

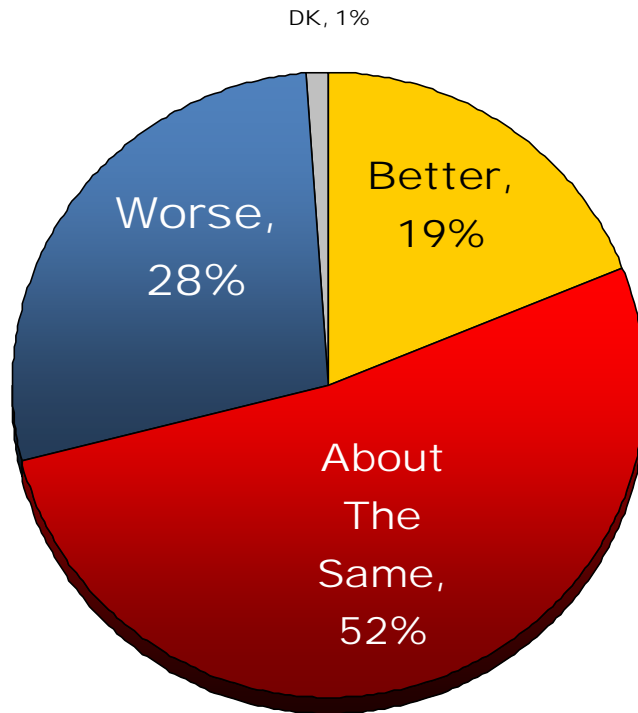
# Holiday Giving Poll

**October 2011**

Telephone survey of 1,020 U.S. Adults 18 years and older on September 29 - October 2, 2011 conducted in ORC International's CARAVAN<sup>®</sup> survey using a landline-cell dual-frame sampling design. Margin of error is +/- 3.1 percentage points at the 95% confidence level.

Report Date: October 4, 2011

Compared to last year, personal finances for more than half of Americans are about the same, while more than a quarter say they are financially worse off.

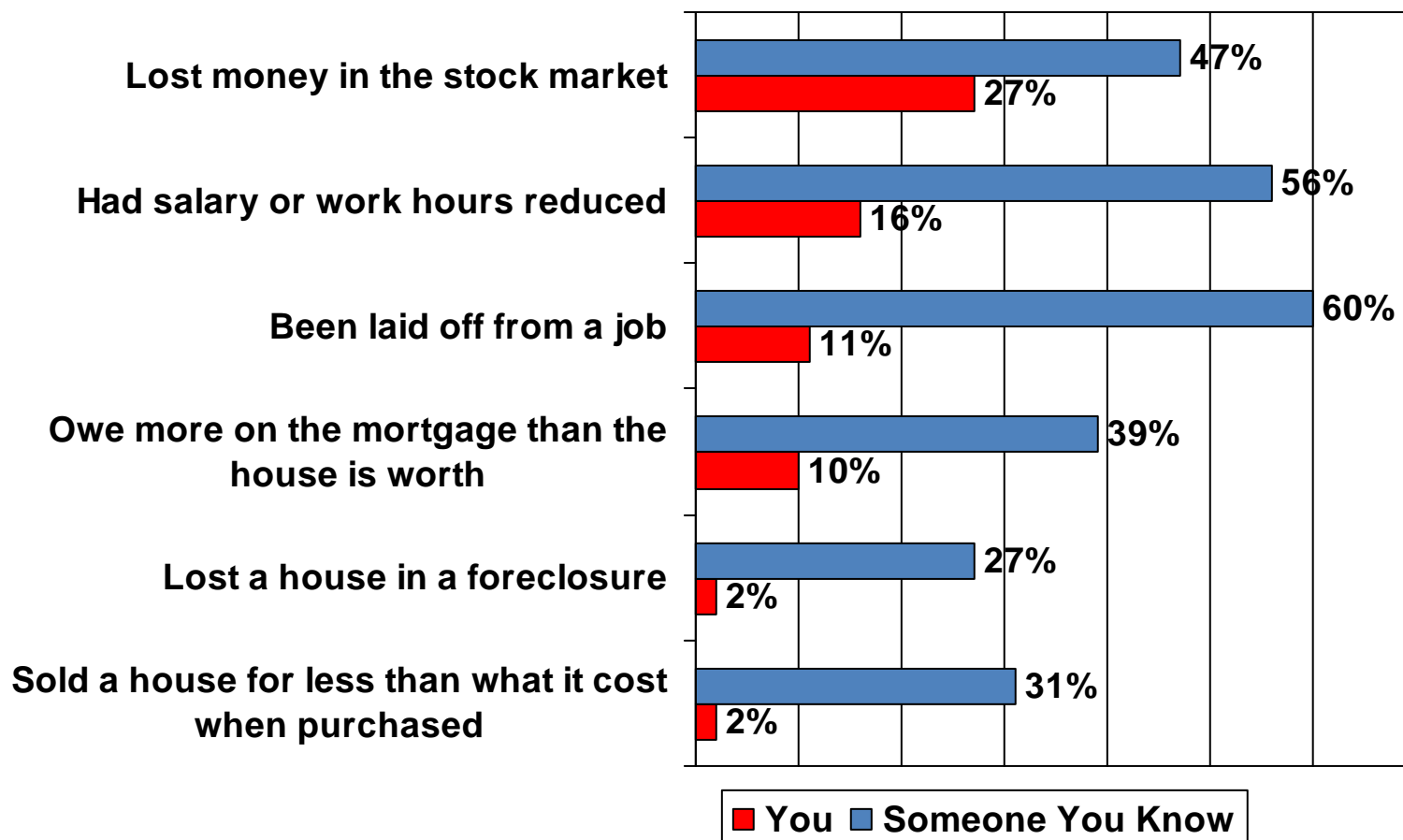


•Compared to older respondents, younger respondents are more likely to feel that they are doing better this year compared to last November (For example, 33% for 18-34 compared to 5% for 65 and over)

Compared to early November LAST year, would you say that your financial situation is better, worse, or about the same?



