

PHILANTHROPY IN THE GCC

Exploring the giving habits of Arabs
across the region



إستبيان العطاء العربي

Philanthropy Age

Philanthropy Age is a mixed media platform dedicated to fostering thoughtful giving in the Middle East, North Africa and South Asia (MENASA) region. We are inspired by one goal: to support and celebrate the longstanding culture of philanthropy in the region. We urge our readers to reflect on the nature of their giving; to think about how they are giving, where they are giving, and whether their giving will truly make a difference to people's lives.

First published in April 2013, Philanthropy Age includes a quarterly print magazine in the English and Arabic languages, a website, and a digital edition, and is specifically targeted at informing and influencing the giving of ultra-high-net-worth, and high-net-worth individuals, royalty and government in the MENASA region. For more information go to philanthropyage.com

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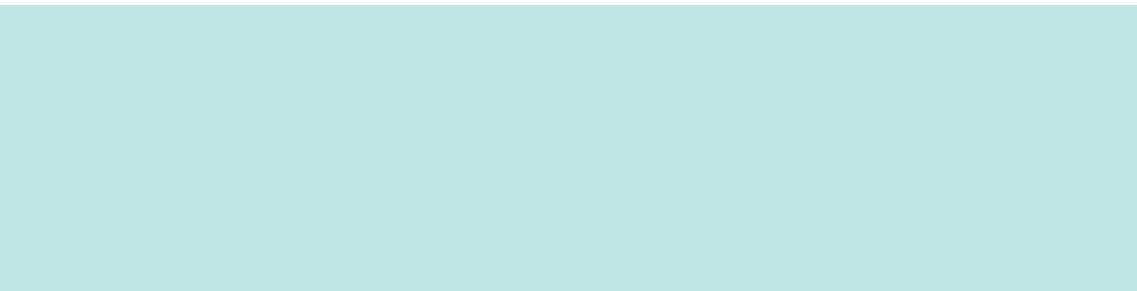
YouGov is one of the world's leading market research companies with offices throughout Europe, the US, the Middle East, North Africa and Asia. With our global online panel, suite of syndicated products, and full spectrum of custom research solutions, we offer businesses a more accurate, more actionable portrait of what the world thinks.

In the Middle East and North Africa YouGov has the largest pure research online panel, where thousands of residents participate in surveys across 19 countries. From our offices in Dubai, Saudi Arabia, Egypt and Iraq we pride ourselves on providing first-class qualitative and quantitative analysis which offers unparalleled insight across the Arab world.



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PROJECT BACKGROUND
AND METHODOLOGY

Philanthropy Age

in association with



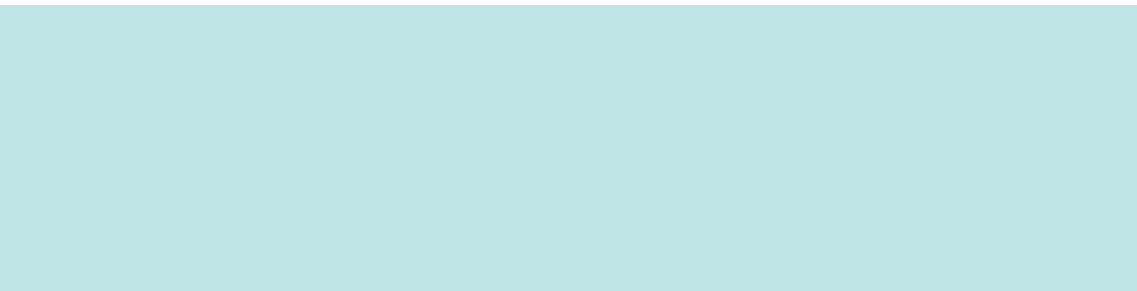
Philanthropy Age magazine partnered with global market research company YouGov to conduct a groundbreaking study of giving behaviour among Arabs living across the GCC.

The inaugural 'Arab Giving Survey' looked to offer a snapshot of modern attitudes to the culture of giving endemic within the region, shed light on donors' priorities and suggest how potential donors can best be reached.

The survey was conducted using YouGov's pure research online panel and a small number of responses from Philanthropy Age's website. A total of 1,008 GCC residents were interviewed between 29 May and 8 June 2015.

This report details the complete research findings.

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02

2015 EXECUTIVE SUMMARY

| 2015 survey highlights

■ The survey highlighted the region's generous spirit, with almost nine in every 10 respondents claiming to have made a financial donation to charity in the past 12 months.

■ On average, respondents had given money to charities six times in the last 12 months. Those with a higher monthly household income (MHI) had donated to charity more frequently; nine times.

■ While the largest proportion of those who had donated had given to one single charity over the past year, just under one-fourth had donated to three or more charities during the same 12-month time period.

■ Just under half of donors had given more than \$150 to charity over the past 12 months. As may have been expected, those in the higher MHI group donated significantly more money to charity during the period.

■ Over half of donors claimed most of their financial donations over the past year had been made spontaneously.

■ Consistently, a similar proportion claim they had donated by putting money in a charity collection box – by far the most popular donation method. One-fourth also donated to an individual in a personal capacity.



Image source: Getty Images

■ Donations tend to be strongly linked to religious beliefs. Consistently, two-thirds tend to donate money to charity on religious occasions such as Ramadan and Eid.

■ Family/friends/colleagues and traditional media adverts emerged as the main sources of information about charity and philanthropy. Street fundraising campaigns and collection boxes are also important sources for a considerable proportion of respondents.

■ Respondents are mostly influenced to donate to charity causes that are important to them. Interestingly, the charity's transparency in how it distributes its funds, and how much it provides access to results showing its effectiveness, also emerged as extremely influential when considering where to donate money.

■ Indeed, the vast majority of those surveyed claimed results are important to them when selecting a charity.

■ The largest proportion prefer donating to community-based or city-wide organisations and favour causes to do with poverty or the third-world or overseas aid/disaster relief. As noted previously, giving

directly to an individual in need is also a popular cause for many.

■ 'Lack of funds' is the main personal obstacle when it comes to making financial donations to charity. Many also prefer to give directly, rather than involving an organisation, while one-fourth complain there is a lack of information on appropriate charities.

■ While lack of funds is a considerable hurdle for those in the lower income bracket, those in the more affluent group are just as likely to select a lack of information on appropriate charities as a major obstacle to donating.

■ Aside from a 'higher disposable income', results highlighted greater transparency and clearer reporting from charities on how funds are utilised and what impact they have had as the main drivers of donations.

■ Over half believe giving should be more widely publicised in an effort to raise awareness of charity and needy causes.

■ Nevertheless, despite their willingness to participate, most still believe governments and corporations should have the most responsibility for contributing financially to charities.



Image source: Getty Images

Survey highlights – significant differences by demographics

■ Male respondents were significantly more likely than females to say they had made financial donations to charity in the last 12 months. In the same way, a significantly larger proportion of GCC nationals had made financial donations to charity, compared to other Arab nationalities.

■ In line with the findings above, when respondents were questioned on how many occasions (in the last 12 months) they had given money to charities, the mean number of occasions for males was 6.4 vs. 5.8 among females, and the average for GCC nationals was 6.4 vs. 5.9 among other Arab nationalities. Perhaps unsurprisingly, the number of occasions increased with income, with those in the highest income group donating on nine occasions over the last 12 months. Comparatively those in the lower income groups still donated on average six times.

■ Other Arab nationals were significantly more likely than GCC nationals to agree they typically give to the same charity organisations.

■ Overall, the majority of financial donations over the past year had been spontaneous. However, looking at differences by gender, males were significantly more likely than females to say they had given regular and/or planned donations.

■ Considering 'how' respondents living in the GCC donate to charity, those living in Bahrain were most likely to say they had donated by putting money in a charity collection box, whilst KSA residents were significantly more likely to say they donate by direct debit. Across age groups, those aged 18-29 were most likely to donate through collection boxes, while older respondents (aged 45+) were significantly more likely than those aged under 45 to donate by direct debit.

■ Two-thirds tend to donate money to charity on religious occasions such as Ramadan and Eid. This is especially true for other Arab nationals. Conversely, GCC nationals were significantly more likely than other Arab nationals to say there is no particular occasion on which they donate.



Image source: Associated Press

■ Respondents residing in the UAE and Qatar were significantly more likely than those in the other GCC countries to say they are particularly likely to donate for humanitarian emergency relief action.

■ Looking at influencing factors when donating to charity, respondents living in Qatar were the most likely to say they are influenced by an immediate and overwhelming need (e.g. disaster relief), whereas Oman residents were significantly more likely than residents of other GCC countries to say they are influenced by seeing

a child, adult, or animal which will directly benefit from a gift.

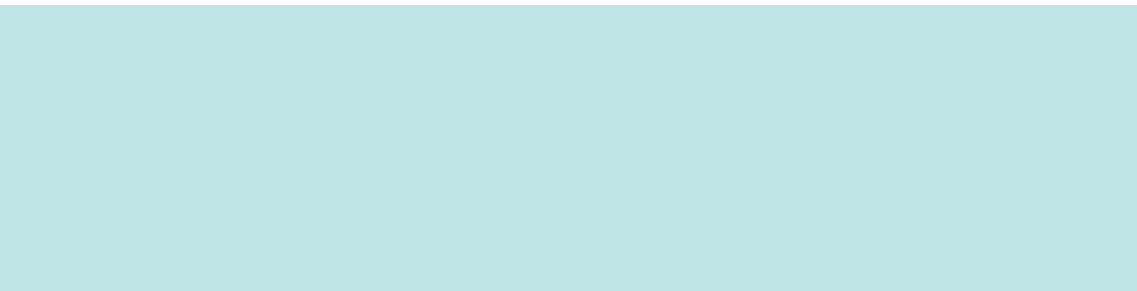
■ UAE residents are inspired by royalty or country leaders to give to charity, more than residents from any other GCC countries. Friends/family/colleagues inspire Oman residents the most.

