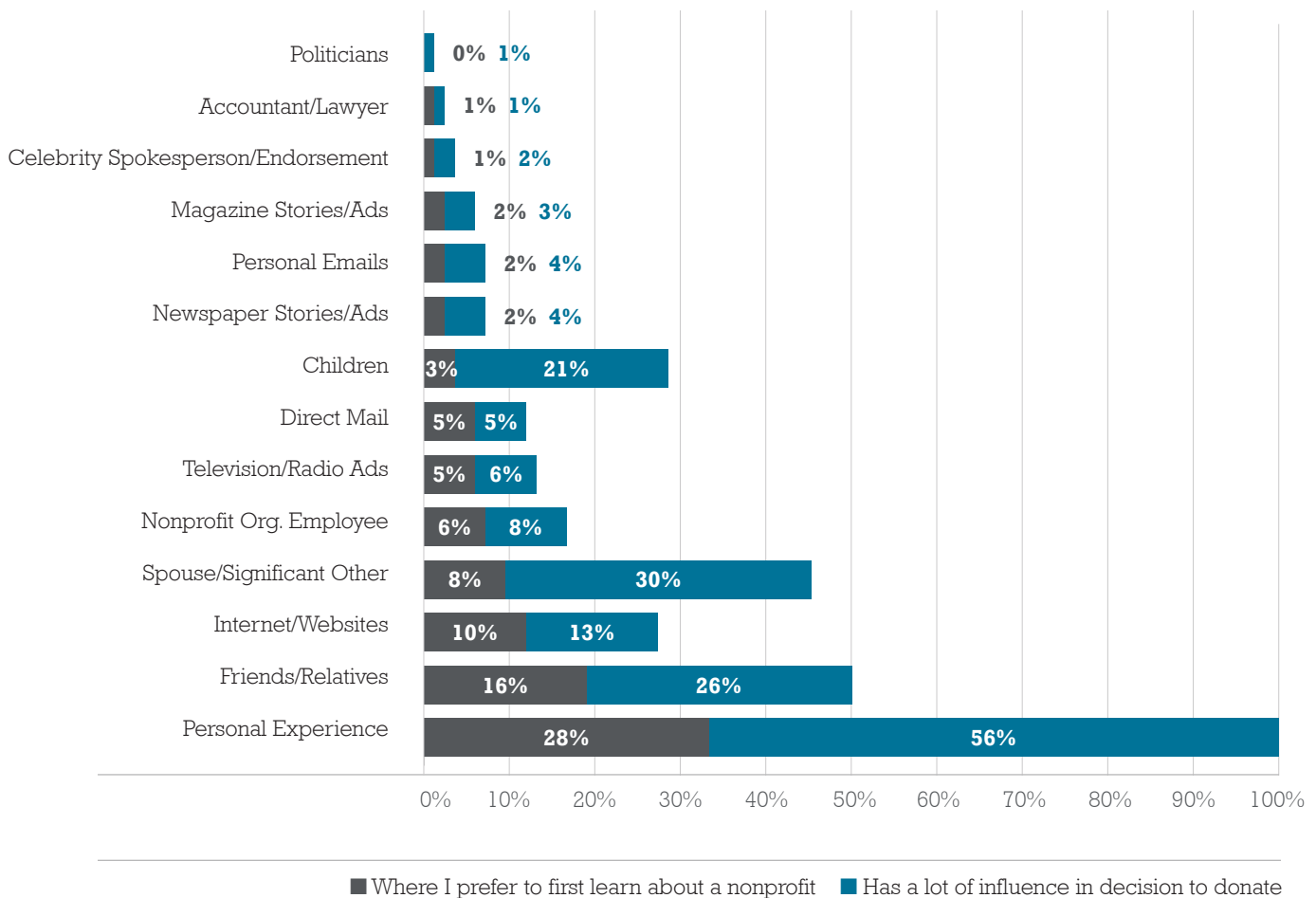
Having enough money for health care expenses

