



Donor Trust Report 2020:

The Pandemic and a Three-Year Retrospective

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Trust and Giving During the COVID-19 Outbreak

During 2020, COVID-19 created pressure on all segments of society. As needs mount, charities that provide vital help during the crisis and charities that address other mission areas press on.

In April 2020, as the effects of COVID-19 began to intensify in the United States (U.S.), we released the *Give.org Special Report: COVID-19 and the Charitable Sector*, outlining the results of charity and donor surveys. At that time, our results showed that 80% of charities anticipated their 2020 revenue would be lower than expected, and most charities (89%) were concerned about maintaining a financially stable organization in 2020. The donor survey, on the other hand, showed some reason for hope, with more than half saying they expected to give about the same, and another 30% of individuals saying they intended to give more.

Charities are striving to continue their mission-driven work under logistical and financial pressure.

As reported by *The Chronicle of Philanthropy* on July 28, 2020, “the nonprofit world is likely to contract as a result of the pandemic and the recession it touched off. Some charities will go under, while others will shrink in size.”¹ On July 24, 2020, *The New York Times* covered how beloved charities like the YMCA find themselves in financial jeopardy, noting that “for nonprofits as a whole, both revenue-generating activities and fund-raising have been hit hard, threatening their short-term operations – and ability to keep people on payroll – and their long-term viability.”² The impact of the outbreak is felt at the local³ and global level⁴, though the effect on any given charity will depend on factors like cause area, size, level of reserves or endowments, and primary sources of revenue.

With giving by individuals (including through bequests) accounting for close to 80% of charitable contributions in the United States,⁵ the willingness and ability to give by individuals is critical to the sector. As covered in our *Give.org Special Report: COVID-19 and the Charitable Sector*, a major concern of charities is that donors will be less able to give during 2020. **Given that individual contributions are known to be tied to the health and growth of the economy, understating how COVID-19 affects not only individuals’ ability to give but also their attitudes toward giving is crucial.**

Like charities, donors are diverse, and the impact of COVID-19 is not equally distributed among individuals. The outbreak came at a time where total giving from individuals was still growing, but the share of households who give was declining.⁶ With the effects of the pandemic hitting lower income and communities of color hardest, COVID-19 has the potential to amplify this trend. Along the same lines, the *2020 Edelman Trust Barometer* uncovered how increasing inequality erodes trust in institutions and creates a trust gap, with wealthier, more educated people trusting institutions significantly more than the general population.⁷ As described by the *2020 Edelman Trust Barometer*, trust in institutions is low, with distrust being “driven by a growing sense of inequity and unfairness in the system,” adding that “income inequality now affects trust more than economic growth.”⁸



Given that individual contributions are known to be tied to the health and growth of the economy, understating how COVID-19 affects not only individuals' ability to give but also their attitudes toward giving is crucial.

The way donors think and feel about charities is fluid, and this year brought an extraordinary set of challenges. BBB's Give.org⁹ believes higher trust in charities translates to higher public engagement and confidence in giving. With that in mind, our Donor Trust Surveys track donor beliefs, feelings, and behavioral intentions related to charity trust and generosity.¹⁰ The *2020 Give.org Donor Trust Report* explores these evergreen themes but also delves into how COVID-19 has affected the bond between donors and charities.

COVID-19 on New York Nonprofits. August 2020.

⁴ As reported by Charities Aid Foundation America (CAF America) in *The Voice of Charities Facing COVID-19 Worldwide*, one-third of participating charities reported they would likely need to close down within 12 months, and another third reported not knowing how long they could stay open. CAF America. *The Voice of Charities Facing COVID-19 Worldwide (Volume 3)*. 2020.

⁵ Giving USA 2020 reports that giving by individuals totaled an estimated \$309.66 billion, close to 70% of total giving. Giving by bequest added an additional \$43.21 billion in 2019. *Giving USA: The Annual Report on Philanthropy for the Year 2019*. Chicago: Giving USA Foundation.

⁶ As reported by The Indiana University Lilly Family School of Philanthropy in *Changes to the Giving Landscape*, data from the Philanthropy Panel Study (PPS) shows a downward trend in charitable-giving participation rates following the Great Recession, "with fewer Americans making donations than in the past... The PPS shows a broad and consistent decline of over 13 percent points in the share of households who gave in 2016 compared to 2000. This percentage equates to approximately 20 million Americans who are no longer giving to charitable institutions." The Indiana University Lilly Family School of Philanthropy (2019). *Changes to the Giving Landscape*.

⁷ Ries, T., et al. *2020 Edelman Trust Barometer Global Report*. Chicago: Edelman. 2020.

⁸ Ries, T., et al. *2020 Edelman Trust Barometer Global Report*. Chicago: Edelman. 2020.

⁹ Also known as BBB Wise Giving Alliance or BBB WGA.

¹⁰ BBB's Give.org conducts a Donor Trust Survey annually that includes a core set of questions intended to measure the health of public trust in the charitable sector and to identify shifts across time. Each year, the survey may also include a set of special questions on a topic of interest. *The Give.org Donor Trust Report: An In-Depth Look into the State of Public Trust in the Charitable Sector* was released in 2018 as the first of its series. That report included data points from the Give.org Donor Trust Survey and surveys conducted in 1993 (Trend from Gallup Organization for Council of Better Business Bureaus) and 2001 (Princeton Survey Research Associates BBB Wise Giving Alliance Donor Expectation Survey).

¹ Gose, B. Nonprofit Finances on the Brink. *The Chronicle of Philanthropy*. July 28, 2020.

² Kulish, N. Providing a Pandemic Safety Net, Nonprofits Need Their Own. *The New York Times*. July 24, 2020.

³ For example, in New York City, one of the cities hit hardest by COVID-19 initially, respondents to a survey of charities by Nonprofit New York reported \$31,387,440 total revenue lost or postponed and 947 laid off or furloughed staff as of May 1, 2020. The report, in *The Impact of COVID-19 on New York Nonprofits*, is available online at: <https://nonprofitnewyork-revision.pi.bypronto.com/2/wp-content/uploads/sites/2/2020/08/Pulse-Poll-2.0-Report.pdf>. Nonprofit New York. *The Impact of*

Our Surveys

In this report, we reference data gathered through the December 2019, 2018, and 2017 Donor Trust Surveys,¹¹ each with more than 2,100 adult respondents in the United States (and, in 2019, 1,000 additional Canadian respondents).

The 2019 Donor Trust survey serves as a solid baseline for donor attitudes just prior to the COVID-19 outbreak in the U.S., and those results are released for the first time here.

To better understand the effects of the COVID-19 outbreak on **donor attitudes, we commissioned two donor surveys during 2020**, each with more than 1,000 adult respondents in the United States. Responses from **the first of these surveys were gathered between March 27 and 30, 2020**; and the results have already been published in the *Give.org Special Report: COVID-19 and the Charitable Sector*. **The second survey was gathered between August 25 and 28, 2020**; and the results are released through this report.

In addition, to better understand the effects **on charities** themselves, we reached out to BBB's Give.org Accredited Charities¹² to learn more about their collective insights. We conducted two COVID-19 charity surveys during 2020. The first was conducted between March 27 and 30, 2020; and the results, which included responses by 118 BBB Accredited Charities, have already been published in the *Give.org Special Report: COVID-19 and the Charitable Sector*. The second survey was gathered between August 27 and-

September 4, 2020; with responses from 90 BBB Accredited Charities released through this report. The BBB Accredited Charities that contributed insights to this report meet high standards of governance, finances, fundraising practices, and results reporting. Less than 9% have revenue below \$1 million, and more than 17% have revenue above \$100 million. As a group, they are not the most vulnerable charities. Still, they expressed substantial strain.

¹¹ Results from the survey conducted December 2019 are first included in this report. Results from the December 2018 survey were published in the *2019 Donor Trust Report: The State of Public Trust in the Charitable Sector* and results for the survey conducted in December 2017 were published in the *Give.org Donor Trust Report: An In-Depth Look into the State of Public Trust in the Charitable Sector*.

¹² To determine whether a charity is accountable and trustworthy, the BBB's Give.org uses *20 BBB Standards for Charity Accountability*, which help individuals verify trust based on charity governance, finances, fundraising practices, and results reporting. BBB's Give.org produces reports on charities based on these standards, and the reports are available free of charge to the donating public on Give.org.

Summary of Results



2020 is our third year reporting donor attitudes and behavioral intentions related to trust and giving. This report includes significant trends we have observed since 2017, noteworthy shifts in donor trust and giving attitudes within 2020, and charity insights in the midst of COVID-19.

Donor Trust in 2019 and a three-year retrospective

- **In 2019, charities remained more trusted than other institutions**, including organized religion, banks, business, media, and government. Still, there is ample space to build trust in the sector, with 63.6% of respondents rating the importance of trusting a charity before giving as 9 or 10 (Essential) on a 10-point scale, and only 16.8% of respondents highly trusting charities.
- **While trust is still considered highly important in the giving process, our results suggest that reliance on trust as a giving indicator has eroded in the past 3 years**, with the portion of respondents who rate the importance of trusting a charity before giving decreasing from 73.0% in December 2017, to 69.8% in December 2018, and to 65.4% in December 2019.
- **During 2018 and 2019, the portion of respondents that highly trust charities decreased moderately** (by 2.2% from 19.0% in December 2017 to 16.8% in December 2019 for charities overall). Respondents were also asked to assess their trust for 13 different charity types. While most charity types did not experience significant changes in donor trust, **the portion of respondents that highly trust religious organizations and civil rights and community action organizations decreased meaningfully** (by 5.8% and 12.3%, respectively).
- **Fewer people reported giving to charities and houses of worship during 2019 as compared to 2017**, with 57.7% reporting giving to a charity and nonprofit (other than a house of worship) in 2019, as compared to 68.0% in 2017.¹³
- Respondents were asked to identify their preferred ways of making a difference (with choices including donating money to a charity, donating items, volunteering time, donor advised funds, raising awareness, raising money through a network, supporting a business, and giving to family and friends. When thinking about making a difference, fewer respondents said they prefer to do so by donating money to a charity in 2019 (39.3%) as compared to 2017 (45.0%). Similarly, the portion of respondents who prefer to give to family and friends dropped to 20.6% in 2019 from 28.0% in 2017.
- **The portion of respondents solicited through direct mail and who report responding to mail appeals decreased significantly in 2018 and 2019**. When asked to select the channels used to donate during 2019, 17.9% reported responding to a mailed appeal, as compared to 28.0% in 2017. Respondents also expressed being solicited less via mail (with 36.9% in 2019 and 49.0% in 2017), by phone (with 25.6% in 2019 and 36.0% in 2017), or through television (with 24.8% in 2019 and 35.0% in 2017).

¹³ This is consistent with findings by The Indiana University Lilly Family School of Philanthropy's *Changes to the Giving Landscape*. Indiana University Lilly Family School of Philanthropy (2019). *Changes to the Giving Landscape*.



While trust is still considered highly important in the giving process, our results suggest that reliance on trust as a giving indicator has eroded in the past 3 years.

- At the end of 2017, 2018, and 2019, approximately 21% of participants expressed willingness to give more, and 12% expressed desire to be approached more by charities. **While the overall portion of respondents that are open to solicitation has not changed significantly over time, 2019 results showed that younger generations were less open to solicitation than previous years.** For instance, while 46.0% of Gen Zers said they “might be willing to give more if approached” at the end of 2018, only 35.2% said the same in December 2019. Matures and Boomers, on the other hand, were moderately more open to solicitation.

63.6% of respondents rated the importance of trusting a charity before giving as essential


16.8% of respondents report as highly trusting a charity





Giving Attitudes During 2020

- **COVID-19 altered the way people think about doing good during 2020.** When asked to consider which forms of giving they hope to increase, participants are more likely to say they want to support good business or social enterprise ventures (with 19.8% in August 2020 as compared to only 5.1% in December 2019) and to give to family and friends directly (with 28.0% in August 2020 as compared to only 16.8% in December 2019). Participants are also less likely to say they want to increase their volunteering (with 41.1% in December 2019 as compared to only 16.5% in August 2020), or give to an individual directly via crowdfunding (with 22.2% in December 2019 as compared to only 10.5% in August 2020).
- **One out of four participants (24.4%) say they plan to give more to charities in 2020** (as compared to their average annual giving in the past 3 years). While encouraging, that is a 6.4% drop from a similar survey conducted in March.
- **Younger generations remain more likely to intend to give more, but their expressed level of intent has dropped significantly in the past 4 months.** For example, in March, 60.8% of Gen Zers said they intend to give more during 2020 but, by August, only 41.7% intended to give more. **Matures, on the other hand, are more likely to want to give more now than they were back in March.** For example, in March, 11.9% of Matures intended to give more during 2020, but by August, 17.2% said that they intended to give more.
- **Most participants still intend to maintain or increase their giving to charities and houses of worship, while many are undecided about their giving to individuals via crowdfunding.** For example, by August 2020, 76.8% intend to maintain or increase their giving to charities and 73.7% intend to maintain or increase their giving to houses of worship, but only 40.7% say they will maintain or increase their giving to individuals via crowdfunding.
- **The portion of respondents who expressed that they will look for ways to support charities, or to look for ways to help unemployed individuals, has decreased over the year.** Impetus to support charities decreased from 48.2% in March to 42.8% in August. Similarly, expressed intent to help unemployed individuals decreased from 24.5% in March to 20.0% in August.
- **Younger generations are relatively more likely to look for ways to help unemployed individuals directly.** For example, by August 2020, with 29.4% of Gen Z participants compared to 14.5% of Matures looking for ways to help unemployed individuals directly.
- Among donors who intend to give less to charity, 54.5% say they need to be conservative because a lot is uncertain this year, and 48.3% say they lost income due to COVID-19. **Matures and Boomers are most likely to feel the need**



to be conservative, with 81.8% of Matures and 64.2% of Boomers feeling conservative as compared to 28.6% of Gen Zers. **Gen Xers and Millennials more frequently report having lost income** (with 66.7% and 63.9%, respectively). **Gen Zers are the most likely generation to say they will give less to charity because they are giving money to support business in their community**, with 28.6% expressing that position compared to 0% of Matures and 1.9% of Boomers.

- While most do not know whether they will give more or less to individuals via crowdfunding in 2020, Gen Zers and Millennials are most likely to say they will maintain or increase such giving. 47.4% of Gen Zers and 57.3% of Millennials intend to maintain or increase their giving to individuals via crowdfunding, as compared to 24.2% of Matures.
- Among those who intend to give more via crowdfunding, 77.0% say the need is higher due to COVID-19, 30.4% say they like knowing who their money will support, and 21.5% say donating directly to the individual is more cost-effective. **Overall, only 13% of respondents say they are dissatisfied with traditional charitable donations, but more than one out of four Gen Zers (26.3%) report being dissatisfied with traditional charitable donations.**



Impetus to support charities decreased from 48.2% in March to 42.8% in August. Similarly, expressed intent to help unemployed individuals decreased from 24.5% in March to 20% in August.



Trust During 2020

- **The importance placed on trusting before giving was eroded in 2018, 2019, and 2020.** Between December 2017 and December 2019, the overall portion of participants that place “high importance on trust” dropped from 69.8% to 65.4%. Between December 2019 and August 2020, the overall portion of participants that consider trust to be highly important before giving decreased another couple of points, from 65.4% to 63.6%. Moreover, the portion of respondents that attribute low importance to trust before giving grew from 16.2% to 20.8%.



