



**2010 Post Election Progressive Donor Survey
Summary Report
December 26, 2010**

Introduction

Presidential elections and big shift congressional elections always have a powerful effect on the way donors and activists think about what's important, what's possible and where they should focus their energy. That is obviously true for progressive causes, whose success or failure in achieving their missions is directly related to the political climate.

But, the mood and priority shifts that accompany elections also impact the work of organizations that don't consider their work political in nature. Sometimes, frustration with the political landscape drives donors into the arms of charitable organizations that offer concrete, tangible opportunities to have an impact. At other times, political disappointments seem to take the air out of the room right across the board.

The purpose of this memo is to provide OMP's clients and friends with a first assessment of the impact of the 2010 elections. We know from past experience that donors react to election results in stages. Often their first response isn't the one they hold onto over time. For that reason, OMP has designed our 2010-2011 research in two stages.

This document reports on the first look at the mood of donors as we enter 2011. In March, OMP will conduct a second study to see where donor and activist attitudes stand after the political changes and economic realities of the new year settle in.

For the moment, the early 2011 climate in which we all will be operating can be summed up as follows:

- 1. Donors and activists look at 2011 as a year in which not much good can happen, but not much bad is likely to happen.**
- 2. They operate from a position of deep disgust with a corrupt political system, one that seriously limits their interest in emotionally investing in Beltway-based progress.**
- 3. Respondents are far less likely than earlier in his term to see President Obama as a vehicle for progressive progress although they yearn for that kind of leadership.**

4. **These factors combine to create a climate in which donors and activists can easily lapse into the belief that action on their part won't have any positive consequences and inaction won't do much harm.**
5. **Political and advocacy organizations should take their work out of the Washington context as often as possible. And, when forced into that context, should emphasize their determination and ability to make progress despite the quagmire in Washington.**
6. **Charitable and humanitarian groups should emphasize their availability as vehicles for principled action that has an unambiguous and tangible impact. But, they should recognize that a general sense of disillusionment makes people uneasy with overblown or Pollyanish rhetoric.**
7. **All organizations should stay alert and nimble enough in their presentation to adjust to shifts in the mood of donors and activists as the opening months of 2011 unfold.**

Let's look at the survey data that leads us to this narrative. But first, a few details about the survey audiences and methodology.

Details of The Study

After each election cycle, OMP conducts a study of progressive donors and activists. The study serves two compelling purposes. First of all, it offers a look at shifts in people's mood, expectations and priorities following a game-shifting political event. But, in addition, it offers us a unique opportunity to check in on shifts in the demographic makeup of the progressive audience as well as shifts in giving behavior, channel use, and patterns of engagement. This election cycle, as we did following the historic 2008 elections, OMP's study will consist of two parts.

For the first part of the study, OMP interviewed over 6,000 donors and activists by phone (500) and email (5,500) between November 22 and December 3, 2010. Respondents were selected from the lists of a variety of participating progressive organizations, including Planned Parenthood Federation of America, the ACLU, Oxfam America, the Natural Resources Defense Council, the NAACP, Common Cause, 21st Century Democrats, the Foundation for National Progress and the Center for Reproductive Rights.

The phone survey included recent direct response donors to each organization with a recent gift of no less than \$25 and no more than \$500. The phone survey was conducted as a blind survey, only identifying OMP Research as the sponsor of the study.

For the online survey, each participating organization emailed an identical survey instrument to 25,000 online activists (non-donors) from their lists. Since the survey was branded, some questions asked in the phone survey were omitted as inappropriate. Also, the online survey format did not allow for any open-ended responses.

While all phone results were aggregated and only exist as part of this report, the organizations that participated in the online survey each received an analysis of their individual online results. With that as background, let's look first at the immediate indications of people's mood and then at some of those longer-term trends.