One in six Americans experienced a reduction in salary or work hours.

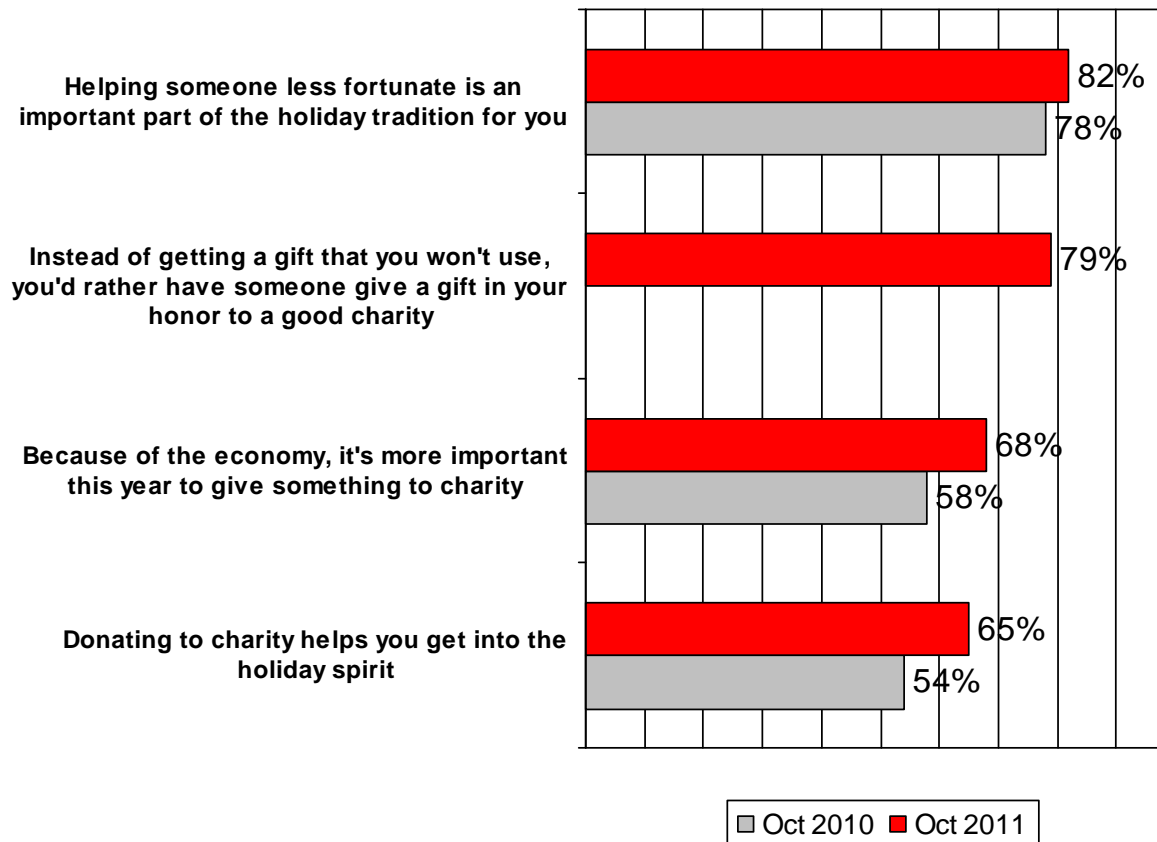


Have you or has someone you know been affected by the economy over the past three years in any of the following ways? Would you say . . .



# Instead of receiving a gift they won't use, eight in ten would rather that someone gave a gift in their honor to a good charity

Table shows top two boxes (5 Completely Agree and 4)



To what extent, on a scale of 1 to 5, with 1 being completely disagree and 5 being completely agree, do you agree or disagree with the following statements?



# Gender Differences

Table shows top two boxes (5 Completely Agree and 4)	Men	Women
Helping someone less fortunate is an important part of the holiday tradition for you	79%	84%
Because of the economy, it's more important this year to give something to charity	65%	71%
Instead of getting a gift that you won't use, you'd rather have someone give a gift in your honor to a good charity	75%	82%*
Donating to charity helps you get into the holiday spirit	61%	70%*

