

SNAPSHOT OF TODAY'S

# Philanthropic Landscape

EXECUTIVE SUMMARY



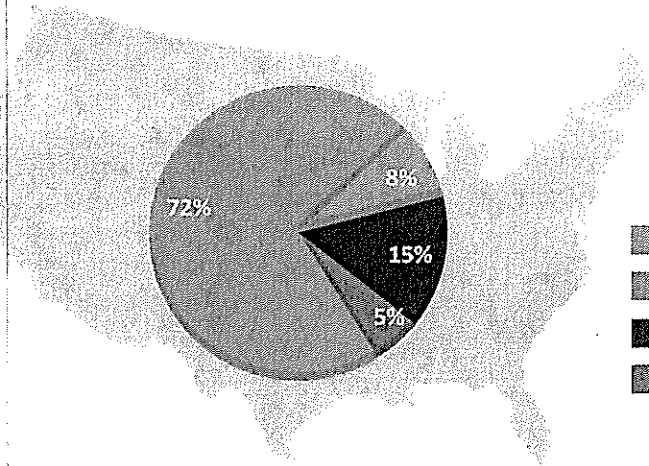
AMERICANS GAVE  
**\$335.17 Billion**  
in 2013



Fundraising · Development Services · Strategic Consulting

# Philanthropy In America

## Where The Money Came From In 2013

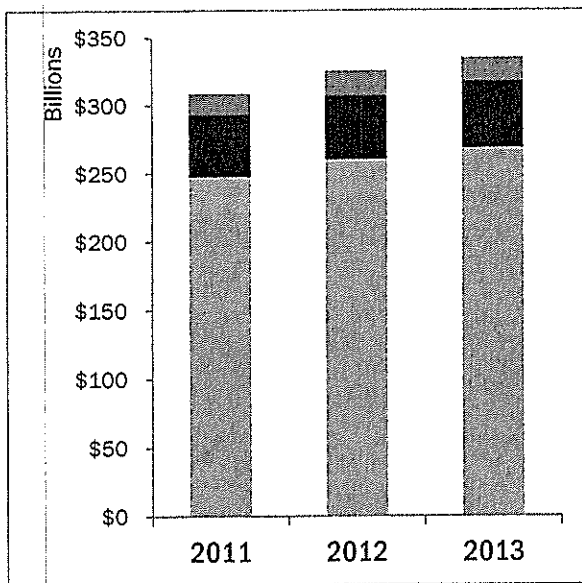


Americans Gave  
**\$335.17 Billion**  
 In 2013

	2013 Giving	2012 vs 2013
Individuals	\$240.60	+4.2%
Bequests	\$27.73	+8.7%
Foundations	\$48.96	+5.7%
Corporations	\$17.88	-1.9%