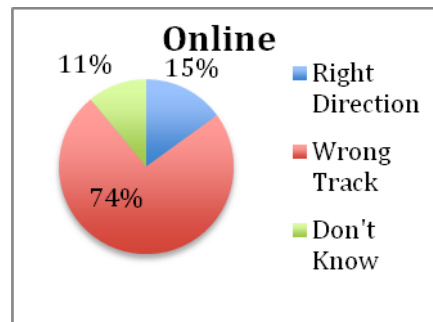
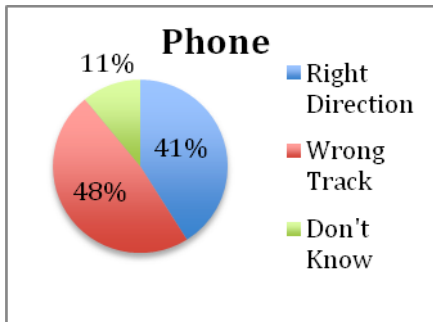
The Progressive Mood as 2011 Begins

It is fair to say that our respondents, both donors and activists, have a fairly negative view of the state of affairs in the country today. Compared to 2008 post-election surveys, where Obama's victory sent a surge of optimism through the progressive community, they are significantly more likely to think things are moving in the wrong direction and not nearly as optimistic about the future.

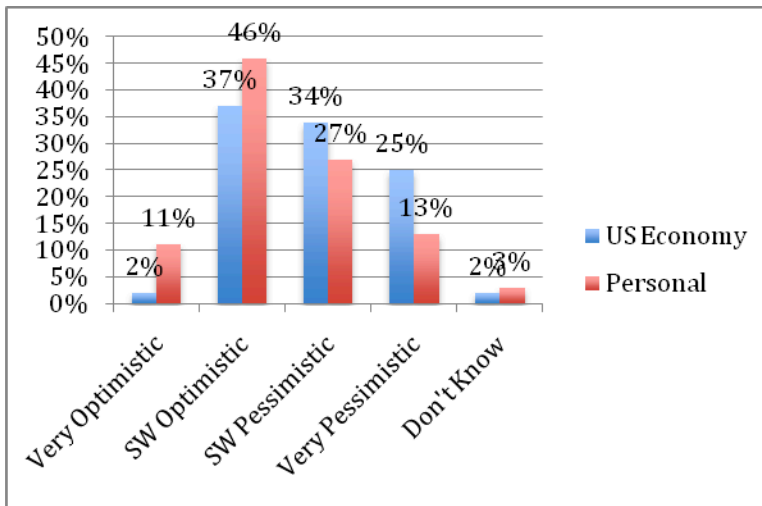
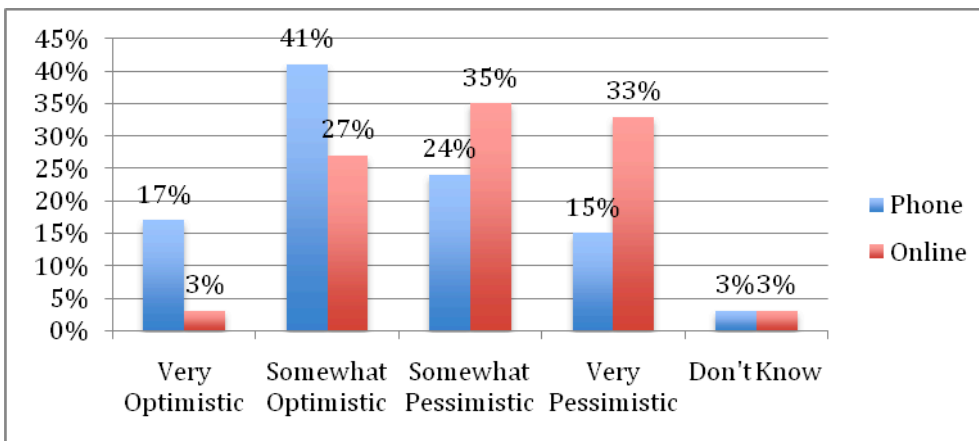
A big part of their negativity is a deep disgust with the political system and with Washington in general. More than two-thirds say that they believe the American political system has been totally corrupted by the influence of money in elections. We've heard this sentiment echoed in other research throughout the year as well.

