

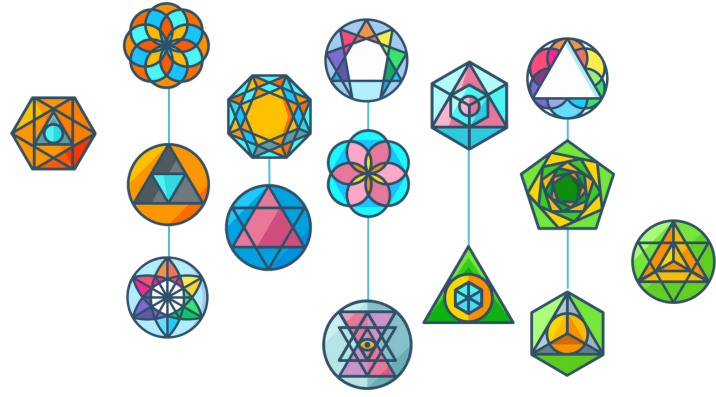


SEPTEMBER 2022

# **MOTIVATING NEXT-GEN PHILANTHROPY BY IDENTITY DISCOVERY: THE GENEROSITY QUIZ**



COIN UP



## CONTRIBUTORS

**PRESENTED BY**



**IN CONJUNCTION WITH**

**BILL & MELINDA**  
**GATES** *foundation* **BETTER GIVING STUDIO**

**AUTHOR AND REPORT DESIGNER**

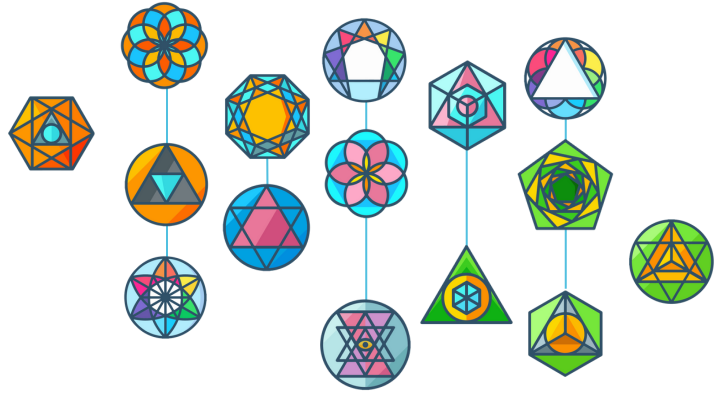
Jackie Sizemore

**EDITED BY**

Leena Patidar, Judie Stillman

## ACKNOWLEDGMENTS

Our sincere thanks to the Bill & Melinda Gates Foundation for their generous grant and to the Better Giving Studio for their continuous support of innovation in philanthropy.



# CONTENTS

- 4 [About Us](#)
- 5 [State of Next-Gen Everyday Giving](#)
- 8 [Identity Self-Categorization](#)
- 9 [Our Big Questions](#)
- 10 [The Generosity Quiz Project](#)
- 17 [Quiz Results](#)
- 24 [Conclusion on Quiz's Impact on Individual Giving](#)
- 26 [Considerations for Quiz Creation in the Non-Profit Sector](#)
- 27 [Future Uses of Coin Up's Results or a Philanthropic Quiz](#)
- 28 [Figures](#)



## ABOUT US

Coin Up believes that giving is deeply personal and can be powered by the strength of collective generosity. Since 2016, our app pioneered effortless, informed, individual donations as the first mobile donation app approved by Apple's App Store. By rounding up the spare change from everyday credit or debit card spending, our app guides new and existing donors to discover causes they care about, set up automatic, recurring giving to the charity of their choice, and share the positive ripple effect of their micro-donations. We reward our users with a monthly "thank you" message and a 100% tax donation receipt. This means our users receive the credit, and the tax benefit, of their entire donation, no matter how small. As a result, Coin Up users have a more personal connection to their philanthropic actions throughout each step of their giving process.

While the Coin Up app set out to make it easier for individuals to support the causes they felt most passionate about, the experience also inspired our own passion for ambitious goals that accelerate change in the social impact sector. We look forward to continuing to expand our impact as a charity-focused, social impact driven business.



# STATE OF NEXT-GEN EVERYDAY GIVING

Next-Gen represents the future of philanthropic giving. With total giving in the U.S. declining by -\$3.29 billion dollars from 2020 to 2021 when adjusted for inflation, helping individuals feel confident in their everyday giving is of high importance.<sup>1</sup> This generational group of Millennials and Gen Z holds a significant place in the future of everyday giving because of four defining characteristics with great philanthropic potential.

First, these two generations are more racially and ethnically diverse than any previous generation.<sup>2</sup> It is no surprise that Next-Gen places a high value on “intersectionality” from their personal politics to the social issues they choose to support. Intersectionality refers to “the complex, cumulative way in which the effects of multiple forms of discrimination... combine, overlap, or intersect.”<sup>3</sup> To them, race, gender, sexuality, and class are all intertwined and must be viewed in this collective way in order to make lasting positive changes.<sup>4</sup> Next-Gen has already made significant national and global impacts through large social movements, each fueled by the digital world. Millennials and Gen Z feel a shared responsibility to ‘actually do something’ by following through with the maximum impact to the intersectional issues they view as crucial for a better world. Over the last two decades, Millennials launched and led the social movements for Dreamers, Occupy Wall Street, anti campus sexual assault, and Black Lives Matter. The lasting effects of these movements “constitute a new political generation, whose lived experiences and worldviews sharply distinguish them from previous generations of youthful activities.”<sup>5</sup>

Gen Z’s focus on climate change also reflects this desire for direct, effective action. Their mixture of frustration and determination is best summarized by Greta Thunberg telling world leaders at the 2019 World Economic Forum, “I don’t want you to be hopeful, I want you to panic. I want you to feel the fear I feel every day and then I want you to act.”<sup>6</sup>

Finally, as digital natives, NextGen grew up using technology as an everyday tool for their social lives, work lives, and personal goals. Their ability to navigate social media and their communication preferences have enormous potential to impact the philanthropic sector.

So, what does Next-Gen’s everyday giving look like? In 2018, a Blackbaud Institute study found that 50% of Millennials gave to an average of 3.5 charities, totaling \$20.1 billion. By comparison, 44% of Gen Z gave to an average of 4.6 charities, totaling \$3.2 billion.<sup>7</sup>

Unsurprisingly, with less stable employment, housing, and educational costs, Millennials and Gen Z choose to give in a variety of ways beyond monetary donations.

<sup>1</sup> “Giving USA 2022: The Annual Report on Philanthropy for the year 2021” (Powerpoint, The Giving Institute)

<sup>2</sup> Ruth Milkman, “A New Political Generation: Millennials and the Post-2008 Wave of Protest,” *American Sociological Review* 82, no. 1 (2017): 2

<sup>3</sup> Merriam-Webster Online, s.v. “intersectionality,” accessed April 1, 2022, <https://www.merriam-webster.com/dictionary/intersectionality>

<sup>4</sup> Ruth Milkman, 2

<sup>5</sup> Ruth Milkman, 2

<sup>6</sup> Greta Thunberg, “Our House is On Fire,” (speech, World Economic Forum, Davos, Switzerland, January 25, 2019), *The Guardian*, <https://www.theguardian.com/environment/2019/jan/25/our-house-is-on-fire-greta-thunberg16-urges-leaders-to-act-on-climate>

<sup>7</sup> Mark Rovern, *The Next Generation of American Giving: The Charitable Habits of Generation Z, Millennials, Generation X, Baby Boomers, and Matures*, (Charleston, SC: Blackbaud Institute, 2018), 8.