■ GCC nationals were significantly more likely than other Arab nationals to say they prefer to volunteer time (rather than give money).

■ When respondents were asked what would encourage them to donate more to charity, females were significantly more likely than males to say 'a wider variety of easy ways to donate'.

■ A significantly higher proportion of GCC nationals prefer to donate money to community-based organisations, while other Arab nationals are more likely than GCC nationals to place a higher preference on donating to international NGOs.

■ Males are significantly more likely than females to prefer donating to 'schools, colleges, universities and other education' and 'hospitals', while females are more likely to prefer donating to 'animal welfare', 'children and young people'.



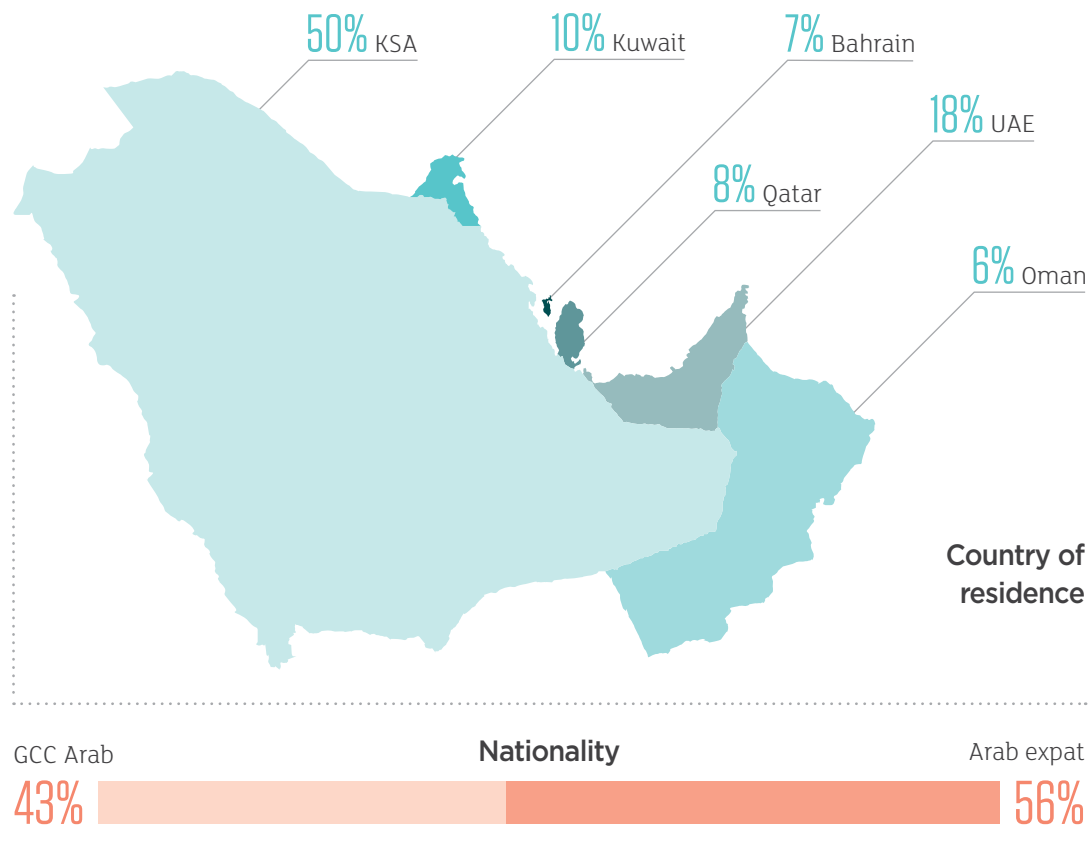
03

RESPONDENT PROFILE

Sample profile

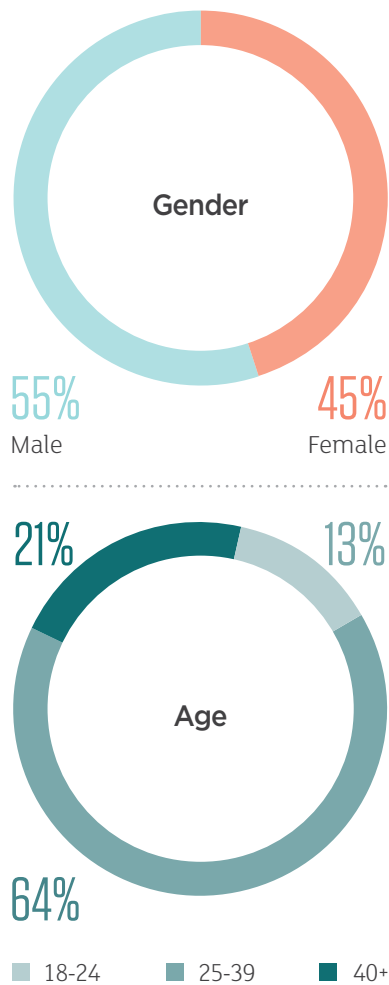
The largest proportion (50%) of respondents lived in KSA and just over half (56%) were Arab expats.

Base: 1,008



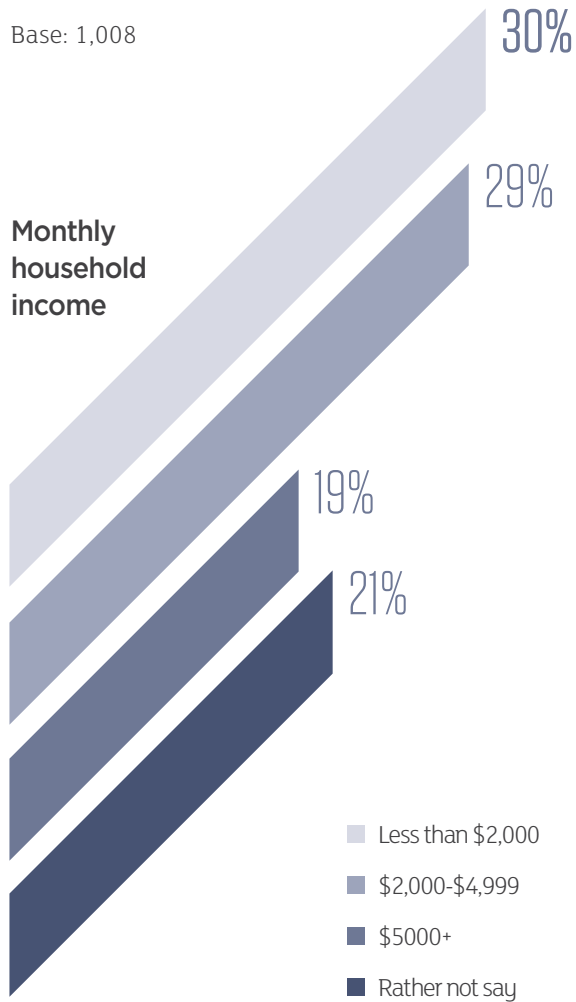
■ The survey was answered by a fairly even number of men and women, with two-thirds (64%) between the ages of 25 and 39-years-old.

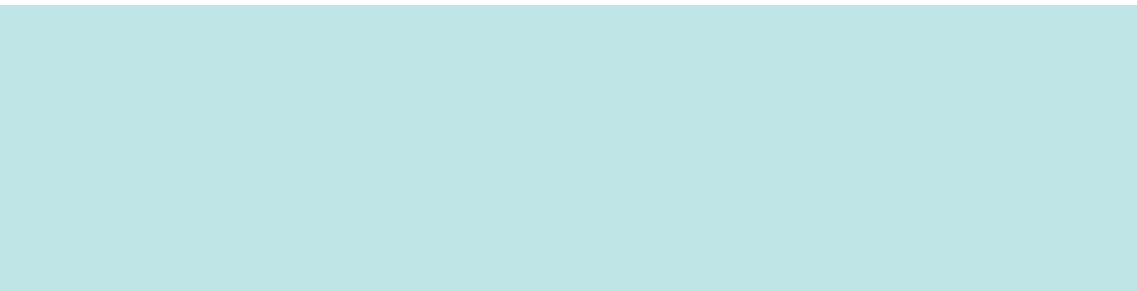
Base: 1,008



■ As shown below, respondents came from a varied socioeconomic background, with just under one-third (30%) claiming their monthly household income was lower than \$2,000; 29% saying it was between \$2,000 and \$4,999; and another 19% placing it at \$5,000 or more. One-fifth (21%) of respondents were unwilling to divulge their income.

Base: 1,008





04

KEY FINDINGS

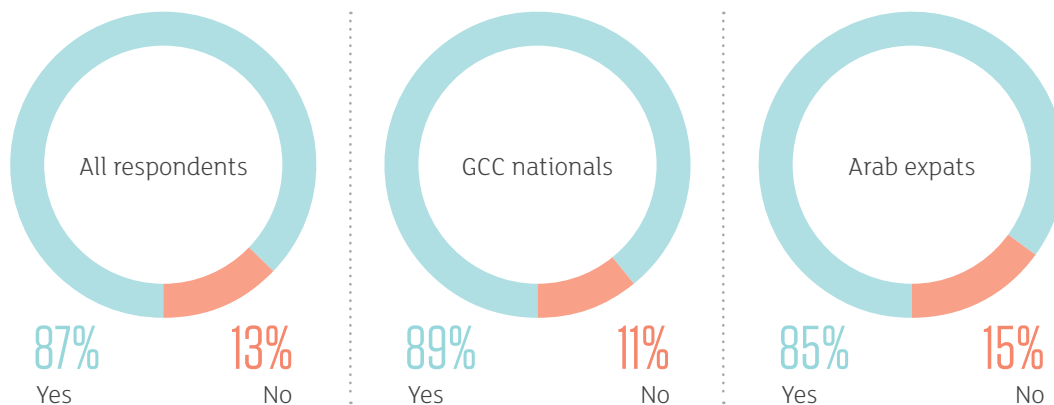
The survey highlighted the region's generous spirit, with nine out of every 10 respondents claiming to have made a financial donation to charity in the past 12 months

A significantly larger proportion of GCC nationals had made a financial donation to charity in the past 12 months (89% vs. 85% of Arab expats). In the same way, male respondents were more likely to have made a donation in the past year (89% vs. 84% of females).