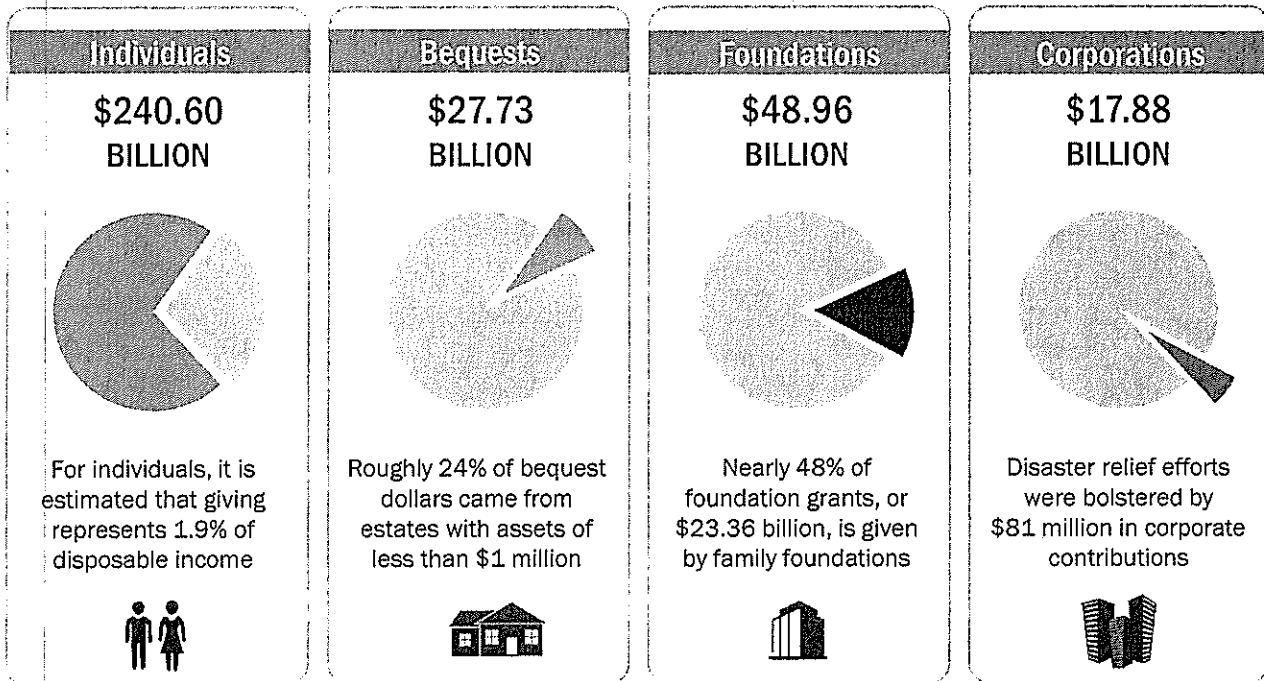
## Where The Money Came From Over The Last 3 Years

In 2013, the \$335.17 billion Americans gave reflects a 4.4% increase from 2012, 3.0% adjusted for inflation.

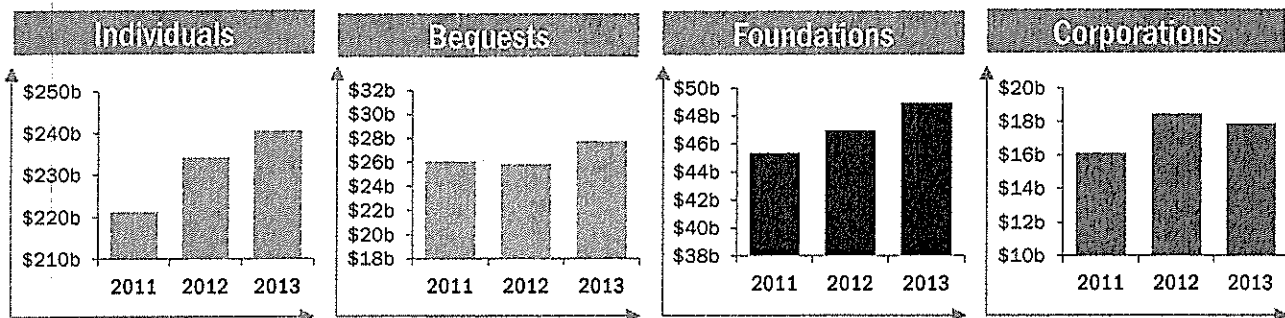


In Billions	2011	2012	2013
Individuals	\$221.39	\$234.19	\$240.60
Bequests	\$26.07	\$25.86	\$27.73
Foundations	\$45.37	\$47.00	\$48.96
Corporations	\$16.13	\$18.48	\$17.88
<b>Total</b>	<b>\$308.96</b>	<b>\$325.53</b>	<b>\$335.17</b>