Mental/brain health

Donor Information and Influence Sources

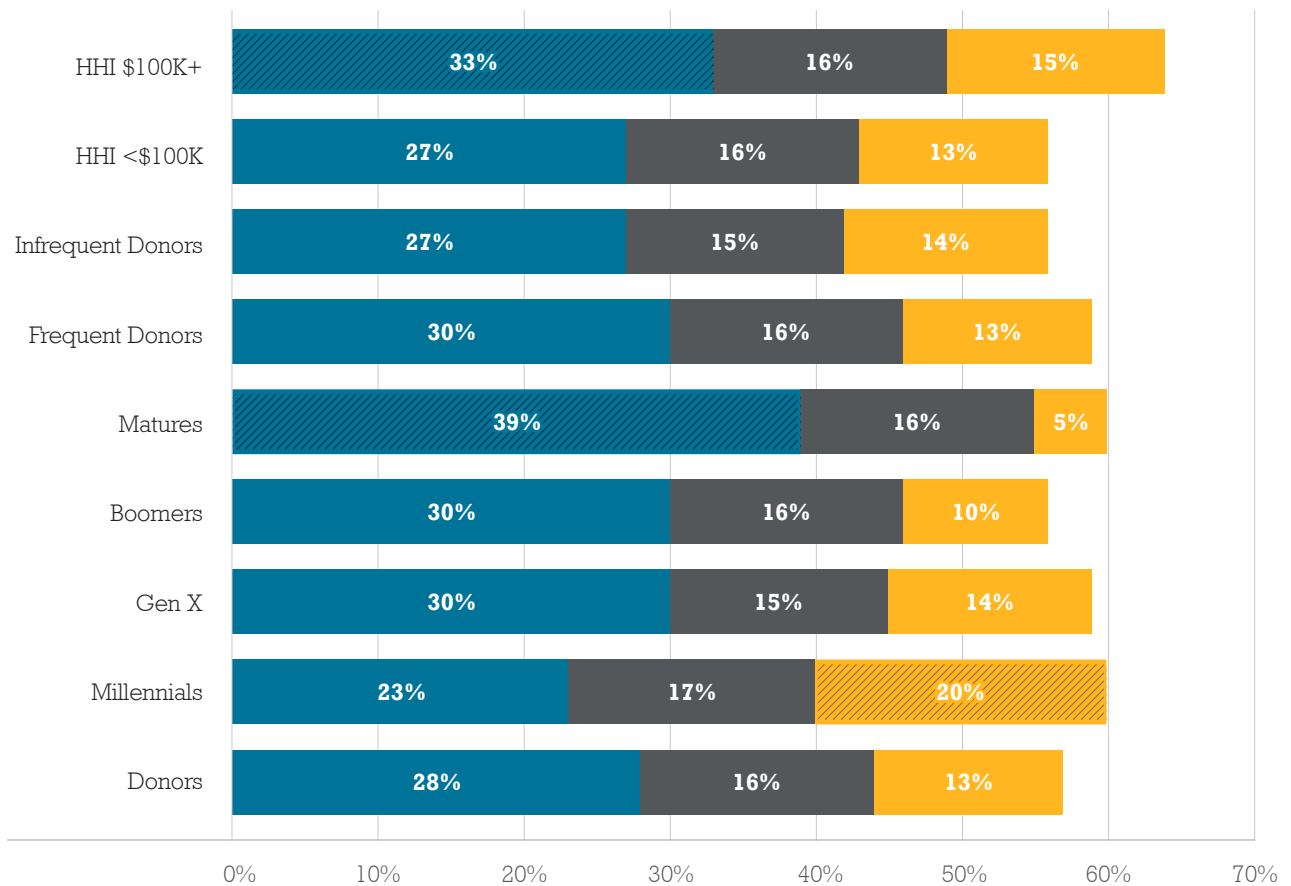
Personal experience, friends/relatives and the Web are top information preferences to learn about a nonprofit.

Personal experience with a charity is by far the **most influential determinant in motivating donors to donate**. People, whether a spouse, friend or relative, are also highly influential.



The Top Three: Where Donors Turn to Learn About a Nonprofit

Matures and higher-income donors have the highest reliance on personal experience with a nonprofit. Millennials are the largest segment using the Web for first learning about a nonprofit.



▨ = Significantly higher compared to other groups within the category

Donor Preference Differs for Initial Information Source

Some charities score higher than others for where donors prefer to first learn about an organization. This is illustrated in the chart below, with an index of 100 representing average and higher index scores (above 120) highlighted by the gray box.

This simply means that while a certain information source—TV/radio ads, for example—may rank toward the bottom of the list for some, contributors to international affairs and health care nonprofits score them as higher than other sources.

	% Donors	Arts/Culture	Education	Environmental/Animal Welfare	Faith Based	Health Care	Human Services	International Affairs	Medical Research	Public/Societal Benefits
Personal Experience	28%	121	116	97	114	93	103	81	106	131
Friends/Family	16%	89	102	83	120	101	109	83	126	98
Websites	13%	113	97	136	68	108	102	157	98	83
Spouse/Significant Other	8%	108	60	108	141	89	99	93	97	127
Nonprofit Org. Employee	6%	128	84	87	58	107	84	101	97	99
TV/Radio Ads	6%	49	62	86	62	117	104	121	86	62
Direct Mail	5%	85	121	104	138	122	109	84	111	67

Web Use: Donors Are Social, Shop and Seek Information

Donors are active in the digital world and show some tendencies to visit certain websites more than non-donors. Facebook tops the list of visited sites—a clear opportunity for nonprofits to integrate social media into their planned giving communication plans.

	% Donors who visit
Facebook	68%
Amazon	67%
Google	55%
YouTube	51%
eBay	32%
Wikipedia	31%
The Weather Channel	27%
Yahoo News	25%
Bing	24%
WebMD	21%
Craigslist	20%
Pinterest	20%
Twitter	19%
Pandora	16%
CNN.com	16%
MSN	16%
Food Network	15%
Instagram	14%
Fox (news, sports, etc.)	14%
LinkedIn	12%
AARP	11%
Trip Advisor	9%
The New York Times	6%
MSNBC	5%
Mayoclinic.com	5%



■ = Denotes significantly more donors than non-donors visit the website

About The Stelter Company

In business since 1962, The Stelter Company is the strategic partner that nearly 2,000 leading nonprofits nationwide depend on most to provide expertise on cultivating valuable, long-term donor relationships through a unique combination of industry insight, customer focus and creative services. Our industry-leading print and digital products and services help nonprofits meet their planned giving goals and provide solutions to tackle the changing communication needs of their donor base. Stelter provides clients strategic counsel with a dedicated project management team, regional marketing representative and our in-house technical consultant.

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