Q: Have you made any financial donations to charity in the past 12 months? (i.e. since May 2014)?

Base: 1,008

Proportion who made financial donations to charity in the past 12 months



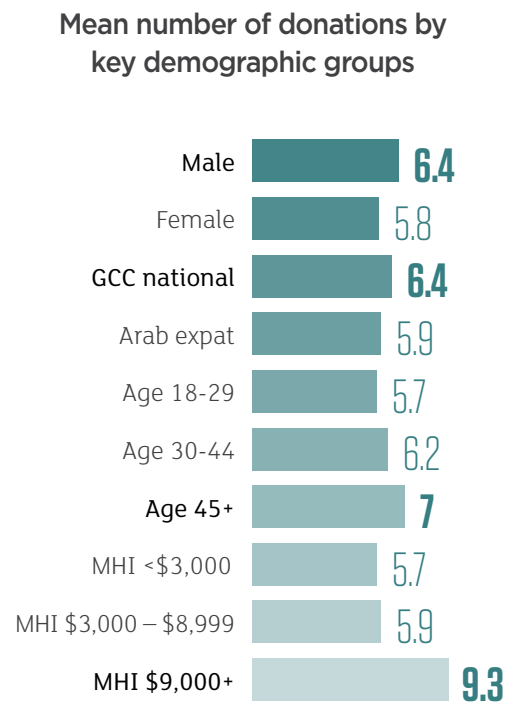
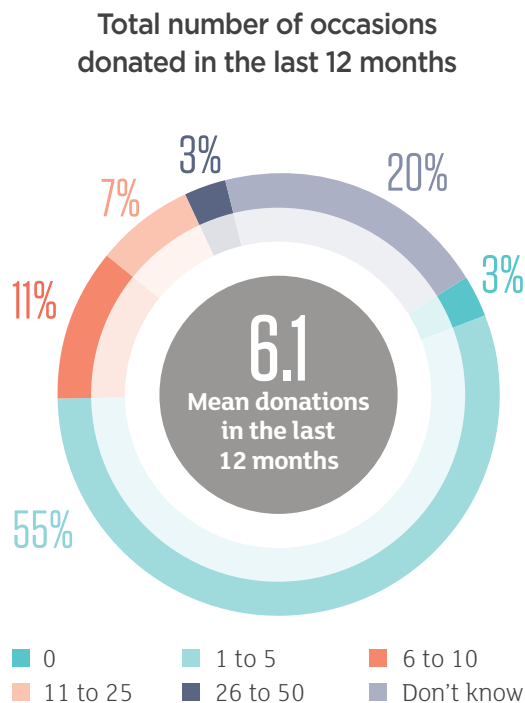
Over half of those who donated in the last 12 months had given money to charities on up to six occasions

On average, respondents had donated to charity six times in the past 12 months. The number of donations per year increased with income, with those in the highest income group (monthly household income of \$9,000+) donating nine times on average, compared to six

times on average from those with an MHI of less than \$9,000.

Q: In total, over the last 12 months, on how many occasions did you give money to charities?

Base: 874



Respondents typically donated to two charities in the last 12 months

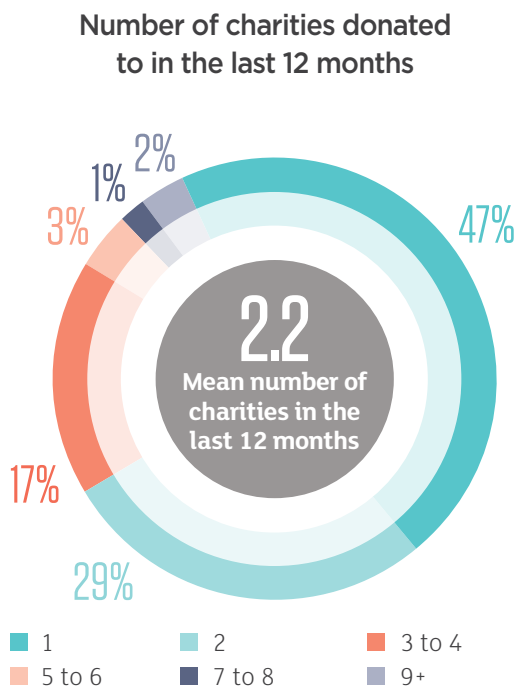
The largest proportion (47%) of those who had donated in the last 12 months had given to one single charity, and just under one-fourth (23%) had donated to three or more charities during this time period.

Looking at the average, overall respondents donated to 2.2 charities in the last 12 months. In line with those in the highest income group

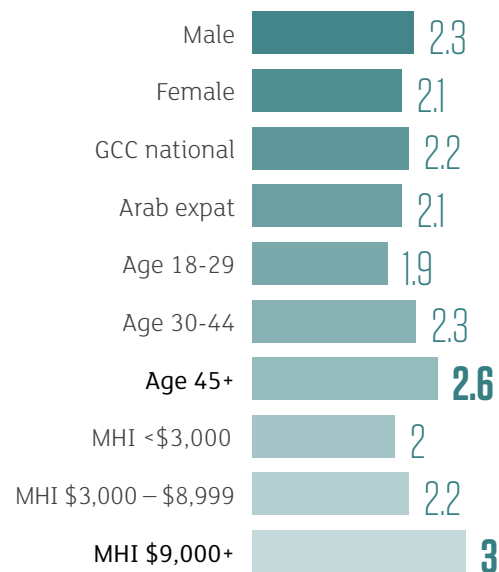
donating on the most occasions, they were also the most likely to donate to multiple charities; the mean number of charities was three in the last 12 months.

Q: How many charities have you donated money to in the last 12 months?

Base: 874



Mean number of charities by key demographic groups



Over half of those who had donated to between one and six charities in the last 12 months agreed they typically gave to the same charity

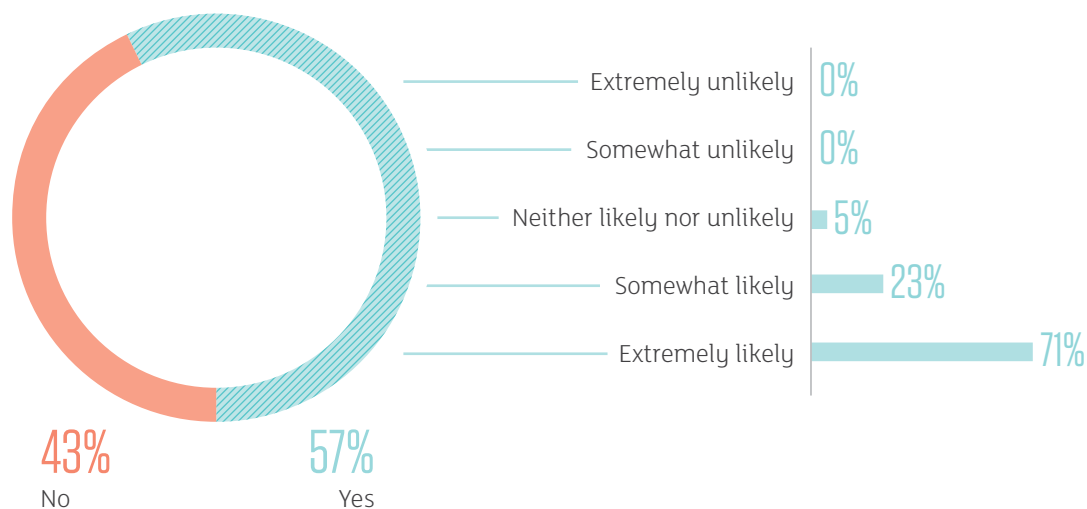
The majority (94%) are likely to give to the same charities again.

Q: Do you typically give to the same charity organisation(s)? How likely are you to give to this/these organisation(s) again?

Base: 844 / 479

Do you typically give to the same charity organisation(s)?

How likely are you to give to this/these organisation(s) again?



\$207* was the average donation made most recently by respondents

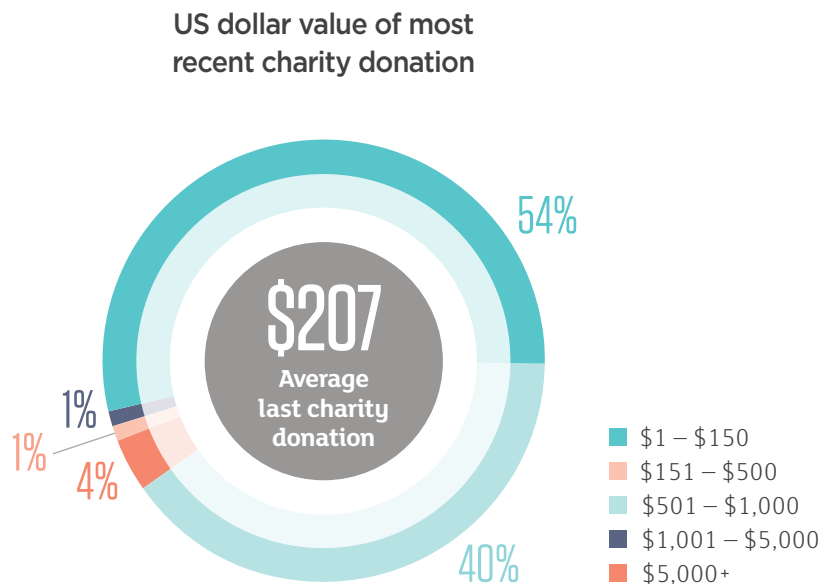
In line with findings already highlighted, respondents in the highest income group (monthly household income \$9,000+) had the largest average last charity donation: \$694, compared to \$107 from those with an MHI of less than \$3,000, and \$213 from those with an MHI ranging between \$3,000 and \$8,999.