- **The portion of African Americans that says trusting a charity before giving is highly important decreased during 2020**, going from 56.9% in December 2019 to 50.4% in August 2020. **During the year, African Americans and Hispanics/Latinos also became less likely to say assessing charity trust is “easy,”** going from 24.4% to 15.1% and from 25.6% to 9.9%, respectively.
- **Individuals who place “high importance” on trust are more likely to donate to charities and to contribute more money.** For instance, 75.2% of individuals who attribute high importance to trust before giving donated during 2019 as compared to 65.2% among their counterparts. Similarly, 53.2% of donors who place high importance on trust donated more than \$200 in 2019, as compared to 39.0% of their counterparts.
- Older generations are more likely to attribute “high importance” to trust before giving. For instance, 79.5% of matures and 81.7% of boomers consider it “essential” to trust a charity before giving, as compared to 53.2% of millennials and 50.0% of Gen Zers.
- **Different racial groups tend to place their trust in different charity types. For instance, while civil rights and community action organizations are among the least trusted charity types overall, these organizations are among the most trusted by African Americans.**

- Different generations also tend to place their trust in different charity types.** For instance, while civil rights and community action organizations are among the least trusted charity types overall, these organizations are among the most trusted by Gen Z. The top-three most trusted categories of charities in August 2020 by Matures are (1) religious organizations, (2) health organizations, and (3) veterans organizations. For Gen Zers, the top three are (1 and 2) a tie between youth development and civil rights and community action organizations, followed by (3) animal welfare organizations.
- When asked what most signals that a charity is trustworthy, the top factors in August were (1) third-party evaluation by an independent organization, (2) name recognition, and (3) accomplishments shared by the organization.** Notably, trust signals like third-party evaluations, name recognition, and opinions expressed by family and friends are relatively more important in 2020 than they were in previous year.
- The importance of financial ratios as a signal of trust has decreased steadily since 2017,** with the portion of participants who rely on financial ratios as a trust signal decreasing by 7.3% between December 2017 and December 2019, and then by another 9.1% between December 2019 and August 2020. That is an overall fall from 35.0% to 18.6% over the past 3 years.
- Different generations and racial groups say they assess trust differently.** For example, Matures rely most heavily on name recognition and third-party evaluations, while Gen Zers rely most heavily on accomplishments shared by the organization and passion and sincerity in the appeal.
- While participants in previous surveys tended to trust small charities (approximately 62%) more than larger charities (approximately 38%) during 2020, the portion of participants that trust large charities over small charities grew to 47.9%.

Top 3 Factors Signaling a Charity as Trustworthy in 2020






Charity Insights

- **Charities report that COVID-19 has negatively impacted their ability to fulfill their programmatic activities as planned (77.0%), maintain revenue from fundraising events (70.3%), engage volunteers (57.3%), reach people or animals they serve (44.0%), and maintain a financially stable organization (30.1%) during 2020.**
- Some charities report that COVID-19 has positively affected their ability to reach people and animals they serve (18.7%), engage volunteers (12.3%), and maintain a financially stable organization (12.3%).
- **Thinking about the impact of COVID-19 on the charitable sector during 2020, 94.7% of charities are somewhat (49.3%) or very (45.3%) concerned.**
- Many charities (49.4%) anticipate that their 2020 revenue will decrease as compared to 2019.¹⁴ While this statistic is sobering, it is less pessimistic than earlier estimates in March 2020, when more than 80% of charities reported expecting decreased revenue.

¹⁴ This finding is consistent with a recent survey of 1,373 charity representatives conducted by CCS Fundraising. According to CCS Fundraising's survey, "Although 53% of respondents reported a fundraising decline so far due to COVID-19, a smaller proportion of declines and a larger proportion of increases have been reported since [their] first and second surveys." CCS Fundraising. *Nonprofit Fundraising Survey: Fundraising Impact of COVID-19*. September 2020.



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- Among charities expecting decreased revenue, 78.1% anticipate their donors will be less able to give, 61.0% say the organization will be unable to host fundraising events (aside from galas or walks) as planned, and 43.9% anticipate the organization's donors will redirect support to individuals in need.
 - As charities gain clarity about their expected 2020 revenue, one out of three charities (34.2%) expect a decrease of 10% or less. 17.1% expect decreased revenue of between 11 and 20%, while 19.5% expect a decrease of between 21 and 30%, and **22.0% of charities expect more than a 30% reduction in revenue.**
 - Half of charity respondents (49.3%) also anticipate decreased expenses, as compared to their original 2020 budget. On the other hand, 16.0% of charity respondents expect an increase in expenses for 2020.
 - **Only 12.0% of charities said crowdfunding sites helped increase the total amount of funds donated to charities during the COVID-19 outbreak.** Most frequently, charities say they do not know whether crowdfunding sites help increase total donations to charity (56.0%) or say that such sites do not have a significant effect on COVID-19 charity donations (14.7%). The remaining **17.3% of charities say crowdfunding sites divert donations from charities to other forms of giving.**
 - When it comes to revenue from crowdfunding, most charities (64.0%) report that they receive no revenue (26.7%) or less than 1% of their revenue (37.3%) from crowdfunding. A total of 20.0% of charities received between 2 and 5%, and 9.3% of charities receive between 6 and 10% of revenue from crowdfunding. The remaining 6.7% get between 11% and 100% of their revenue from crowdfunding sites.
 - Charities consider news media to be the most important influence on COVID-19 giving. When asked about which factors most influenced donor's COVID-19 giving decisions during 2020, charities said news media (41.3%), social media (25.3%), family and friends (14.7%), celebrity appeals (4.0%), and other, including communication from the charity (14.7%).
 - Only 13.3% of charities in this survey partnered with a celebrity during 2020 to bring attention to their COVID-19 efforts.
 - **The top five fundraising goals that responding organizations have not been able to prioritize in the past 2 years are young donor support (43.7%), government grant revenue (40.9%), corporate support (33.4%), minority donor support (31.0%), and private foundation grants (26.8%).** In their open-ended responses, charities say they have not had the bandwidth to prioritize young donors or target their communications to different audiences. For government and corporate support, some charities purposefully do not pursue these



forms of funding, while others have not had the opportunity.

- **Thinking about the effects of COVID-19 for 2021, charities are most concerned about (1) the impact on the charitable sector as a whole (94.5%), (2) fulfilling programmatic activities as planned (86.3%), (3) losing revenue from fundraising events (83.6%), (4) reaching the people or animals they serve (75.7%), and (5) maintaining a financially stable organization (74.0%).**

Among charities expecting decreased revenue:

78.1% anticipate their donors will be less able to give

61.0% say the organization will be unable to host fundraising events as planned

43.9% anticipate the organization's donors will redirect support to individuals in need

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- **Reflecting about 2021, less than one-quarter (23.0%) of charities say they expect things to be better for themselves, and only 10.8% say they expect things to be better for the sector.**

Canadian Donor Trust in 2019

- **Charities in Canada are more trusted than other institutions**, including organized religion, banks, business, media, and government. **As compared to their U.S. counterparts, Canadians are relatively more trusting of their government and relatively less trusting of organized religion.** For example, 31.2% of Canadians (as compared to 21.1% of Americans) said they trust government more than charities. Similarly, 22.9% of Canadians (as compared to 35.0% of Americans) said they trust organized religion more than charities.
- **There is ample space to build trust for charities in Canada, with 67.0% of respondents rating the importance of trusting a charity before giving as 9 or 10 (Essential) on a 10-point scale, and only 11.7% of respondents highly trusting charities.** The portion of Canadians that highly trust charities (11.7%) is significantly lower than in the U.S. (16.8%).
- **The most trusted charity types in Canada are (1) not-for-profit hospitals, (2) health organizations, and (3) police and firefighter organizations;** their U.S. counterparts place the most trust in (1) religious organizations, (2) not-for-profit hospitals, and (3) veterans organizations.
- **When asked to consider how confident respondents feel that their institutions can do what they say they will, Canadians tend**



to be less confident than U.S. participants, particularly about organized religion (with 10.6% of Canadians versus 18.7% of Americans saying they are highly confident) and about charities (with 15.2% of Canadians versus 21.0% of Americans saying they are highly confident).

- **When researching a charity, Canadians said the most influential factors in their giving decisions are (1) general web searches, (2) research on the charity's website, (3) questions asked of the charity;** their U.S. counterparts said the most influential factors were (1) information provided by a third-party monitoring organization, (2) research on a charity's website, and (3) general web searches.
- **Approximately 23% of Canadian and U.S. respondents said they have more power to do good now than they did 5 years ago.**

Individuals continue to represent close to 80% of total giving in the United States,¹⁵ but their trust and giving preferences are shifting during the unexpected reality of the COVID pandemic. Charities faced a historically difficult year in 2020 and are bracing for an uncertain 2021.

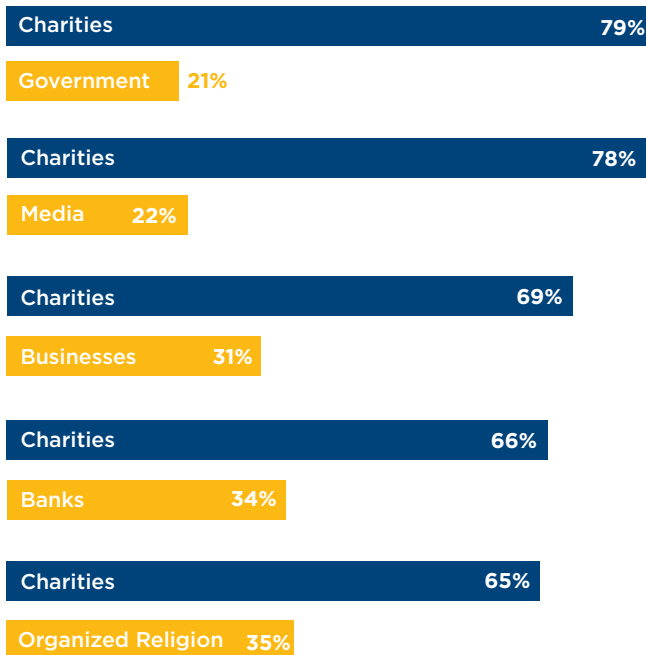
Nurturing the bond between charities and donors is as important as ever. While charities are under strain, this situation calls for a sector that is responsive to the way people want to engage in making a difference, and active in shaping trust toward the sector.

¹⁵ *Giving USA: The Annual Report on Philanthropy for the Year 2019. (2020).* Chicago: Giving USA Foundation.

Donor Trust in 2019 and a Three-year Retrospective



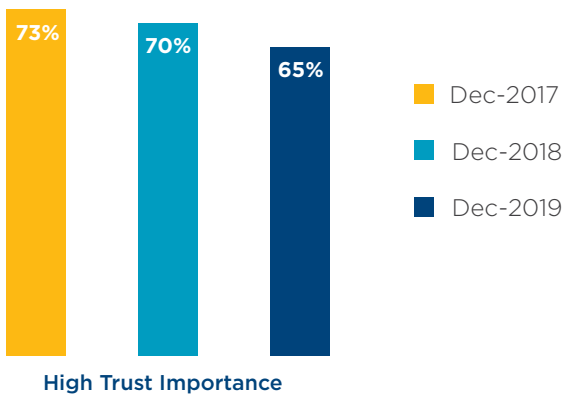
Charities remain more trusted than other institutions, including organized religion, banks, business, media, and government:



Still, there is ample space to build trust in the sector:



While trust is still considered highly important in the giving process, our results suggest that reliance on trust as a giving indicator has eroded in the past 3 years.



During 2018 and 2019, the portion of respondents that highly trust charities decreased moderately (from 19% to 17% for charities overall).

However, the portion of respondents that highly trust religious organizations and civil rights and community-action organizations decreased meaningfully.

- Dec-2017
- Dec-2018
- Dec-2019





Fewer people reported giving to charities and houses of worship during 2019 as compared to 2017.

■ 2017
■ 2019

A charity or non-profit organization OTHER than your church or place of worship



Your church, synagogue, mosque, or other place of worship



Family & Friends (other than your children under age 21) living INSIDE the United States as a form of assistance or support

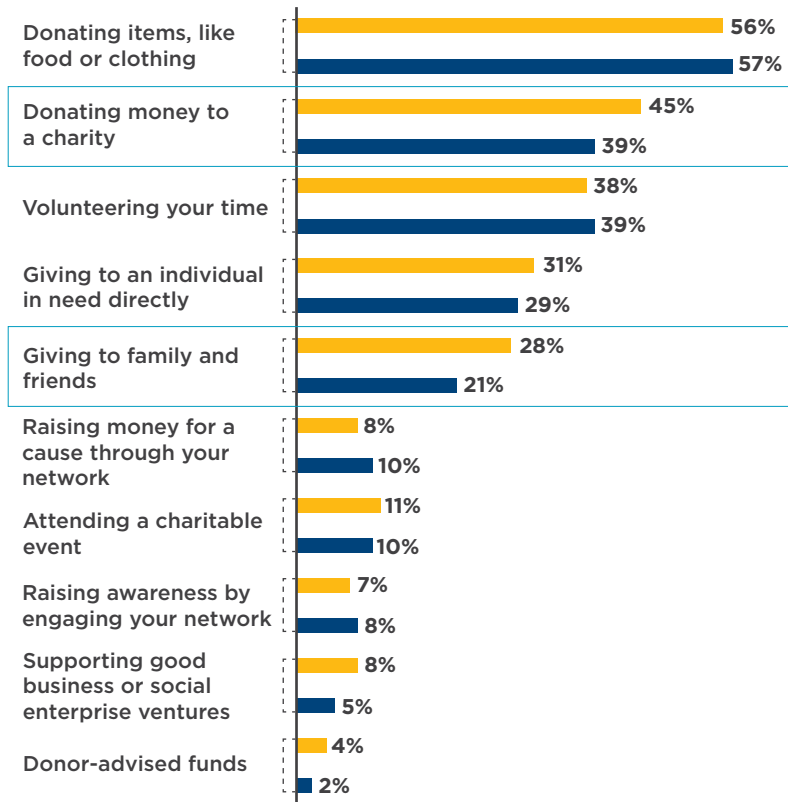


Family & Friends (other than your children under age 21) living OUTSIDE the United States as a form of assistance or support



And, when thinking about making a difference, fewer respondents said they prefer to do so by donating money to a charity or by giving to family and friends.