The Blackbaud Institute's 2018 survey showed their Gen Z donor participants' giving breakdown as 26% volunteer, 19% word of mouth, 15% donation, 12% advocacy, 12% peer-to-peer (runs, walk-a-thons, etc), and 16% other. For Millennials, the same survey showed 30% donation, 24% volunteer, 11% word of mouth, 10% peer-to-peer, 6% advocacy, and 19% other.<sup>8</sup> Next-Gen's follow-through on climate change activism is clear as a 2021 Pew Research Center article found, "32% of Gen Zers and 28% of Millennials have taken at least one of four actions (donating money, contacting an elected official, volunteering or attending a rally) to help address climate change in the last year."<sup>9</sup> As digital natives, the majority of Next-Gen gives through websites and social media with an increasing number feeling willing to give through the mobile version of a website, app, or text to donate campaign.<sup>10</sup> Overall, Gen Z is much more likely to give to organizations that relate to activism and to give in small amounts at spontaneous times. Millennials are equally likely to give small and spontaneously as they are to plan for when and how much they want to give.<sup>11</sup>

"Philanthropy and charity may be acts of private citizens, but they are acts with public and therefore political significance" and nowhere is this truer than on social media platforms.<sup>12</sup> With so much of Next-Gen's philanthropy occurring in online spaces, social media plays a vital role in their giving. When looking for information to guide their decision to donate, the Blackbaud Institute's 2018 survey found that 48% of Gen Z and 41% of Millennials used social media to research organizations.<sup>13</sup> Irregular Labs, a reporting team of Gen Zers, surveyed over 2000 self-identified Gen Z people in seven countries asking how they wanted to be informed about social and political issues and received 63% of votes for through "social media channels."<sup>14</sup> For Next-Gen givers, social media is both a source of information and a pathway to influence others. This means every Next-Gen giver has the potential to be both a donor and a partner to charitable causes. Within every social media application, there is a built-in philosophy of reciprocity– if a new friend likes one's post, one is likely to return the favor by liking something that friend has posted.<sup>15</sup> Philanthropic marketing that feels personal rather than targeting a monolithic mass audience is more impactful, especially within the social media space where Next-Gen donors can become coproducers of philanthropic messages, helping them feel like, "active participant[s] in the joint solving of social problems."<sup>16</sup>

<sup>8</sup> Mark Rovern, 12

<sup>9</sup> "Gen Z, Millennials Stand Out for Climate Change Activism, Social Media Engagement With Issue," Pew Research Center, Washington, D.C. (May 26, 2021) <https://www.pewresearch.org/science/2021/05/26/gen-z-millennials-stand-out-for-climate-change-activism-social-media-engagement-with-issue/>

<sup>10</sup> Mark Rovern, *The Next Generation of American Giving: The Charitable Habits of Generation Z, Millennials, Generation X, Baby Boomers, and Matures*, (Charleston, SC: Blackbaud Institute, 2018), 17, 22

<sup>11</sup> Mark Rovern 16

<sup>12</sup> Jacqueline Pfeffer Merrill, "From Hobbes to Hayek: Perspectives on Civil Society and Philanthropy," *The Independent Review* 23, no. 4 (2019): 489

<sup>13</sup> Mark Rovern, 15

<sup>14</sup> "Irregular Report: Fluidity," Irregular Labs, (2018): 678-679

<sup>15</sup> Elizabeth Crisp Crawford, Jeremy Jackson, "Philanthropy in the Millennial Age: Trends Toward Polycentric Personalized Philanthropy," *The Independent Review* 23, no. 4 (2019): 5545

<sup>16</sup> Elizabeth Crisp Crawford, Jeremy Jackson, 561, 555

The preference for decentralized interactions and polycentric philanthropy also reflects Next-Gen's life experiences growing with social media as a part of their everyday life. The viral 2014 ALS Ice Bucket Challenge campaign is a perfect early example of a personalized donating experience fueled by social media that led to spontaneous giving.<sup>16</sup> Next-Gen's ability to influence philanthropic motivation online through their social media expertise is a powerful tool in encouraging others to take action, donate money, volunteer time, or advocate for specific issues.

From battling climate change to responding to an international crisis like the 2022 invasion of Ukraine, Next-Gen is already paving the path for philanthropy's future with an intersectional, digital mindset. Building opportunities to better understand Next-Gen's philanthropic preferences is a smart investment for the present and for the future. With Next-Gen individuals already more likely to be engaged in some form of activism or online advocacy, it makes sense to help both ongoing and potential new donors to discover genuine connections between their values and the philanthropic sector. Resources that bring self-awareness of values will help Next-Gen feel more confident in their motivations for giving and in their decisions for how and when they choose to give.

## STATE OF NEXT-GEN EVERYDAY GIVING KEY TAKEAWAYS

- Next-Gen (Millennials and Gen Z) represents the future of philanthropic giving.
- Place a high value on "intersectionality" or the ways multiple forms of discrimination intersect.
- Responsible for social movements of Dreamers, Occupy Wall Street, anti campus sexual assault, Black Lives Matter, and a renewed focus on climate change.
- As younger generations are still building wealth, Millennials and Gen Z choose to give in a variety of ways beyond monetary donations.
- Volunteering, Word of Mouth activism, and Advocacy are popular ways to give.
- In 2021, 32% of Gen Zers and 28% of Millennials took action to address climate change.
- Give both spontaneously and planned, usually to three to four charities a year.
- Use social media to research organizations and influence others about issues.
- The reciprocity of social media makes it a perfect fit for Next-Gen philanthropy
- Building opportunities to better understand Next-Gen's philanthropic preferences is a smart investment for the present and for the future.

<sup>16</sup> Ben Carter and Keith Moore, "Icy Logic: Choosing a charity with your head and your heart," BBC, September 7, 2014, <https://www.bbc.com/news/magazine-29087531>





# IDENTITY SELF-CATEGORIZATION

There are many different aspects of an individual's identity, from things they cannot control to things they self-select. Identity can also shift depending on a person's environment, creating both a public and private self. People also "derive part of their identity and sense of self from the organizations or work-groups to which they belong."<sup>17</sup> In fact, "many friendships, confiding relations, and social support ties are formed within voluntary groups."<sup>18</sup> From online to in-person, the groups and communities a person chooses to belong to shape who that individual is.

The ability to self-select groups to belong to can have powerful impacts on an individual. When people feel similar to one another, their similarities stand out even more, creating connections within the group.<sup>19</sup> Furthermore, research shows that the choice to perceive oneself as belonging to a specific self-selected group can lead to individuals changing their behavior to better suit the group's identity. A 2000 study on Social Identity and Self-Categorization found that an individual's decision to transform themselves to match a group identity could lead to "positive in-group attitudes and cohesion, cooperation and altruism, emotional contagion and empathy, collective behavior, shared norms, and mutual influence."<sup>20</sup> This same study also found that individuals were motivated to pursue such social identity processes to "reduce subjective uncertainty about [their] perceptions, attitudes, feelings, and behaviors and, ultimately, [their] self-concept and place within the social world."<sup>21</sup>

While an individual's identity may change and evolve with time, the act of pursuing a new understanding of the self can have a significant impact on that individual's philanthropic behavior. A 2008 study published in the *Journal of Marketing Research* conducted several experiments on the influence of a previous donor's identity to a new donor's donation intentions. This "identity congruency effect" was more likely to happen when a donor had high identity esteem or when a donor was asked to focus their attention on others. However, if a donor had low identity esteem, the effect did not occur.<sup>22</sup> For everyday givers, philanthropic decision-making is often deeply personal. It is encouraging that consumer research supports the premise that "self-focused attention promotes a greater reliance on feelings in consumer judgment and decision making."<sup>23</sup>

Overall, research from psychological, sociological, and consumer behavior fields suggests that an individual's sense of belonging to a specific group will positively impact both the individual and the group's charitable giving behavior.

<sup>17</sup> Michael A. Hogg, Deborah J. Terry, "Social Identity and Self-Categorization Processes in Organizational Contexts," *The Academic of Management Review* 25 no. 1, (2000): 121

<sup>18</sup> Miller McPherson, Lynn Smith-Lovin, and James M. Cook, "Birds of a feather: Homophily in social networks," *Annual Review of Sociology* 27, (2001): 433.