Considering respondents' country of residence, those residing in Qatar had the highest average last charity donation: \$310,

compared to an average of \$250 among UAE residents; \$246 from Kuwait residents; \$182 among KSA residents; \$171 from Bahrain residents; and \$127 from Oman residents.

Q: Thinking of your most recent donation to charity, what was the US dollar value of this donation? (Select one only)

* This value likely reflects a few large donations made by a small proportion of the sample

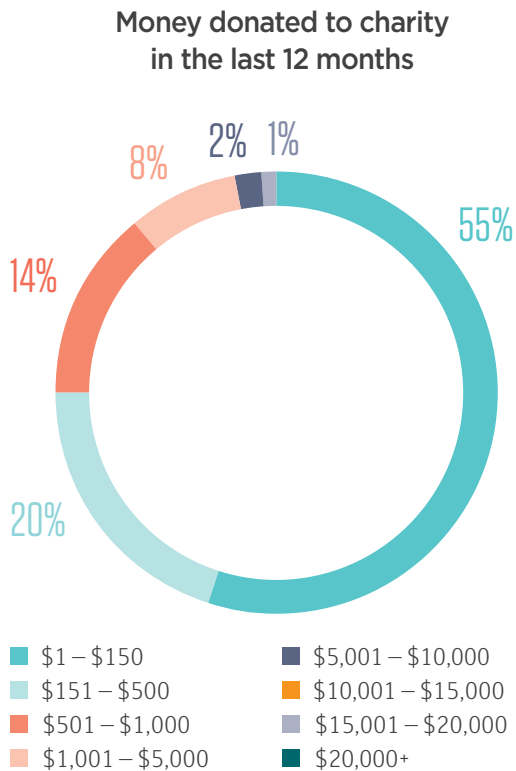


One quarter of donors had given more than \$500 to charity over the past 12 months

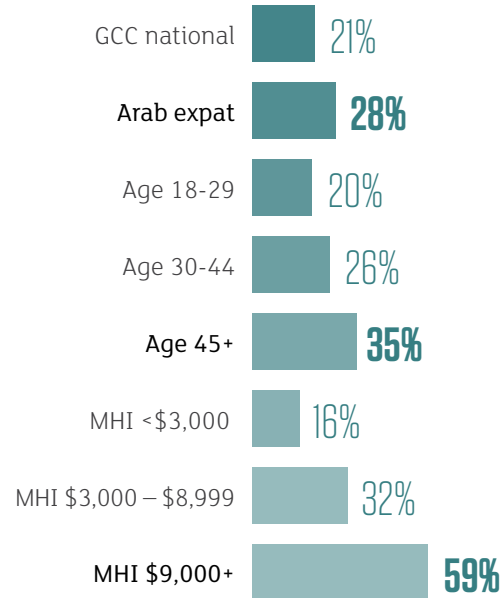
Arab expats, those aged 45+ and those in the highest income group were all the most likely to have donated more than \$500 to charity in the past 12 months.

Q: In total, over the past 12 months, how much money would you estimate you have donated to charity?

Base: 874



Percentage of respondents giving more than \$500 to charity in the past 12 months



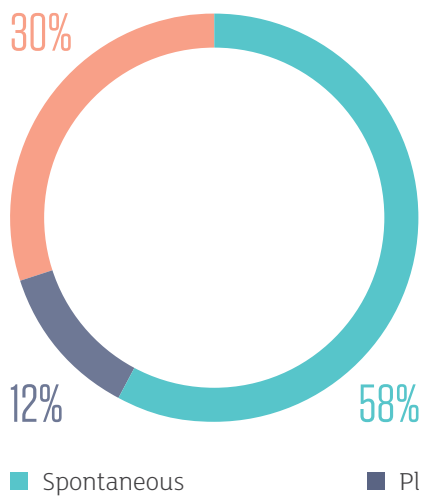
Over half of donors claimed most of their financial donations over the past year had been spontaneous

A significantly larger proportion of male respondents (compared to females) said they had made planned/regular donations, while younger respondents were the most spontaneous in their donations (60% of 18 to 29-year-olds vs. 47% of those aged 45+).

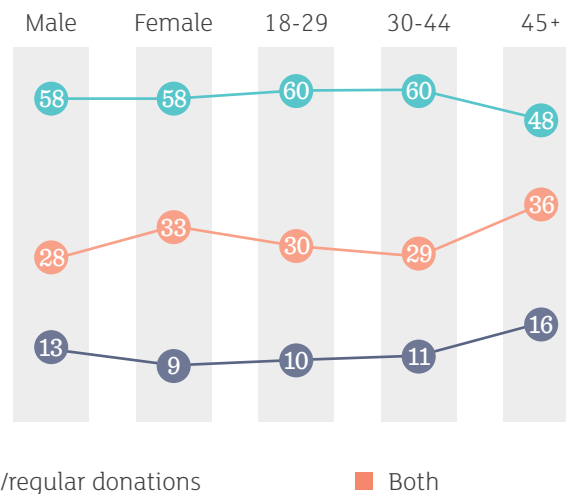
Q: Over the past 12 months, have most of your financial donations to charity been spontaneous or planned? (Select one only)

Base: 874

Nature of financial donations in the past 12 months



Nature of financial donations by key demographic groups (%)



The largest proportion had donated by putting money in a charity collection box

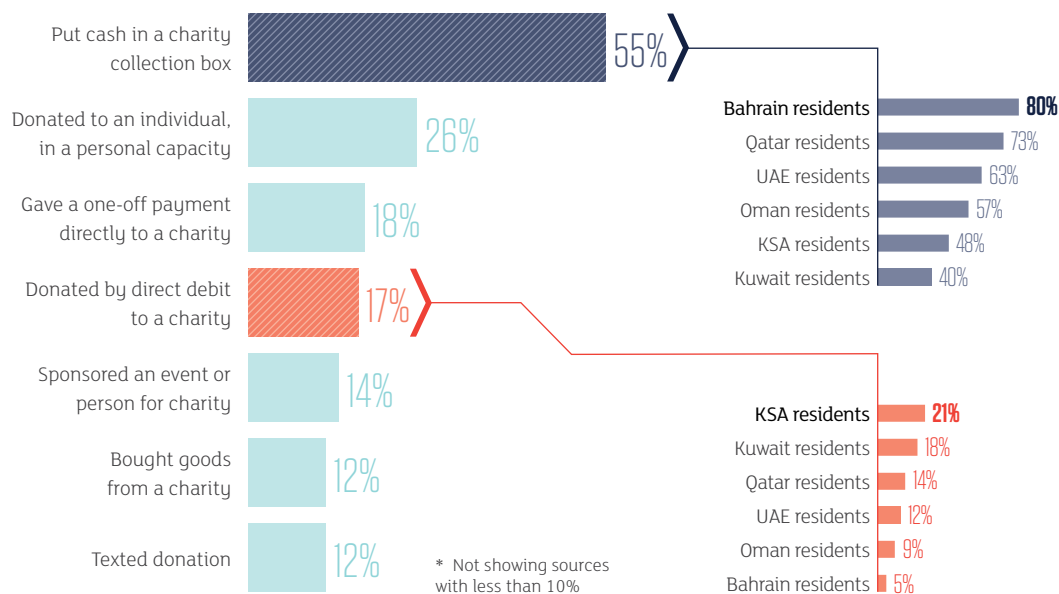
Putting money in a charity collection box was by far the most popular donation method over the past 12 months. This method was especially popular among Bahrain residents (80% had used this method, which is significantly higher than the proportion of respondents from other GCC countries).

KSA residents were the most likely to have donated via direct debit.

Q: Over the past 12 months, what methods have you used to make financial donations to charity? (Select all that apply)

Base: 874

Donation methods*



Family/friends/colleagues provide inspiration to give for the largest proportion of donors

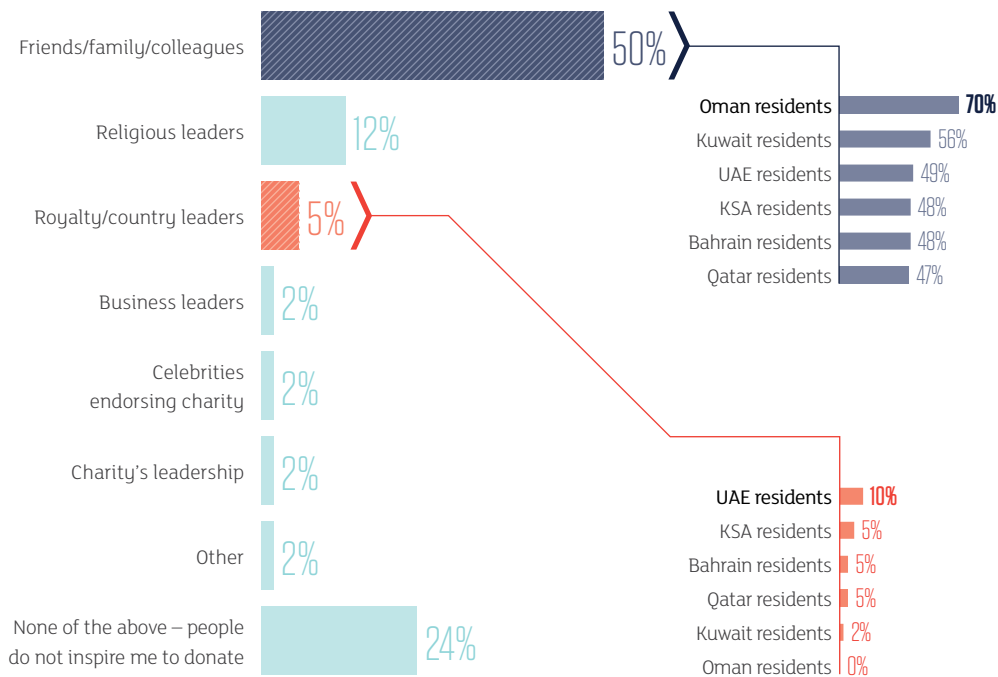
This is true especially among Oman residents, of whom 70% said they are most inspired to give by their friends, family or colleagues. Interestingly, UAE residents were significantly more likely than residents of any other GCC country

to say they are inspired by royalty or country leaders.