## Where The \$335.17 Billion Came From In 2013



### Where The Money Came From Over the Last 3 Years

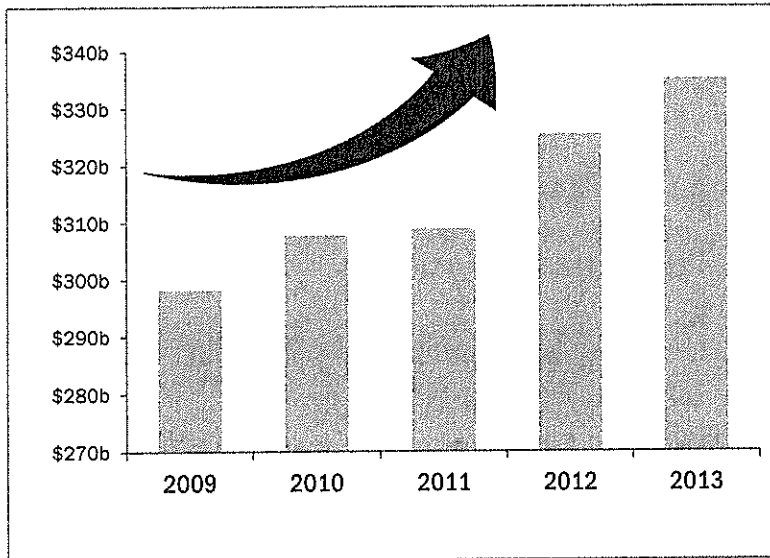


#### Insights

- Individual giving accounts for an estimated 87% of all giving, inclusive of bequests and family foundation giving.
- Giving by individuals has returned nearly to pre-Economic Crisis levels, attributed to much larger gifts and bequests.
- Historically, corporate giving increases, though not proportionally, as company profits rise. Corporate profits have increased more slowly in recent years, which is reflected in the slight decrease in corporate giving.

## Total Giving In The U.S. Has Increased By \$36.8 Billion (Inflation Adjusted) In The Last Five Years

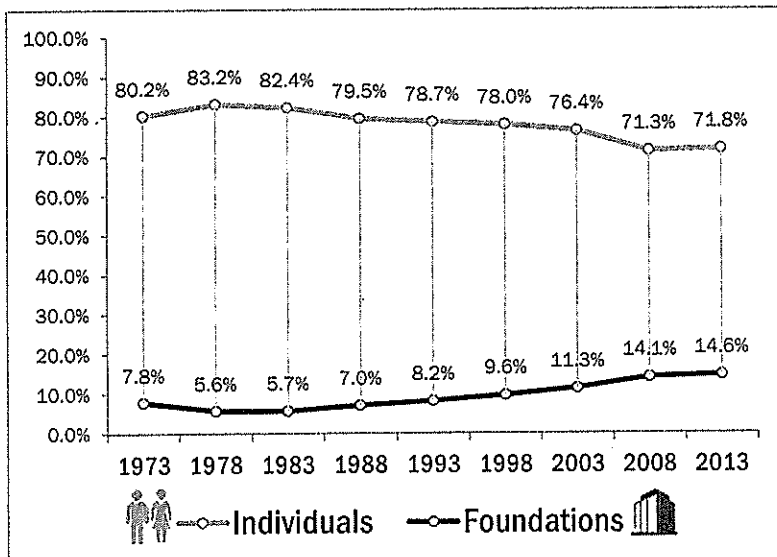
- Since 2009, the rate of change in total giving was 12.3%, adjusted for inflation.



### What this means

If charitable giving continues to grow at the current rate, giving will return to pre-recession high of \$349.50 billion (adjusted for inflation) in just one more year.

- The proportions of giving from corporations and bequests have remained relatively steady since 1973.
- The percentage of giving that comes from foundations has steadily increased, while the percentage of giving from individuals has declined.