<sup>19</sup> Michael A. Hogg, Deborah J. Terry, 123; Miller McPherson, Lynn Smith-Lovin, and James M. Cook, 428.

<sup>20</sup> Michael A. Hogg, Deborah J. Terry, 123

<sup>21</sup> Michael A. Hogg, Deborah J. Terry, 124

<sup>22</sup> Jen Shang, Americus Reed II, Rachel Croson, "Identity Congruency Effects on Donations," *Journal of Marketing Research* 45, no. 3 (2008): 351-361.

<sup>23</sup> Hannah H. Chang and Iris W. Hung, "Mirror, Mirror on the Retail Wall: Self-Focused Attention Promotes Reliance on Feelings in Consumer Decisions," *Journal of Marketing Research* 55, no. 4 (2018): 596





## OUR BIG QUESTIONS

- Will the Generosity Quiz motivate new Next-Gen donors to take charitable action?
- Will the Generosity Quiz lead to positive behavioral changes such as increased donations or other philanthropic actions?
- Does providing a Giving Personality, Action Style, or Giving Style positively impact the likelihood of Next-Gen giving?
- Which creative ad content results in the highest Next-Gen audience philanthropic quiz engagement?
- What causes do Millennials, Gen Z, and Next Gen identify with?



# THE GENEROSITY QUIZ PROJECT

The fifteen-question quiz will analyze the taker's selections. At the end of the quiz, each taker will receive a Giving Persona, three Badges, a Giving Style, and an Action Style. Following this information, the quiz will present two customized Cause categories with three suggested charities each, selected from over 1,500,000 IRS-designated charities. When the quiz taker receives their results page with all of this information, they will be prompted to share their email address with Coin Up. After reading their quiz results, the taker would take one of the following three actions:

- a. Donate
- b. Decline to donate but do give email address
- c. Decline to donate and do not give email address

Using Call to Action website buttons, meta tags and email-based metric tracking, Coin Up will track each quiz taker's experience, decisions, and at what point in the process they chose to act through donating or volunteering.

## PLANNING STAGE

### Team Creation

**Chief Technical Officer:** Responsible for leading the development of the quiz's architecture. Manages necessary coding to create structure of the quiz, implement mapping of meta tags, retain quiz results, and provide all metrics for data collection.

**Quiz Expert:** Understands how to utilize gamification, behavioral psychology, and consumer psychology to create a targeted quiz. Ideally has successful experience in writing and creating an online quiz. Responsible for incorporating focus group feedback and creating final mapping schema of quiz answers, meta tags, and quiz results to achieve project goals.

**Quiz Producers:** A small team responsible for bringing the technology of the quiz and the overall purpose together. Organizes the quiz team, ensures each creation step reflects the quiz project's goals, and executes testing of the Quiz.

**Graphic Designer:** Leads artistic vision of quiz, including reflecting the inclusive and emotional goals of the visual rhetoric.

**UI/UX Expert:** In charge of testing the quiz for overall user experience, and that the target feelings of ease of completion, clarity, and optimism are felt through each quiz step. Ensures that all people-facing elements of the quiz meet or exceed ADA standards.

## FOCUS GROUPS AND ADJUSTMENTS

### Phase One

Asked approximately fifteen people within Coin Up's network to take the quiz and share general feedback on the user experience and resonance with their quiz results.

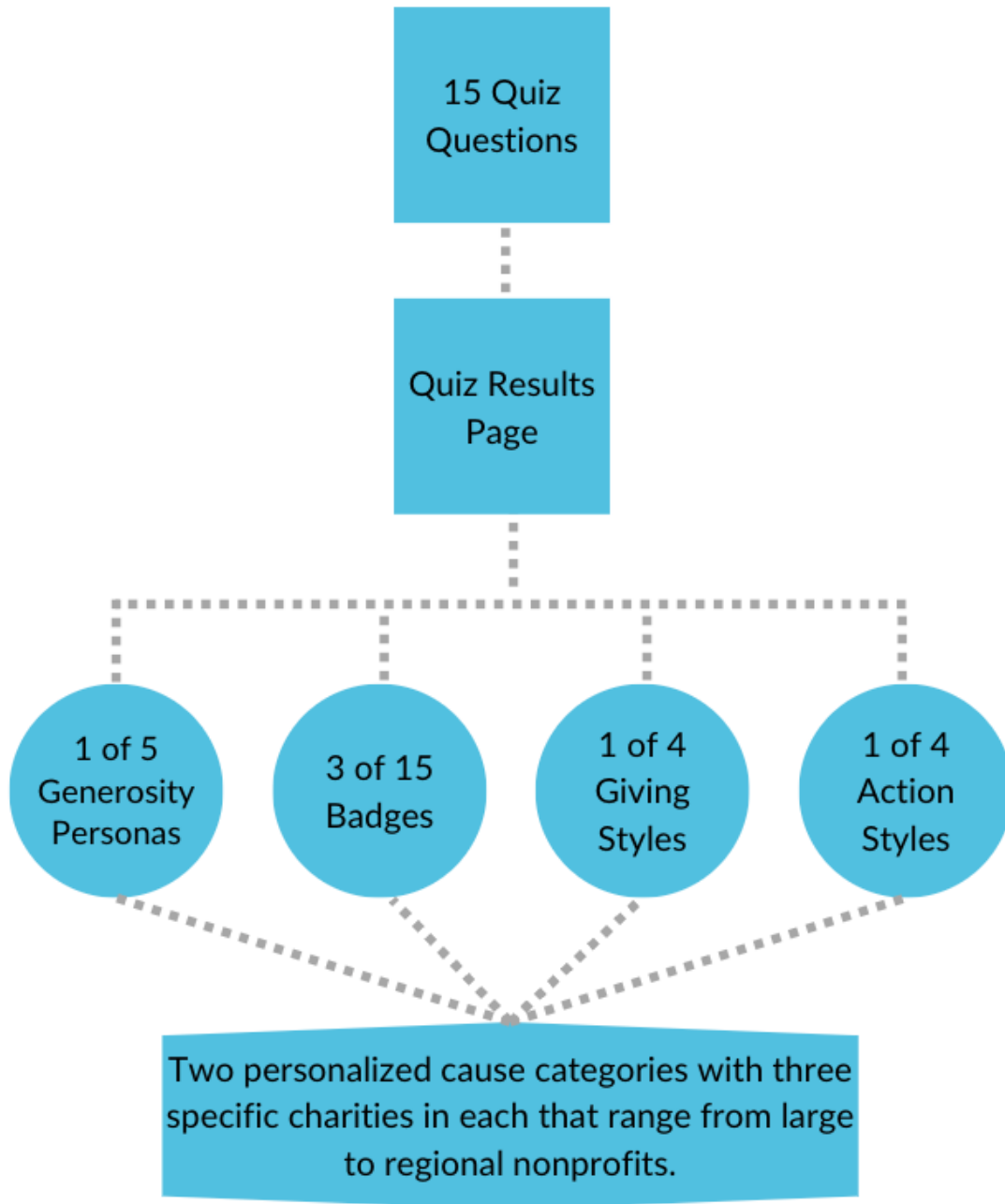
- Spent two weeks adjusting graphics and copy for optimal engagement.
- Made technical adjustments to ensure smooth transitions between mobile, tablet, and computer browser access.
- Removed the “next” button on each of the fifteen quiz questions to reduce the total number of “clicks” and move the user more seamlessly to the end results.
- Switched some of the photographs correlating to quiz responses. Made sure that each photograph was deliberate in eliciting emotion, and that each of the four pictures for each question felt similar in emotional response.
- Kept copy more concise and to the point so that the quiz's intent in wanting intuitive or quick responses was clearer. Wanted to limit the amount of reading a quiz taker had to do during the quiz so that they would feel more prepared to allocate their time to reading their quiz results.
- Changed email marketing software from MailChimp to Klaviyo to allow for enhanced tracking and measurement of user behavior from the email marketing campaign of the quiz.
- Created a new pop-up on Coin Up's website to promote quiz which appears before the tab is closed.
- Ensured that any update to a quiz question also updated the associated meta tags and created enough data on the back end to match the quiz taker with their optimal persona and badges.
- Changed celebrity pictures on question five to well-known celebrities along with the causes they support (Angelina Jolie, Leonardo DiCaprio, Sean Penn, and Beyoncé) instead of the previous version with activist-celebrities.
- Changed copy, graphic, and placement on Welcome Screen to ensure user sees the “Start Quiz” button upfront and understands why the quiz exists.