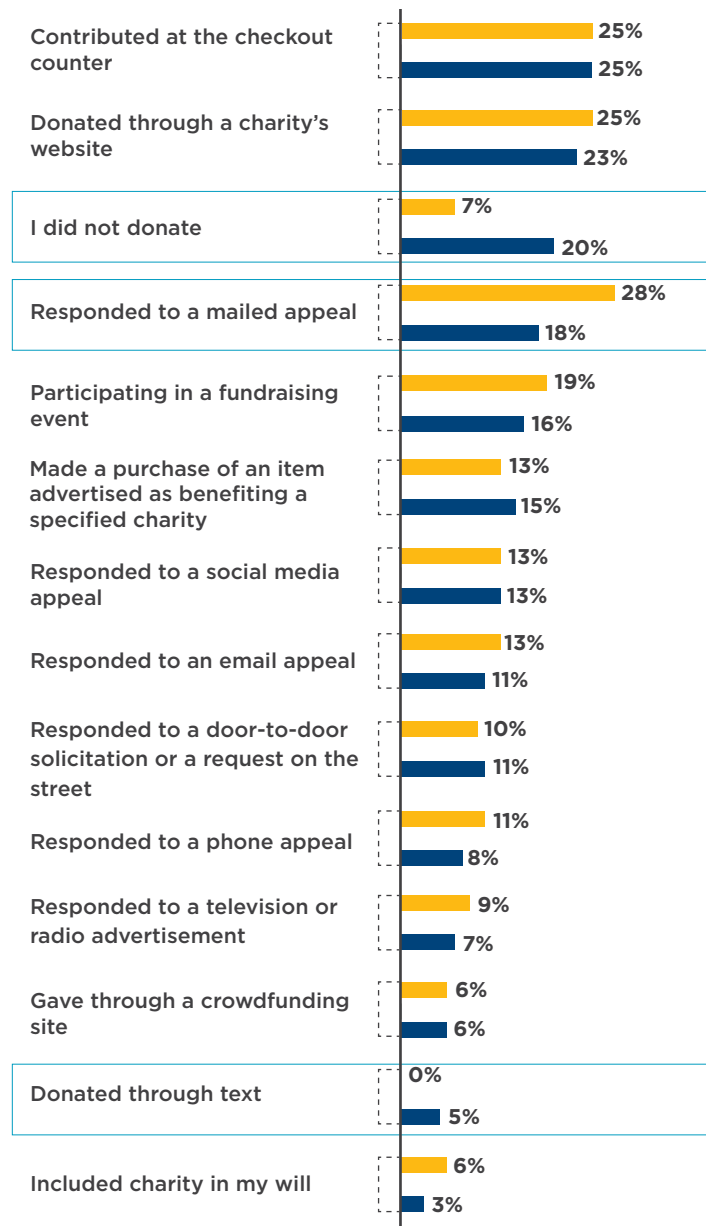
■ Dec-2017
■ Dec-2019



The portion of respondents solicited through direct mail and responding to direct mail appeals decreased significantly in the past 2 years.

Among self-reported donating channels, mailed appeals showed the most significant decline.

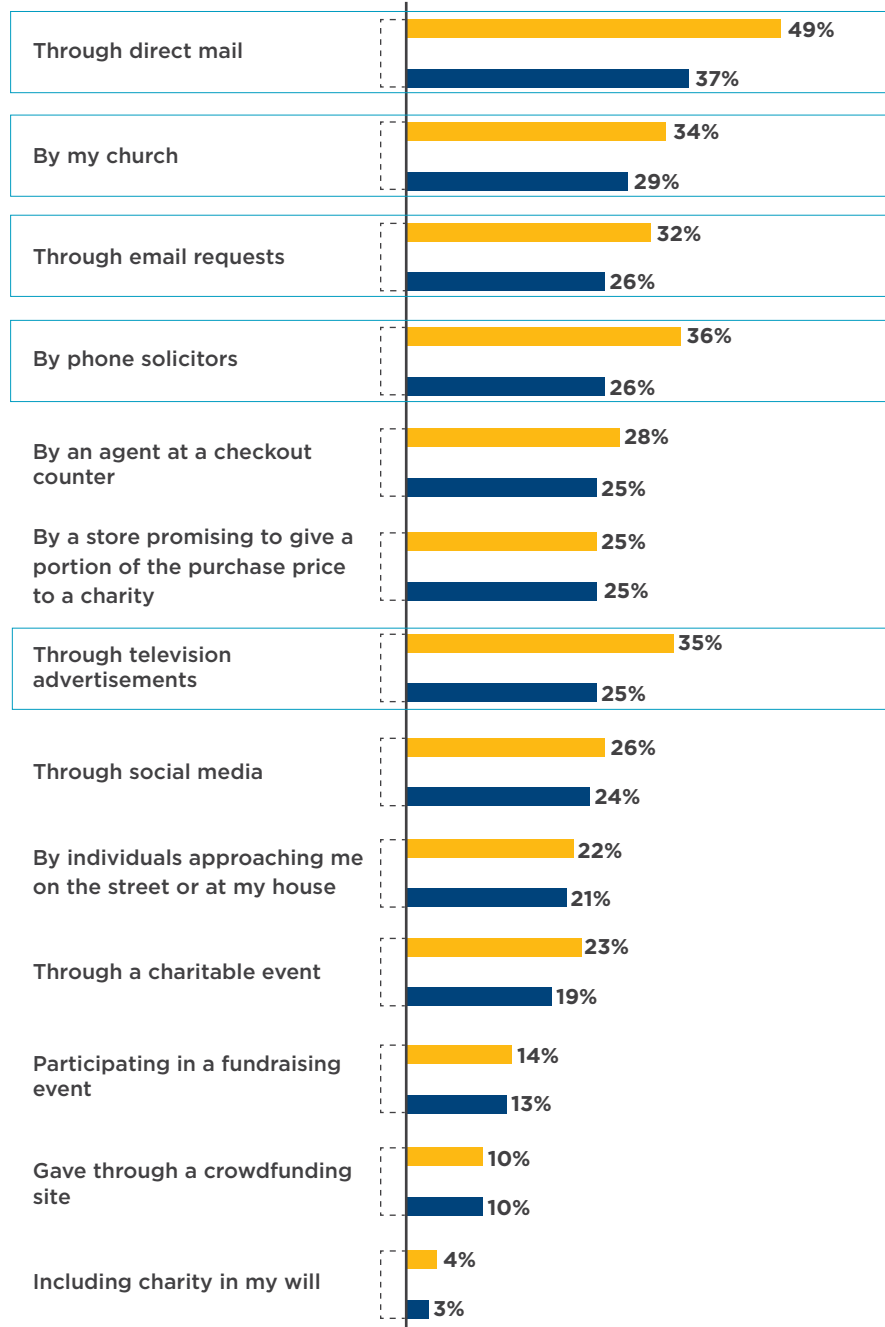
■ Dec-2017
■ Dec-2019



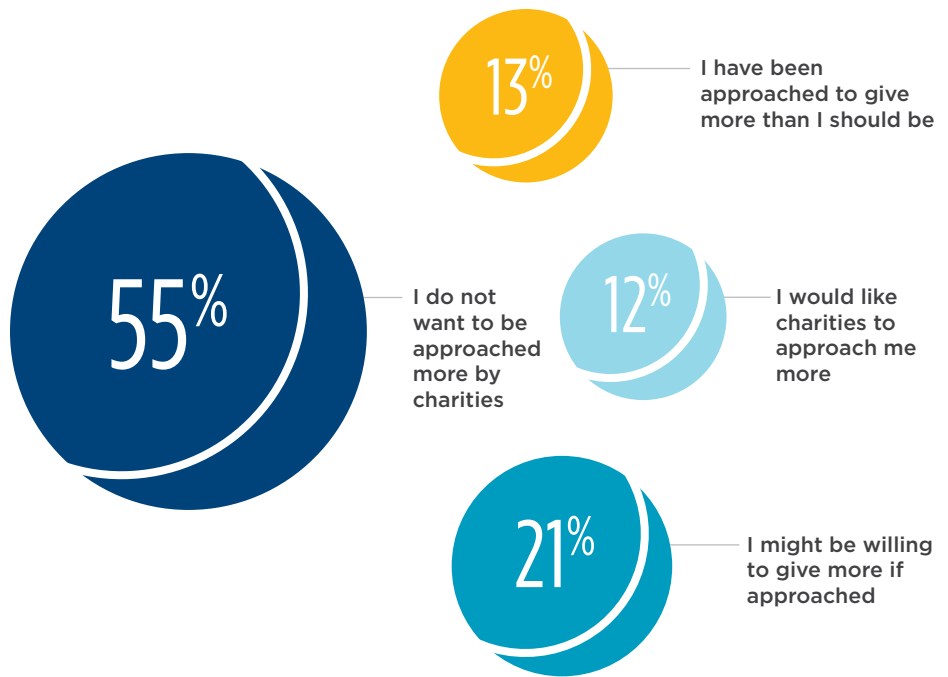


Respondents also expressed being solicited less in 2019 via mail, phone, or television.

■ Dec-2017
■ Dec-2019



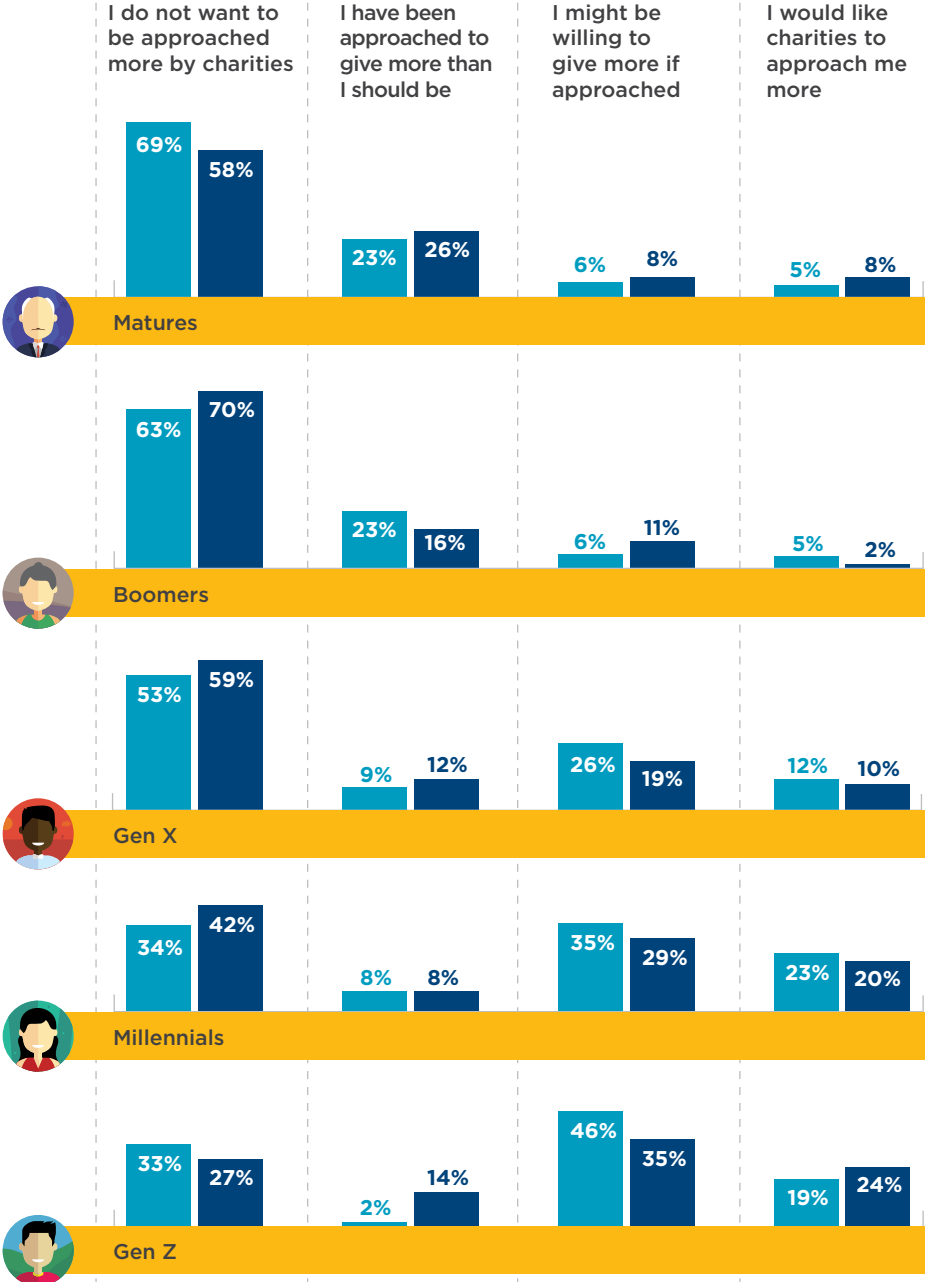
At the end of 2019 and over the previous 2 years, approximately 21% of participants expressed willingness to give more, and 12% expressed a desire to be approached more by charities.





While younger generations remain more open to being approached by charities and give, 2019 results showed less openness by younger generations. Matures and Boomers, on the other hand, were moderately more open to solicitation.

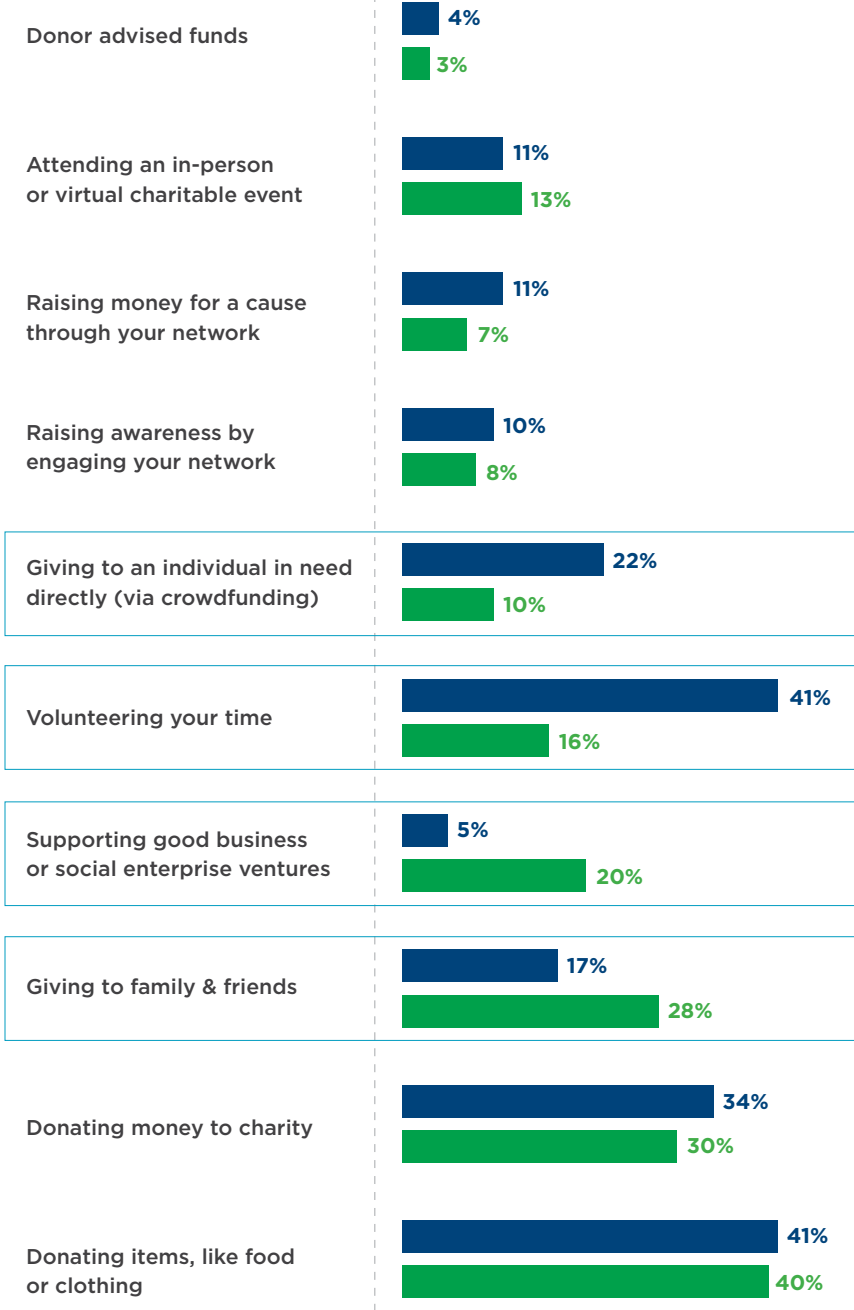
■ Dec-2018
 ■ Dec-2019



Giving Attitudes During 2020

COVID-19 altered the way people think about doing good. When asked to consider which forms of giving they hope to increase, participants are now more likely to say they want to support good business or social enterprise ventures and give to family and friends directly than they did at the beginning of the year. Participants are also less likely to say they want to increase their volunteering or giving to individuals directly via crowdfunding.