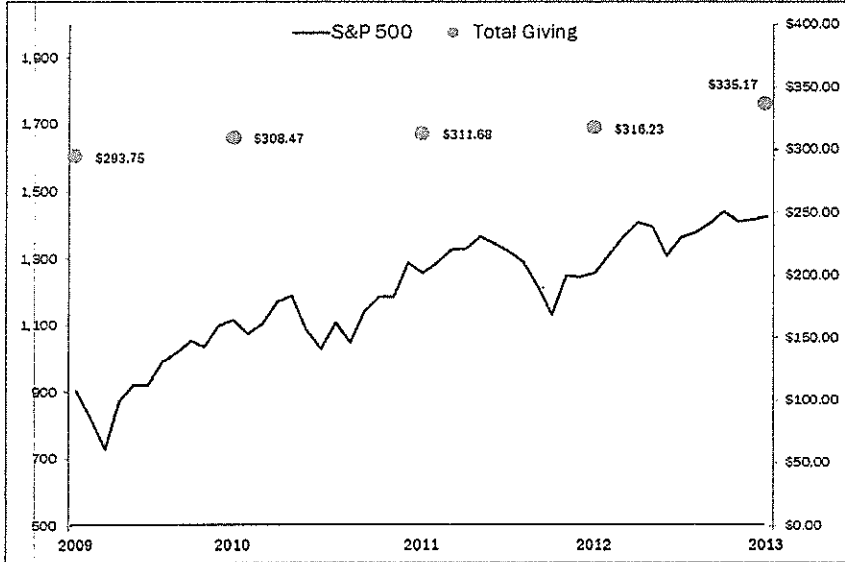
### What this means

The decline in the percentage of individual giving and increase in the percentage of foundation giving likely can be attributed to individuals shifting their philanthropic giving to their family foundations.

# Overall Giving Correlates To Stock Market Performance

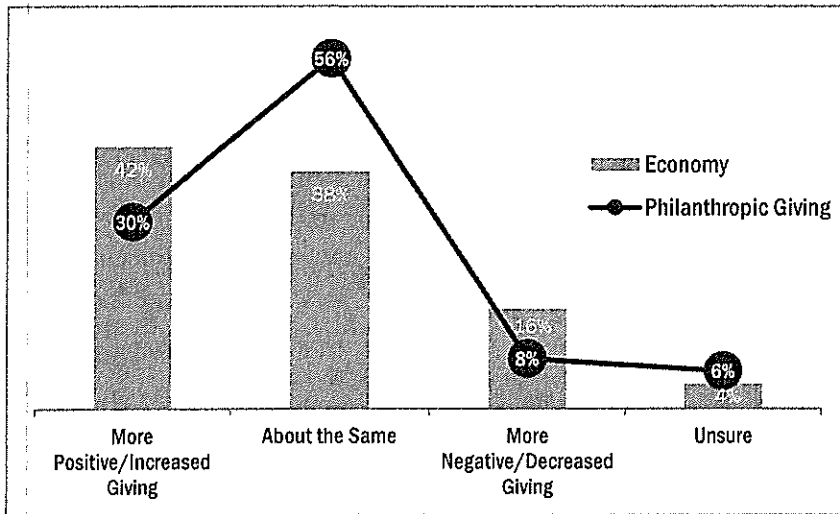
Over The Last Year, The Stock Market Has Seen A Nearly 30% Increase

Since 2009, the S&P 500 has doubled, and overall giving has also increased, though at a much slower rate.



## Outlook on Economy Impacts Philanthropic Giving Positively<sup>1</sup>

Analysis of Interview Results of 2,000+ Non-profit Stakeholders From June 2013 to May 2014