## Phase Two

Invited approximately fifty colleagues, nonprofit partners, and other people within Coin Up's network to take the Generosity Quiz and complete a follow up quiz to capture their feedback on the experience.

- Updated cause photos and answers to be more diverse, as well as associated meta tags and results.
- Implemented charity search API so that users could select a charity of choice out of any of the 1,500,000 IRS-designated charities, in case the suggested charities did not resonate with the user.
- Added a barometer for the quiz taker to see where they are in the process.
- Removed five demographic questions that were originally asked after the quiz questions and before the quiz results page.
- Changed a quiz question from "Which celebrity do you identify with" to "Which of these issues would you be most likely to discuss with friends?" due to feedback about lack of connection with celebrity personas. (See Figure 2.)
- Moved the social media sharing icons on the quiz results page to the end of the page.
- Reduced the total number of "causes" highlighted on the quiz results page from four to two in order to create a more focused answer for each quiz taker.
- Decided to change advertising strategy by increasing budget from \$5,000 to \$10,000 and focus solely on Facebook and Instagram over other potential social media and entertainment platforms. Facebook and Instagram's robust advertising services and data collection capabilities fit the quiz project's needs the best.

## GENEROSITY QUIZ MAP



## CREATING THE RESULTS PAGE

To maximize each quiz taker's resonance with their results, the quiz team spent significant time researching phrasing for the Generosity Personas and Badges, considering visual rhetoric, and analyzing other successful quizzes. The quiz expert created a complex scheme of matching each answer to one of these personas and badges via "meta tags." Breaking down each Persona into an additional three Badges provided more depth on their characteristics of giving.

These original designs chosen to represent each Generosity Personas and Badges were inspired by mandalas that are used in many cultures and religions to center an individual and provoke introspection. The mandalas represent the four directions – north, south, east, and west, as well as four boundless thoughts – sympathy, compassion, loving-kindness, and equanimity. Mandalas also represent a balance of the inner self with the outer world. The definitions developed for each Generosity Persona and Badge, as well as the colors and beauty of these complex designs, can intrigue and inspire quiz users.

### Five Generosity Personas



- The Altruist "Your power of observation allows you to spot an opportunity and spring into action. You aim to leave everywhere you go a little bit better than it was when you got there."



- The Crusader "You see the big picture and that inspires confidence in others. You ask the right questions and help find solutions while staying the course, no matter how big the problem seems."



- The Guardian "You bring a sense of kindness and security to those around you with your compassionate spirit. You can be found buying and supporting local, posting a supportive meme, or attending an event to show your support."



- The Mastermind "You have a driving thirst to learn, and use your knowledge to help find solutions. Research, education, and community are all places where your gifts shine."



- The Trailblazer "You are the most likely to start a beach cleanup, or curate an online space to help people find their tribe. You are a vital member of the giving landscape, with your guidance, organizational know-how, and contagious energy."

## Fifteen Badges

### ■ Action



Dedicated



Determined



Ernest



Reliable



Welcoming

### ■ Communication



Aspiring



Honorable



Innovative



Insightful



Optimistic

### ■ Emotion



Adaptable



Devoted



Expressive



Loving



Purposeful

## Four Giving Styles

- Round Up (“doing good daily”)
- Fixed Monthly
- One Time
- Crowdfunding

## Four Action Styles

- Volunteer
- Acts of Kindness
- Advocacy
- Education

## Twenty-Three Cause Categories

- Animals
- Athletics
- Autism Awareness
- Cancer Awareness
- Coronavirus
- Culture
- Disease Prevention
- Education
- Environment
- Food Security
- Health
- Housing & Homelessness
- Humans
- Immigrants
- Mental Health
- Poverty Alleviation
- Racial Justice
- Refugees
- Research
- Seniors
- Veterans
- Women Led
- Youth



## MARKETING

Coin Up retained an external marketing firm to launch social media campaigns for Facebook and Instagram. The social media ads used seven different images to see which would engage Next-Gen audiences the most.

Coin Up created a press release in July 2022 to members of the media which generated 115 articles, including Yahoo! Finance and MarketWatch (Figure 3). Finally, organic advertising occurred from the buzz generated from the Phase 2 focus group and through Coin Up's friends and family sharing through their own social media and email networks. Coin Up provided an email template to any nonprofit partners or social impact networks, such as the San Diego Foundation who expressed interest in sharing news of the quiz.

After completing the quiz itself, if the quiz takers provided their email address, they were moved onto the email funnel system. The email funnel system consisted of four unique emails that used different strategies to nurture quiz takers to take action or donate to charity. The initial email contained the participant's quiz results. The second phase of the email funnel (emails two through four) utilized phrasing and rhetorical strategies that correlated to the Giving Personas and psychology that the marketing team believed would work well for each type to encourage charitable actions. Quiz takers who completed "partial sign-ups" were tracked and contacted with specific follow-up emails to promote completion of the Coin Up account process. Coin Up's website pop-up invited people to take the quiz by sharing their email addresses. Anyone who provided their email address through the pop-up received an email with a link to the quiz.



# QUIZ RESULTS

Coin Up saw a 100% increase in individuals completing the signup and donation process post-quiz compared to the average sign up rate. Additionally, the drastic boost to social media and website reach demonstrates the great potential that educational and interactive content can bring to the philanthropic landscape. The quiz project successfully built awareness, educating, and motivating interest in the everyday giving space.

## QUIZ OPEN RATE AND COMPLETION RATE

During the twelve weeks of data collection, 14,467 people viewed the quiz landing page. 855 people began the quiz and 458 people completed the quiz, creating a completion rate of 53.5%. The highest rate of engagement came from “peer to peer” advertising where members of the Coin Up team emailed friends and colleagues. Participants who did not complete the fifteen-question quiz were most likely to drop off before question ten out of fifteen. Those who answered past question ten almost always continued through to the results page.

In weeks one and two, the quiz asked participants to complete seven demographic questions before revealing their results. The initial data showed a clear drop-off from completing the quiz after encountering these demographic questions. Therefore, from week three onward, Coin Up removed the demographic component and collected participants’ demographic information from their social media accounts instead. This led to a 250% increase in the following weeks from people choosing to enter their emails to receive a copy of their quiz results.