■ Dec-2019
■ Aug-2020

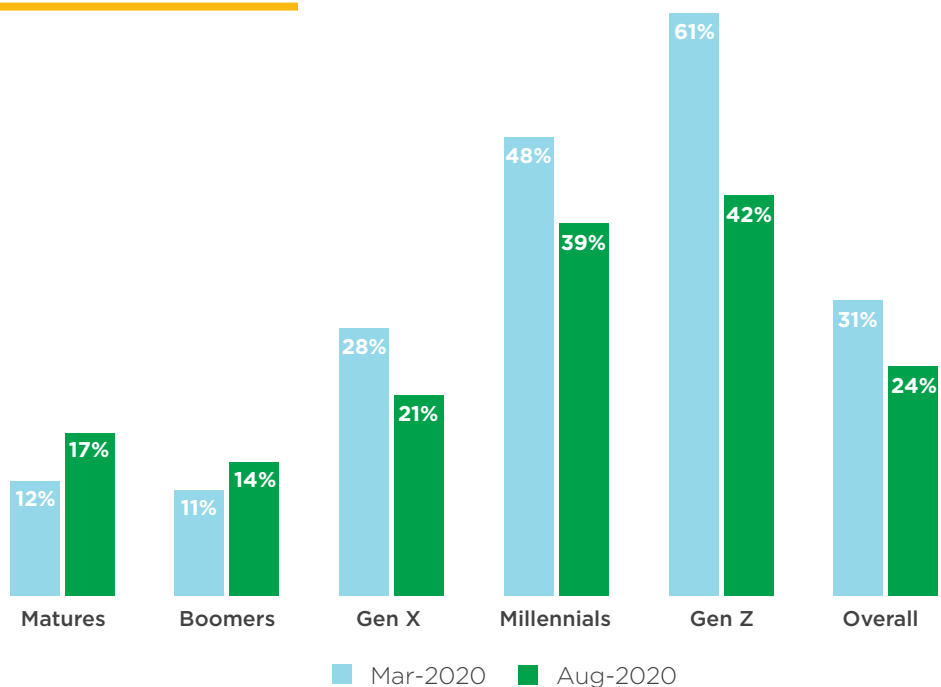




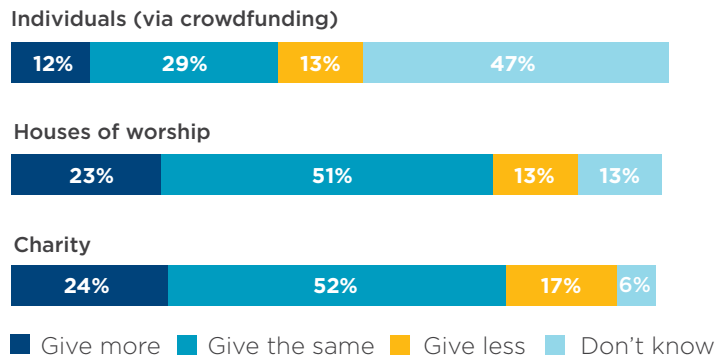
One out of four participants say they plan to give more to charities in 2020 (as compared to their average annual giving in the past 3 years) and another 52% plan to maintain their giving level.

While encouraging, this is a 6% drop from a similar survey conducted in March.

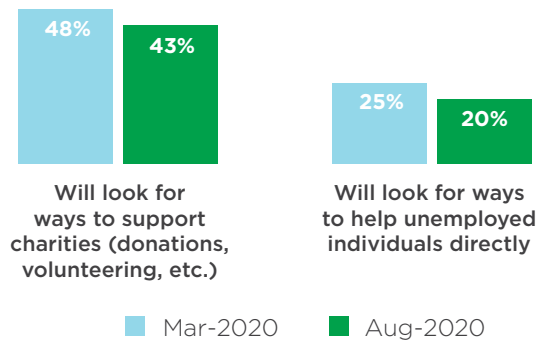
Younger generations remain more likely to intend to give more, but their expressed intent has dropped significantly over the past 4 months. Matures, on the other hand, are more likely to want to give more now than they were expecting to give in March.



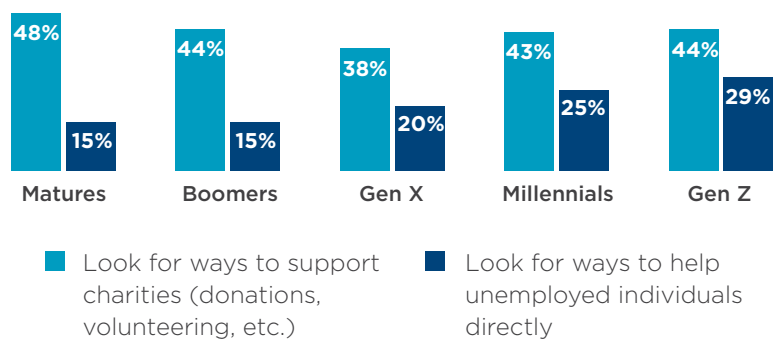
Most participants still intend to maintain or increase their giving to charities and houses of worship, but many are undecided about their giving to individuals via crowdfunding.



The portion of respondents who expressed that they will look for ways to support charities or will look for ways to help unemployed individuals has decreased over the year.

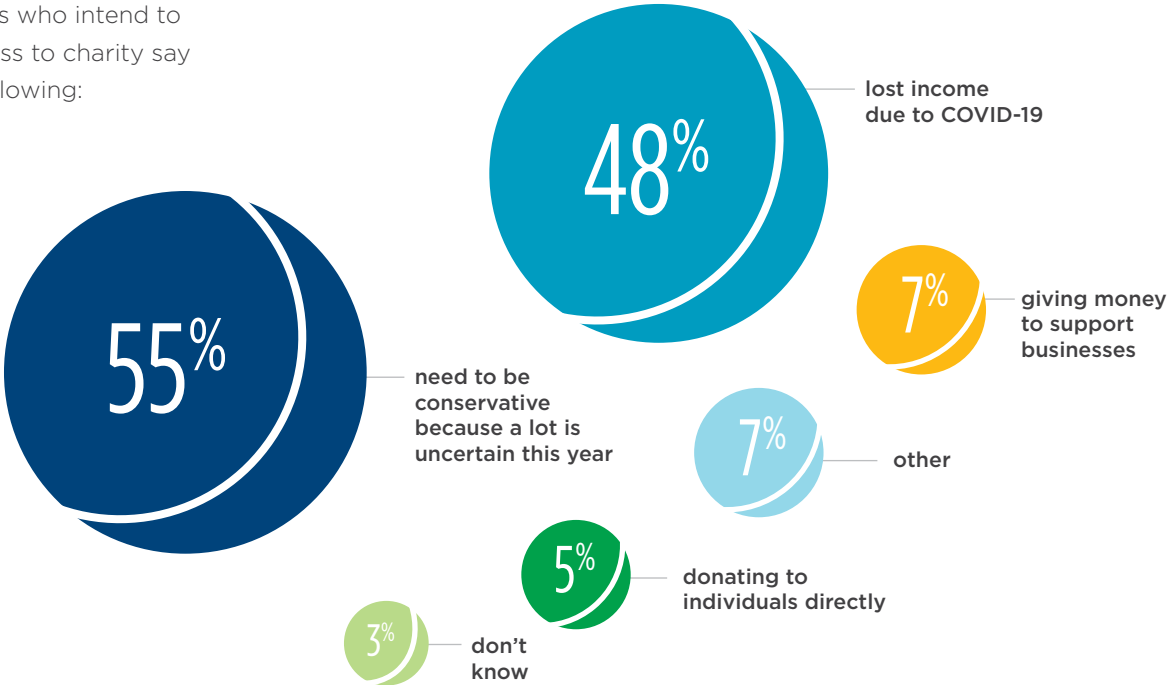


Younger generations are relatively more likely to look for ways to help unemployed individuals directly.

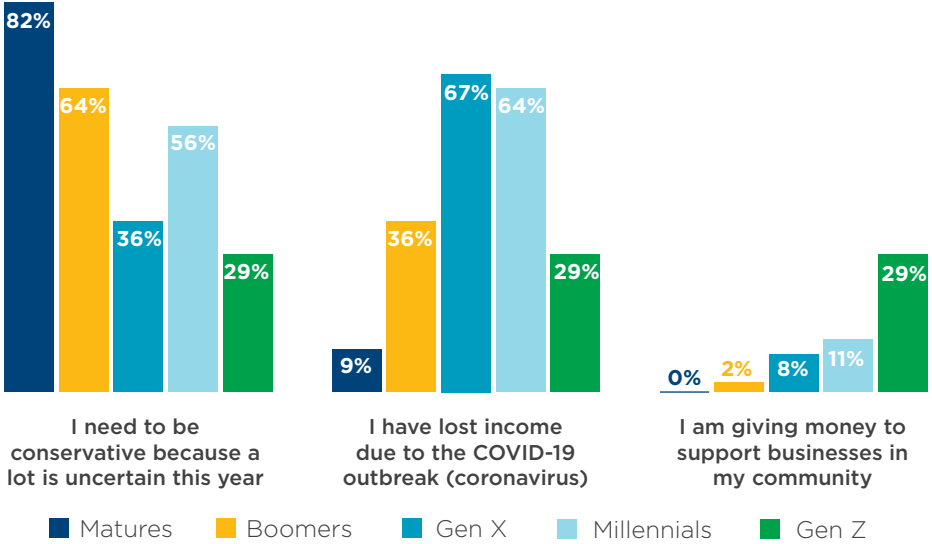




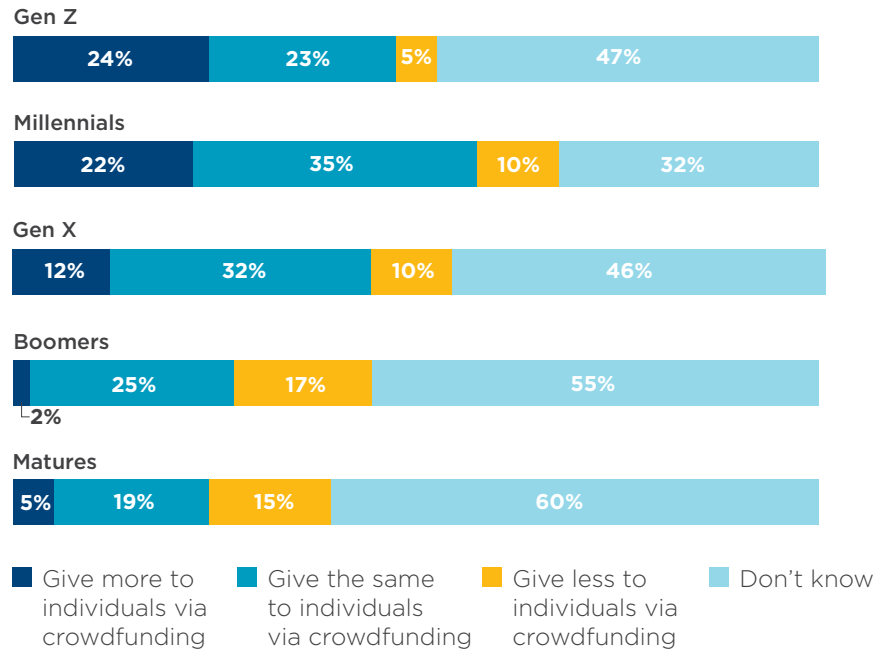
Donors who intend to give less to charity say the following:



Matures and Boomers are most likely to feel the need to be conservative, while Gen Xers and Millennials more frequently report having lost income. Gen Zers are the most likely to say they will give less to charity because they are giving money to support business in their community.



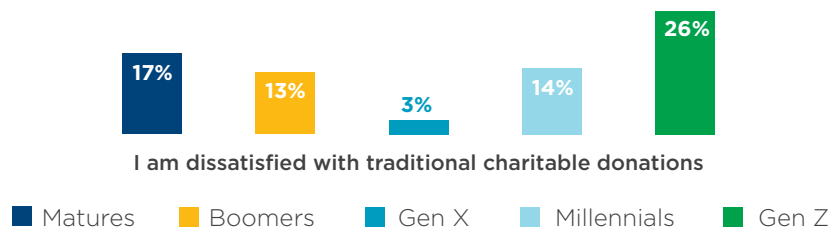
While most people do not know whether they will give more or less to individuals via crowdfunding, Gen Zers and Millennials are most likely to say they will maintain or increase such giving.



Among those who intend to give more via crowdfunding:

- 77%** say the need is higher due to COVID-19
- 30%** say they like knowing who their money will support
- 21%** say donating directly to the individual is more cost effective
- 17%** have received more crowdfunding requests than requests from a charity
- 13%** are dissatisfied with traditional charitable donations
- 12%** want to support people they know

Significantly, more than one out of four Gen Zers report being dissatisfied with traditional charitable donations.

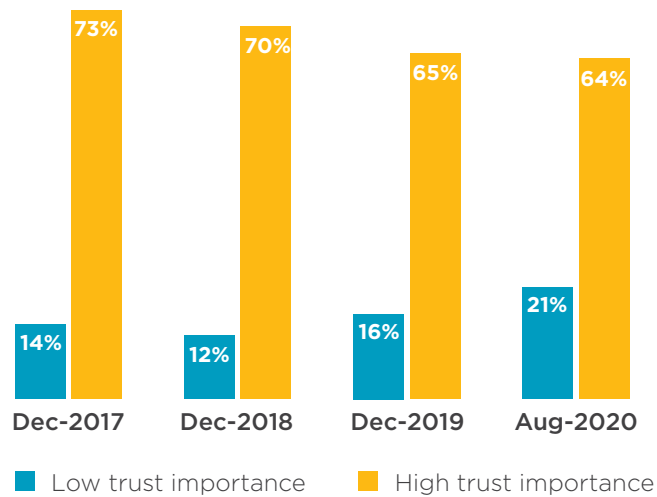


Trust during 2020

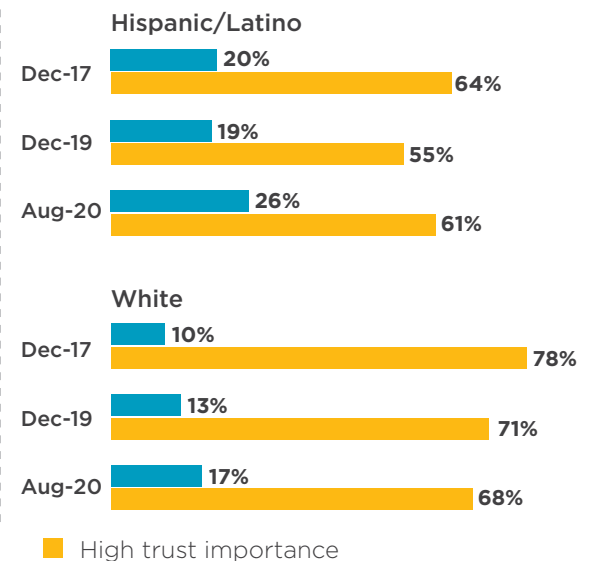
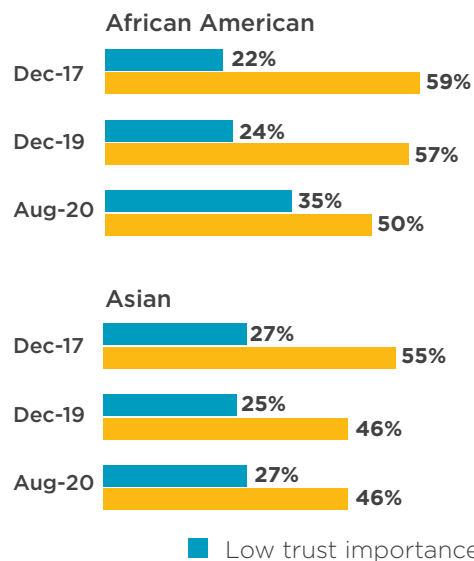


The importance placed on trusting before giving eroded in 2018 and 2019.