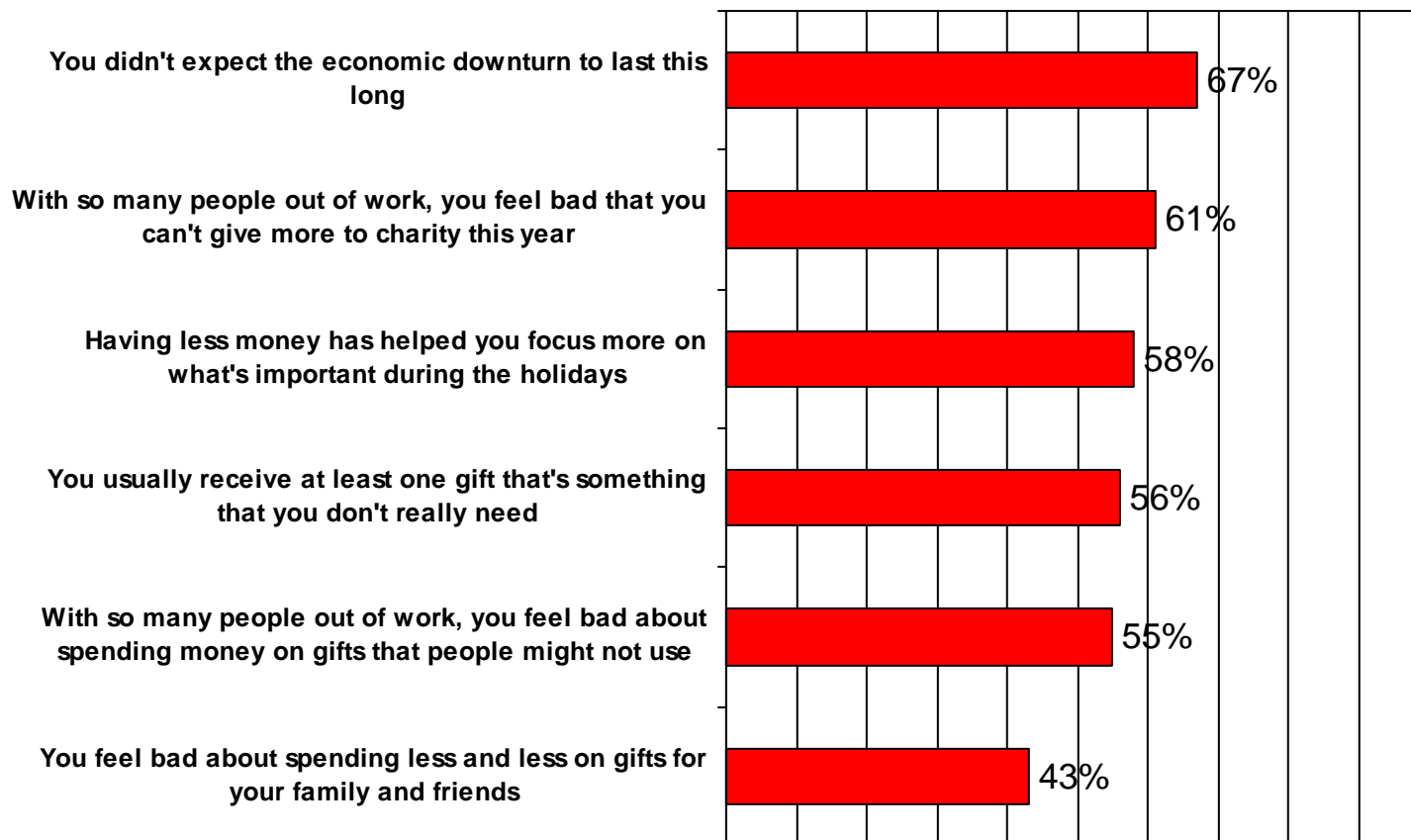
\* Differences are statistically significant.

To what extent, on a scale of 1 to 5, with 1 being completely disagree and 5 being completely agree, do you agree or disagree with the following statements?



# More than half usually receive at least one gift that's something they don't really need

Table shows top two boxes (5 Completely Agree and 4)



Thinking about the fact that the economy has been in a downturn for three years now, to what extent, on a scale of 1 to 5, with 1 being completely disagree and 5 being completely agree, do you agree or disagree with the following statements?



