



**Children's
Miracle Network
Hospitals®**

Point-of-Sale Research Study 2024

Adeline
Age 8



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Executive Summary



Children’s Miracle Network Hospitals® conducted its point-of-sale research study to explore customer sentiment in giving at checkout around the ask, the donation, the charity and cause, and campaign awareness and understanding. The 2024 study found continuing trends from the 2022 study in areas such as customer donation propensity, amounts, sentiment, and preferred causes, plus added new learnings around the likelihood of giving by checkout type and customer understanding of how donations reach a charity.

Key learnings:



Customers most often prefer and are most likely to give in a line with a cashier, especially by rounding up their total to the nearest dollar through a digital-pin pad ask.



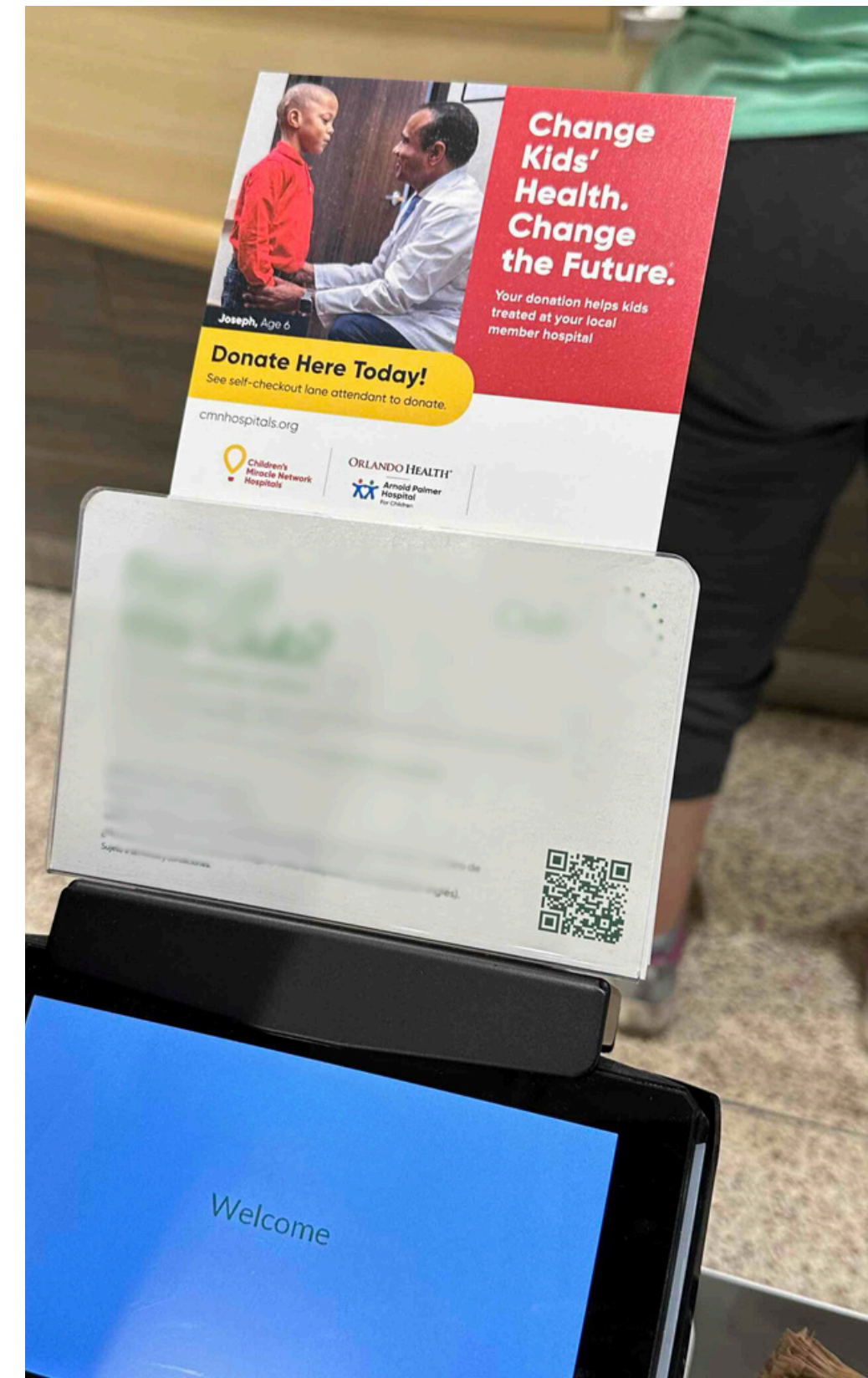
The majority of customers have positive to neutral feelings about this customary ask to give with their sentiment toward the retailer improving or staying the same.



The average customer wants to give at point-of-sale because they know it is the right thing to do and want transparency and trustworthiness from those charities in return.



Most customers do not know what happens to the money they give at the register believing companies either donate to charity as a store donation for tax credit or reimburse prior donations.



The Comparison to 2022



A key goal of Children's Miracle Network Hospitals 2024 research study was to understand both changes and consistencies in customer sentiment around point-of-sale fundraising over time compared with data collected in 2022. The identified trends and key learnings are intended to be utilized to build effective strategies for point-of-sale fundraising campaigns and to help inform campaign planning.

Key trends holding consistent from 2022 to 2024 include:

#1

Children's Health remains the top supported cause among customers.



58%

The majority of customers still donate when asked at checkout.



2:1

Rounding-up to the next dollar remains the preferred donation amount at checkout.



81%

Positive to neutral sentiment of being asked to donate at checkout remains strong among donors.