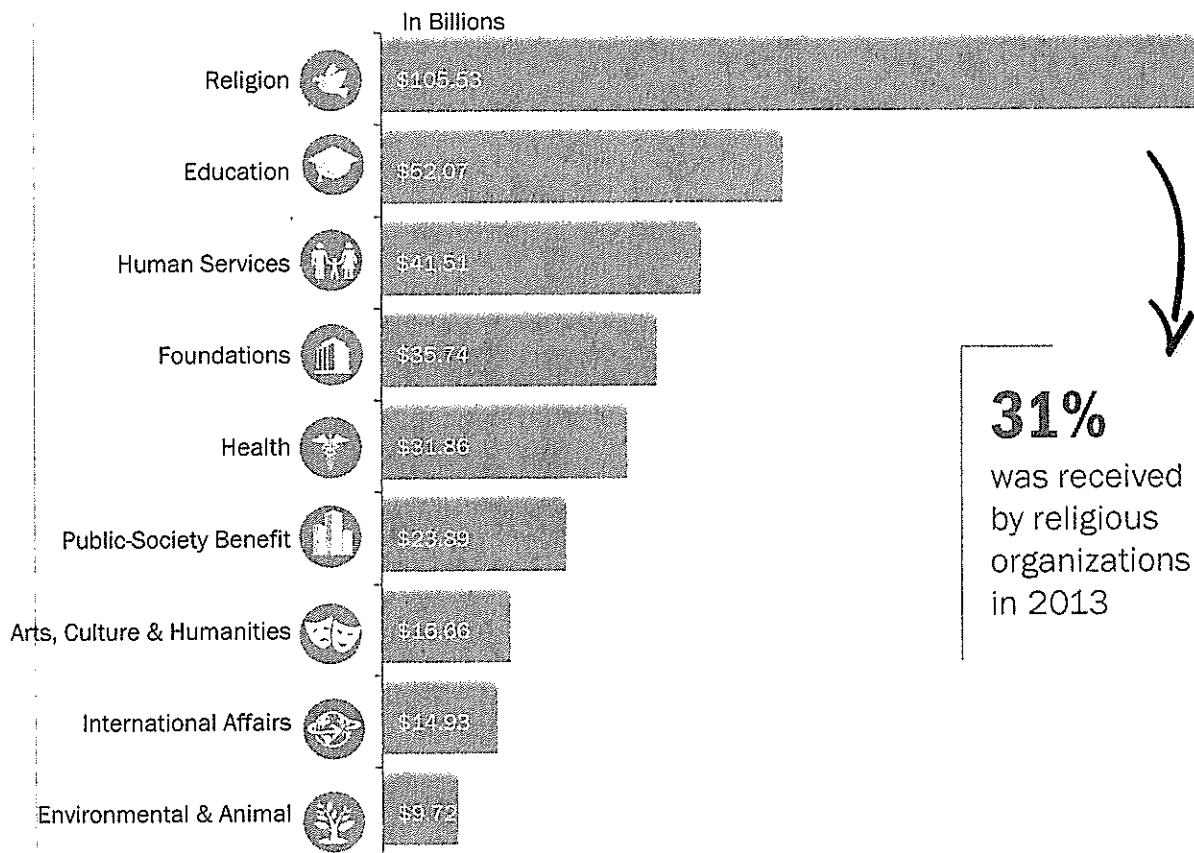
## Uptick in the Economy Impacting Philanthropic Giving

- ▶ The S&P 500 can be used as a strong indicator of charitable giving. When the Market is doing well, households and corporations are more likely to give. Other factors include income, the unemployment rate, consumer confidence, and corporate earnings.
- ▶ 42% of non-profit stakeholders feel more positively about the economy this year compared to last, a 3% increase from last year.<sup>1</sup>
- ▶ 86% of non-profit stakeholders said they would give more or about the same to charity this year compared to last, a 5% increase from last year.<sup>1</sup>

Source: Giving USA Foundation (Giving USA 2014)  
<sup>1</sup>CCS Analytics (2014)

## Where Does The \$335.17 Billion Go?

Religious Organizations Received The Largest Share Of Charitable Dollars 1972-2013

