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DONOR SENTIMENT A MIXED BAG: ACTIVE IN FUNDRAISING BUT WEAK IN CONFIDENCE

This report takes a deeper look into the influences of donor sentiment within the type 1 diabetes community. It is based on a survey conducted during June of 2014 among the T1D community.

Conclusions:

- Finding a cure remains the number one reason why people give. 88% state raising money for a cure is the primary reason they participate in fundraising activities. Cure as a top priority is consistent with all other JDCA surveys conducted over the past 3 years.
- Donors are engaged and active in fundraising for their primary charity. Seven out of 10 respondents participate in fundraising activities and/or make direct donations.
- While cure is a priority and donors are highly engaged, they express very low confidence that a cure will be found in the near future. 53% express ambivalence toward the performance of their primary charity.

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Donor Sentiment a Mixed Bag: Active in Fundraising but Weak in Confidence

This is the fourth survey-based report that tracks donor attitudes, expectations and priorities. It builds upon two previous survey reports, [Cure Attitude and Trends Survey: Donors Value Speed and Focus](#) (March 2014) and [What Do Donors Expect from the Major Type 1 Non-Profits](#) (June 2013).

In particular, our latest survey uncovers several deeper trends related to giving. It reveals a few important, but conflicting attitudes, including the fact that donors give money because they want a cure, but have low confidence that a cure will be found anytime soon. While many donors are satisfied with their non-profit of choice, just as many are ambivalent about the organization they support.

Survey Method and Screening:

The survey was conducted online through a third party platform. Respondents were screened for a direct connection to type 1 diabetes. Among the respondents, 43% have type 1 diabetes themselves while the remainder have a close family member or close friend with type 1.

All respondents were asked a series of questions about their 'primary charity' (or organization) that they support most often. The primary charities included the big fundraising organizations like the JDRF, ADA, and DRI; as well as a range of other regional research centers like The Naomi Berrie Diabetes Center, UCSF, Faustman Labs, etc.

Age was well distributed among adult age groups. 78% of respondents were between the of ages 35 and 60, suggesting that respondents were primarily adults with type 1 diabetes and parents/caregivers of children with type 1 diabetes.

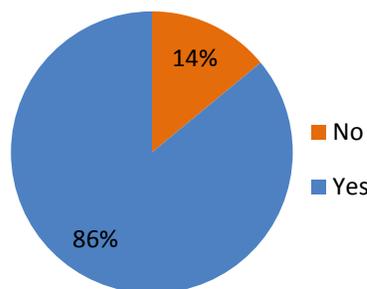
The survey has a 90% confidence interval with an 8.5 margin of error.

1. The type 1 diabetes community is highly active in fundraising.

The overwhelming majority of survey respondents annually participate in raising money for type 1 diabetes organizations. Nine out of 10 say that they have either donated directly to a diabetes charity or participated in a fundraising event over the past 12 months. This level of support is consistent with previous JDCA surveys and demonstrates the ongoing passion and commitment of the type 1 community for finding a cure.

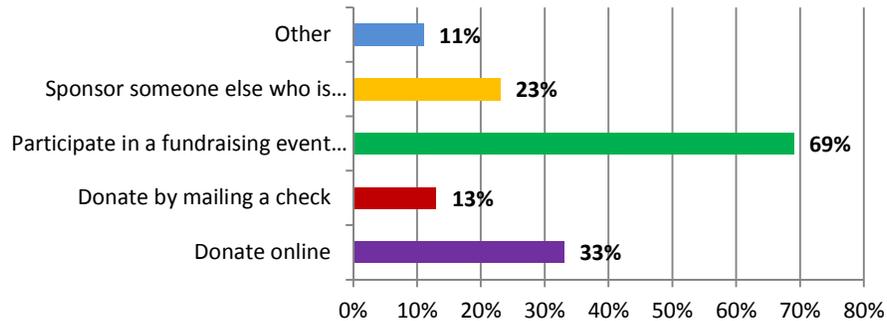
Exhibit 1: Have you donated to or raised money for type 1 diabetes in the past 12 months?

This can include mailing a check, making an online donation, participating in a walk/ride, sponsoring someone else in a walk/ride, and/or hosting your own fundraising event.



More specifically, fundraising events are the primary point of engagement for the type 1 community. 69% participated in a fundraising event, such as a walk, gala, ride, etc. for their primary charity this year. The community also gives directly to their primary charity, with 46% of people indicating that they either donate online or mail personal checks.

Exhibit 2: How do you support your primary charitable organization/research center?

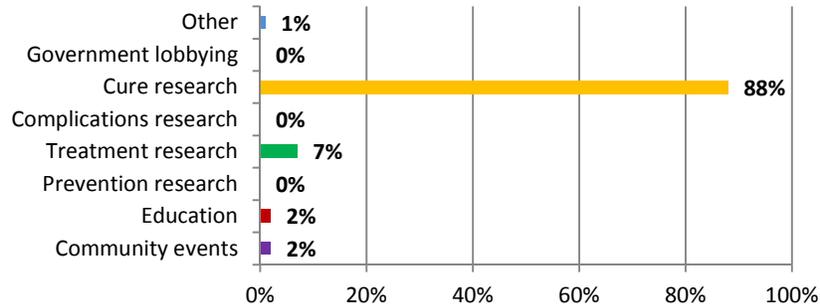


The type 1 community also expects to remain highly engaged in fundraising events during the year ahead, with 93% indicating that they plan to donate or participate in the next 12 months.