And while this is generally true across all respondents, online activists are dramatically more negative in their views. While just under half of the respondents to our phone survey say the country is on the wrong track, three quarters of online respondents hold that view. What's more, online activists are almost twice as likely to express pessimism that 2011 will move things in a better direction. In this and other dimensions, the online audience tends to be more critical and skeptical than their older offline counterparts. It could also be true that, given their younger and lower income demographics, the economy is affecting online activists in a deeper way than our donor community.

With respect to our country, do you think things are going in the right direction or that they have gotten seriously off track?



When you think about 2011, how optimistic are you that this will be a year in which things move in a better direction?



How optimistic are you about the direction of the US economy /your personal financial situation over the next six months?

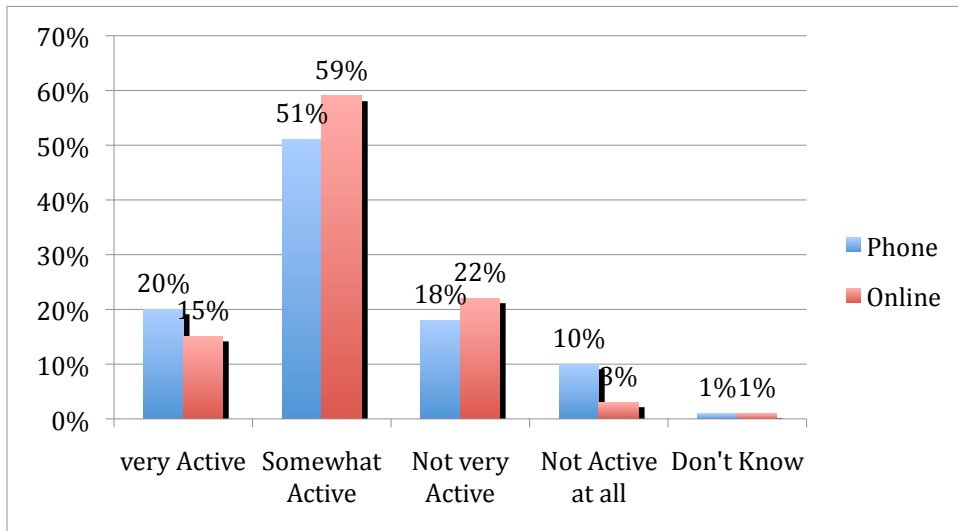
Paired Statement

The American political system has been totally corrupted by the undue influence of money in elections.	<u>Phone only</u> 67%
The American political system, while not perfect, is still able to function.	30%
Don't Know	3%

When we see data that indicates this kind of negativity, our concern is donors and activists can get paralyzed into inaction. If donors feel that their contributions can't do anything to advance an agenda, they start to tune out of the conversation with groups and organizations they have cared about.

The data in this survey suggests that we could be dangerously close to that dynamic. It remains to be seen if the flurry of activity in the final weeks of 2010, including the repeal of Don't Ask Don't Tell and passage of the START treaty, does anything to lift donor mood and restore a sense of possibility, but today respondents report being less active than in previous years in efforts to help groups advance the causes they support.

How active are you personally in efforts to help groups and causes working to move things in the right direction?



When respondents were asked how likely they were to donate by the end of the year to a series of causes and then a series of specific organizations, the results were

more lukewarm than anticipated. No cause or organization reached more than 30% extremely likely (10 ranking).

On a scale of 1-10, how likely are you to donate to a group working on each of the following issues before the end of this year?

	Likely (8-10)	Middle (5-7)	Not Likely (1-4)
Responding to disasters and emergency situations	47%	34%	17%
Protecting human rights	54%	27%	12%
Working to end global hunger and poverty	56%	26%	17%
Challenging discrimination and protecting civil rights and liberties	58%	25%	16%
Working to end the undue influence of special interests and corporations in elections	51%	19%	31%
Fighting for equal rights for gays, lesbians, bisexuals and transgenders	42%	27%	29%
Working to reduce greenhouse gas emissions that cause global warming	47%	29%	22%
Advancing clean energy policies that protect the environment	49%	28%	22%
Stopping powerful interests from blocking clean energy policies	58%	23%	19%
Working to protect a woman’s right to choose	56%	21%	20%
Working to keep abortion safe and legal	56%	22%	22%
Challenging extremism across gender, ethnic and religious lines	41%	26%	27%
Challenging hatred and intolerance across gender, ethnic and religious lines	52%	26%	20%
Reducing US dependence on foreign oil	30%	27%	41%
Promoting a clean energy future	53%	31%	15%