80%

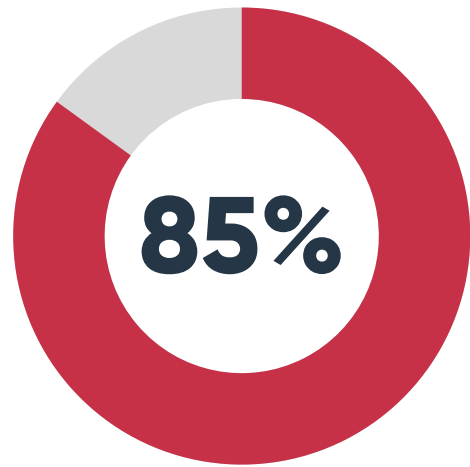
Overall positive to neutral sentiment towards the retailer remains strong after being asked to donate at checkout.



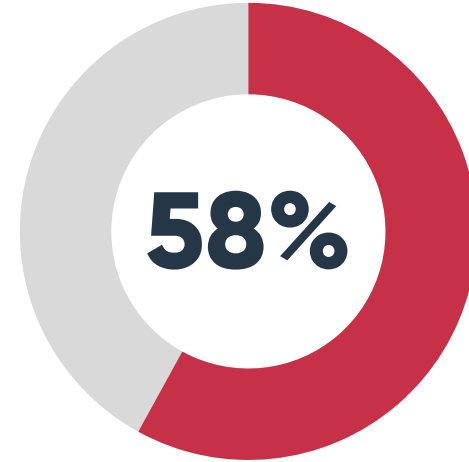
The Ask



Ask at Point-of-Sale



of customers have been asked to donate at checkout in the last year.



of those asked donated at least once at checkout in the last year.



Among customers checking out in a line with a cashier

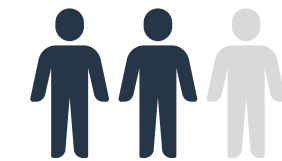
2:1

digital ask



Customers prefer to be asked to donate digitally through the pin-pad to being asked personally by the cashier but the human presence is still an influencer in the donation process.

Among repeat customers



66% feel positive to neutral about being asked to donate to the same charity each visit (daily/weekly/monthly).



28% would consider a one-time opt-in for automatic round-up donations on all future purchases.

Among Donors



feel positive to neutral about being asked to donate at checkout.



have an improved or consistent opinion of the place they are shopping after being asked to donate.

The Ask



Age and Gender Spotlight



Customers aged 45-60 gave to a charity at the checkout at the highest rates during the past 12 months (68%) and also saw the largest increase over 2022 (+11%). Donors aged 45-60 also had the highest positive to neutral sentiment about the ask (85%).



18-29 year-olds most prefer to be asked to give digitally when checking out in a line with a cashier (47%).



Male donors have higher positive to neutral sentiment about the ask than females (+20%) as well as prefer an automatic round-up donation option at higher rates (+9%).



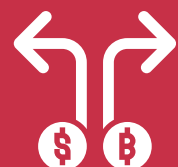
Insights



Most customers that give to charities at checkout, feel positive to neutral about being asked to give, whether as one-time or repeat customers, and feel positive to neutral about the retailer after being asked to give. These findings indicate point-of-sale campaigns remain an appealing option for both customers and companies.



1/4 of customers will consider a one-time opt-in for automatic round-up donations on all future purchases. This could provide additional revenue beyond the defined campaign period if corporate partners extend the giving timeframe.