In 2020, the overall portion of participants that consider trusting highly important before giving decreased mildly, though the portion of respondents that attribute low importance to trust before giving grew.



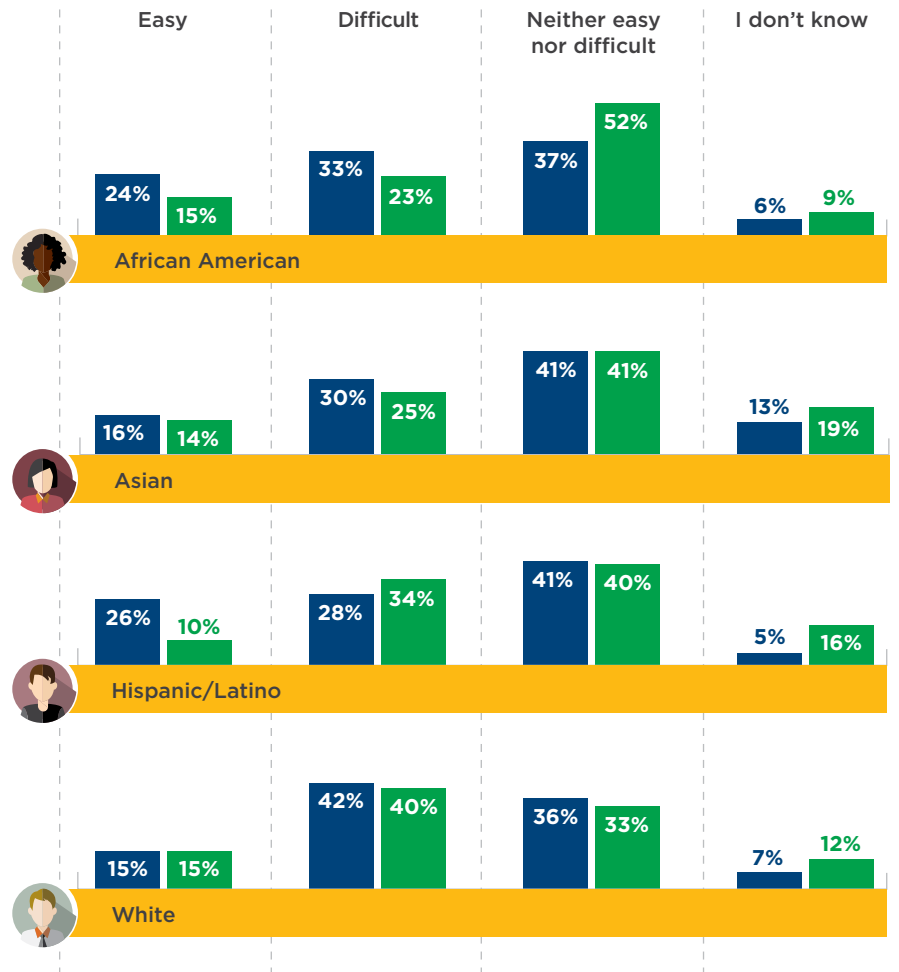
The percentage of African Americans that say trusting a charity before giving is highly important decreased meaningfully during 2020.





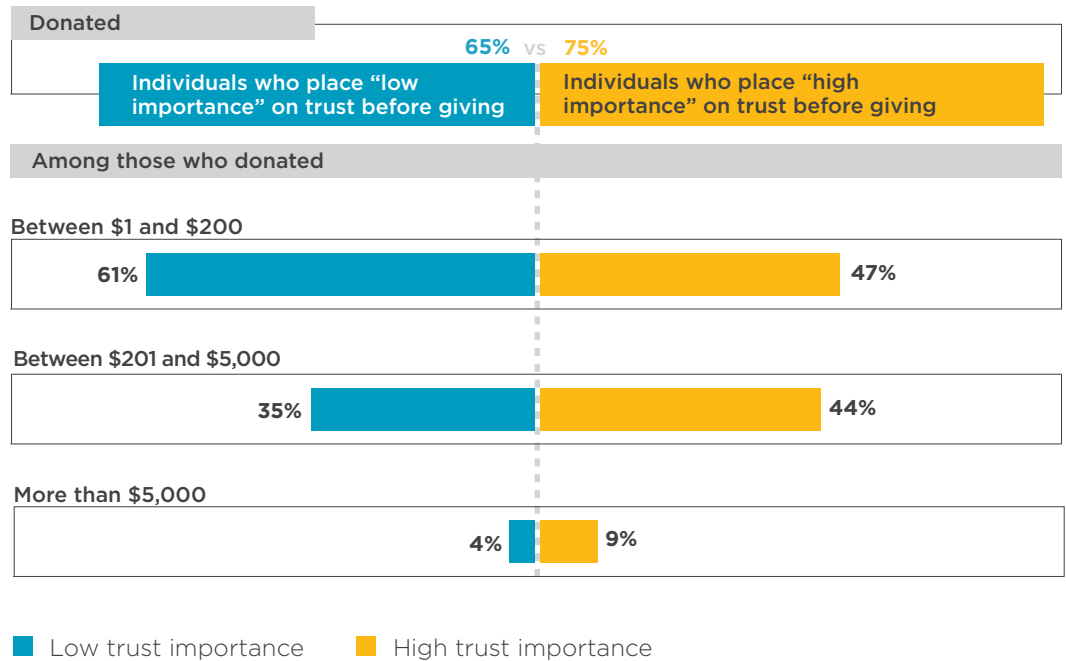
During 2020, African Americans and Hispanics/Latinos also become less likely to say assessing charity trust is 'easy'.

■ Dec-2019
■ Aug-2020

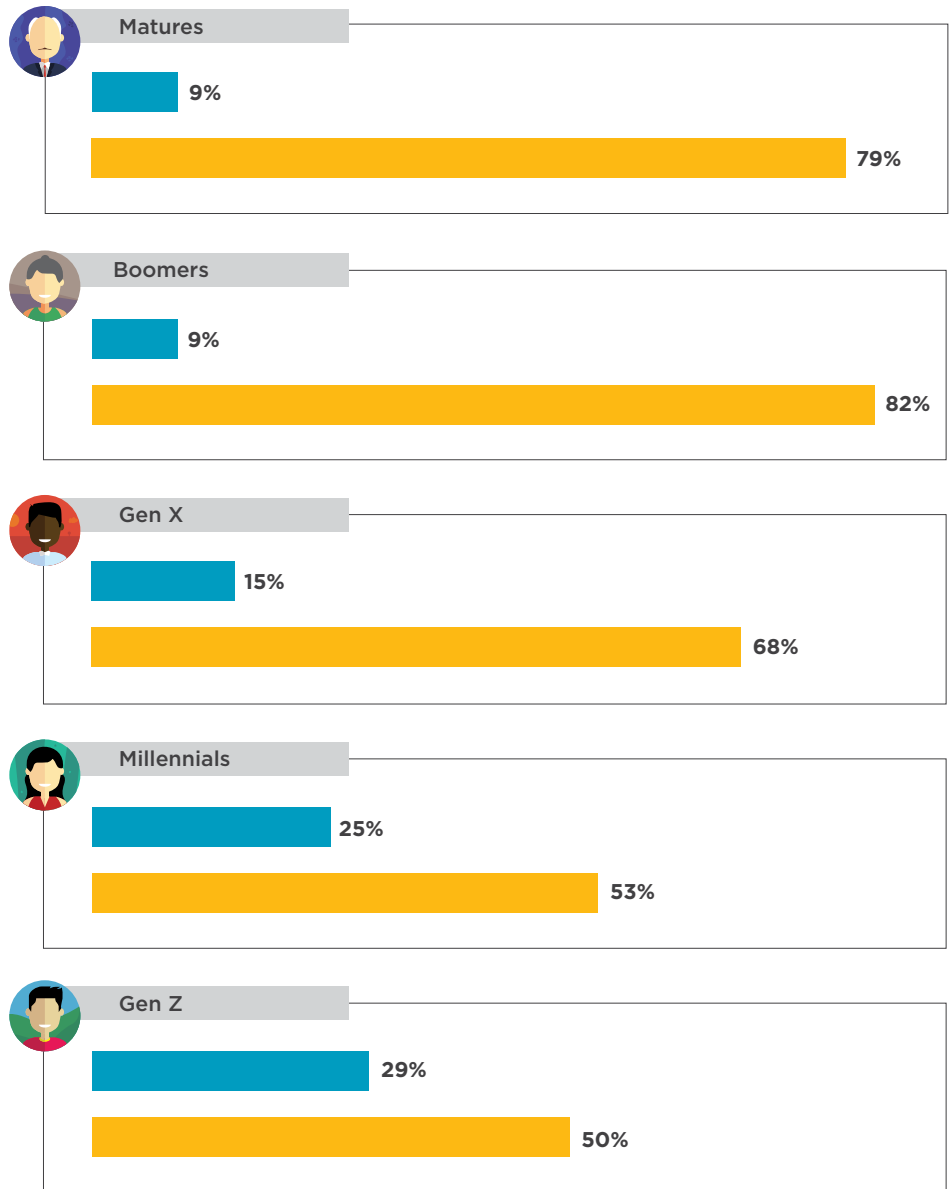




Individuals who place “high importance” on trust are more likely to donate to charities and to contribute more.



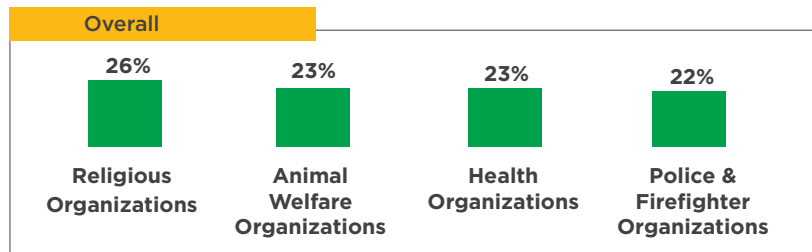
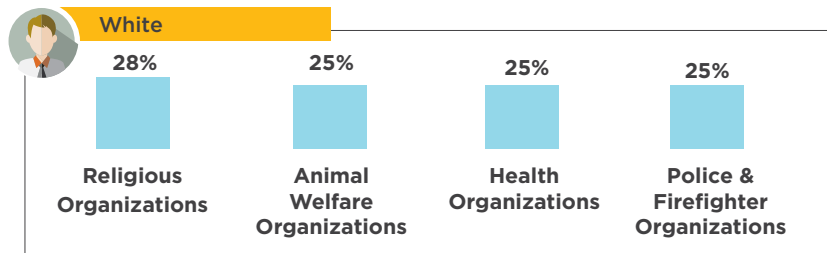
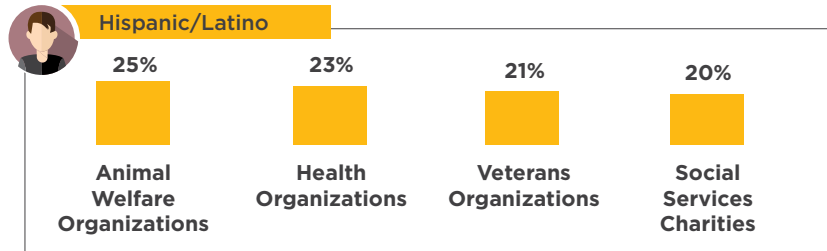
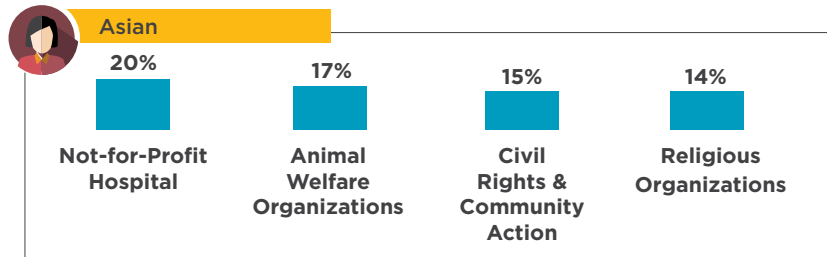
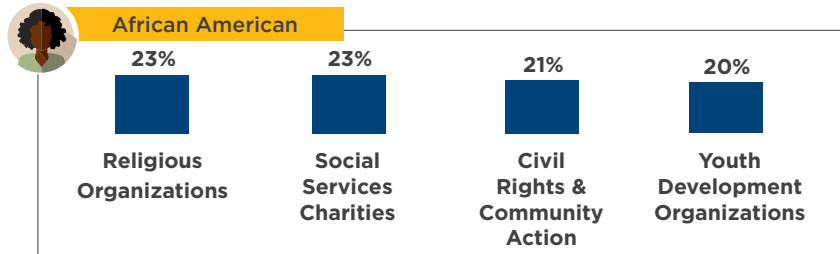
Older generations are more likely to attribute “high importance” to trust before giving.



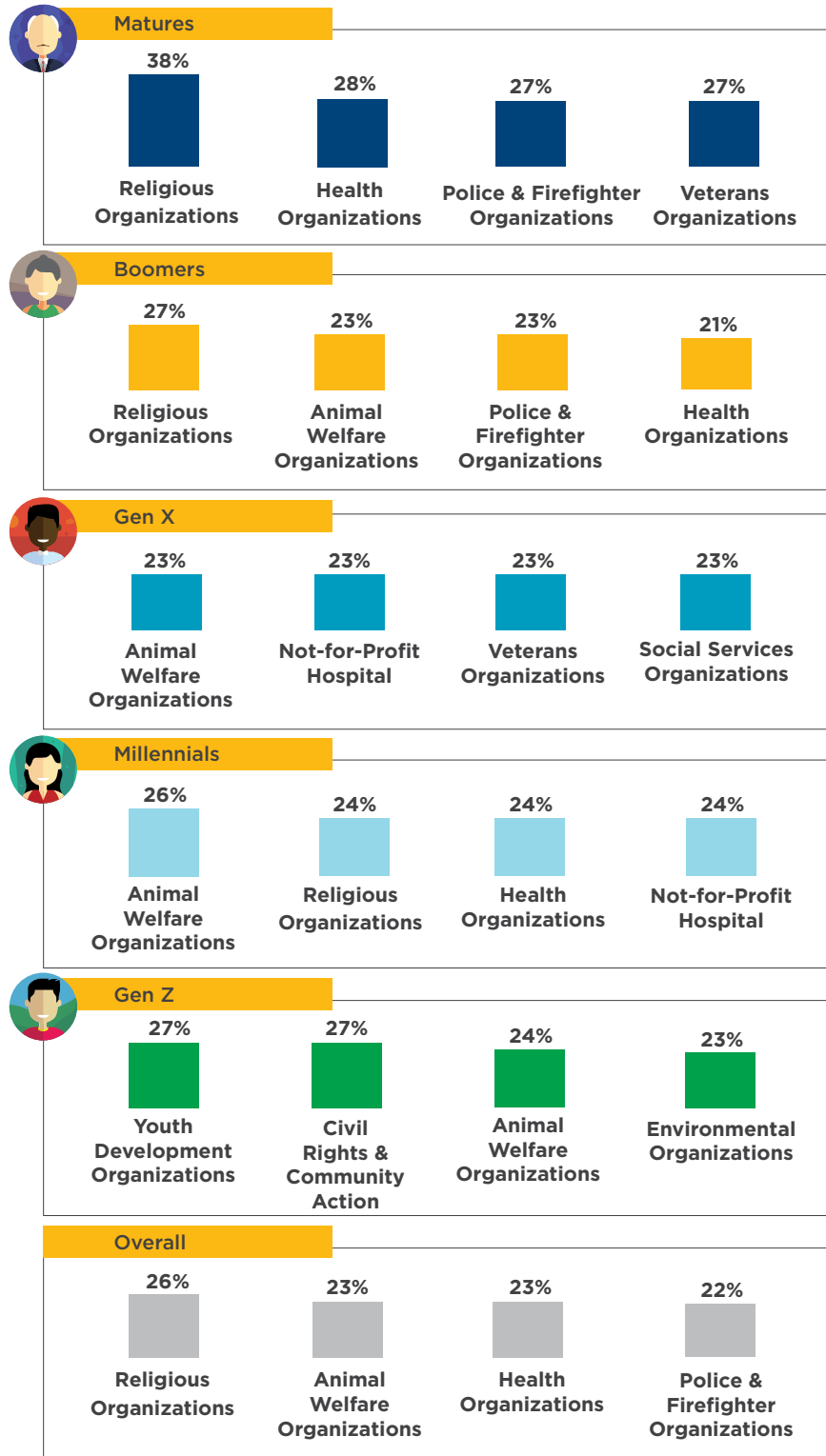
■ Low trust importance ■ High trust importance



Different racial groups tend to place their high trust in different charity types. For instance, while civil rights and community action organizations are among the least trusted charity types overall, these organizations are among the most trusted by African Americans.