2. Cure remains the number one reason donors give.

Cure research is the undisputed top priority of respondents. Nine out of 10 indicate that the number one motivation for either making a donation or participating in a fundraising activity is to raise money for cure research.

Exhibit 3: What is the top activity that you want your donation to be used for?



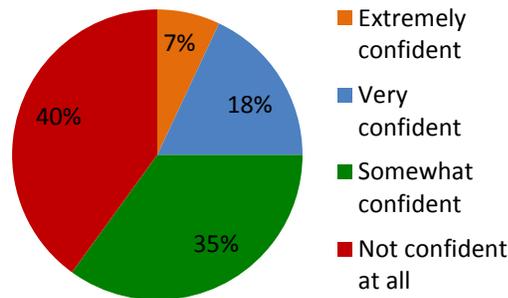
This priority is consistent with all previous surveys of donor priorities and values conducted by the JDCA. And, yet, as noted in past reports, there remains a gap between the top reason money is given by donors and the actual utilization of the funds. On average, only 18% of total funds raised by donors are being used for type 1 cure research ([90% of Fundraising Events Use a Cure Message, but Only 18% of Total Funds Go to Cure Research](#), September 2013).

3. The T1 community has low confidence that a cure will be found.

The majority of donors are not optimistic that a cure will be found in the near future.

A full 75% of respondents indicate no or low confidence that a cure will be found in the near future. More specifically, 40% of respondents say that they are “not confident at all” and another 35% indicate that they are only somewhat confident.

Exhibit 4: How confident are you that a cure will be found in the near future?



This sentiment has not changed over the last 12 months. When asked to compare their confidence level today versus a year ago, most respondents said that they have exactly the same level confidence (or lack thereof). We do not expect this trend to change until there is a genuine breakthrough in cure research.

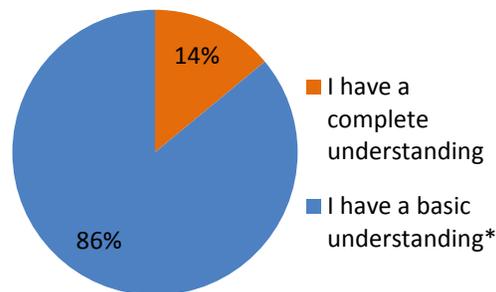
4. Donors are not well informed about how their donation is used.

Donors do not feel they have a strong understanding of how their money is being used, due in part to how they are kept informed and in part to a lack of transparency. There is a clear opportunity from this data for the primary charities to improve communication with donors.

More specifically, only 14% of respondents indicate that they have a full understanding of how their donation is used; while the other 86% express only 'basic' or limited knowledge. Improving this response presents a great opportunity for the charities to enhance their relationship with donors by providing a more direct communication about how the donation is utilized and what progress has been made with those additional resources.

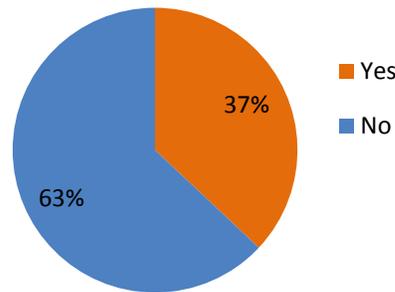
Exhibit 5: How aware are you of what your donation is used for?

**This includes "I have a basic understanding", "I have very little understanding", and "I have no understanding".*



Furthermore, only 37% indicate that once they make a donation they are informed by the charity about the impact of their gift. The remaining 63% say that once they have given to their primary charity they do not receive any return communication about impact, which presents another opportunity for fostering enhanced donor relationships. This finding echoes [Cure Attitude and Trends Survey: Donors Value Speed and Focus](#) (March 2014).

Exhibit 6: Once you make a donation, are you informed by your primary charity on the impact that the donation made?

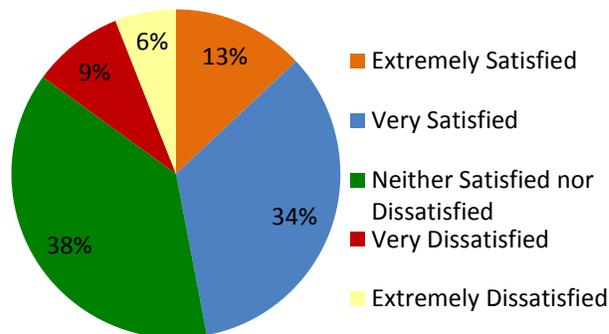


It is worth noting that among the minority 37% who feel that they are informed about how their donation is used, email is the primary communication vehicle (51%) while mailing is the secondary vehicle (27%). Website, phone-calls, event-based communication, etc. are all tertiary.

5. On average, donors are ambivalent about their primary charitable organization (despite their participation in fundraising events).

While some donors express overall satisfaction with their primary type 1 charity, just as many are ambivalent. Slightly more than half of survey respondents (53%) express a lack of satisfaction or ambivalence toward the overall work of their primary charity.

Exhibit 7: How satisfied are you with the work of the primary charitable organization/research center that you support?



This fact stands in stark contrast to the data shared in the first takeaway of this report, which showed that the majority of the type 1 community actively participates in fundraising events for their primary charity and plans to continue to do so in the future. While we cannot identify specifically from this survey why there is an apparent conflict in sentiment, it is plausible that the answer is found in donor desire for a cure in the near term and their lack of confidence that it will be delivered in that time frame.



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