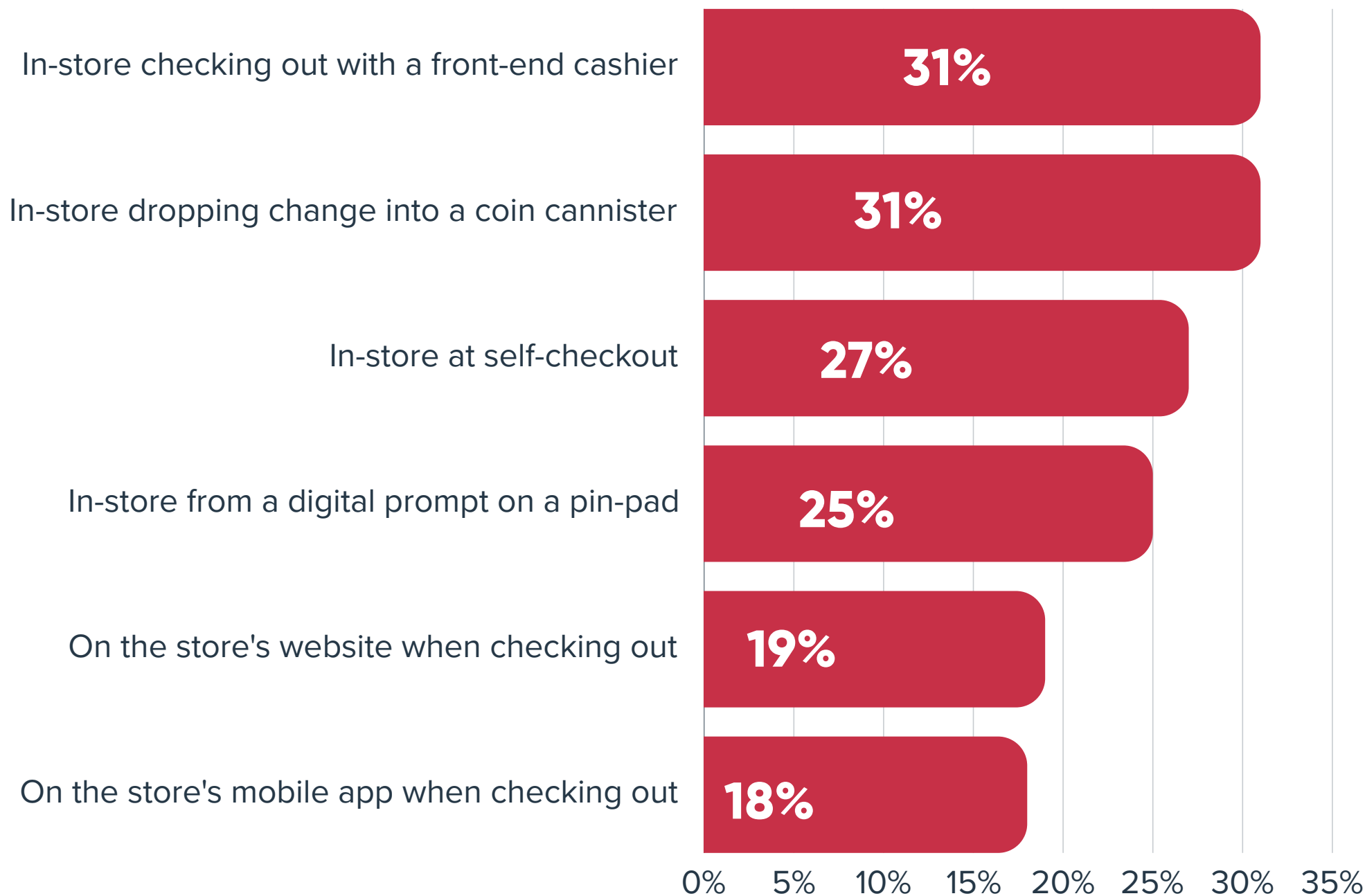


Although customers prefer being asked digitally to donate, the cashier's presence influences likelihood to donate.

The Donation



When shopping, which of the following ways do you prefer to donate to a charity?

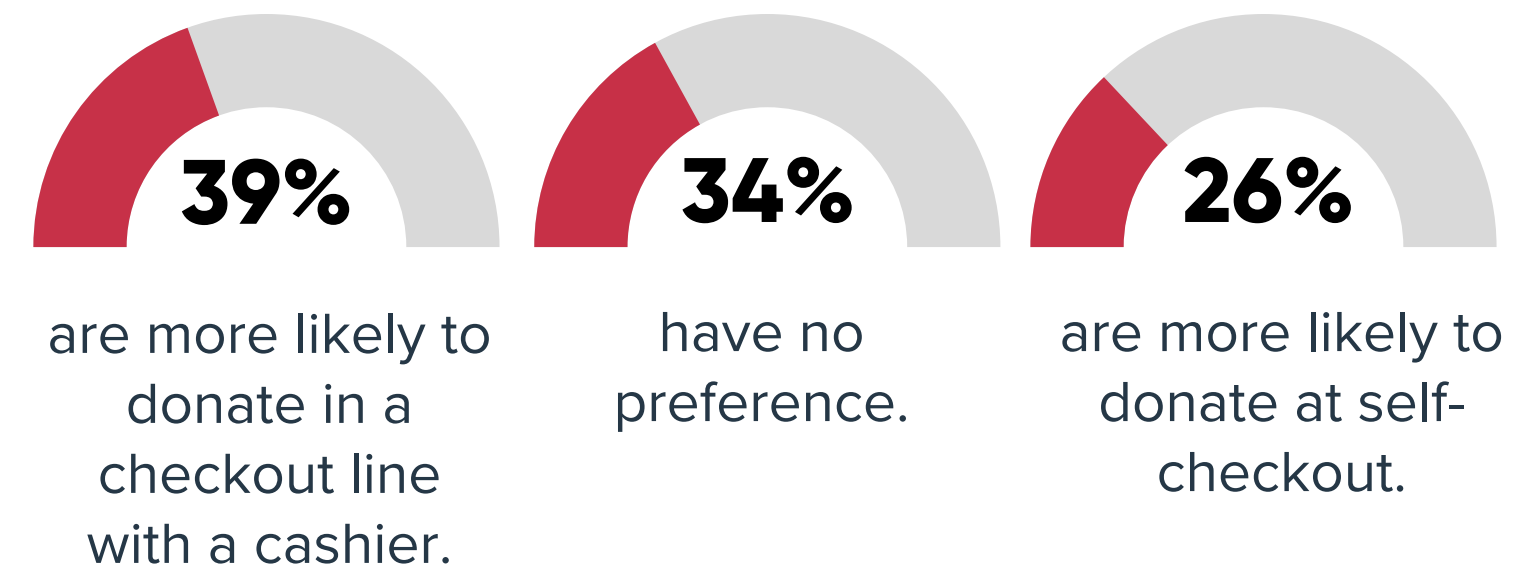


What is your preferred amount to donate to charity at checkout?



By a 2:1 ratio, customers prefer to round up their total to the next dollar amount over other donation options.

Are you more likely to donate to a charity at self-checkout or in a checkout line with a cashier?



The Donation



When donating to a charity at checkout, which of the following reasons best motivates you to give?

Expectations in return for a donation to charity at checkout:

Top Motivators

Top Expectations

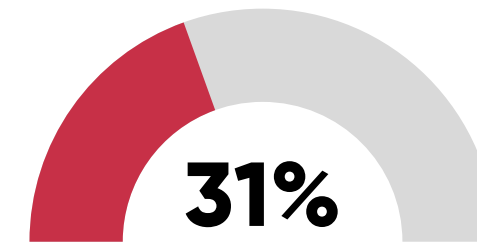
#1

Donating to charity is the right thing to do

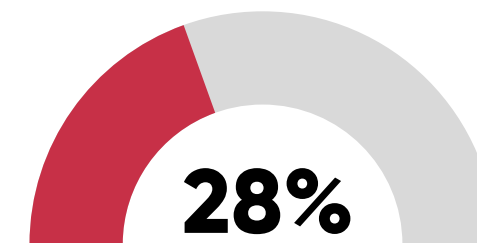


#2

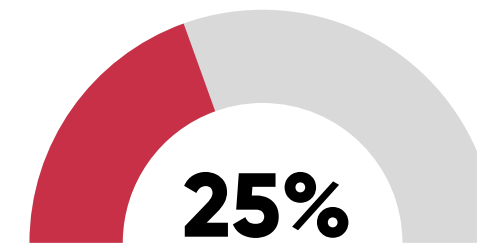
I recognize the charity's name/brand



No expectation



Tax receipt of donation



Coupon

The Donation



Age and Gender Spotlight



Although younger customers indicate they prefer to donate in-store at self-checkout over in a line with a cashier at slightly higher rates (+3%), customers aged 18-29 are more likely to actually make a donation in a line with a cashier instead of at a self-checkout (+22%).