In the causes section, we split-tested a few issues for language. The results suggest that “stopping powerful interests” is more attractive language for donors than “advancing” – another sign that donors don’t expect much forward progress. In the wake of the Tea Party’s influence on election season this year, we also tested “challenging extremism” against “challenging hatred and intolerance.” “Challenging hatred and intolerance” was far more powerful for respondents and it may mean that, in terms of language choice, the “extremism” label isn’t connecting.

On a scale of 1-10, how likely are you to donate to each of the following organizations before the end of this year?

	Likely (8-10)	Middle (5-7)	Unlikely (1-4)
Group 1	47%	22%	29%
Group 2	42%	25%	32%
Group 3	41%	28%	31%
Group 4	40%	22%	35%
Group 5	38%	19%	40%
Group 6	32%	16%	41%
Group 7	31%	22%	44%
Group 8	29%	25%	43%
Group 9	29%	21%	38%
Group 10	29%	22%	37%
Group 11	28%	17%	39%
Group 12	27%	26%	38%
Group 13	25%	25%	50%
Group 14	23%	21%	46%
Group 15	22%	26%	43%
Group 16	16%	21%	56%
Group 17	6%	6%	52%

To measure how engaged and passionate donors and activists are today, we presented a series of scenarios and asked respondents to rank how likely they thought it was that the described event would happen. Their answers reinforce that donors and activists believe we have entered a period where nothing much – good or bad – is likely to occur.

On a scale of 1-10, how likely do you think each of the following is to happen?

		Very Likely (8-10)	Moderate (5-7)	Very Unlikely (1-4)
Barack Obama will be re-elected in 2012.	Phone	44%	42%	12%
	Online	22%	44%	34%
Sarah Palin will run for President in 2012.	Phone	32%	28%	39%
	Online	37%	37%	26%
Democrats will regain control of the House in 2012.	Phone	20%	46%	29%
	Online	13%	45%	42%
Congress will pass Climate Change legislation.	Phone	10%	27%	62%
	Online	4%	18%	78%

The Supreme Court will sharply limit a woman's right to choose.	Phone Online	14% 19%	29% 40%	54% 41%
Congress will pass immigration reform.	Phone Online	9% 5%	41% 29%	49% 65%
President Obama and Congress will balance the budget and reduce the deficit.	Phone Online	9% 4%	22% 18%	67% 79%
The United States will be attacked by terrorists in the next two years.	Phone Online	17% 15%	32% 38%	45% 47%
Congress will repeal the health care bill.	Phone Online	9% 12%	23% 37%	65% 51%
We will withdraw our troops from Afghanistan in 2011.	Phone Online	13% 5%	23% 21%	63% 73%
Congress will pass campaign finance reform.	Phone Online	4% 3%	24% 17%	69% 80%
The Supreme Court will overturn Prop 8 in California, allowing same sex couples to marry.	Phone Online	15% 14%	33% 38%	43% 48%
Congress will pass Wall Street and financial reform.	Phone Online	12% 5%	34% 23%	50% 72%
The unemployment rate will go down.	Phone Online	36% 12%	42% 39%	20% 50%
Congress will pass legislation to stop corporations from shipping jobs overseas.	Phone Online	8% 3%	23% 16%	67% 80%

Donors and activists are also much tougher on Obama than they would have been early in his term. Large numbers, especially among the online audience, believe that he could have done more to deliver.

But despite all their negativity, it's clear that respondents really want Obama to get back on track and drive the progressive agenda they expected. More than 75% of all respondents say that President Obama needs to return to the vision of his campaign rather than move to the center. That gives us hope that donors and activists can shake off the hopelessness in 2011 and start to engage the way they have in the past.

