Consumer Awareness

Methodology

• December 1, 2016
• Ipsos online survey among 1000 respondents
• National sample 18+ yrs

Highlights

• Aided awareness for GivingTuesday increased to 53%, up from 49% in 2015
• 69% of those aware participated in some way: donations 39%, food/clothing drive 27%, volunteering 20%, social media 12%
• Significantly higher participation among 18-34 year olds – 88% participated in some way: donations 55%, drives 36%
• Yes, GivingTuesday inspired me to be more giving 62%
Public awareness at an all time high in USA

Aided awareness %

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>25</td>
<td>39</td>
<td>49</td>
<td>51</td>
</tr>
</tbody>
</table>

Base: total sample
Q. Are you aware of the non-profit movement "Giving Tuesday" which follows after Black Friday and Cyber Monday?
Public awareness is consistent across regions

Aided awareness %

North East: 52%
Mid West: 55%
South: 50%
West: 56%

Base: total sample
Q. Are you aware of the non-profit movement "Giving Tuesday" which follows after Black Friday and Cyber Monday?
The great majority of people did something to participate in GivingTuesday.

<table>
<thead>
<tr>
<th>Participation</th>
<th>Yes, any participation</th>
<th>Did not participate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>69</td>
<td>31</td>
</tr>
</tbody>
</table>

88% among 18-34 yrs

Base: aware of GivingTuesday

Q. Which, if any, of the following have you done or will you do to participate in GivingTuesday?
Types of participation

Base: aware of GivingTuesday
Q. Which, if any, of the following have you done or will you do to participate in GivingTuesday?

- Make donation: 39 (55%)
- Food/clothing drive: 27 (36%)
- Volunteer: 20 (22%)
- Discuss with friends/family: 11 (14%)
- Blood/organ commitment: 8 (10%)
- Social media: 12 (17%)
- Other: 2 (1%)

Among 18-34 yrs:
- Make donation: 55%
- Food/clothing drive: 36%
- Volunteer: 22%
- Discuss with friends/family: 14%
- Blood/organ commitment: 10%
- Social media: 17%
- Other: 1%
GivingTuesday inspires people to be more giving

Yes, inspired me to be more giving %

- Yes: 62%
- No: 38%

Base: aware of GivingTuesday
Q. Do you feel that hearing about the GivingTuesday movement inspired you to be more giving?
Public awareness continues to grow steadily in Canada

Q. Are you aware of the non-profit movement "Giving Tuesday" which follows after Black Friday and Cyber Monday?

<table>
<thead>
<tr>
<th>Year</th>
<th>Awareness %</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013 (pre)</td>
<td>5</td>
</tr>
<tr>
<td>2013</td>
<td>14</td>
</tr>
<tr>
<td>2014</td>
<td>21</td>
</tr>
<tr>
<td>2015</td>
<td>27</td>
</tr>
<tr>
<td>2016</td>
<td>31</td>
</tr>
</tbody>
</table>

40% among 18-34 yrs

Base: total sample