Customers aged 60+ are most motivated to give at checkout by a charity's name/brand recognition among all age groups (+5%).



Males are more likely than females to give at self-checkout (+14%).



Customers aged 45-60 are most likely to donate at self-checkout (38%).



Insights



Customers prefer and are more likely to donate in a checkout line with a cashier instead of at self-checkout, but prefer the ask to come digitally through the pin-pad. This indicates the continued influence of a human presence in campaigns as well as opportunities to explore digital pin-pad best practices for self-checkout.



Customers most frequently give because it is the right thing to do, to well-recognized charities and expect nothing in return.

2:1

Round-up remains the preferred donation amount by a 2:1 option, indicating that this option should be a consideration for point-of-sale campaigns.

The Charity and Cause



Children's Health

top cause supported overall and across all age and gender groups

Top 4 causes supported overall:



Children's Health (47%)



Animal Welfare (41%)



Food Insecurity (39%)

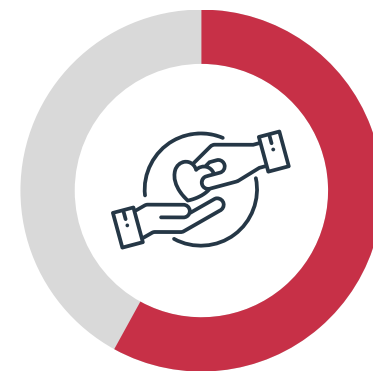


Disaster Relief (37%)



2/3

68% of customers said it is somewhat to extremely important that employees making the donation ask are able to share additional information about the charity with them.



58%

While 18-29 year olds are more likely than other age groups to give to charities they are just learning about at checkout (32%), the majority of customers are more likely to do so if they are already familiar with a charity (58%).

The three things most important for customers to know about a charity when donating at checkout are:

#1

a charity's trustworthiness

#2

how the charity will use the donation

#3

percentage of donation used for the charity's management costs



The Charity and Cause



Age and Gender Spotlight



Younger customers are more likely to donate to a charity they are just learning about than older customers with 18-29 year olds highest (32%) compared with those aged 60+ (7%).



Males are more likely than females to donate to a charity they are just learning about at checkout (+7%).



Customers aged 18-29 find it most important among age groups that employees can share additional information about the charity when making the ask (74%) and rank statistics about a charity's impact as more important to know than other age groups.



Insights



Children's Health remains the number one cause supported by customers overall and across all genders and age groups. Based on the research, four of the top 10 individual charities supported at the register are exclusively in the children's health space (St. Jude Children's Research Hospital, Make-A-Wish, Ronald McDonald House Charities, Children's Miracle Network Hospitals).






Nonprofit transparency and trustworthiness are essential to customers, as well as the ability to learn more about a charity from an employee when asked to donate, indicating the importance of educating employees and consumers by providing information and signage.

The Awareness and Understanding

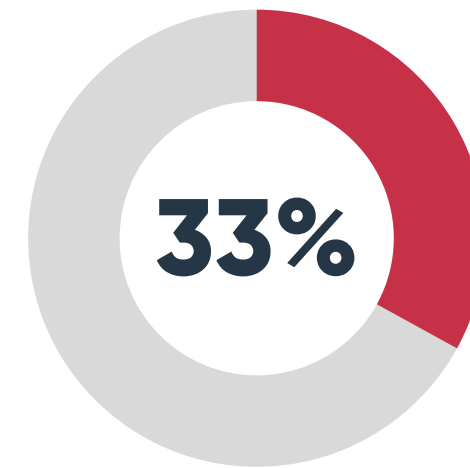


How do you first become aware that you can donate to a charity at checkout at the place where you are shopping?

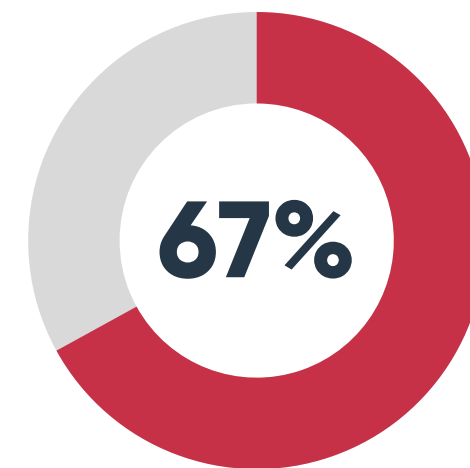
Top Three Ways Customers Become Aware:

- #1** from a front-end cashier (43%) 
- #2** on the pin-pad at the register (38%) 
- #3** on a sign at the register (30%) 

What do you believe happens to the money that customers donate to a charity at checkout?



Only 1/3 of customers are accurate in their belief that the store passes the money to a charity as consumer donations with no tax benefit.



The remaining 2/3 inaccurately believe that stores either:

- give the money to a charity as a store donation and receive tax benefits (45%)
- use the money to pay themselves back for a donation they already made to a charity (18%)
- other (4%)



The Awareness and Understanding



Age and Gender Spotlight



18-29-year-olds learn about the opportunity to donate at checkout most often from a digital pin-pad at the register (40%) whereas all other age groups most often learn from a front-end cashier.