Paired Statements

	<u>Phone</u>	<u>Online</u>
Times have been tough, but President Obama could have done more to deliver on his campaign promises.	39%	66%
With difficult circumstances, President Obama Has shown real leadership in getting America moving in the right direction.	55%	30%
Don't Know	6%	4%

	<u>Phone</u>	<u>Online</u>
Following the 2010 elections, President Obama should move closer to the center.	22%	9%
President Obama needs to return to the progressive vision of his campaign.	70%	84%
Don't Know	8%	7%

Demographics

Though the two survey populations are similar in demographics and ideology, there are some notable differences. The biggest difference between the two has to do with age. Online activist respondents are three times more likely to be under the age of 50 than the phone respondents, who are verified donors. That age gap is the likely cause of the education variance, where phone respondents report a higher instance of both four-year and post-grad education.

	<u>Phone</u>	<u>Online</u>
Male	38%	38%
Female	62%	62%

	<u>Phone</u>	<u>Online</u>
<35 Years Old	4%	16%
35-49 Years Old	8%	19%
50-64 Years Old	34%	39%
65+ Years Old	53%	26%

	<u>Phone</u>	<u>Online</u>
< 4-Year Degree	22%	32%
4-Year Degree	34%	23%
Some Post Grad	12%	13%
Post Grad Degree	43%	33%

The income gap, however, is significant. While some of the gap is a function of age and education, the variance at the lowest and highest income levels is too far apart to only be a function of age. Online respondents are more than three times more likely to earn less than \$30,000 per year, while phone respondents are almost 40% more likely to earn more than \$100,000 per year.

There are a significant number of respondents who refused to answer this question or said they didn't know in the phone survey, which is within the normal range of 20-25%. It is generally considered that those who refuse to answer are on the higher end of the income scale. But no respondents who completed the online survey chose the "don't know" option.

	<u>Phone</u>	<u>Online</u>
<\$30k per year	9%	35%
\$30-\$49k per year	14%	17%
\$50-\$74 k per year	13%	18%
\$75-\$99k per year	16%	14%
\$100k+ per year	26%	16%
RA/DK	21%	N/A

Another place that the phone and online survey respondents differ is in ideology. One has to be careful because the online survey didn't provide a moderate option. But, it still appears that the online audience is more intensely liberal than the phone audience.

	<u>Phone</u>	<u>Online</u>
Very Liberal	40%	57%
Somewhat Liberal	34%	33%
Moderate	18%	Not Offered
Somewhat Conservative	5%	5%
Very Conservative	2%	1%

On the phone, where the survey was not identified with any individual organization, we asked a party id question. Online, where the survey was branded with the originating organization, we chose not to party id. There has been a significant increase in the percentage of respondents who self identify as independent since the last mid-term election.

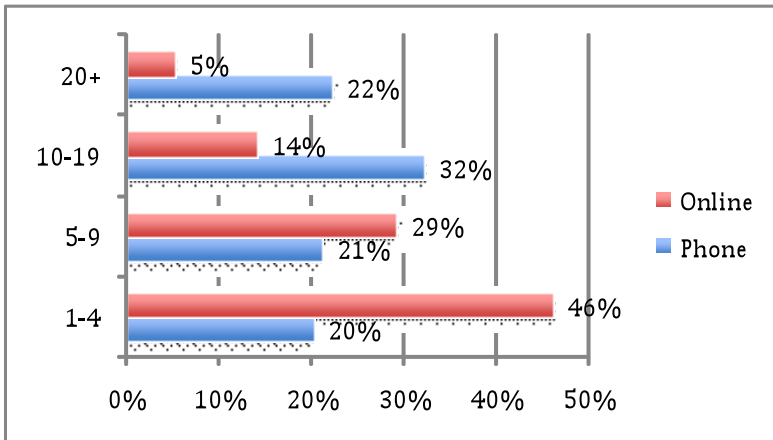
	<u>Phone</u>
Strong Democrat	62%
Not so strong Democrat	13%
Independent	20%
Not so strong Republican	1%
Strong Republican	1%

Both panels were asked to identify their primary source for news and information. While NPR ranked as number one with both groups, the two groups diverge from there. Phone respondents are much more likely to get news from newspapers, national or local, while online respondents prefer mainstream news sites and cable news networks. Though the numbers are still small, the emergence of social media as a primary source of news and information is interesting to note.