At the end of the twelve weeks of data collection, the quiz inspired 28 new donors. 46.4% chose to Round Up their change from their monthly debit or credit purchases, 21.4% elected to donate monthly, and 21.4% opted for a one-time donation. Noticeably, the most popular charities donated to work on medical, animal rescue, education, and social justice issues. Charities that donors selected included:

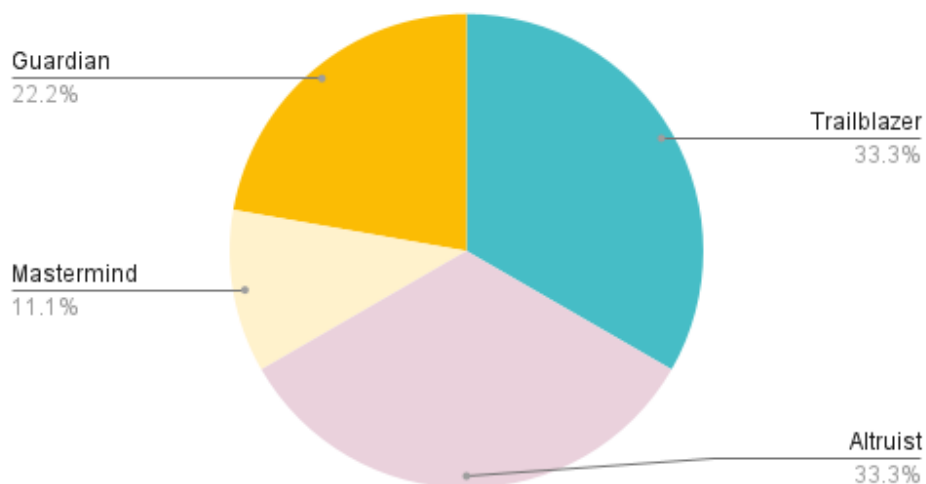
Autism Speaks  
BraveOnes Foundation  
Community Action North Bay Dresher  
Eagle Peak Montessori School Innocence Project  
Keys of Change  
Miracles for Kids  
Oceana  
Id Friends Senior Dog Sanctuary Planned  
Parenthood  
Pound Puppy Rescue

Preeclampsia Foundation  
Razom for Ukraine  
Safe in Austin Rescue Ranch  
T-Time Transgender Support  
Texas Christian University  
The Crohn’s and Colitis Foundation  
The Pug Queen Foundation  
Timothy Center for Sustainable Transformation  
Turrell Art Foundation  
UNICEF USA

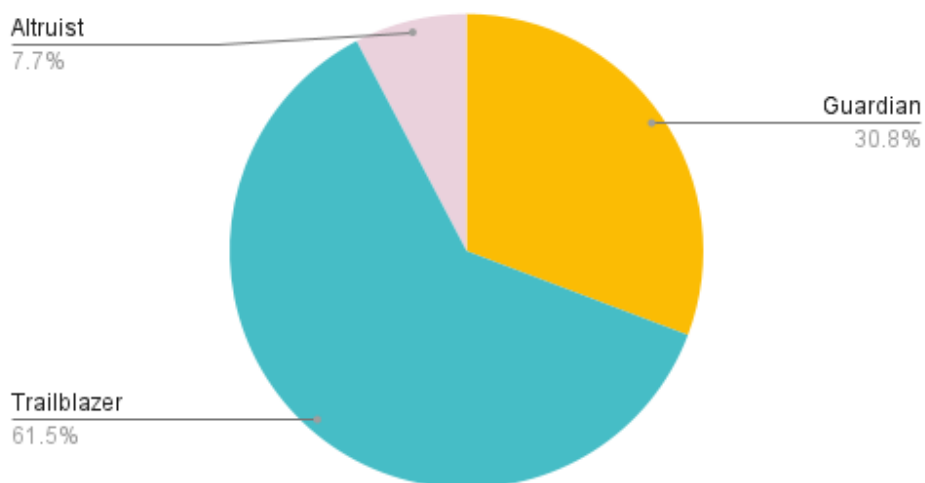
## NEXT-GEN GENEROSITY PERSONA & CAUSE RESULTS

The most popular of the five Generosity Personas for Next-Gen people who completed the quiz were Trailblazer, Altruist, and Guardian. A Trailblazer is often a charitable leader, an Altruist looks for unique opportunities of need, and a Guardian frequently brings their compassion to micro-decisions such as choosing to buy locally.

### Millennial Personas

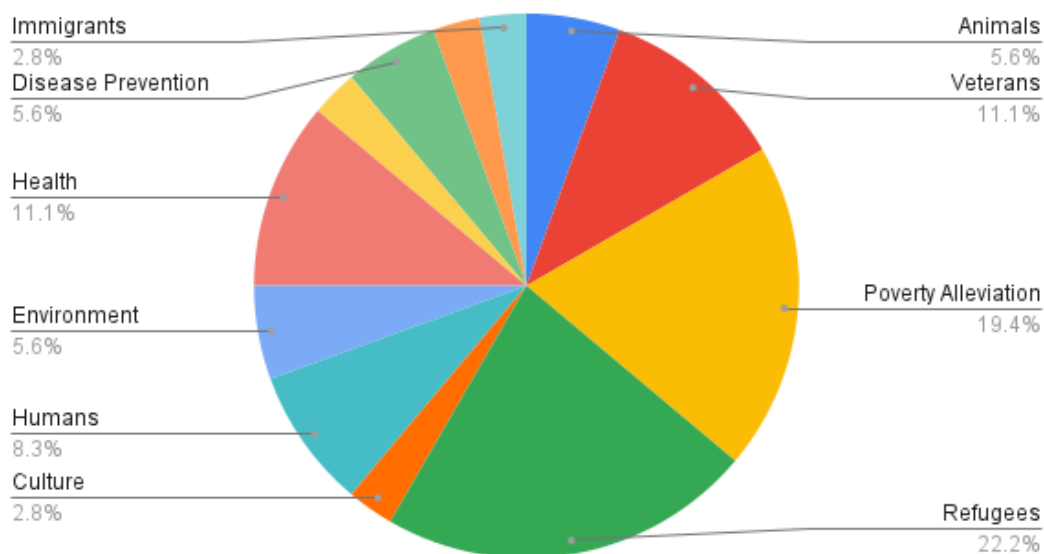


### Gen Z Personas

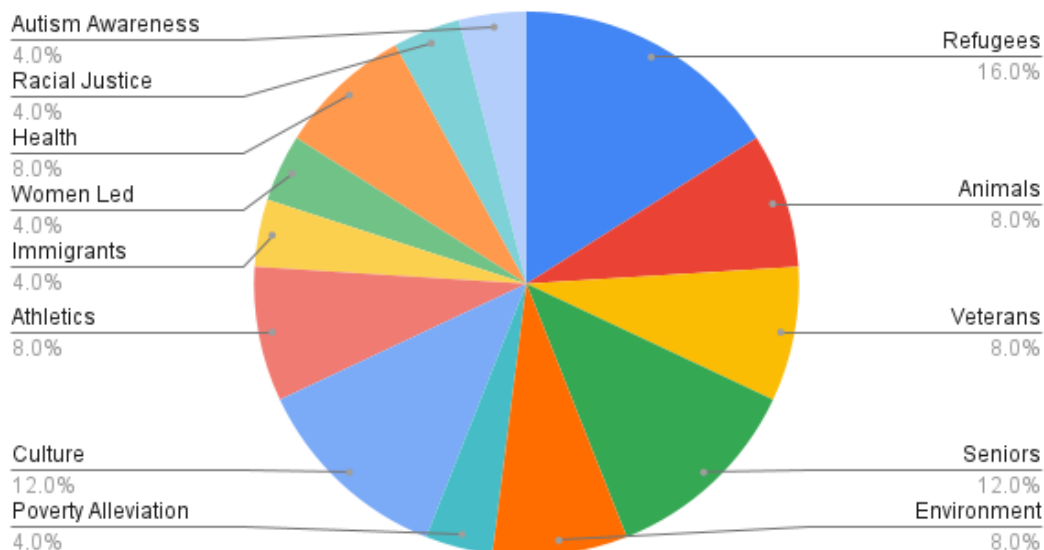


On each quiz taker's results page, the quiz recommended two "cause categories" to help the individual identify the main issues their quiz responses lined up with. The quiz's most popular calculations for Next-Gen's personalized "cause types" were Refugees, Poverty Alleviation, Health, Veterans, Culture, and Animals which aligns with existing research findings on Next-Gen's preference for an intersectional approach to philanthropy.