Males are more likely than females to learn about the opportunity to donate at checkout through digital sources (+21%).



Customers aged 60+ have the highest accurate belief in what happens to their donations made at checkout at 45%.



Insights



Most customers become aware of their opportunity to donate to a charity at checkout at the register itself, with the largest group learning from a front-end cashier. This highlights the continued importance of the human element in campaigns.



While most customers are willing to donate to a charity at checkout, they do not understand what happens to the money they give. This indicates the opportunity to provide additional consumer education at the register through cashiers, pin-pad information, or signage.

Key Findings - Generational Highlights



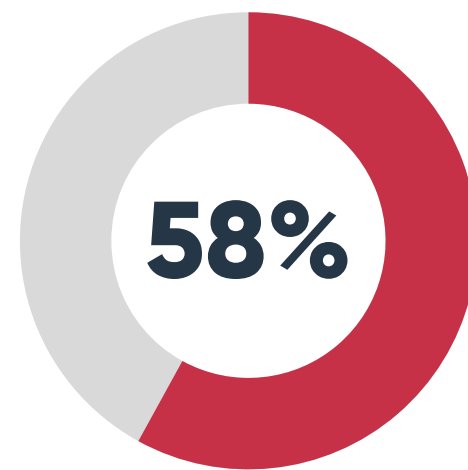
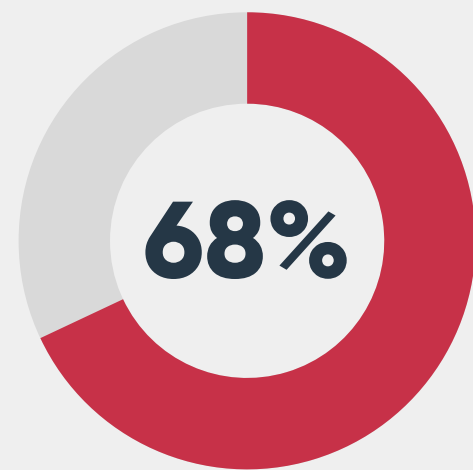
45-60 Year Olds (Gen X/Late Boomers)

Overall Population

Giving Behavior



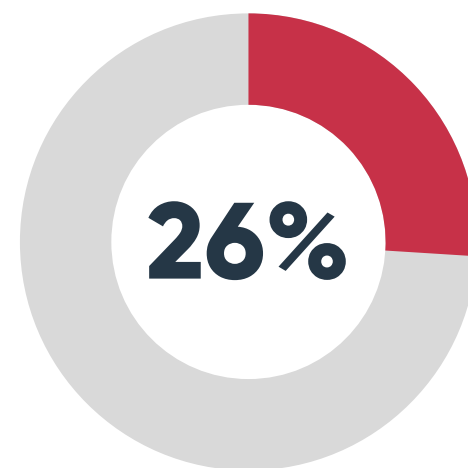
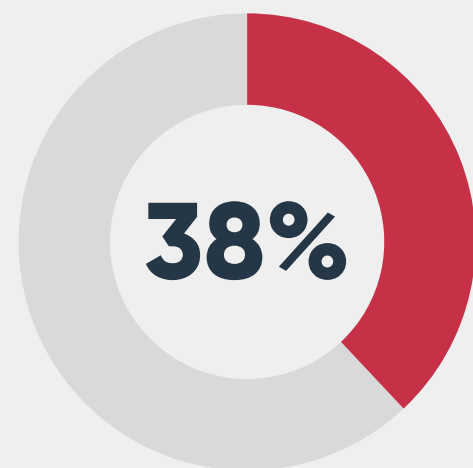
68% of 45-60 year olds have given at the register when asked during the past 12 months, higher than any other age group, +10% than the overall population, and a +11% increase over 2022.



Donating at Self-Checkout



38% of 45-60 year olds said they were more likely to donate at self-checkout than in a line staffed by a cashier, highest among age groups and +12% higher than the general population.



18-29 Year Olds (Gen Z)



Most likely to give to a charity new to them at the register at 32%, compared with 21% overall.

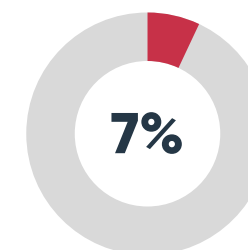


Most likely to donate in a checkout line with a cashier than in a self-checkout at 46% compared to 32% of 45-60-year olds

60+ year olds (Baby Boomers)



Rank charity's trustworthiness highest among generations as important to know about a charity and their donation at the register



Least likely to give to a charity new to them at the register compared with 28% of 30-44 year olds

Key Findings - Gender Highlights



Differences by Gender

Males stand out when compared to females in the following areas of point-of-sale giving:

Positive Sentiment - Ask to Give



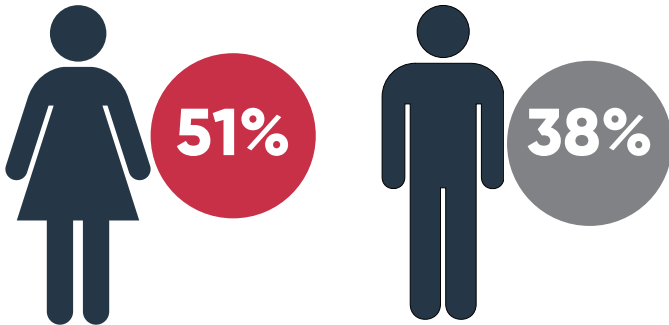
Male donors feel somewhat to significantly positive about being asked to donate at checkout over female donors (+20%).