	<u>Phone</u>	<u>Online</u>
NPR	19%	20%
National Newspaper	18%	10%
Local Newspaper	13%	6%
Cable News Network	12%	13%
Network News	10%	6%
PBS	6%	5%
Blogs	6%	4%
Mainstream News Sites	5%	14%
Local TV News	4%	4%
Magazines	2%	2%
Social Media	0%	4%
Other	4%	12%

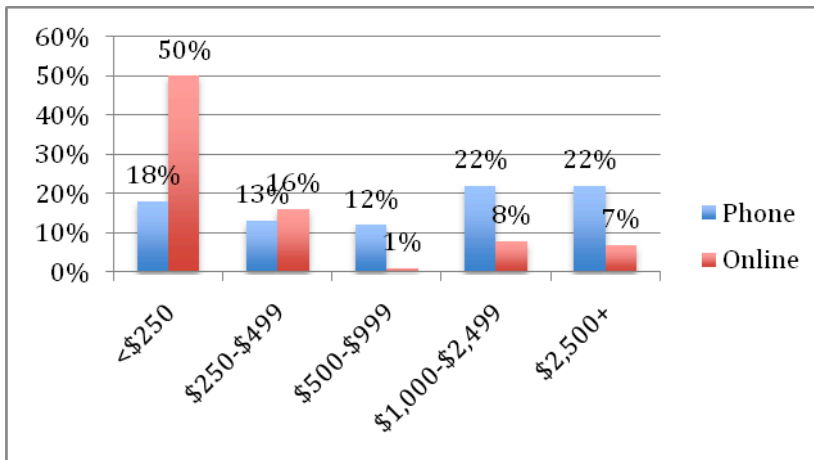
Giving Behavior

As expected, there is a large gap between the audiences in the number of groups respondents donate to each year. But, what is disturbing is that, over time, indications are that all donors are pulling back significantly on their number of organizations. For a number of years, at least 30% of direct response donors have reported giving to at least 20 groups. This year's responses indicate that critical mass has shifted to the 10-19 range, and this data is consistent with what organizations have seen in independent research over the last two years.



Excluding your house of worship, how many organizations have you contributed to in the last 12 months?

The conventional wisdom used to be that your online activist was someone else's donor. But with 46% of online activists reporting that they give to fewer than five organizations in a year that may be less true today. Years of work in moving the "low hanging fruit" off of activist lists and into donor lists, the increasing difficulty of building online lists and the continued economic woes may indicate that the remaining activists will be extremely challenging to convert.



And again excluding your house of worship, how much would you say that you have donated to nonprofit organizations in the last 12 months?

The good news, at least for direct response donors, is that although they have cut back significantly on the number of groups they are involved with they haven't cut back very much on the total dollars they are giving.

This trend indicates that donors are focusing more on the organizations they choose, and concentrating their giving either for attention span or to have a greater impact. And while it is comforting that donors are still giving in the same range, it raises the stakes for your organization's appeals because groups now have to argue for your place on their list and for your share of the giving.

Donors are also becoming increasingly more diverse in their channels of giving. Though mail is still the most often used channel, online giving adoption among direct mail donors has increased dramatically each year. More than 40% reported making an online gift in the last 12 months. And the reverse is also true among online activists and donors; direct mail is still a strong giving channel.

	<u>Phone</u>	<u>Online</u>	
Mail	78%	54%	
Online	41%	68%	
Phone	35%	14%	<i>And were any of those gifts made by...?</i>
Events	39%	25%	
On the Street	19%	16%	
At your Door	12%	6%	
Mobile Phone	**	4%	

One interesting trend to note this year is that “event” giving is on the rise across the board, validated by other research as well. Based on giving levels and other donor profiles, it is likely that the “event” giving is in response to personal fundraising and its popularity in social media, such as walk-a-thons and other sponsorship events rather than traditional ticketed fundraising events. In future surveys, OMP will separate traditional events from sponsorships to refine this category.

Conclusion

We at OMP hope that the information in this report has been useful to you, and we look forward to moving to the second phase of this study in March 2011. Our thanks to all of the organizations that participated in the study, your partnership in this process benefits the entire community and we are extremely appreciative of your trust and support.