Q: Who, if anyone, inspires you most to give? (Select one only)

Base: 1,008

Who, if anyone, inspires you most to give?



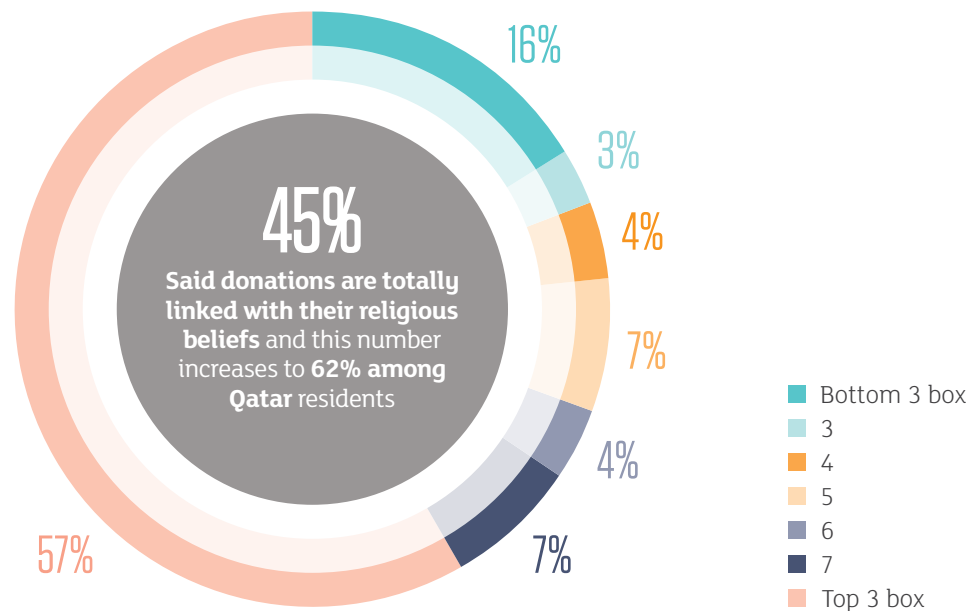
Results suggest donations tend to be strongly linked to religious beliefs

Some 45% of respondents claimed their donations to charity are totally linked to their religious beliefs. This sentiment appears to be most accentuated among Qatar residents, of whom 62% said their donations to charity are totally linked to their religious beliefs (a significantly higher proportion than any other GCC country).

Q: On a 0 to 10-point scale, where 0='Not at all' and 10='Totally', how much would you say your donations to charity are linked to your religious beliefs?

Base: 1,008

Strength of link between donations and religious beliefs

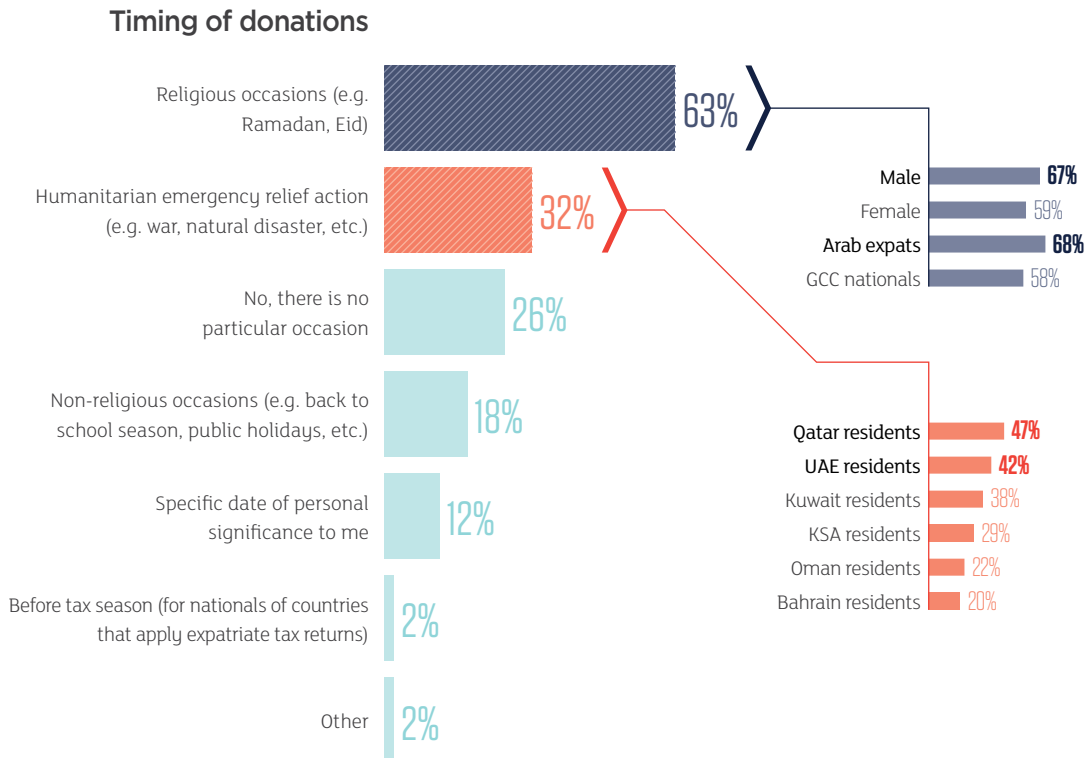


Two-thirds consistently donate money to charity on religious occasions such as Ramadan and Eid

Male respondents and Arab expats were the most likely to say they typically donate money to charities during religious occasions. Qatar and UAE residents were significantly more likely to donate during humanitarian emergencies.

Q: Typically, is there a particular time of the year/occasion during which you donate money to charities? (Select all that apply)

Base: 1,008



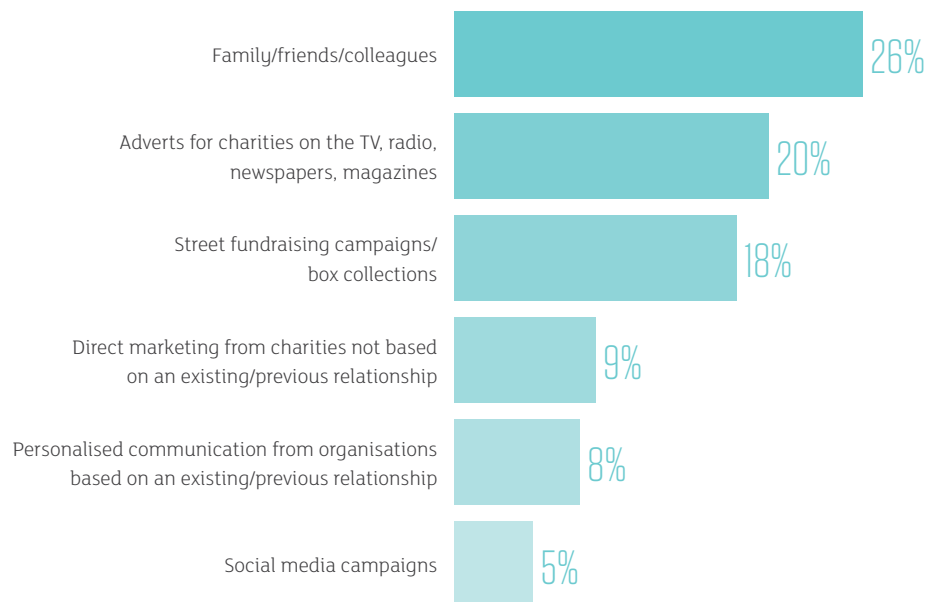
Family/friends/colleagues and adverts in traditional media are the main sources of information about charity and philanthropy

In addition, and in line with previous findings, street fundraising campaigns and collection boxes are also important sources of information for a considerable proportion of respondents (top source of information for 18% of those surveyed).