Additional Charity Information from Employees



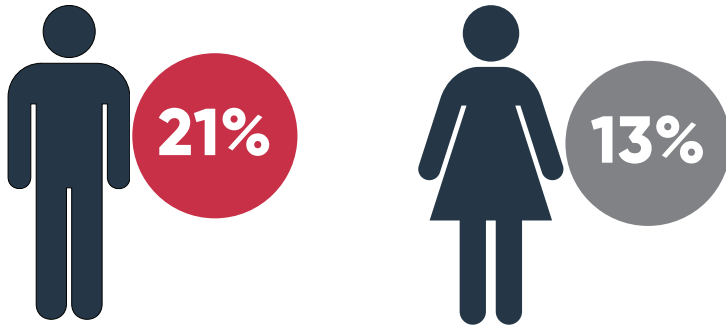
Males say it is somewhat to extremely important that employees making the donation ask are able to share additional information about a charity with them at higher rates than females (+13%).

Preferred Giving Amounts



Round-Up

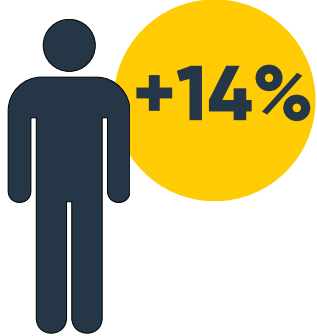
Males prefer rounding-up their total to the next dollar as their donation amount to a charity at checkout less than females (-13%).



Adding \$5 to Total

Males are more likely to give to a charity at checkout at higher amounts than females, preferring to add \$5 to their total as a donation (+8%).

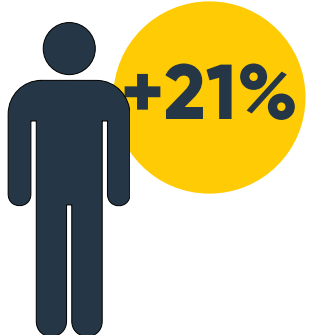
Males Lead in Point-of-Sale Digital Interaction



Males are more likely than females to donate at self-checkout than in a checkout line staffed by a cashier.



Males are more likely than females to prefer a one-time opt-in for automatic round-up donations on all future purchases.



Males are more likely than females to first become aware that they can donate to a charity through digital sources including social media, apps, website, and register pin-pad.



Males are more likely than females to donate on a store's website and on a mobile app when shopping.

The Human Element

Employees play an essential role in the point-of-sale donation process.

Though digital channels have become more prevalent in point-of-sale giving in recent years, front-end cashiers continue to play a crucial role in making customers aware of campaigns, securing donations, and providing additional information on the charity partner. Therefore, their engagement and education should continue to be a key part of any campaign.



68%

Customers said it is somewhat to extremely important that employees making the donation ask can share additional information on the charity with them.

Customers often first become aware of the opportunity to donate to a point-of-sale campaign in stores from a front-end cashier.

+13%

Customers are more likely to donate to a charity at checkout in a line with a cashier vs. at self-checkout.

The Understanding

Transparency and trust play critical roles in informing customer donations at checkout.

Customers are motivated to give to a charity because it is the right thing to do. They want to trust the charities they support at checkout and know more about the use of the funds they donate. Customers do not understand how their donations reach the charities they support at checkout. Providing information through store employees and register signage demonstrates impact and increases customer knowledge as they decide to donate at the register.



Top 3

The things important to customers to know about a charity and their donation:

- 1 Charity trustworthiness
- 2 Charity use of funds
- 3 Donation % used for charity management costs

It is important to most customers that they are able to obtain additional information about the charity from the employee making the ask.