### Millennial Cause Categories



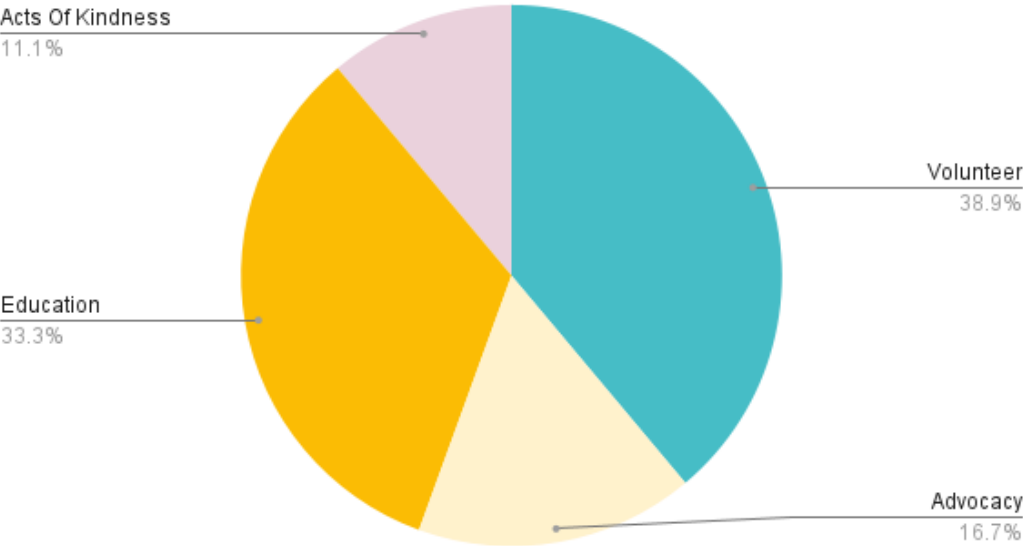
### Gen Z Cause Categories



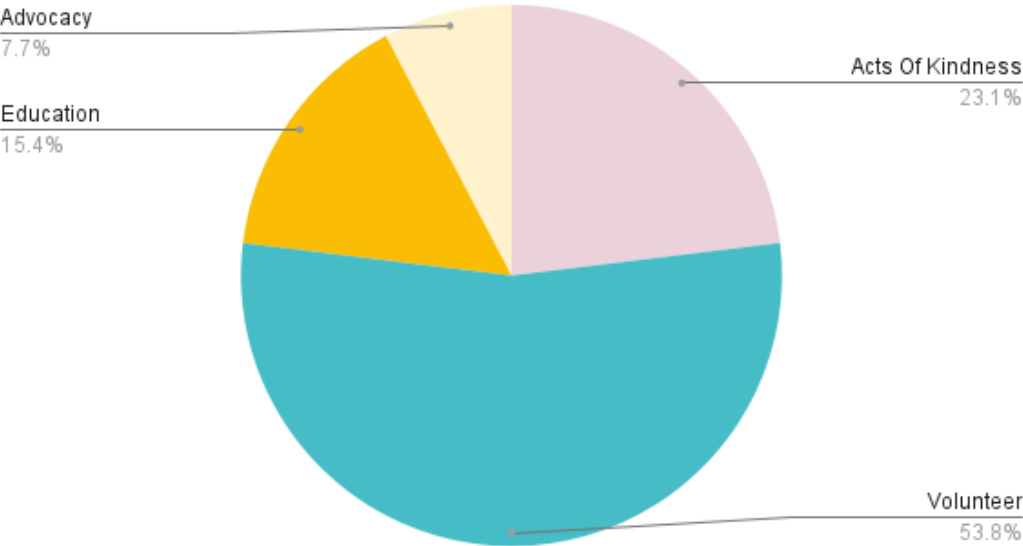


Next-Gen Action Styles show a significant preference for volunteering. With both online and in-person volunteering opportunities, there are more ways than ever for Next-Gen to give back through volunteerism.

Millennial Action Styles



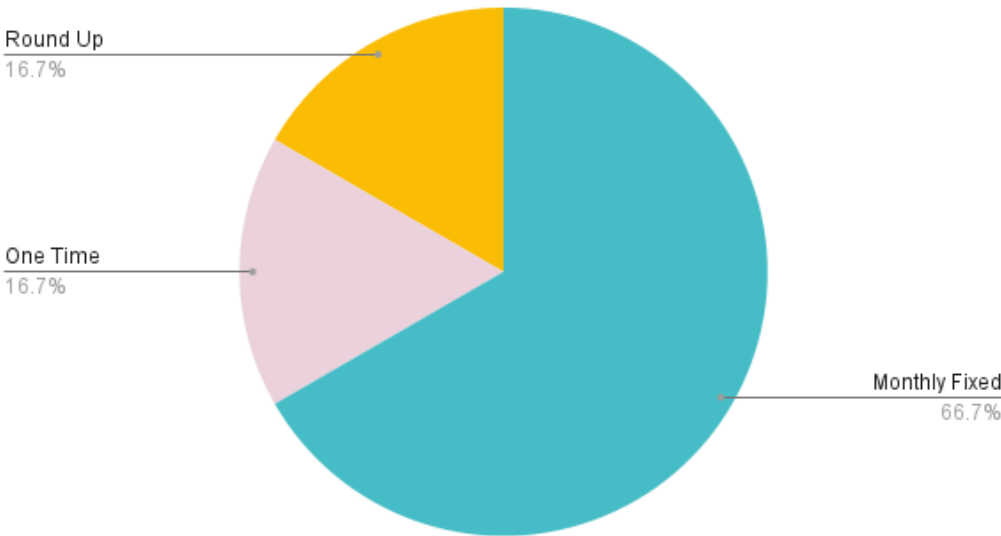
Gen Z Action Styles



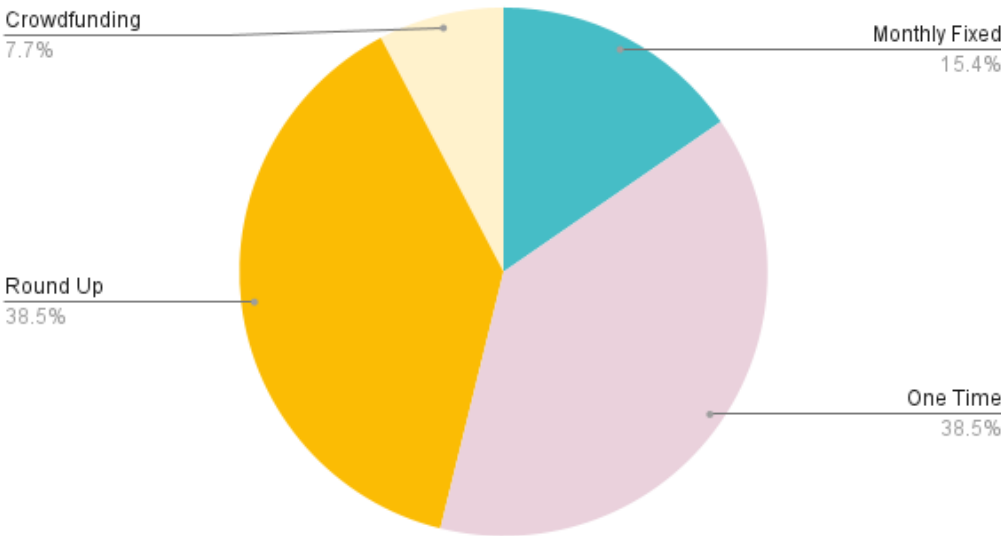


For Millennial quiz takers, their responses showed a clear preference for donating a monthly fixed amount. However, for Gen Z, their preference was even split between rounding up their leftover change from purchases each month and one time donations.