Q: Typically, where do you get your information about charity and philanthropy? (Select the top source)

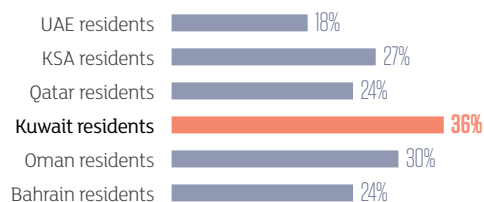
Base: 1,008

Top source of information about charity and philanthropy overall

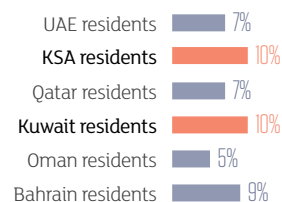


Top source of information among country of residence

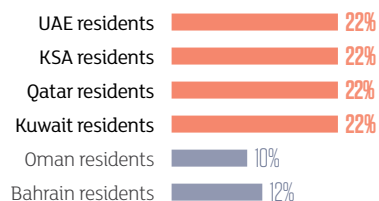
Family/friends/colleagues



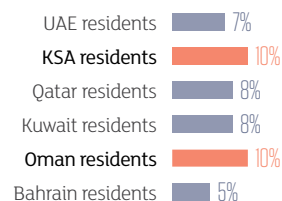
Direct marketing



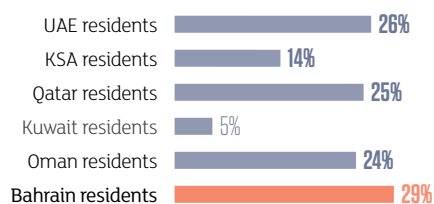
Adverts for charities on the TV, radio, newspapers, magazines



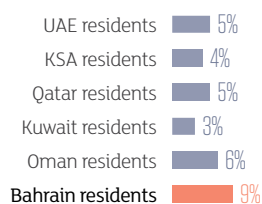
Personalised communication



Street fundraising campaigns/box collections



Social media campaigns



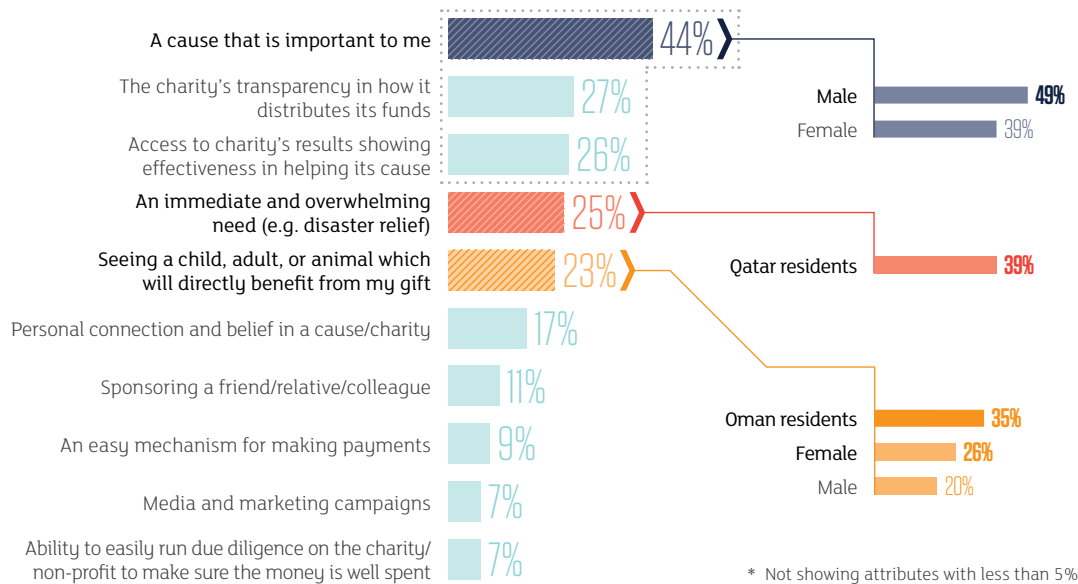
Respondents are mostly influenced to select a charity which has causes particularly important to them

Interestingly, the charity's transparency in how it distributes its funds, and access to the charity's results showing effectiveness in helping its cause, also emerged as extremely influential factors when deciding where to donate money.

Q: Which of the factors below influences you most in selecting a charity? (Select up to three)

Base: 1,008

Most influential factors when selecting a charity*



The vast majority of those surveyed claimed results are important to them when selecting a charity

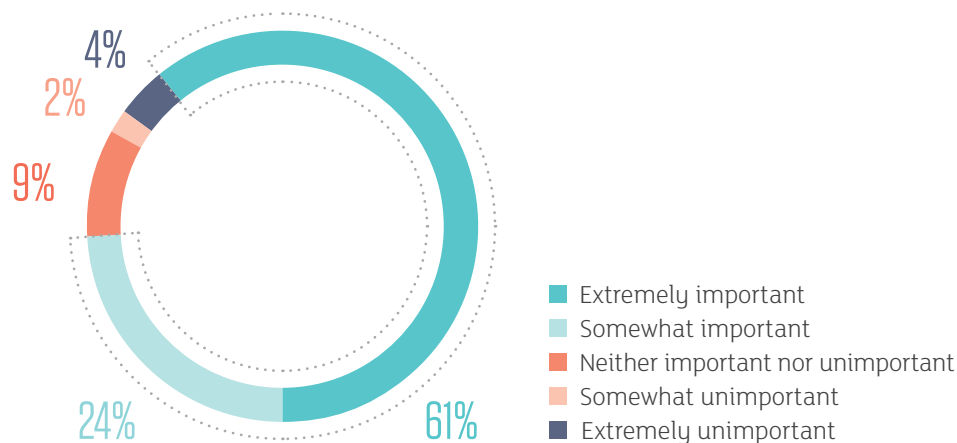
This was especially true for respondents earning between \$3,000 and \$8,999, for which 93% said that results are either extremely or somewhat important when selecting a charity to donate to.

In addition to this, seven in every 10 respondents explained they would stop contributing to a charity if they found it to be performing poorly in terms of results.

Q: How important are results to you when selecting which charity to donate to? Would you stop contributing to a charity if you found it to be performing poorly in terms of results?

Base: 1,008

Importance of results when selecting a charity



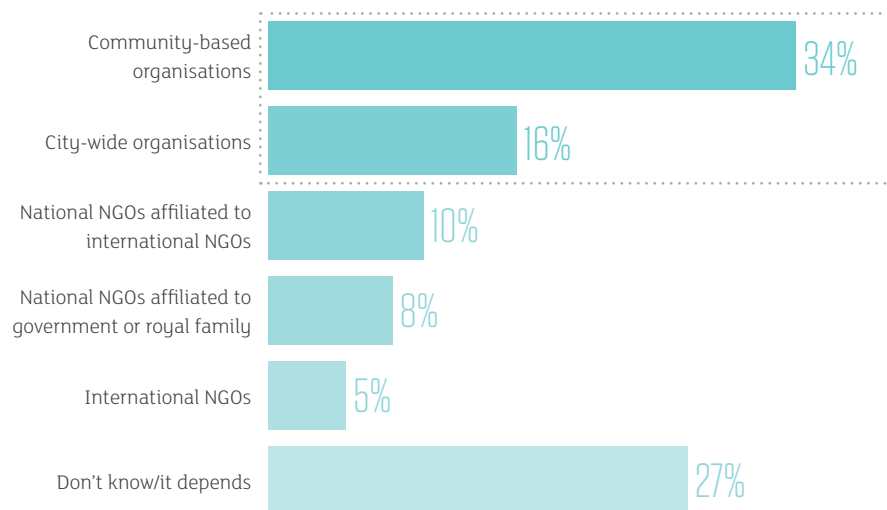
The largest proportion of respondents prefer donating to community-based or city-wide organisations

Interestingly, GCC nationals were significantly more likely to say they prefer donating to community-based organisations compared to the proportion of Arab expats choosing this response. Whereas, Arab expats placed a significantly higher preference on donating to national NGOs affiliated to international NGOs.

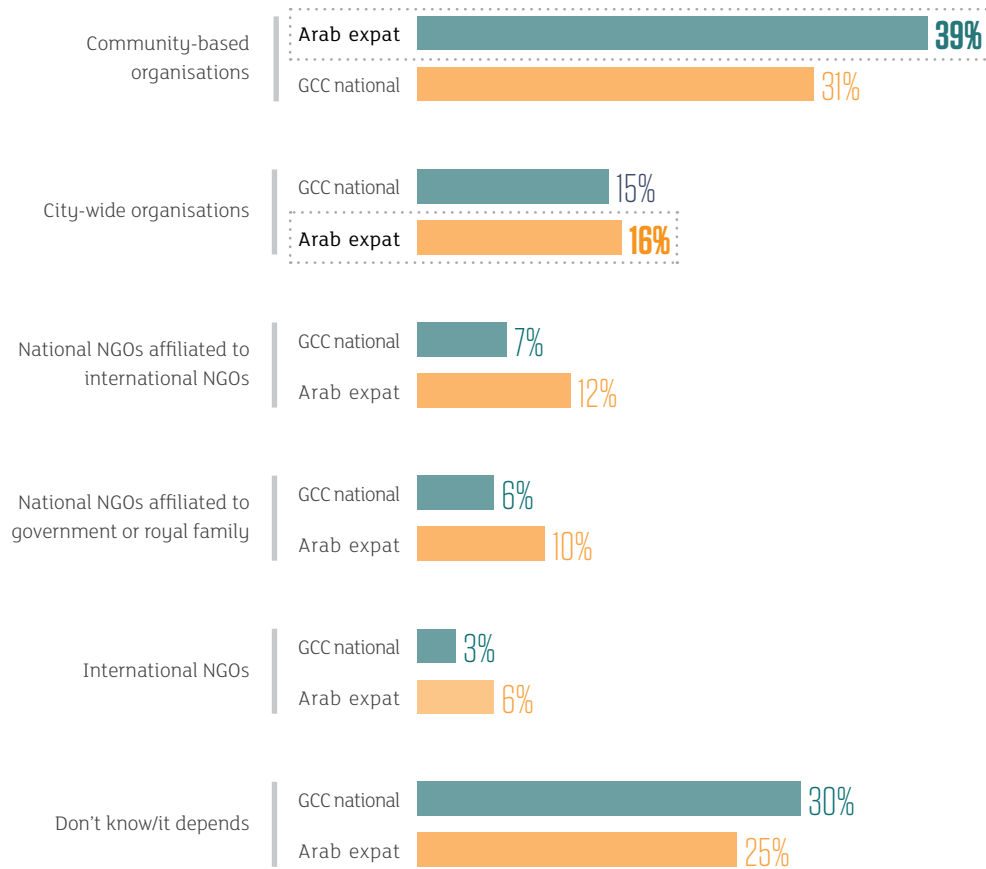
Q: Typically, to which type of charities do you prefer to donate money to? (Select one only)