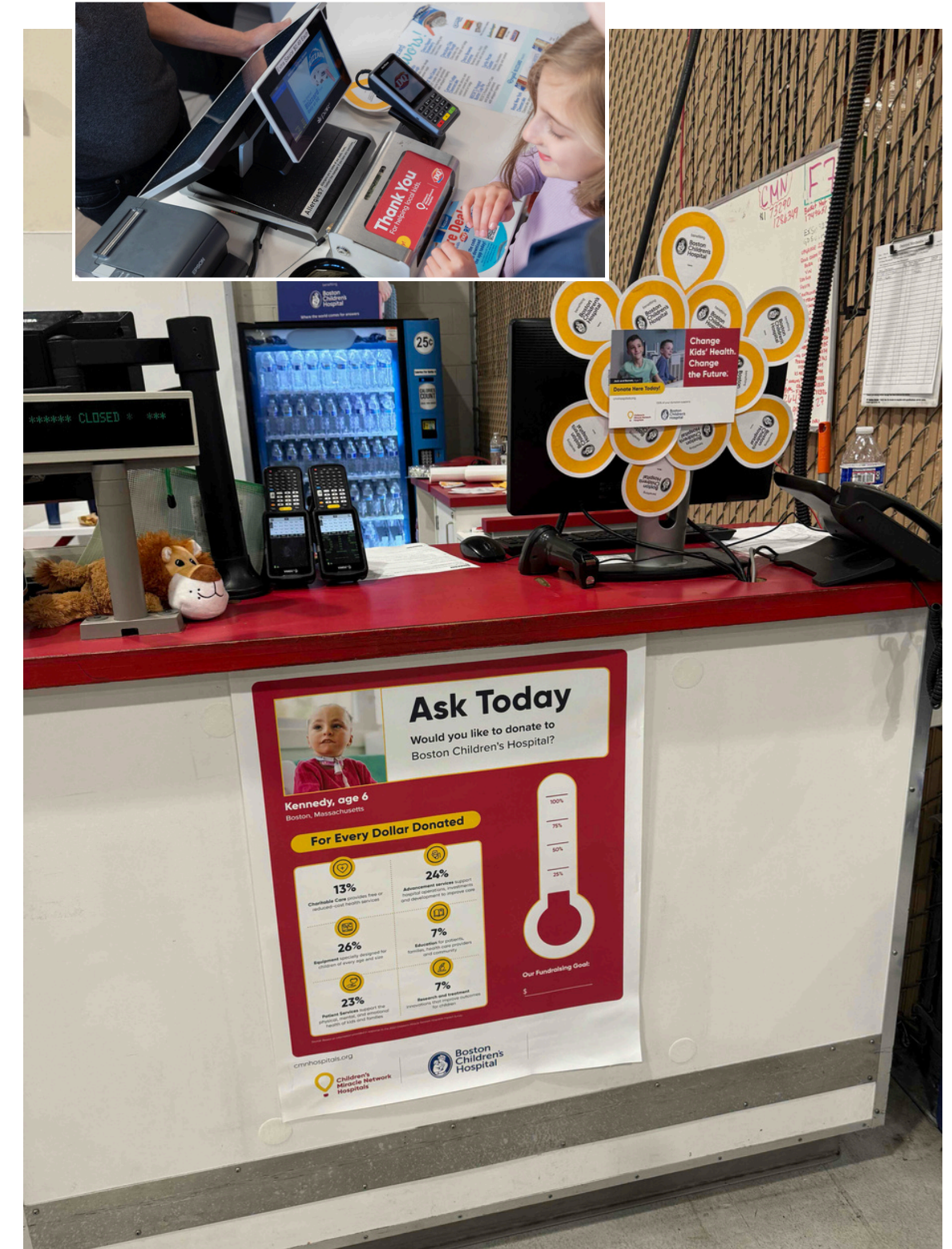
33%

Only 33% of customers have an accurate belief that stores pass donations made at the register as consumer donations with no tax benefit.




Point-of-Sale Campaigns in the Marketplace

Enabling charitable giving at the register is an excellent way for charities and corporate partners to impact their communities significantly. With 77 one-million-dollar plus point-of-sale fundraising campaigns run by nonprofits and their corporate partners in 2023*, the ask for a donation at point-of-sale continues to be a customary step of the checkout process. Dollars raised by the nation’s top campaigns continue to increase, indicating sustained customer willingness to support good causes through point-of-sale donations.



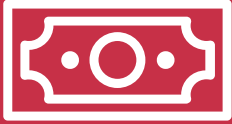
77 \$1 million + point-of-sale fundraising campaigns run by nonprofits and their corporate partners in 2023 raising

\$749 million*



Point-of-sale programs have raised more than

\$6.7 billion



over the last three decades*


*Source - Engage For Good 2023 America’s Charity Checkout Champions

Children's Miracle Network Hospitals Point-of-Sale Leadership



Children's Miracle Network Hospitals is a leader in point-of-sale fundraising in the nonprofit industry. Children's Miracle Network Hospitals raised \$148.5 million in 2023 across 83 point-of-sale fundraising campaigns with 36 unique corporate partners. This success was due to best-in-class fundraising materials, fundraising best practices, and a network of local hospital fundraisers.

Through point-of-sale fundraising in 2023, Children's Miracle Network Hospitals' partners raised more than