Millennial Giving Style Preferences



Gen Z Giving Style Preferences

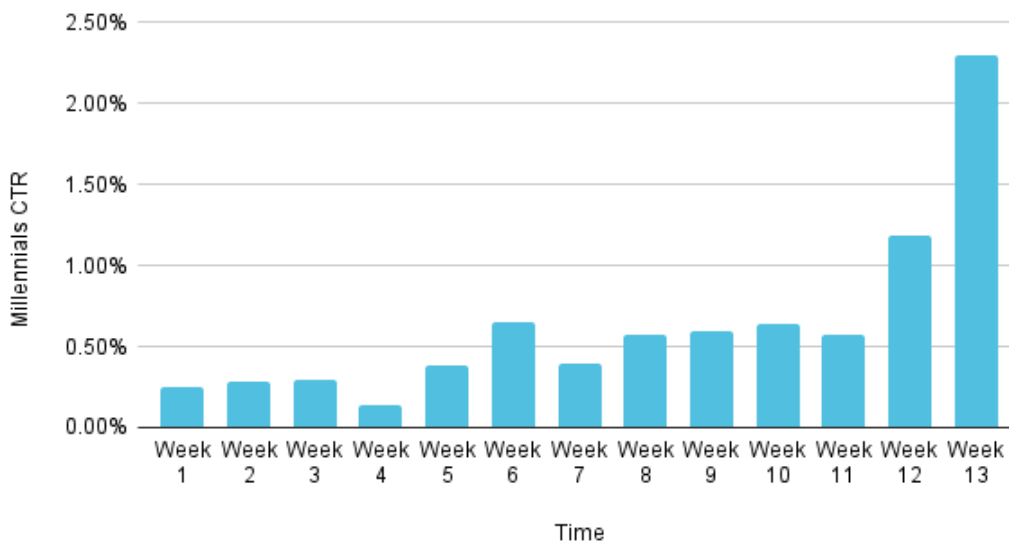


## SOCIAL MEDIA AD RESULTS

Overall, the social media campaign of targeted Facebook and Instagram advertisements was successful and cost-effective. The Generosity Quiz campaign led to a 382% increase in Coin Up's Facebook page reach and a 122% boost to its Instagram page reach from the previous two years combined. Coin Up's website also saw a 105% increase in new visits compared to 2021.

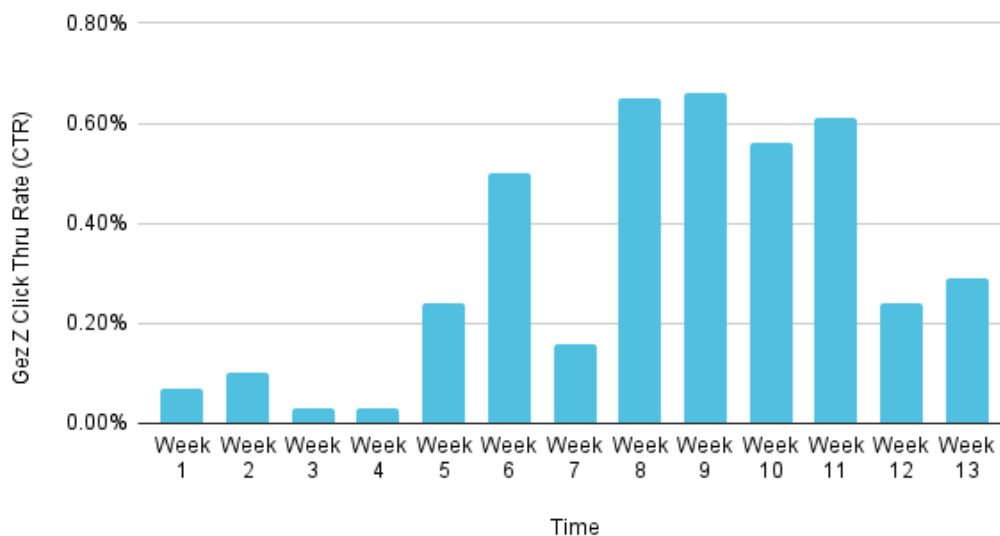
Advertising on both platforms began by targeting four different audiences: Gen Z, Gen X, Millennials, and Socially Conscious. By August, Coin Up added additional audiences of LGBTQIA+, High Income, Lookalike Audiences, Social Engagers, and Website Visitors. The top states represented in the advertising reach were California, Texas, New York, Florida, and Pennsylvania. In total, social media advertising reached 519,796 Next-Gen individuals over the twelve weeks of data collection. Millennials and Gen Z had the same results for which ads had the highest engagement with and which had the lowest. Their best performing ad used a carousel of pictures showing Next-Gen people engaging in charitable acts such as gardening in a forest. The ad text read, "Are you an Advocate? Or a Volunteer? Or are you even a crowd funder? Find out now with our custom quiz!" (Figure 4) The lowest engagement ad contained a static image of a Next-Gen woman in front of the quiz's backdrop with several of the colorful Persona designs. The ad text shared a bit about Coin Up, the quiz, and the mission. (Figure 5)

Millennials Click Through Rate (CTR) Over Time





### Gen Z Click Through Rate (CTR) Over Time



With continually adapting advertising, the cost per click of the total marketing campaign became cheaper each week. Week one of data collection cost on average \$2.15 per click and decreased to \$0.64 per click by week twelve.

Since the advertisements ran for most of the twelve weeks of data collection, it is safe to assume that many targeted users encountered the same ad more than once. With social media's established role of both personal sharing and information highway, the success of Coin Up's advertising in driving interested people to the website and quiz is a strong indicator that individuals are eager for experiences that also combine the personal and the informational. The clear patterns of steady upward trends in social media engagement, website traffic, and quiz completion all align with Coin Up's hypothesis that Next-Gen donors would be open to participating in a reflective quiz.

In addition to paid advertising, Coin Up identified six soft-advertising moments that contributed to noticeable spikes in the quiz landing page's traffic: During weeks one and two, sharing the initial quiz launch among close friends and colleagues; in week nine, Coin Up emailed friends and family directly; in week ten, the additional targeted advertising toward LGBTQIA+ individuals; in week eleven, Coin Up sent an email to all Gates Partners; in week twelve, the Coin Up quiz team members shared the quiz with their extended personal networks, and during the final days of data collection, Coin Up sent a text message to the entire Coin Up community.

## CONCLUSION ON QUIZ'S IMPACT ON INDIVIDUAL GIVING

Bringing more Next-Gen individuals into the world of charitable giving may take time. However, the successful advertising and social media engagement show a clear interest in experiences like Coin Up's Generosity Quiz. Just as word-of-mouth remains one of the most effective ways of creating large-scale change, the built-in trust of personal recommendations boosted the Generosity Quiz's ability to spread awareness of individual donation impact. The wide range of donation styles and charities selected represent the positive impact of democratizing charitable donations. The more the philanthropic industry does to welcome Next-Gen donors with experiences that reflect their preferences, the more diverse of a range of impacts individual donations can have. With accessible education about oneself and one's values, individuals donated with confidence, 67.8% choosing a reoccurring, monthly donation plan. The predominance of the leadership-driven "Trailblazer" persona in quiz takers also reflects Coin Up's hypothesis that many individuals feel the drive to help but may not know what their first step should be as they are early adopters and there is not always a clear path.

Comparing the social media marketing campaign for the Generosity Quiz to Coin Up's next largest ad campaign also shows encouraging results. In March 2019, Coin Up undertook a general social media campaign to showcase its mobile app and tie into the March of Dimes organization's work during the month of March. The click-through rate for Next-Gen during March 2019 was 0.03% compared with the Generosity Quiz's 0.47% for Millennials and 0.24% for Gen Z. This significant change in interest demonstrates the success of the quiz in interesting would-be Next-Gen donors by inviting them to be interactive and educational.

Surprises included the LGBTQIA+ and Gen X responses to the quiz ads and quiz participation. The click-through rate of the LGBTQIA+ ads at 4.57% outperformed all other audiences targeted for the quiz. The overlap of the Generosity Quiz's twelve weeks and Pride Month in June may have had an impact on this positive result. Then, even though Gen X was not the main target of this project, the generation's adaptation to social media and increased trust in sharing personal information online led to encouraging trends during Coin Up's data collection weeks. This audience could be full of potential for a targeted quiz to further understand and influence online and mobile-based philanthropic behavior as they enter life stages where they will have more discretionary funds.