# Gender Differences

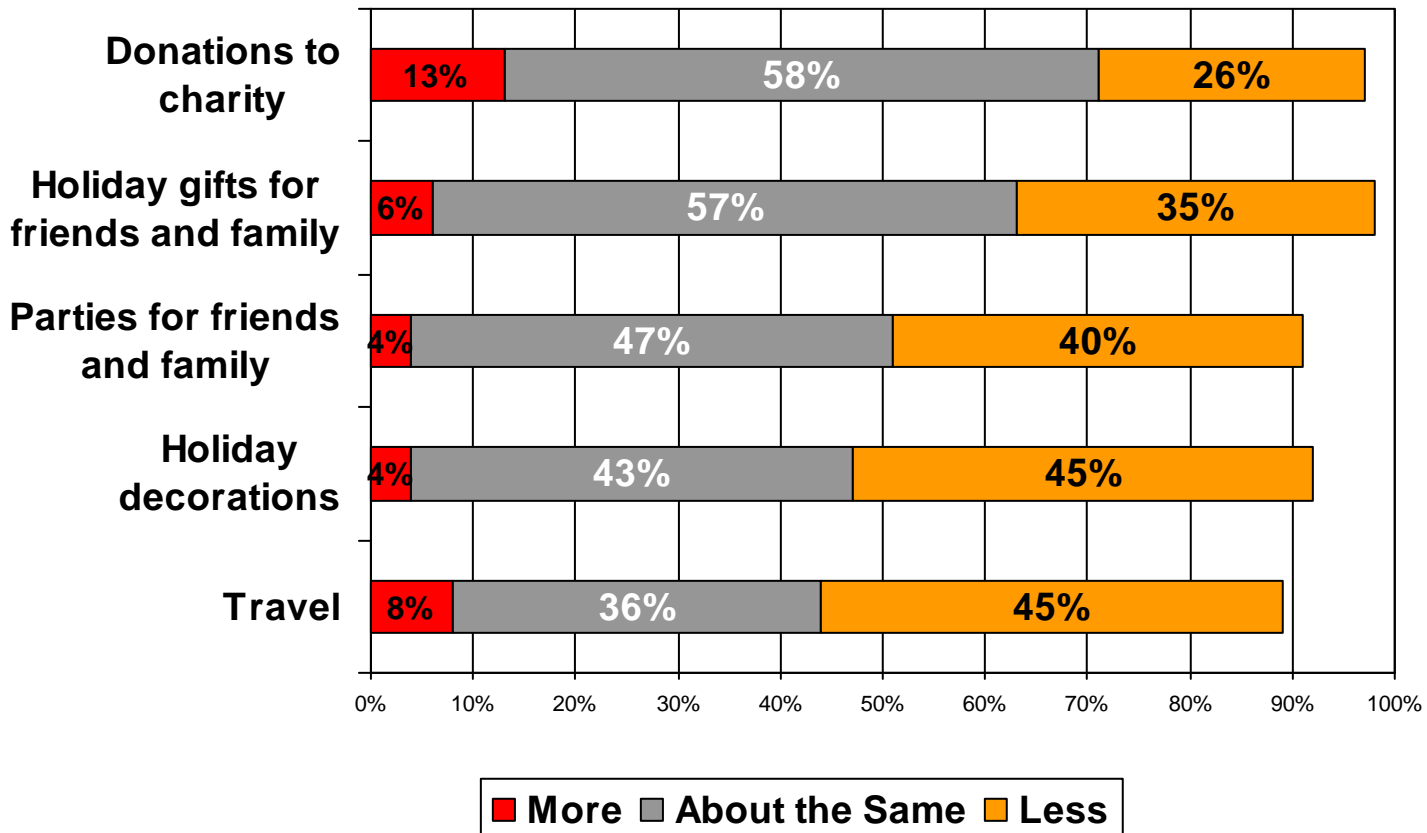
Table shows top two boxes (5 Completely Agree and 4)	Men	Women
You didn't expect the economic downturn to last this long	62%	71%*
With so many people out of work, you feel bad that you can't give more to charity this year	51%	71%*
Having less money has helped you focus more on what's important during the holidays	49%	66%*
You usually receive at least one gift that's something that you don't really need	53%	58%
With so many people out of work, you feel bad about spending money on gifts that people might not use	48%	61%*
You feel bad about spending less and less on gifts for your family and friends	40%	46%

\*Differences are statistically significant

To what extent, on a scale of 1 to 5, with 1 being completely disagree and 5 being completely agree, do you agree or disagree with the following statements?



Americans are most likely to economize on travel (45%) and holiday decorations (45%), and least likely to economize on donations to charity (26%)

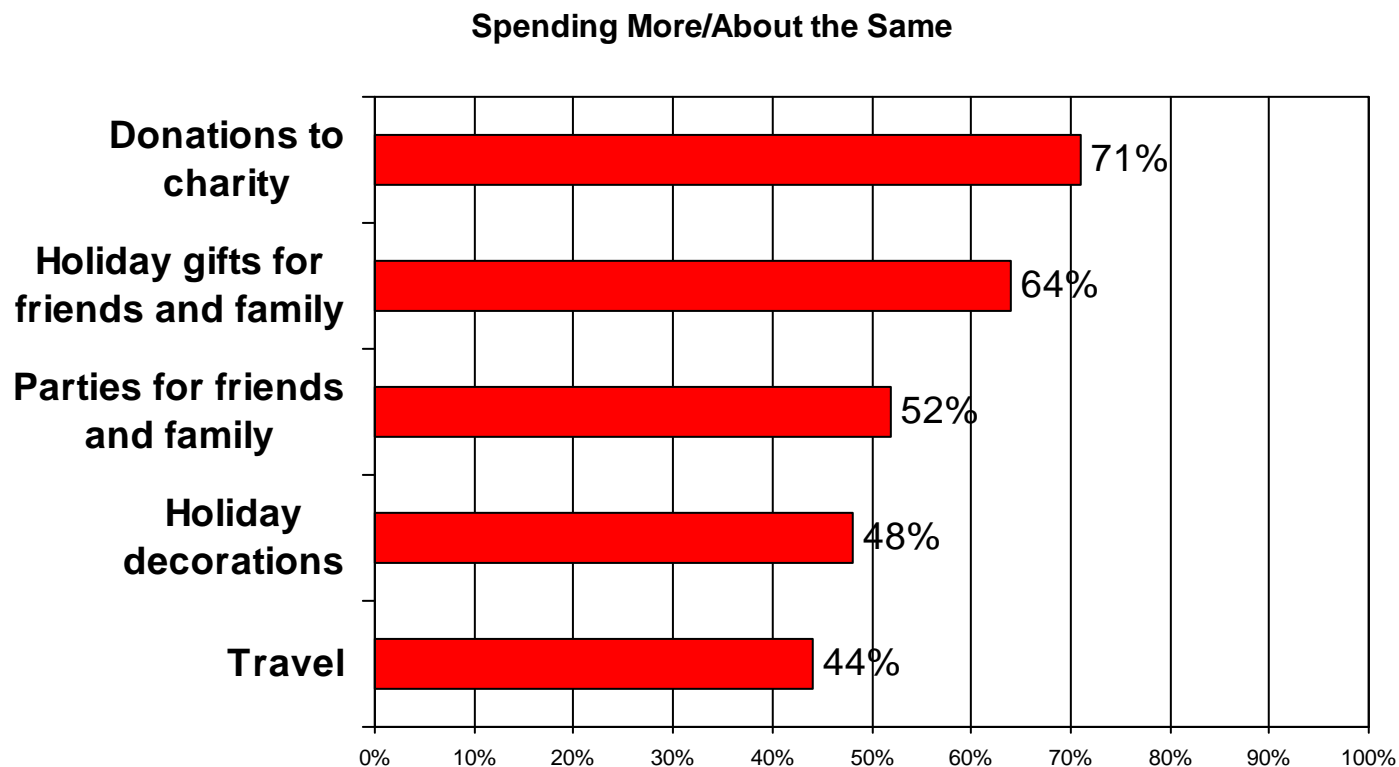


During this year's holiday season, for each of the following items, do you plan on spending more, less or about the same amount as you did over the holiday season last year?