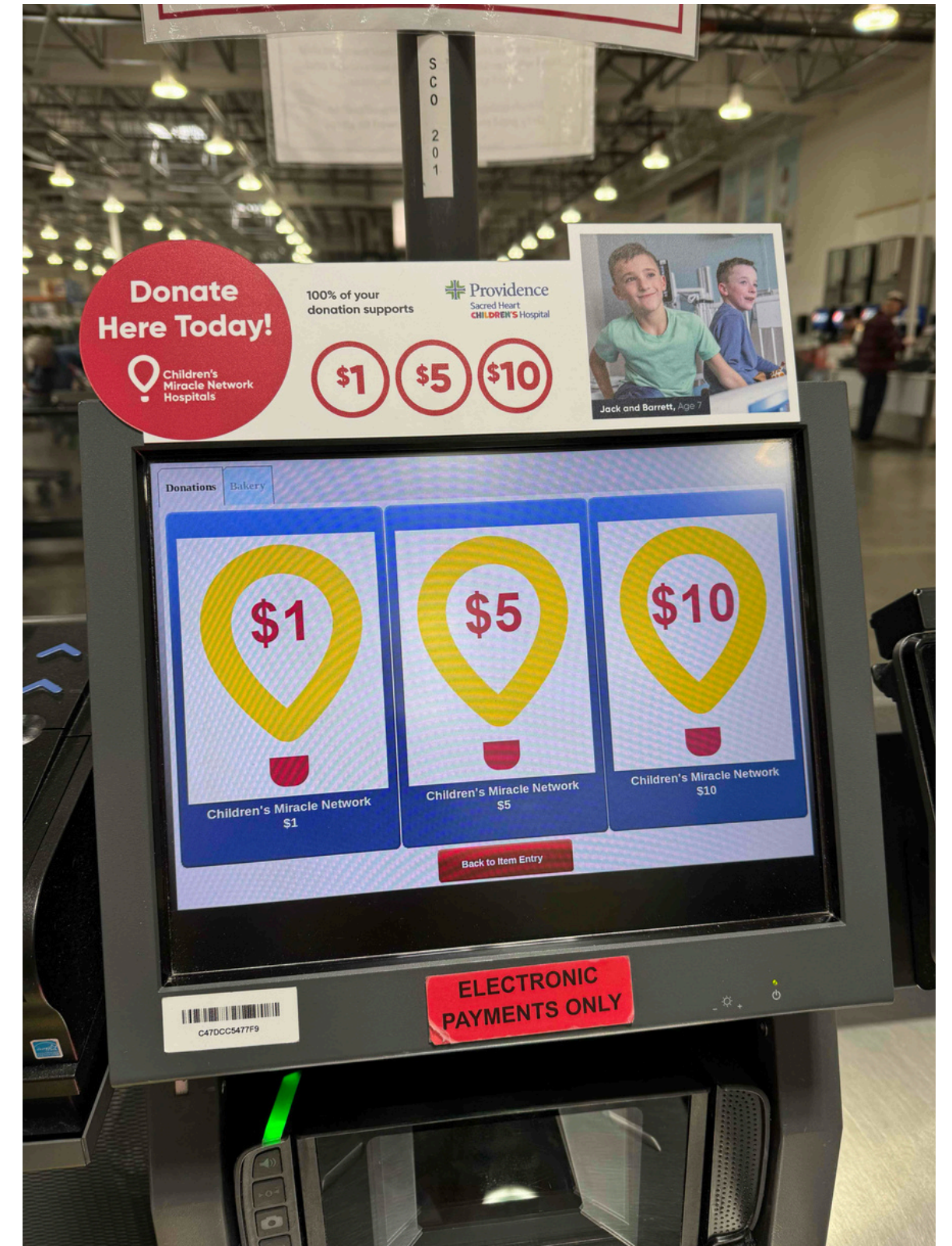
\$148.5 
million

for member hospitals across the U.S. and Canada

Since 1983 Children's Miracle Network Hospitals' partners and programs have raised more than

\$9 
billion

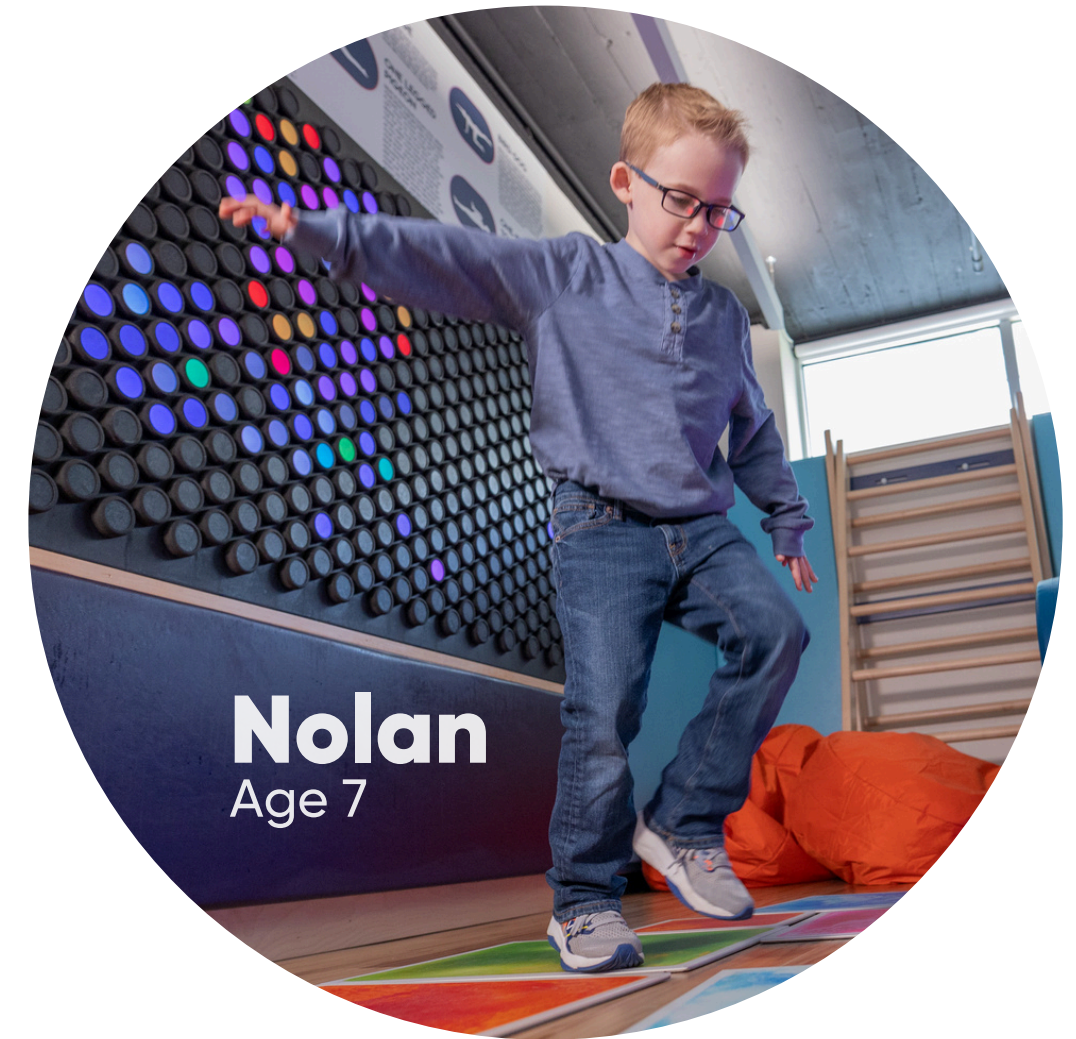
for member hospitals across the U.S. and Canada



About Children's Miracle Network Hospitals & the Study



Children's Miracle Network Hospitals was founded more than 40 years ago with the vision to Change Kids' Health, Change the Future. Children's Miracle Network Hospitals has raised more than \$9 billion for 170 children's hospitals by empowering and engaging with local communities and businesses – and we're not done yet. All donations benefit local member hospitals to fund what's needed most, like critical life-saving treatments and healthcare services, innovative research, vital pediatric medical equipment, child life services that put kids' and families' minds at ease during difficult hospital stays, and financial assistance for families who could not otherwise afford these health services.



About the study

- Anonymous, non-branded U.S. Market Survey through an online survey platform
- Conducted in April 2024
- 1,809 respondents
- 95% confidence level, 2.4% margin of error
- Age and gender are balanced to match census distribution



Change Kids' Health. Change the Future.[®]



Children's Miracle Network Hospitals

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