Different generations also tend to place their high trust in different charity types. For instance, while Civil Rights and Community Action organizations are among the least trusted charity types overall, these organizations are among the most trusted by Gen Z.

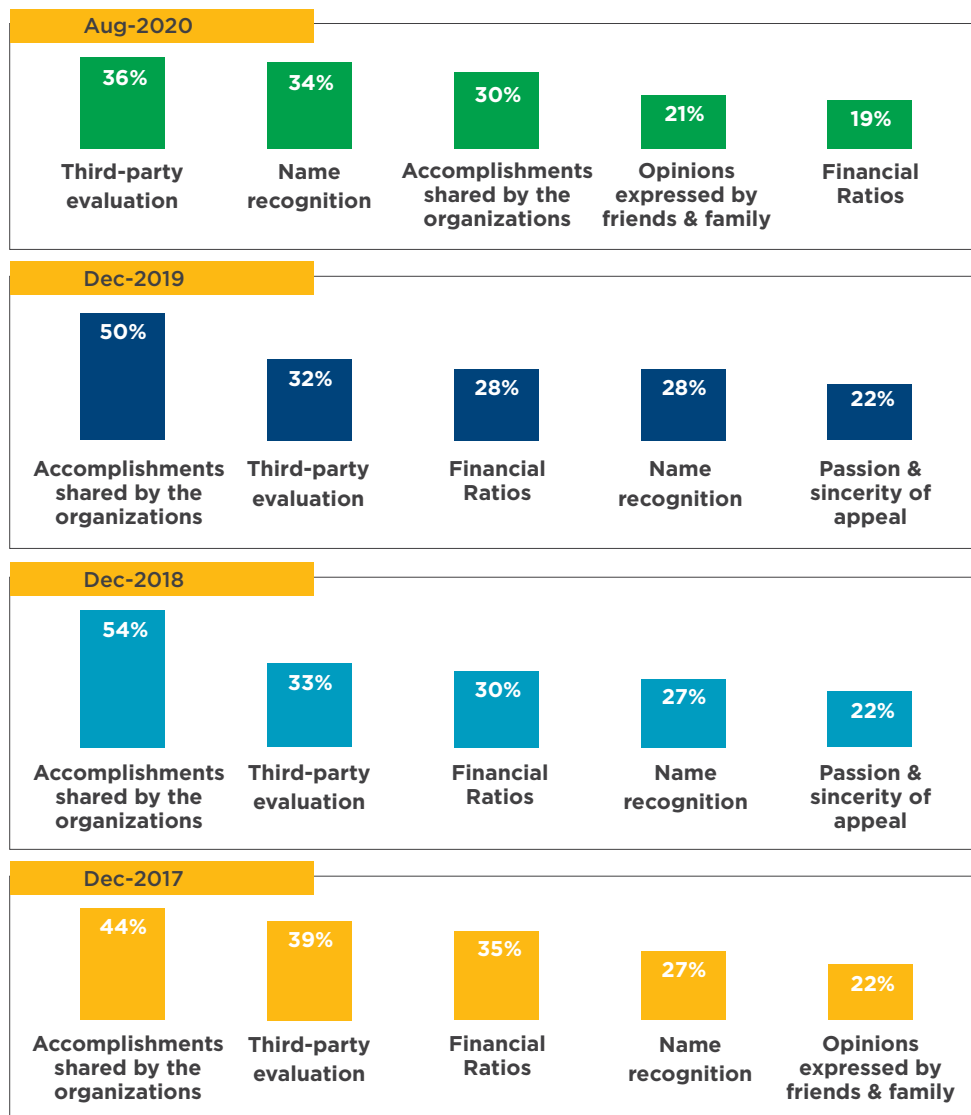




When asked what most signals that a charity is trustworthy, the top factors in August were:

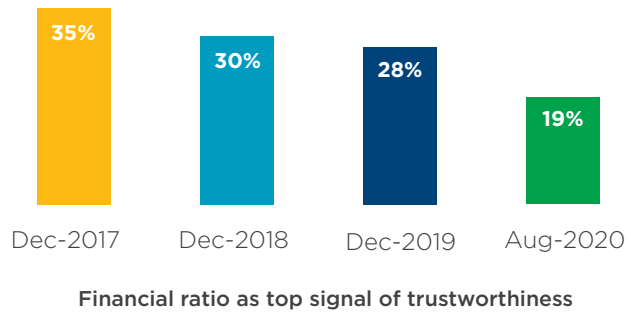
- 1** Third-party evaluation
- 2** Name recognition
- 3** Accomplishments shared by the organization
- 4** Opinions expressed by friends and family
- 5** Financial ratios

Notably, trust signals like third-party evaluations, name recognition, and opinions expressed by family and friends are relatively more important in 2020.

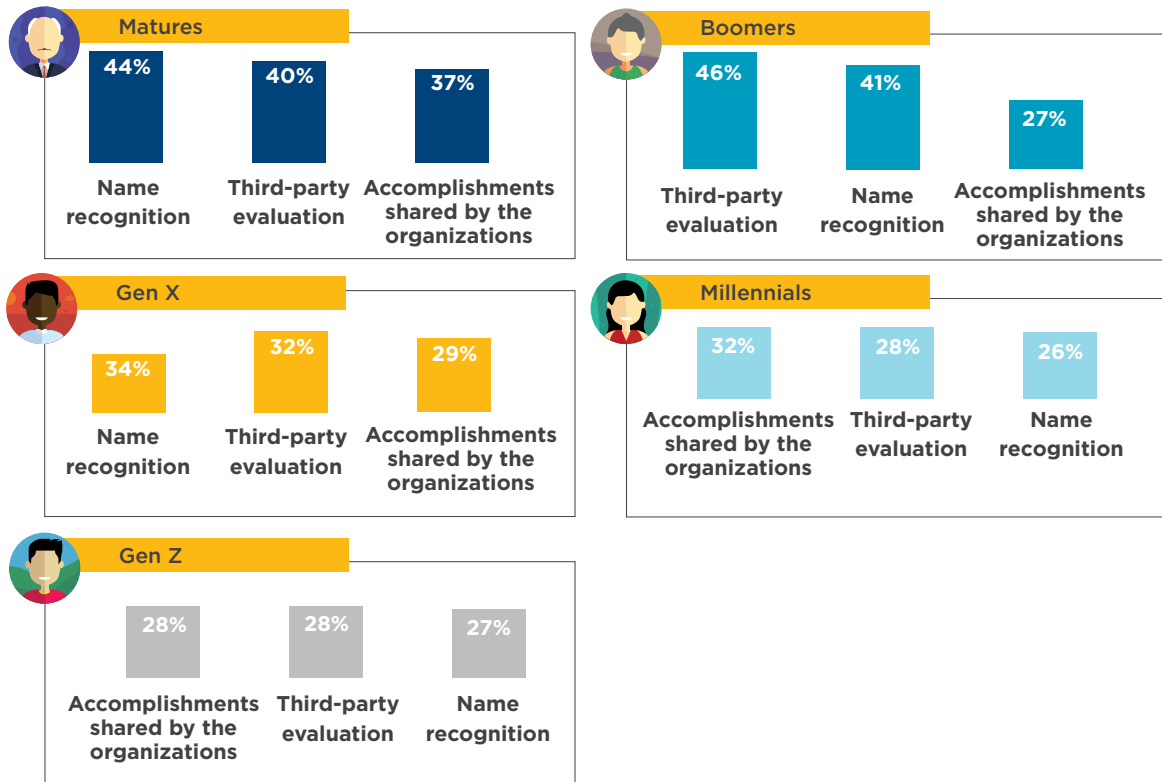




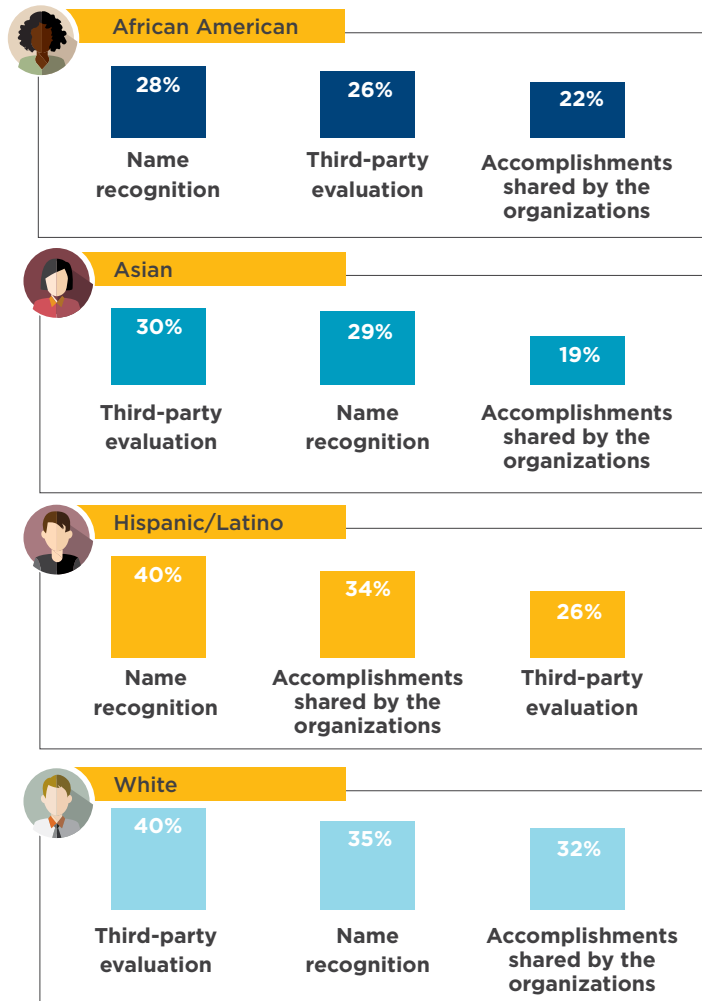
The importance of financial ratios¹⁶ as a signal of trust has decreased steadily since 2017, and the percentage of participants who rely on financial ratios as a trust signal decreased by close to 10% during 2020.



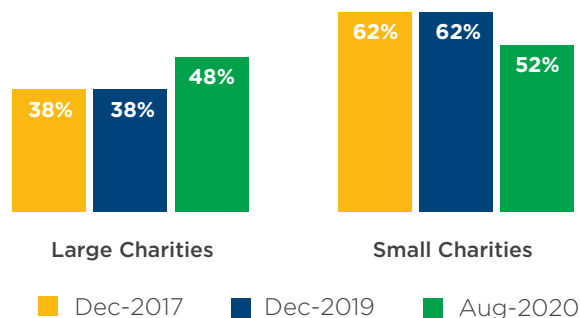
Different generations and racial groups say they assess trust differently.



¹⁶ BBB's Give.org has long maintained that excessive focus on any one factor, like overhead spending, can be misguided and harmful to a charity's capacity to thrive. We remind donors that assessing a charity's trustworthiness takes both a keen eye and a broad view. The BBB Standards for Charity Accountability, for instance, consider adequate board oversight, how funds are spent, appeal accuracy, accomplishment reporting, and transparency. Each component can factor into donor considerations, but no single factor is enough to make a complete assessment.





While participants in previous surveys tended to trust small charities more than larger charities, during 2020, the portion of participants that trust large charities more than small charities has grown.



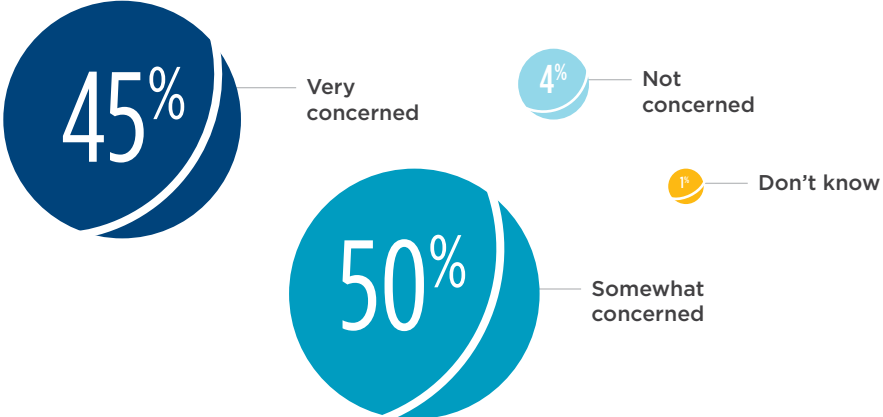
Charity Insights

Charities faced a historically difficult year in 2020 and are bracing for an uncertain 2021. The BBB Accredited Charities that contributed insights to this report meet high standards of governance, finances, fundraising practices, and results reporting. Less than 9% have revenue below \$1 million dollars, and more than 17% have revenue above \$100 million. As a group, they are not the most vulnerable charities. Still, they express substantial strain.

Most charities report that COVID-19 has negatively impacted them:

	 Negatively	 Positively
Fulfilling programmatic activities as planned	77%	5%
Maintaining revenue from fundraising events	70%	5%
Engaging volunteers	58%	12%
Reaching people or animals they serve	44%	19%
Maintaining a financially stable organization	30%	12%
Having to lay off employees due to lack of funding	8%	5%
Having to lay off employees due to lack of funding	7%	3%

And 95% of the charities are concerned about the impact of COVID-19 on the charitable sector during 2020:



Vulnerable populations are hit the hardest...This crisis [can potentially] set back our efforts to end poverty by decades... but [donors] can help fill that gap.

- Project Concern International

Although we don't provide direct COVID-related support like food or financial support, our community has faced new challenges and we've had to work hard to meet them.