Balance=NOT APPLICABLE/DO NOT CELEBRATE THE HOLIDAYS/DID NOT SPEND ON THIS LAST YEAR/DON'T KNOW/NOT SURE

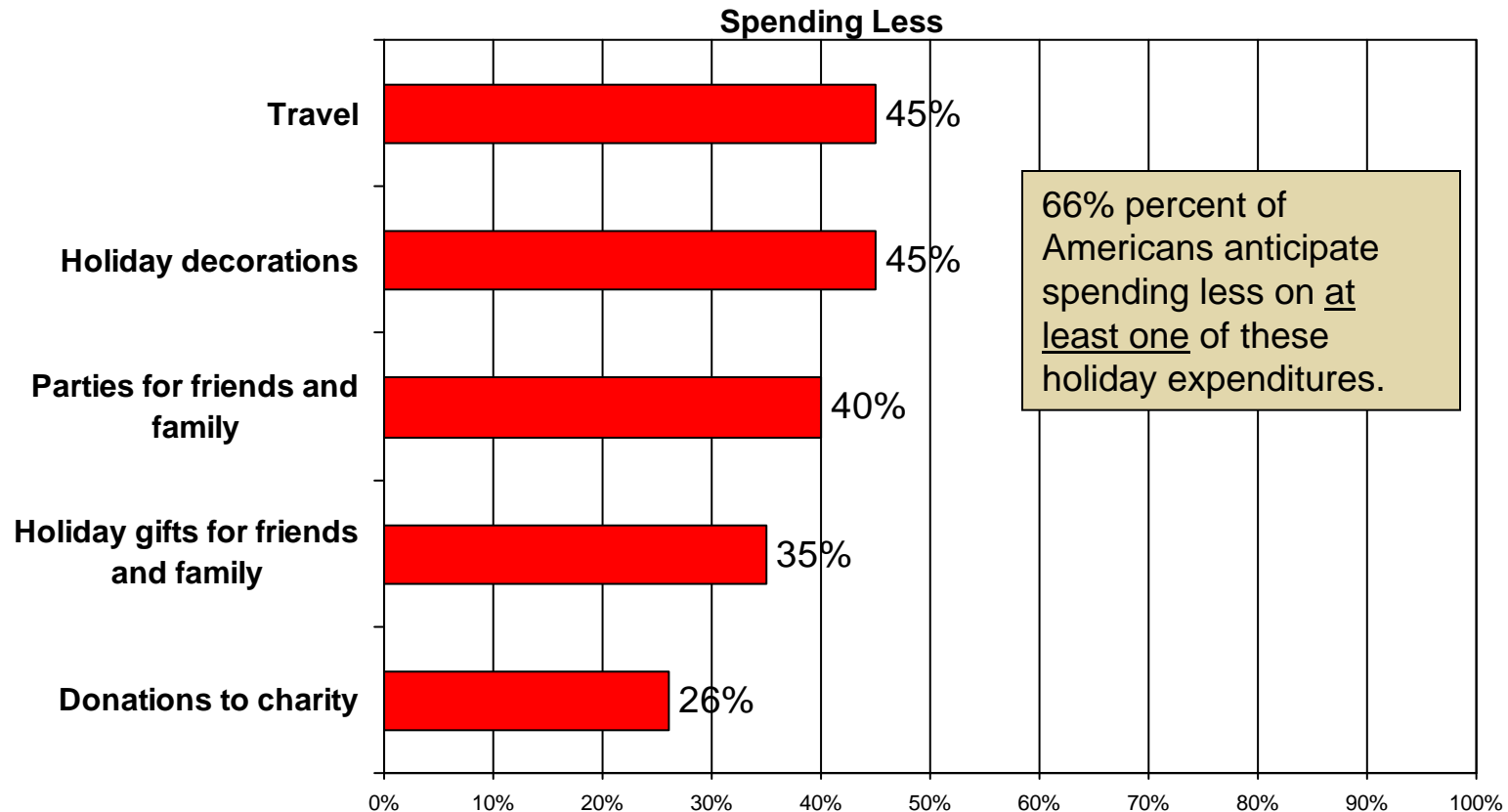
# Seven in ten expect to donate more or about the same to charity this holiday season



During this year's holiday season, for each of the following items, do you plan on spending more, less or about the same amount as you did over the holiday season last year?