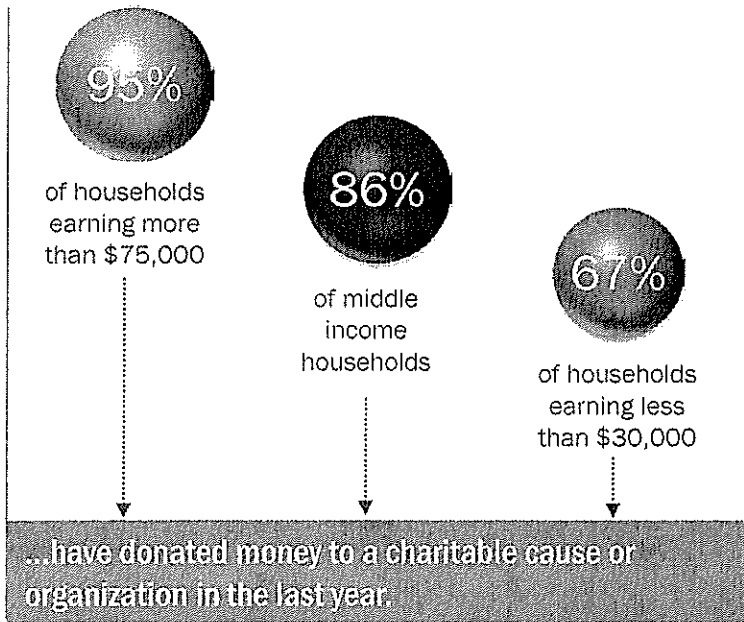


### Insights

- Religious giving, as a percent of all giving, has declined since 1984. In 2013, the total dollar amount attributed to this sector decreased slightly. These trends reflect a decline in both worship attendance and the number of individuals with religious affiliations.
- Rapid growth in giving to the education sector can be linked to an increase in the number of capital campaigns.
- The human services sector saw counter-cyclical growth rallied by the demand for support during the recession. A shift to pre-recession giving preferences by donors has resulted in slower growth for this sector.
- Consistent support of the health sector mirrors donors' commitment to researching cures, supporting facilities, and funding innovative new research.
- Arts organizations were forced to refocus their fundraising efforts during the recession, as wealthy donors shifted their support away from the arts. The increase in giving to the arts in recent years may be the result of these donors returning to their pre-recession giving behavior.

# Why Do People Give?

**83%**  
of Americans  
have donated  
money to a  
charitable  
cause or  
organization in  
the last year.<sup>1</sup>

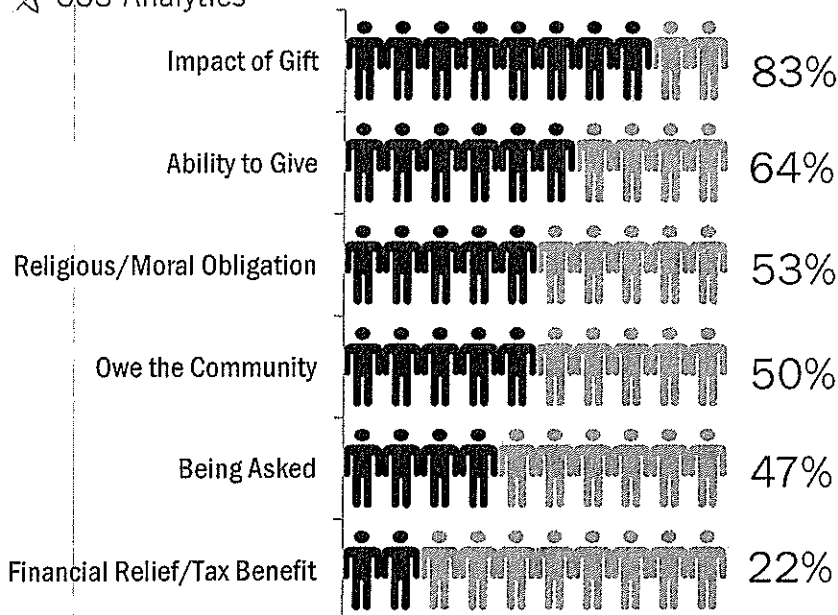


## Top Reasons

- 1 People are inherently generous
- 2 People give to people
- 3 People respond to a meaningful mission
- 4 People give to the person who asks
- 5 People respond to specific requests for support
- 6 People respond to successful and beneficial programs
- 7 People give in a campaign atmosphere - annual or capital
- 8 Most people want, and all deserve, recognition for their gifts
- 9 People relate a gift to a specific need or project
- 10 People give to positive, enthusiastic solicitors
- 11 People give most often to their peers
- 12 People give because they are asked