Base: 1,008

Preferred charities to donate to



Preferred charities to donate to by nationality



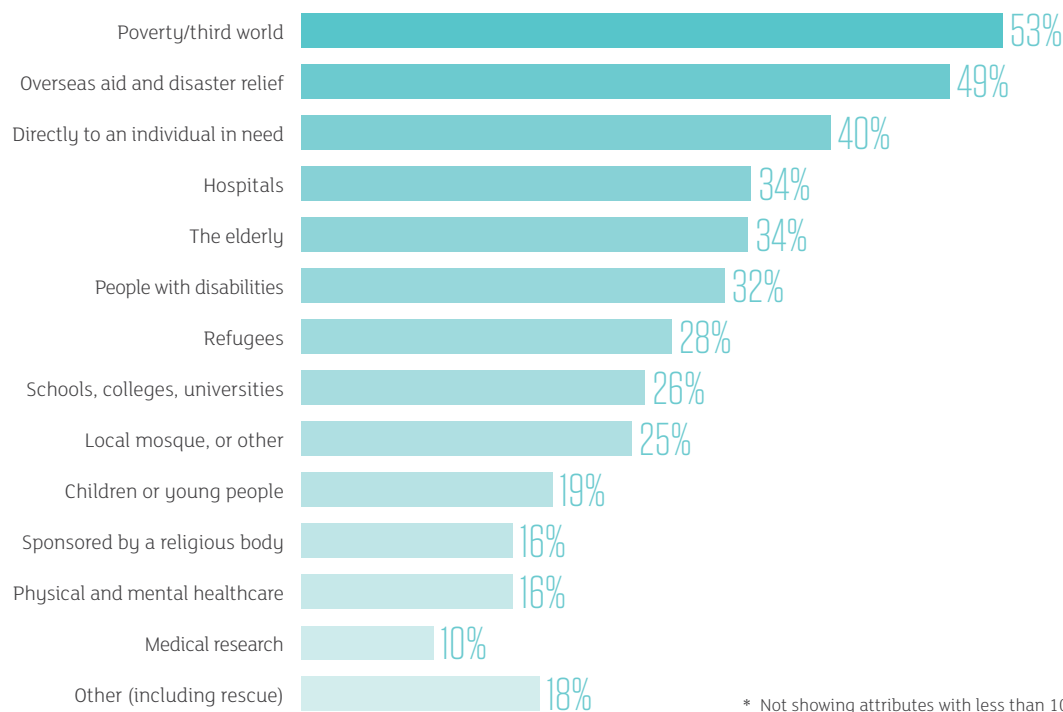
One in two favour causes related to poverty/third world or overseas aid/disaster relief

Males were particularly likely to preference donating to causes related to hospitals and schools, whilst females placed significantly higher preference than males on child/youth related charities.

Q: What causes do you prefer to financially donate to? (Select all that apply)

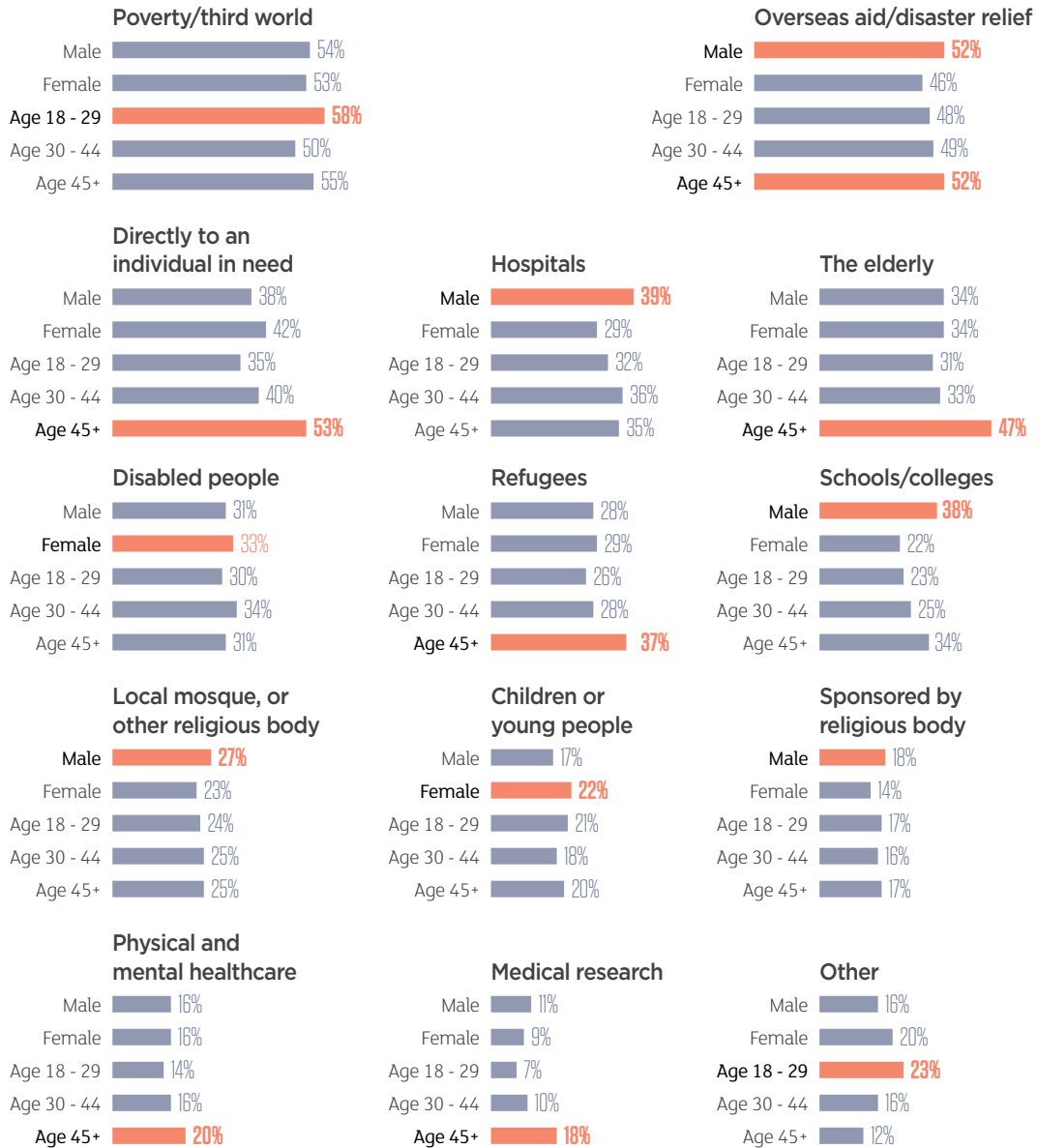
Base: 1,008

Preferred causes to donate to*



* Not showing attributes with less than 10%

Preferred causes by key demographics



'Lack of funds' is the main personal obstacle when it comes to making financial donations to charity

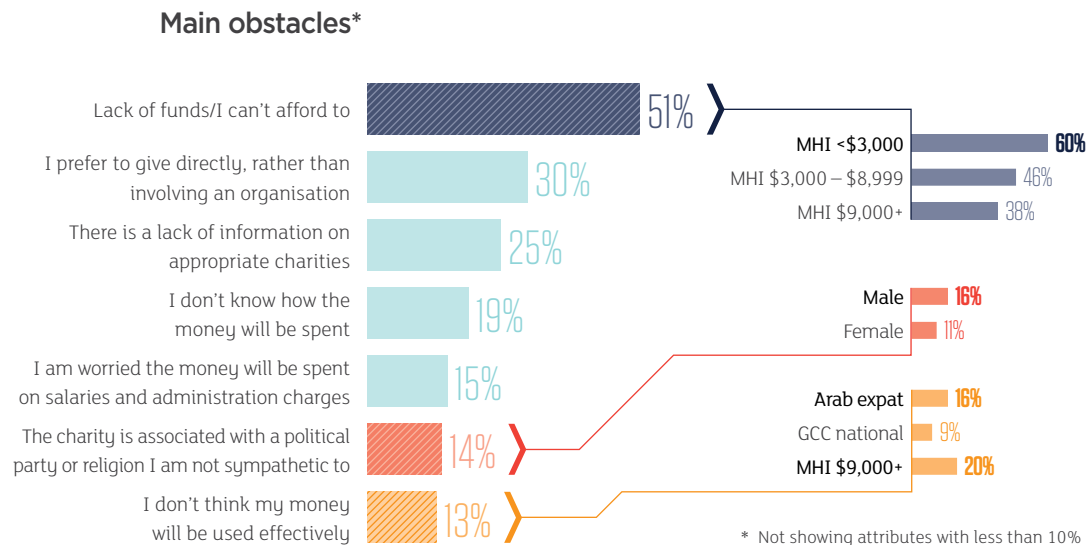
Many (30%) also prefer to give directly, rather than involving an organisation, while one-fourth (25%) complain there is a lack of information on appropriate charities.

While lack of funds is a considerable hurdle for those in the lower income groups (60% of those with MHI of less than \$3,000 vs. 38% of those with MHI of \$9,000+), those in the more affluent group are as likely to select a lack of information on

appropriate charities (35%) as a major obstacle or the concern that their money will not be used effectively (20%).