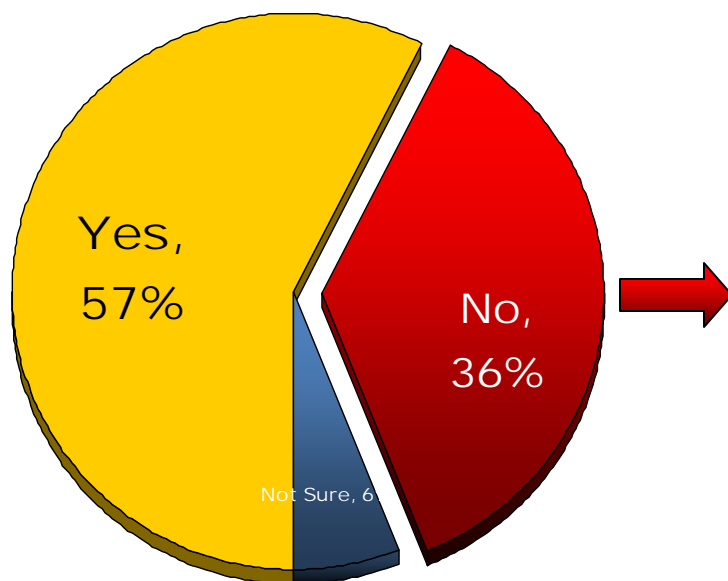
# One in four plan on reducing their donations to charity



During this year's holiday season, for each of the following items, do you plan on spending more, less or about the same amount as you did over the holiday season last year?



## Nearly six in ten plan on donating to charity between Thanksgiving and the end of December



### Why not planning on making a financial donation?

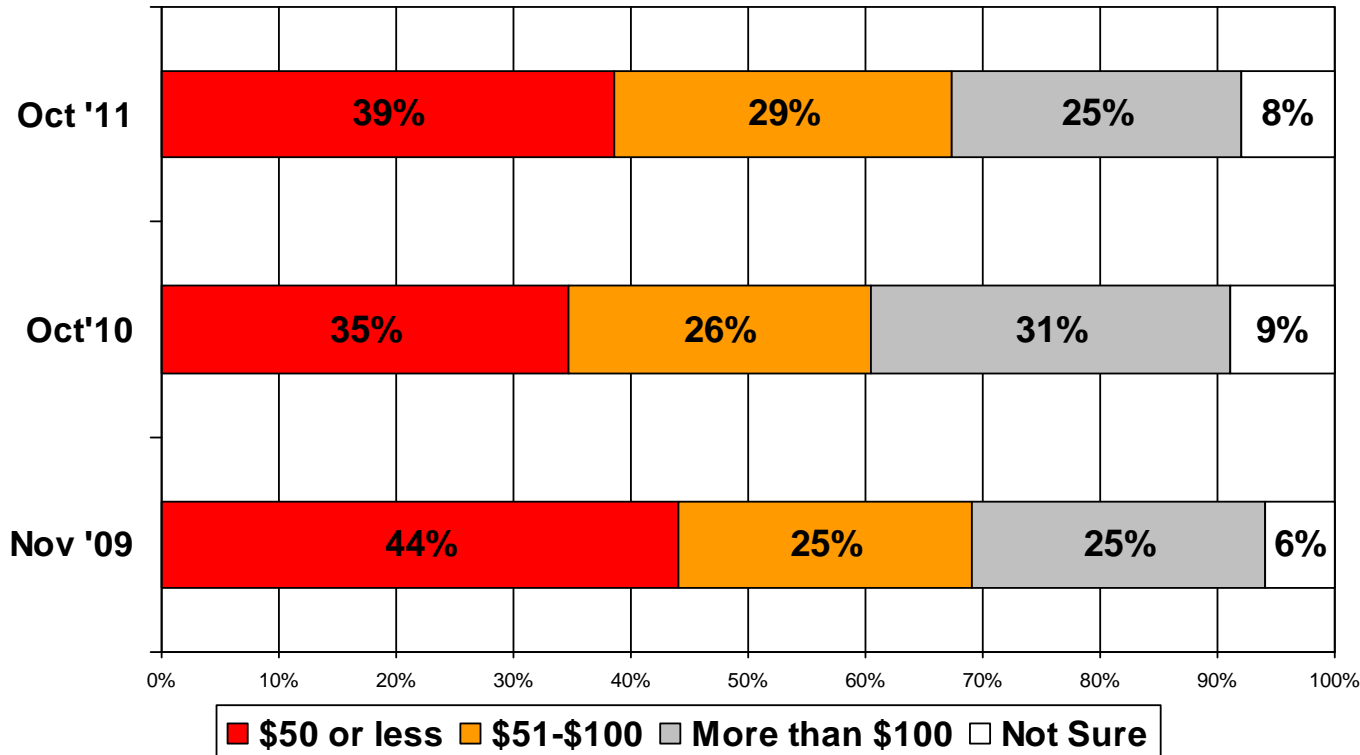
- 49%-You just don't have the money now
- 14%-You've already donated as much as you planned to this year

In October 2010, 57% of Americans were planning on donating to charity between Thanksgiving and the end of December

Are you planning on making a FINANCIAL donation to a charity between Thanksgiving and the end of December? Is that because...

More than half of Americans (54 percent) who plan on donating to charity this holiday season expect to contribute more than \$50.

Based on 57% who plan to donate to charity over the holidays



Using last year's reported donations as a barometer, fewer Americans will donate \$50 or more to charity.