With overwhelmingly positive social media results, Coin Up is confident that the Generosity Quiz can continue to inspire new Next-Gen donors with personal conversations, social media sharing, and targeted advertising.

## CONCLUSION ON QUIZ'S IMPACT ON INDIVIDUAL GIVING

- The Generosity Quiz achieved strong results in raising awareness over twelve weeks of individual donor's impact potential
- Democratization of charities is bringing exciting transparency and choice to potential donors, and social media is an effective way to spread this message
- Inspiring large-scale changes in Next-Gen charitable behavior may take time, so lower conversion to donations is not surprising
- Identifying a strong correlation with the Trailblazer persona demonstrates that there is a curiosity to seek education around how and where one can give
- One campaign cannot be both an awareness and a conversion catalyst simultaneously, but instead works best when one campaign leads naturally into the next
- The Generosity Quiz's social media results prove that the desire to engage and learn more about philanthropic giving does exist



# CONSIDERATIONS FOR QUIZ CREATION IN NON-PROFIT SECTOR

- With new technology and web-based innovations each year, the technical tools for creating online quizzes may change rapidly, including the way conditional adaptations are built into users' quiz answers, capabilities for tracking users' online behavior, and the possible uses of AI and machine learning in the front end and back end of quiz creation and analysis.
- Next-Gen donors, especially Gen Z, place a high value on transparency in charitable spaces. Strategies such as highlighting the full impact of giving with clear explanations of necessary administrative overhead can help reinforce this trust between donors and charities.
- With the popularity of alternative payment methods, paying attention to the details of what payment methods a payment processor can accept, how donations are made, and how they are tracked may be important for donation efforts.
- Advertising and marketing strategies should reflect the target audience, especially as social media platforms fall in and out of favor generationally. What works well for Gen X may not work well for Gen Z, and so forth.
- Utilize personal networking through personal social media channels, email, LinkedIn, as this creates implicit trust in the quiz itself.



# **FUTURE USES OF COIN UP'S RESULTS OR A PHILANTHROPIC QUIZ**

- The results could be used by charitable organizations to shift donation targets to reflect the giving styles of personas most relevant to their causes.
- The results could be used to create targeted advertising toward specific cause interests or personas as part of a large-scale giving campaign (The global GivingTuesday movement in November, etc.)
- Quizzes can be developed around certain cause categories to get even more insight into specific areas of that cause and how one can advocate, volunteer, or give in a more meaningful way
- A modified quiz could be used in K-12 and higher education settings to introduce students to the concept of charitable giving while helping the students become more self-aware about their behavior styles and top concerns.
- The quiz could be implemented at any level of political campaigns to help undecided voters see new connections between issues they care about and political platforms.

## **COIN UP'S PLANS FOR BUILDING UPON THE GENEROSITY QUIZ**

- Creating targeted ads for a wider variety of audiences, including specific Giving Styles and Action Styles, on Facebook and Instagram to continue using the quiz as a conversion tool
- Over the next three to six months, continue to nurture the emails addresses received through targeted ads and emails to see if we can get those Generosity Personas to convert

# FIGURES

Figure 1: The Generosity Quiz landing page

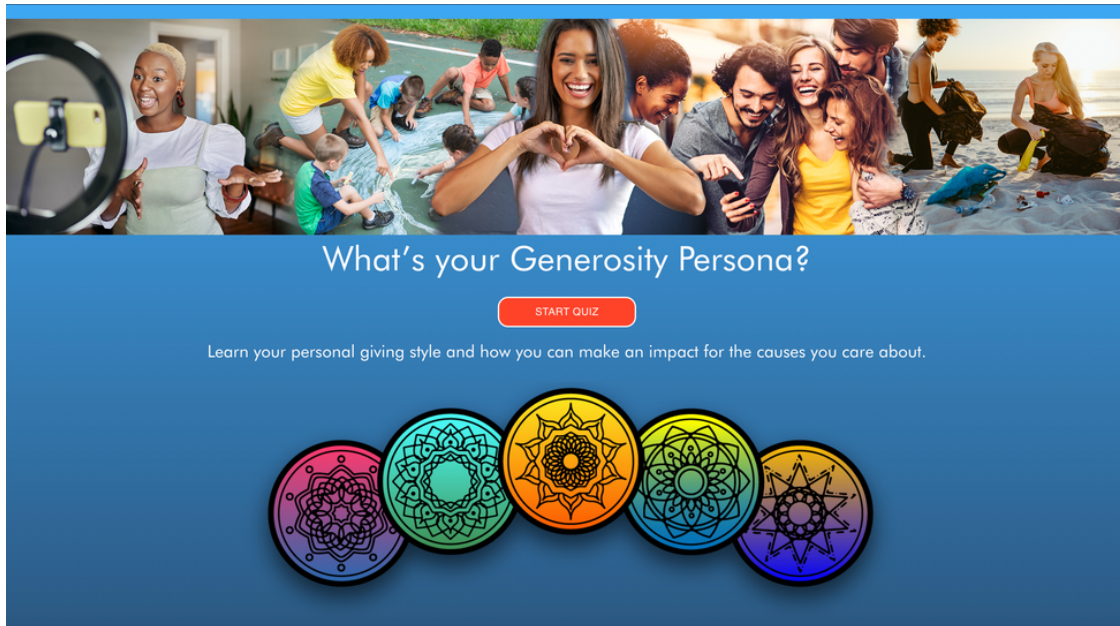


Figure 2: Original and Final Question 5 from The Generosity Quiz





Question 5

Which of these issues would you be most likely to discuss with friends?

5 / 15



Ukraine



Conservation



Gun violence



Reproductive rights

BACK

Figure 3: Yahoo! Finance article

**yahoo!finance**

Search for news, symbols or companies



Sign in



Finance Watchlists My Portfolio Cryptocurrencies Yahoo Finance Plus Screeners Markets News Personal Finance Videos ...

## Help Next Gen Donors Connect With Causes They Care About



July 29, 2022 · 3 min read



*There are 1.7 million charities nationwide to choose from - this quiz helps people discover their personal guide to giving*

SAN DIEGO, July 29, 2022 /PRNewswire/ -- Gen Z and Millennials are poised to be the leading force in charitable giving. [84%](#) of millennials already give to charity, and as they age and increase their wealth, they will surpass Baby Boomers and Gen Xers in terms of dollars donated. These emerging philanthropists are also powerful societal changemakers, passionate about supporting issues they care about. They want to learn where they can make an impact that matters to them. Coin Up, a mobile app platform where donors can give effortlessly and securely to their favorite charitable cause, has developed an interactive "Generosity Quiz" to do just that. It is a fun



Quote Lookup



### TRENDING

1. Yen Extends Decline as Traders Eye 145 Level and 1998 Lows



Figure 4: Best Performing Advertisement

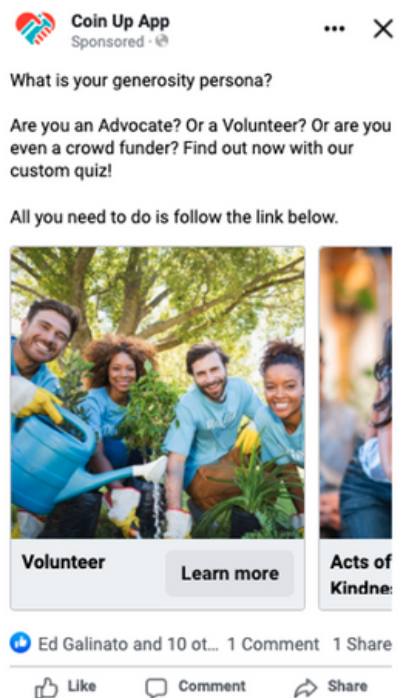


Figure 5: Lowest Performing Advertisement