Q: What are the main obstacles for you personally when it comes to making financial donations to charity? (Select up to three)

Base: 1,008



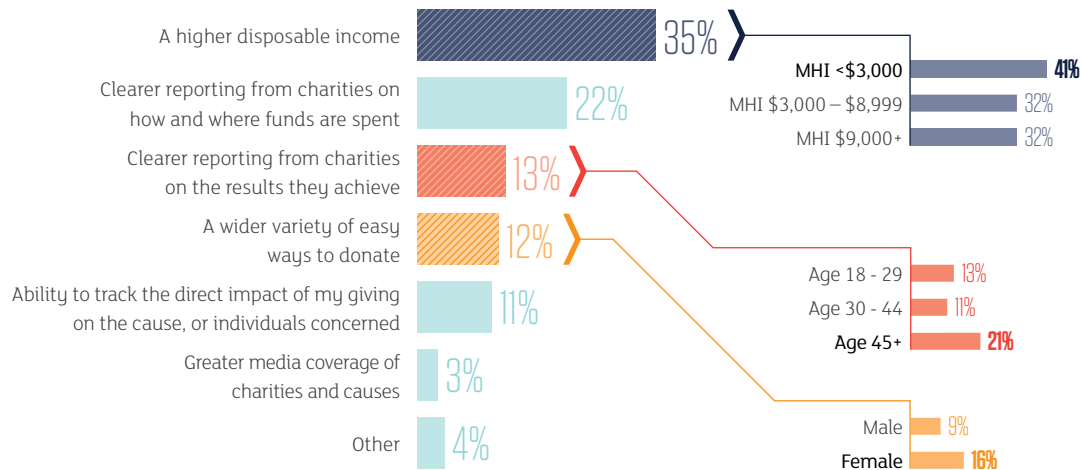
Higher disposable income is the main driver to donating more

As highlighted on multiple occasions, there is a clear connection between income and charity donations. In this case those in the lowest income group were the most likely to say they would be encouraged to donate more to charity if they had a higher disposable income. Interestingly, donors aged 45+ were significantly more likely to say they would be encouraged to donate more by clearer reporting from charities on the results they achieve.

Q: Which of the following would encourage you to donate more to charity? (Select one main reason)

Base: 1,008

What would encourage you to donate more to charity?



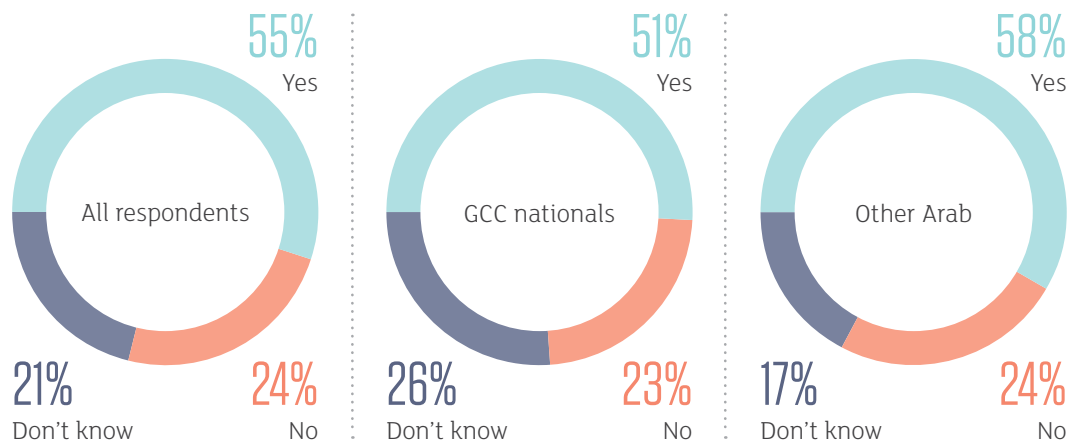
Over half believe giving should be more widely publicised in an effort to raise awareness of charity and needy causes

This is especially true among other Arab expats, of whom 58% agreed that giving should be more widely publicised (compared to 51% of GCC nationals).

Q: In your opinion, should giving be more widely publicised, rather than discreet, in an effort to raise awareness of charities and needy causes?

Base: 1,008

Should giving be more widely publicised rather than discreet, in an effort to raise awareness of charities?



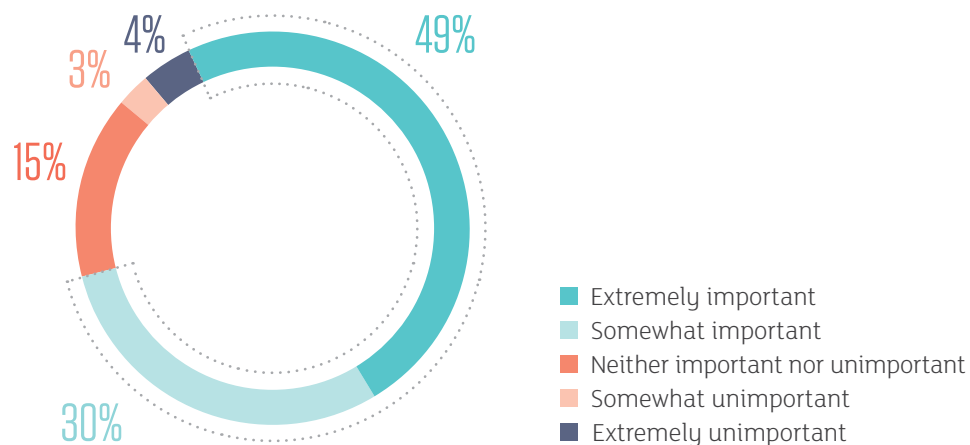
The survey highlights the importance of a company's charitable and CSR record for respondents when deciding who to give business to

This is especially true among males, of whom 82% said records are important (vs. 75% of females).

Q: In your day-to-day life, how important is a company's charitable and CSR record in your decision of who to give business to?

Base: 1,008

Importance of a company's charitable and CSR record



Nevertheless, despite their willingness to participate, most still believe governments and corporations should have the most responsibility in contributing to charities

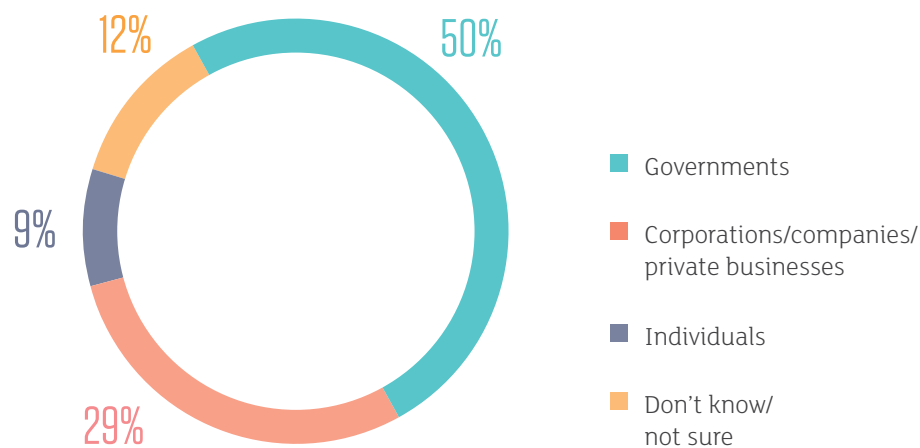
Across age groups, those between 18 and 29 were significantly more likely than those aged over 30 to say governments should have the most responsibility in contributing financially to important causes and charities (54% vs. 47% respectively). On the other hand, a significantly higher proportion of those aged 30+ said corporations/companies/private businesses should have the most responsibility (31%

among 30-44 year olds and 36% among those aged 45+, vs. 24% among donors aged 18-29).

Q: Ultimately, who do you think should have the most responsibility in contributing financially to important causes and charities? (Select one only)

Base: 1,008

Who do you think should have the most responsibility in contributing financially to important causes and charities?



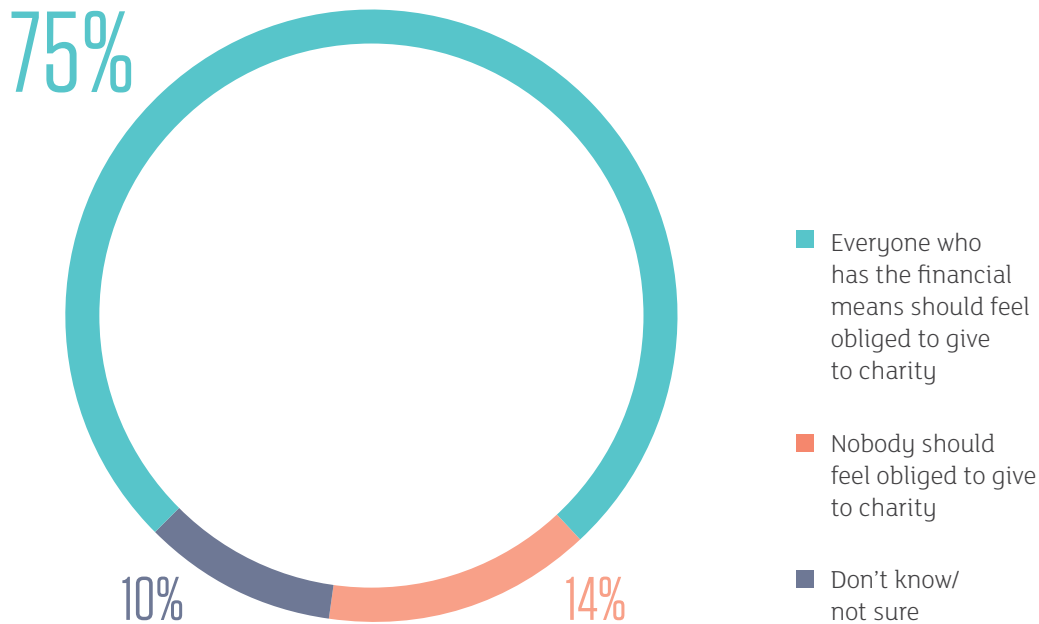
Lastly, the vast majority agree everyone who has the financial means, should feel obliged to give to charity

Arab expats were significantly more likely than GCC nationals to agree most strongly that everyone who has the financial means should feel obliged to donate to charity (80% vs. 70% of GCC nationals).

Q: Finally, which of the following statements do you agree with most strongly? (Select one only)

Base: 1,008

Which of the following statements do you agree with most strongly?



Philanthropy Age

in association with