- National Down Syndrome Society

Online fundraising is essential. While we'd rather be in person, our efforts can't wait until we can gather.

- Huntington's Disease Society of America

The critical role that nonprofits play in our country's society and economy has not diminished. If anything, it has expanded.

- The Fuller Center for Housing

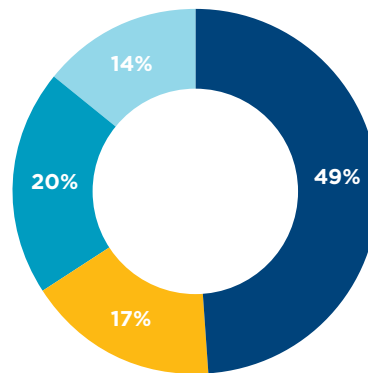
We are investing twice the amount of time/resources to generate 1/2 the donations, while still trying to provide funding to our grant partners.

- Anonymous Charity

We understand many people are struggling in many different ways right now. Some who might wish to support their charity(ies) of choice are not able to right now. We understand. For those that are in a position to support their charity(ies) of choice, right now is the most impactful time in recent history... - Children's Defense Fund

Many charities anticipate that their 2020 revenue will decrease as compared to 2019.

While this statistic is sobering, it is less pessimistic than earlier in the year, when more than 80% of charities reported expecting decreased revenue within 2020.



■ Decrease ■ Stay the same ■ Increase ■ Don't know

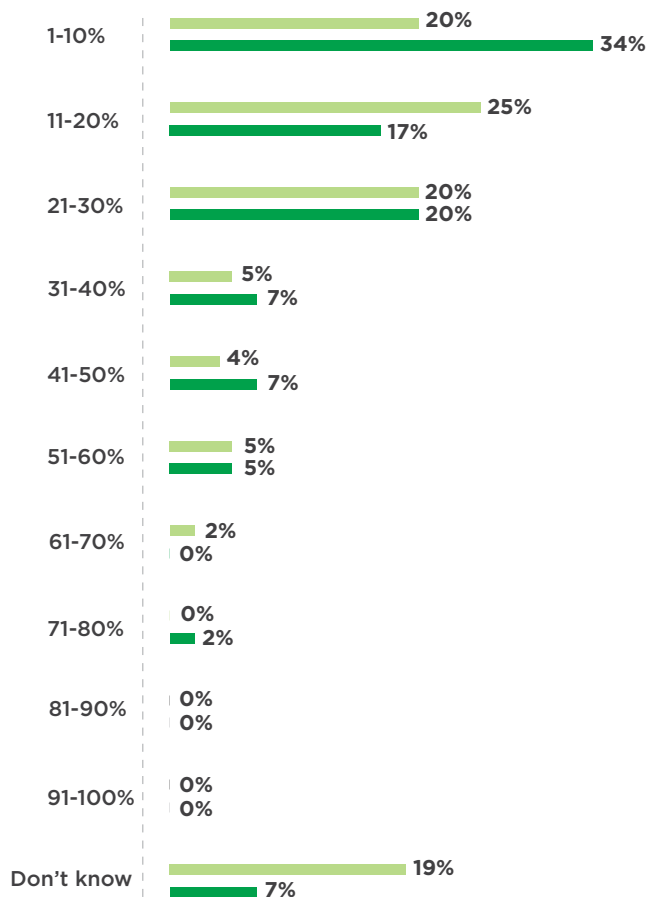
Among charities expecting a decrease in revenue:

- 78%** anticipate their donors will be less able to give
- 61%** say the organization will be unable to host fundraising events (aside from galas or walks) as planned
- 44%** anticipate the organization's donors will redirect support to individuals in need
- 37%** say the organization will be unable to host a gala
- 32%** anticipate less program service revenue
- 32%** say the organization's cause is unlikely to be top-of-mind
- 27%** say the organization will receive less volunteer support than expected
- 24%** say the organization will be unable to host a charity walk as planned
- 22%** anticipate the organization's donors will redirect support to businesses in need
- 0%** reference reasons unrelated to COVID-19

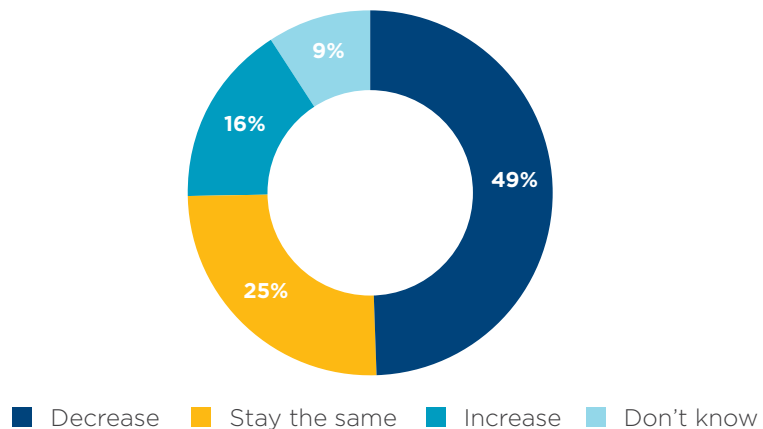


As charities gain clarity about their expected 2020 revenue, one out of three charities expect a decrease of 10% or less.

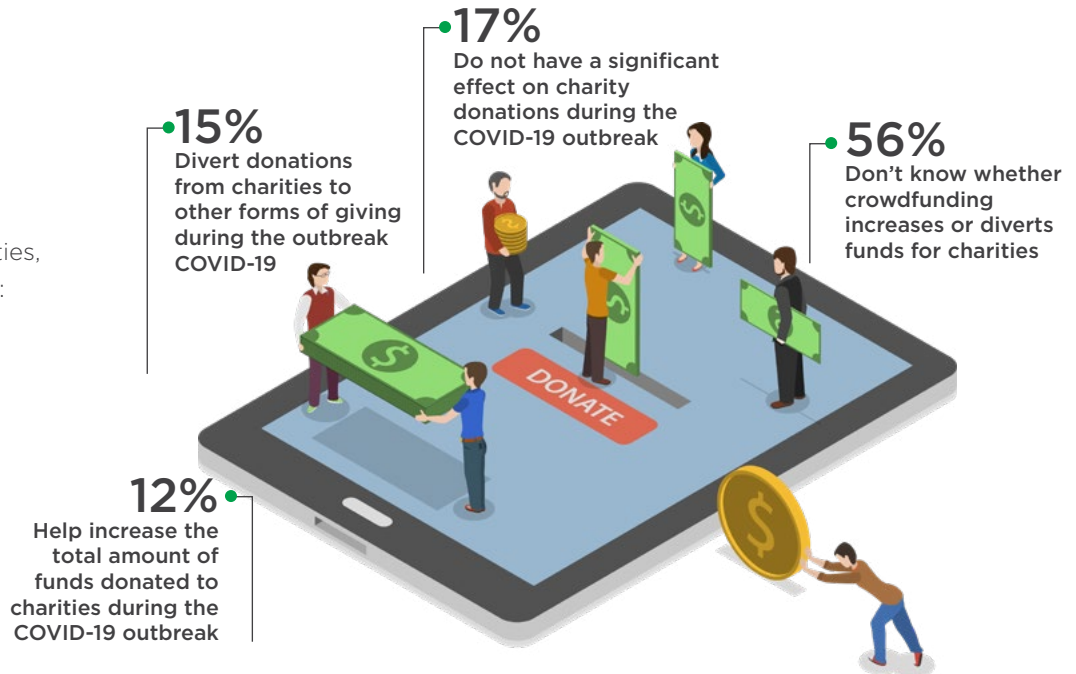
- Mar-2020
- Aug-2020



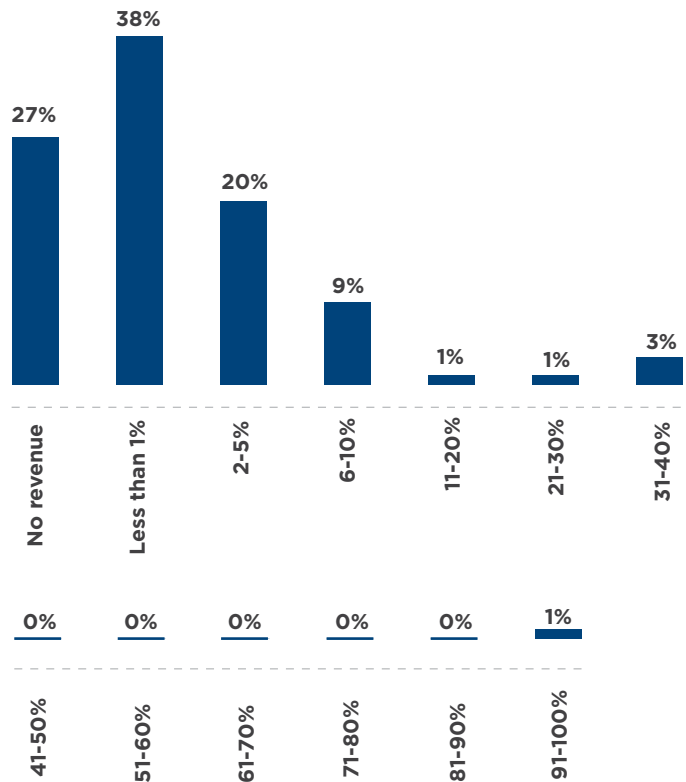
In August 2020, half of the charities also anticipate decreased expenses, as compared to their original 2020 budget. On the other hand, 16% of the charities expect an increase in expenses for 2020.



According to charities, crowdfunding sites:

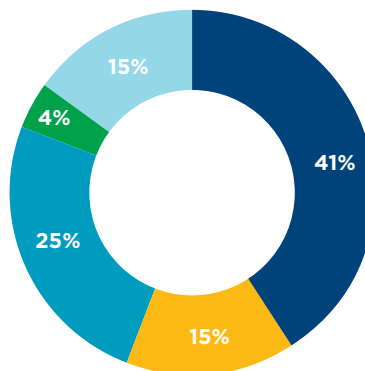


When it comes to their revenue, charities report that crowdfunding campaigns account for the following:



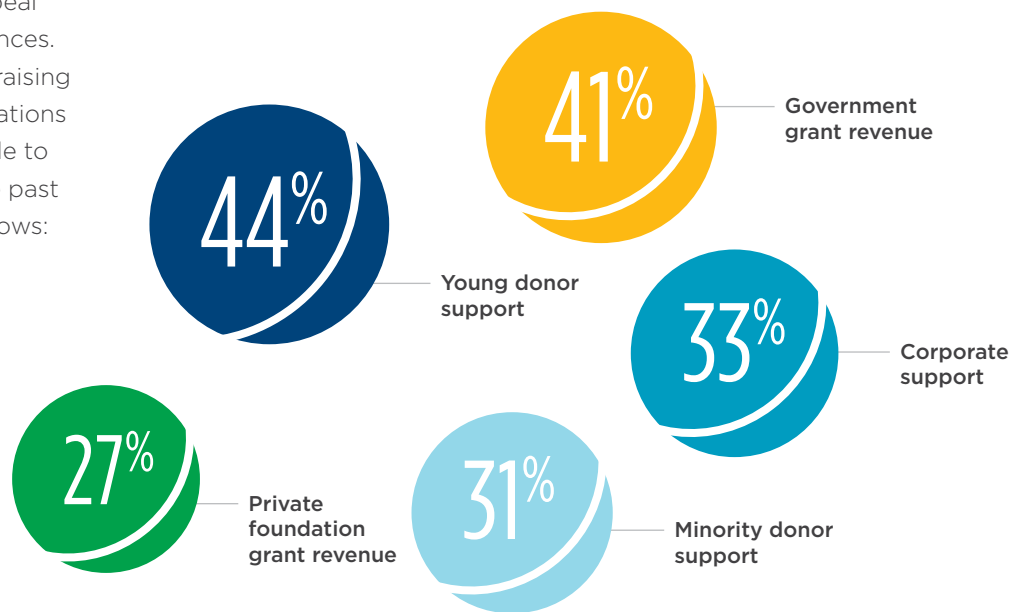


Only 13% of charities partnered with celebrities to bring attention to their COVID-19 associated needs. Charities consider news media to be the most important influence on COVID-19 giving. When asked about which factors most influenced donor's COVID-19 giving decisions during 2020, charities said:



- News media
- Family and friends
- Social media
- Celebrity appeals
- Other (including charity communication)

Many charities feel they don't have the bandwidth to appeal to different audiences. The top five fundraising goals the organizations have not been able to prioritize over the past 2 years are as follows:





Stated reasons why organizations have not been able to prioritize these fundraising goals include:

Young Donors Support

“Simply put, we don’t have the bandwidth.”

Government Grant Revenue

“Not interested in government funding.”

Corporate Support

“Corporations like to show immediate results for the funds they donate. [Our] methodology is not a quick fix...”

“Not enough capacity to segment and specifically target various donor audiences. Appeals and campaigns have been directed toward [the] general public for support.”

“Our policy is to not seek out or accept government funding.”

“Our bylaws do not allow us to accept corporate revenue or government grants.”

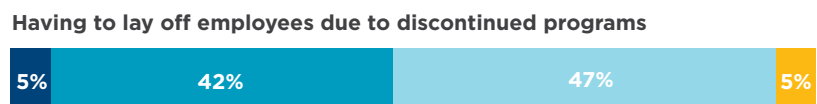
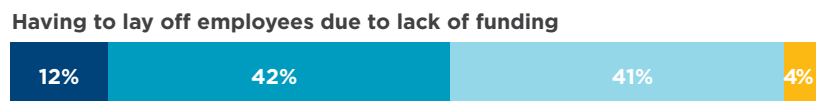
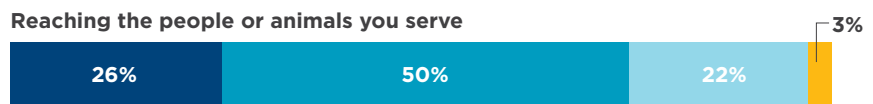
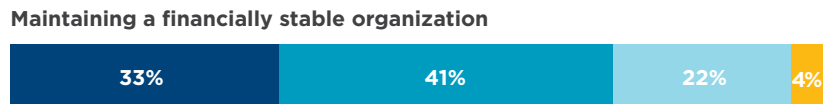
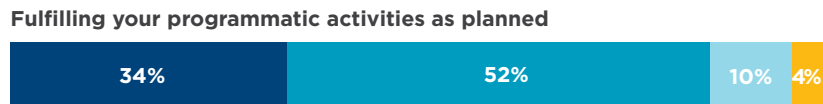
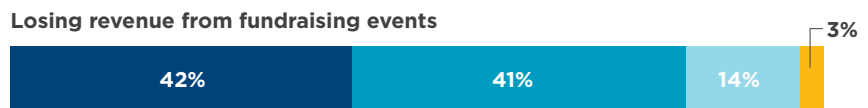
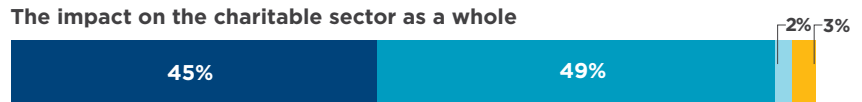
“Beyond young professional boards, we haven’t been able to prioritize this demographic.”

“Just not applicable for our cause and situation.”

“It is not part of our strategic plan.”