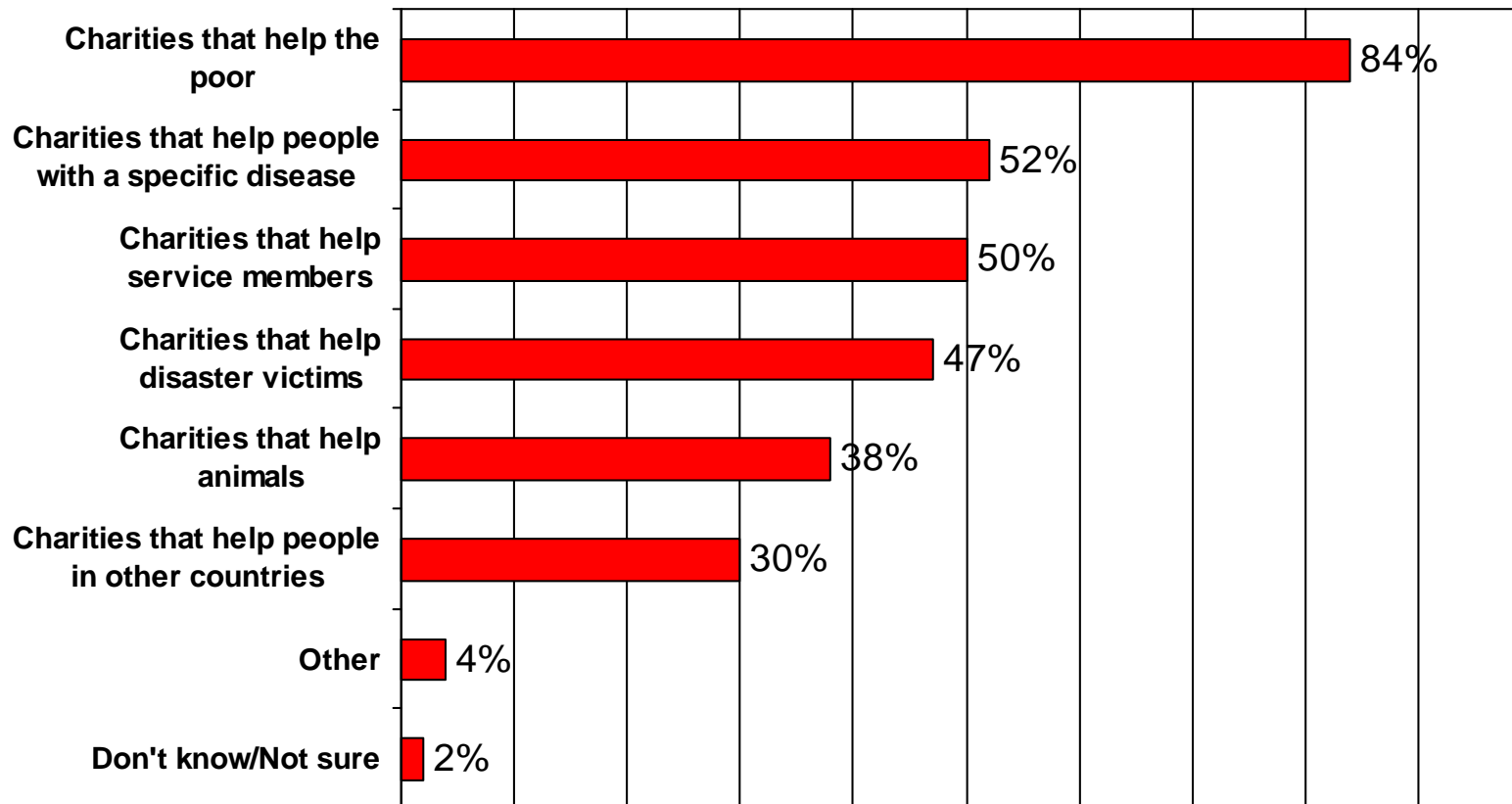
32 percent of men plan to donate *more than* \$100, compared to 20 percent of women.

How much are you planning to donate to charity over the holiday season? Would you say . .



# Charitable donors are placing their emphasis on charities that help the poor

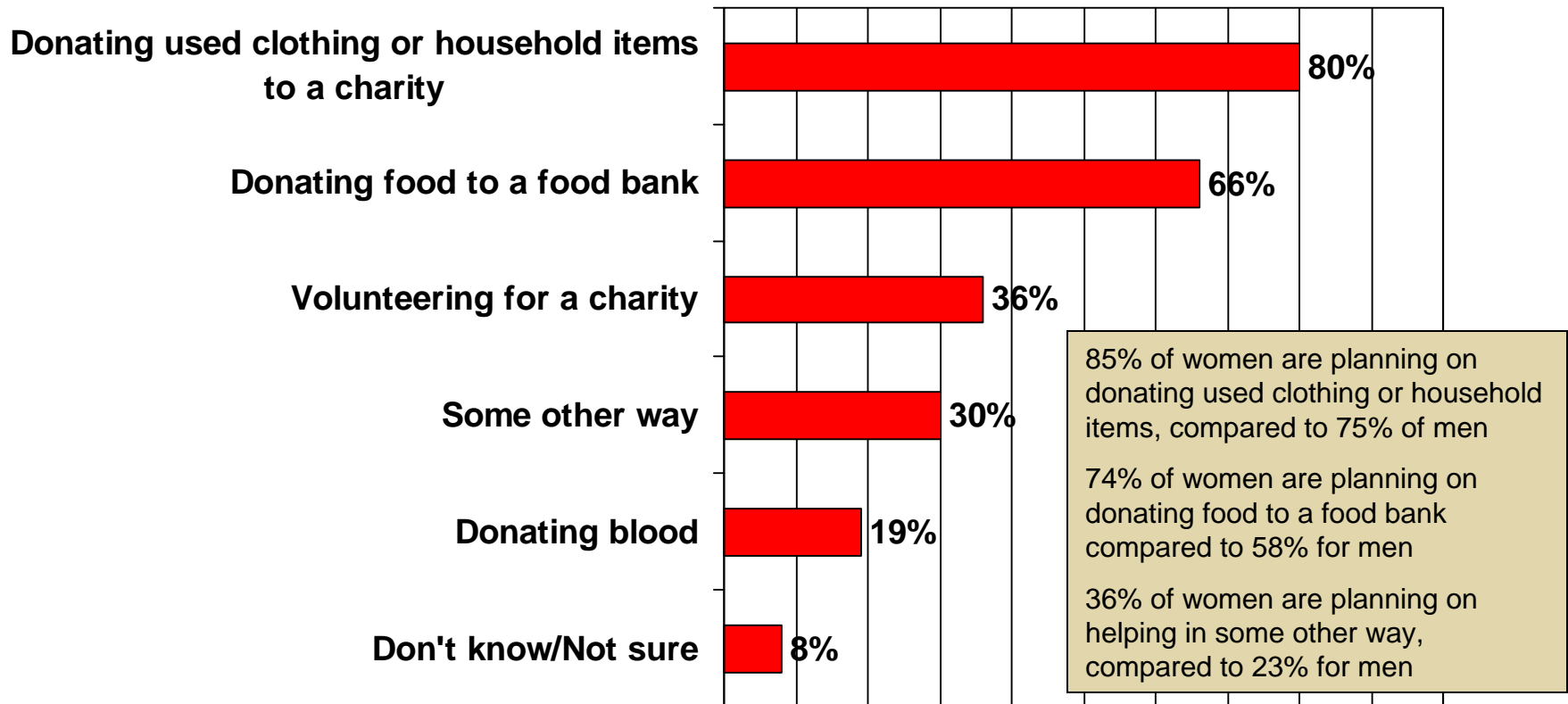
Based on 57% who plan to donate to charity over the holidays