## Donors Give Based On The Impact Of Their Gifts<sup>2</sup>

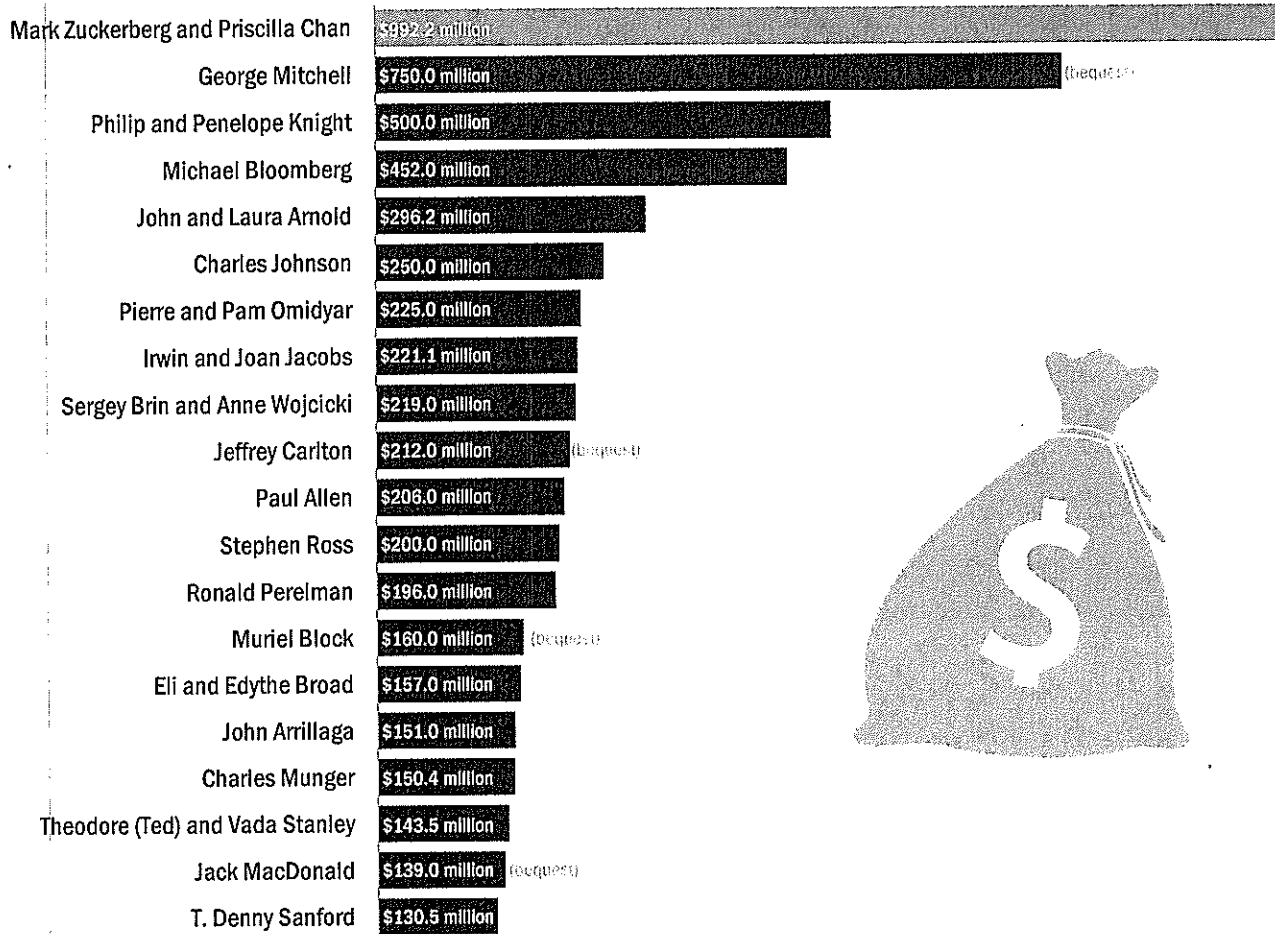
Analysis of Interview Results of 32,000+ Non-Profit Stakeholders Since 2011



Source: <sup>1</sup>Gallup Poll, 2013; <sup>2</sup>CCS Analytics (2014)

# The Philanthropy 50: A Perspective On Top Donors

The 20 Largest Donors in the United States in 2013  
(in terms of new commitments)



## The Philanthropy 50: Who They Are and How They Give