During the holiday season, will you be making a financial donation to any of the following types of charities?



# One in five Americans is planning on donating blood this holiday season



Beyond donating money to charity, there are other actions that people might take to help others. Do you plan on doing any of the following during the holiday season?  
Do you plan on . . .



# African Americans

(93 respondents)

- 49% of African Americans are planning on making a donation to charity this holiday season
- African Americans are more likely to:
  - Have been laid off from a job (18% versus 7% for non-Hispanic whites)
  - Agree that helping someone less fortunate is an important part of the holiday tradition for them (92% versus 79% for non-Hispanic whites)
  - Agree that donating to charity helps them get into the holiday spirit (77% versus 62% for non-Hispanic whites)
  - Agree that they didn't expect the economic downturn to last this long (84% versus 63% for non-Hispanic whites)
  - Agree that having less money has helped them focus more on what's important during the holidays (72% versus 54% for non-Hispanic whites)
  - Agree that they feel bad about spending less and less on gifts for your family and friends (57% versus 39% for non-Hispanic whites)
  - Plan on spending less for holiday travel (59% versus 41% for non-Hispanic whites)
  - Plan on spending less for parties for family and friends (53% versus 34% for non-Hispanic whites)
  - Plan on spending less for holiday gifts for friends and family (49% versus 33% for non-Hispanic whites)
  - Be planning on donating blood over the holiday season (35% versus 18% for non-Hispanic whites)
- African Americans are less likely to:
  - Have lost money in the stock market (12% compared to 34% for non-Hispanic whites)
  - Be planning on making a financial donation to charity between Thanksgiving and the end of December (50% will not make a donation, versus 35% for non-Hispanic whites)

# Selected Regional Values Follow

Below is a list of the states included in each region.

- North East - Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania
- Midwest - Ohio, Indiana, Illinois, Michigan, Wisconsin, Minnesota, Iowa, Missouri, North Dakota, South Dakota, Nebraska, Kansas
- South - Delaware, Maryland, District of Columbia, Virginia, West Virginia, North Carolina, South Carolina, Georgia, Florida, Kentucky, Tennessee, Alabama, Mississippi, Arkansas, Louisiana, Oklahoma, Texas
- West - Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, Nevada, Washington, Oregon, California

# Regional Values

Respondents in the West are more likely than respondents in the Northeast to be planning on donating less to charity this holiday season

<b>Plan on spending <u>less</u> this holiday season on</b>	Northeast (n=189)	Midwest (n=226)	South (n=373)	West (n=232)
Travel	43%	43%	45%	49%
Holiday decorations	38%	47%	46%	45%
Parties for friends and family	35%	39%	41%	41%
Holiday gifts for friends and family	31%	34%	37%	35%
Donations to charity	19%	25%	26%	30%

# Regional Values

Respondents in the South are most likely to agree that because of the economy it's more important this year to give something to charity.

	Northeast (n=189)	Midwest (n=226)	South (n=373)	West (n=232)
Had salary or work hours reduced	14%	18%	15%	19%
Owe more on the mortgage than the house is worth	8%	6%	9%	16%
Because of the economy, it's more important this year to give something to charity*	68%	61%	73%	68%
You usually receive at least one gift that's something that you don't need*	50%	60%	55%	57%
Instead of getting a gift that you won't use, you'd rather have someone give a gift in your honor to a good charity*	82%	70%	81%	80%
Helping someone less fortunate is an important part of the holiday tradition for you*	78%	82%	84%	81%

\*Note: Top Two Box



# Regional Values

Respondents in the Northeast are more likely than respondents in the South and West to be planning on donating to charity over the holiday season

Are you planning on making a FINANCIAL donation to a charity between Thanksgiving and the end of December?	Northeast (n=189)	Midwest (n=226)	South (n=373)	West (n=232)
Yes	67%	58%	55%	52%
No	25%	37%	39%	40%