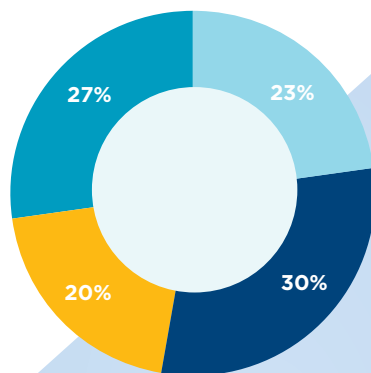
Thinking about the effects of COVID-19 for 2021, charities are concerned about the following issues:

- Very concerned
- Somewhat concerned
- Not concerned
- Don't know



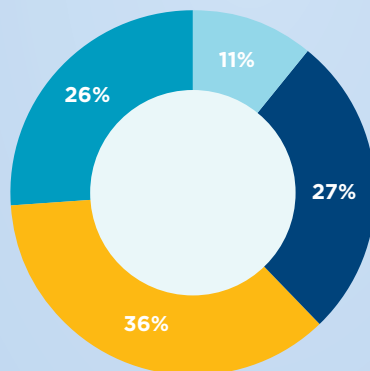
Thinking about 2021, less than one-quarter of charities say they expect things to be better for themselves.

- Be better
- Be the same
- Be worse
- Not sure



And when thinking about what they anticipate for the charitable sector as a whole in 2021, only 11% expect things to be better.

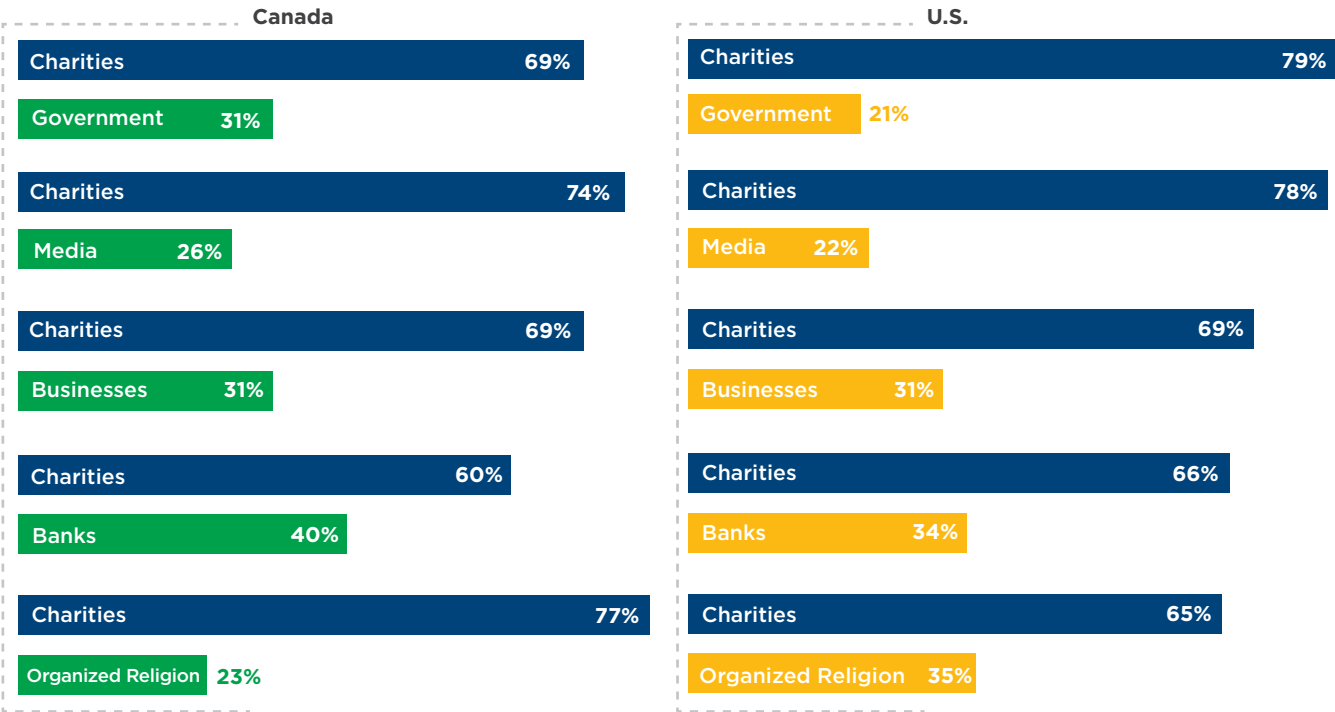
- Be better
- Be the same
- Be worse
- Not sure



Canadian Donor Trust in 2019

Charities are more trusted than other institutions in Canada, including organized religion, banks, business, media, and government.

As compared to Americans, Canadians are relatively more trusting of their government and relatively less trusting of organized religion.



There is ample space to build trust for charities in Canada:





The portion of Canadians that highly trust charities (12%) is significantly lower than in the United States (17%). Canadian respondents also place their trust in different charity types.

Canada

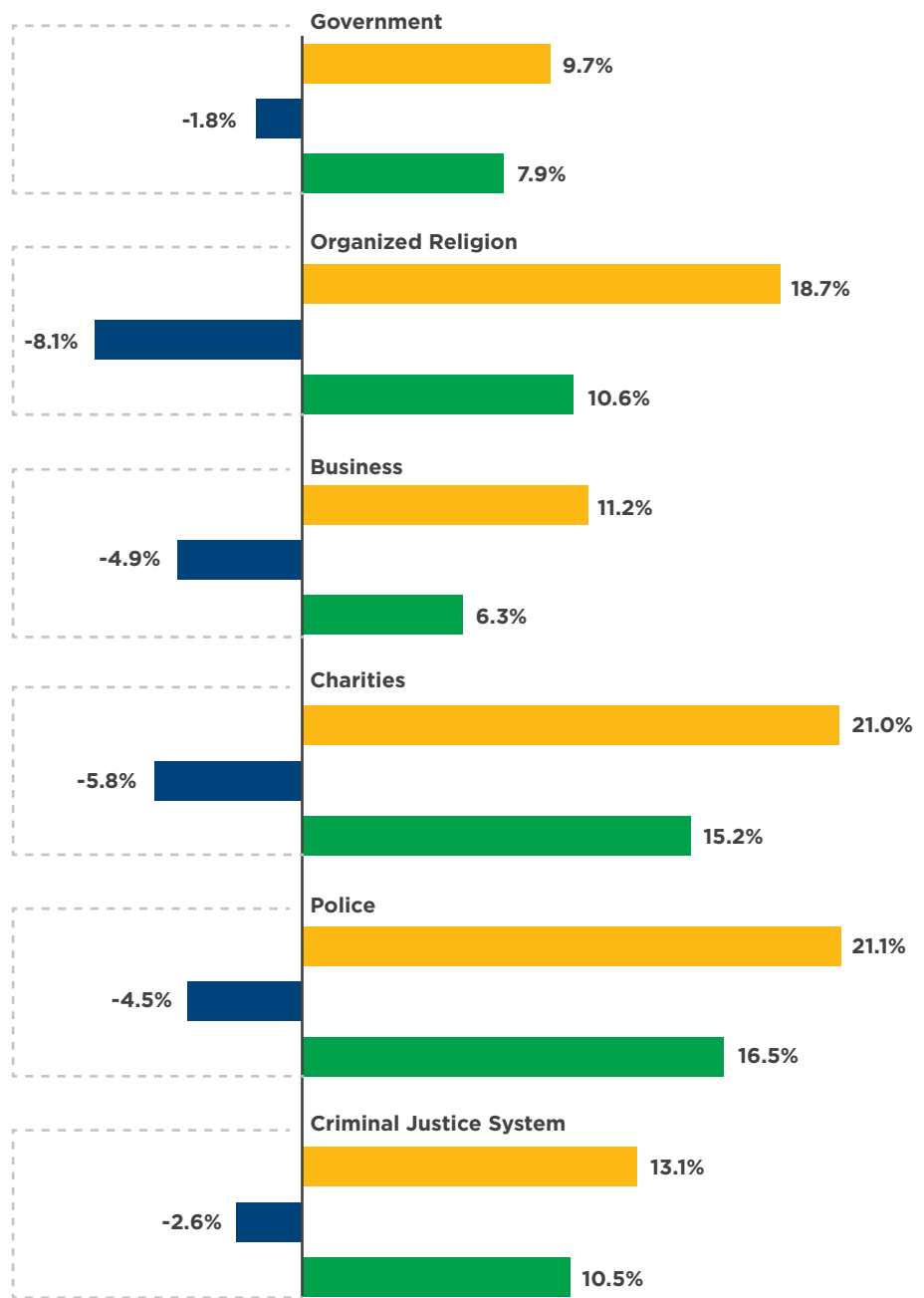


U.S.



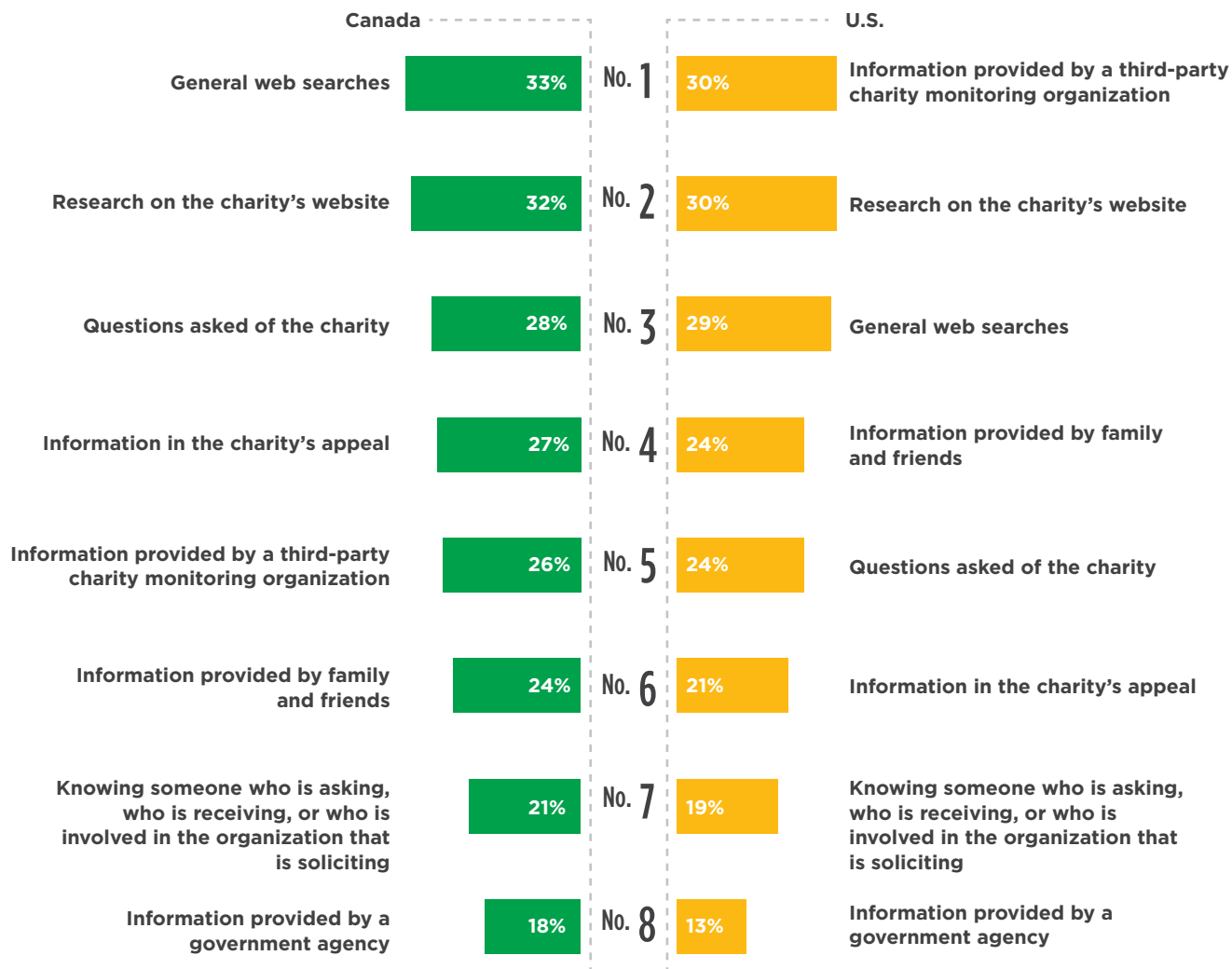
When asked to consider how confident Canadians feel that their institutions can do what they say they will, Canadians tend to be less confident than U.S. participants, particularly about organized religion and charities.

- U.S.
- Difference
- Canada





When researching a charity, Canadians say the most influential factors in their giving decision are the following:

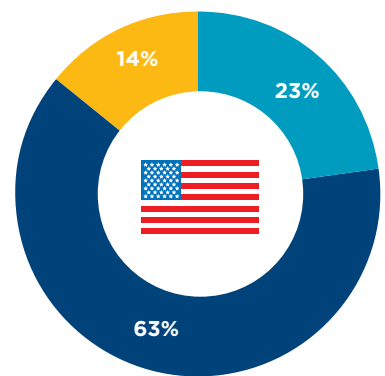
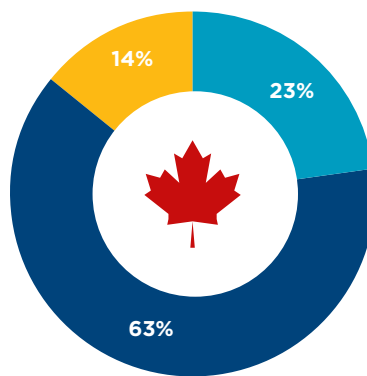




Despite some significant giving and trust differences between Canadians and Americans, individuals in both countries are similarly positive about their ability to do good.

Approximately 23% of Canadian and U.S. respondents said they have more power to do good now than they did 5 years ago.

- More
- About the same
- Less



Conclusion



2020 marks our third year reporting on donor attitudes and behavioral intentions related to trust and giving. The three most significant trends we have observed since December 2017 are: (1) a significant decline in the portion of donors relying on financial ratios as a signal of trust, (2) the erosion of public reliance on trust and (3) the importance of donor segmentation in reaching a diverse set of donors.

BBB's Give.org has long maintained that excessive focus on one signal of trust (such as financial ratios) can be misguided and harmful to a charity's capacity to thrive. The erosion of public reliance on trust, and the barriers to donor segmentation faced by the sector, are more concerning. Americans have a long and rich tradition of generosity and have built a charitable sector that enriches lives, communities, and society as a whole. The ability of the sector to build upon this collective generosity depends on public trust and on the sector's alignment with the way people want to be engaged in advancing a greater good. Still, charities don't exist in the vacuum, and trust is affected by both charity-donor interactions and the external environment.

Unfortunately, we suspect the larger social-economic context is driving donors to be more skeptical. The 2020 Edelman Trust Barometer, for example, uncovered how increasing inequality damages trust in institutions. As public skepticism spills into the charitable sector, charities may have to compensate by building deeper relationships to protect the bond with their donors.

Charities are in the middle of a historically difficult 2020 and most (94%) say they are concerned about 2021.


A chief concern for the coming year is fulfilling programmatic missions as planned (86%). As reported by *The Chronicle of Philanthropy*, in a time of tumultuous change and uncertainty, "...multiple crises are pushing some nonprofits to reinvent themselves...and to be bolder in their goals and the way they do their work." For instance, they are testing new approaches to deliver cash rather than human service programs, or integrating resources for racial healing in the arts.¹⁷

This year, charities had to reinvent themselves, not only by finding novel ways to fulfill their missions, but also by finding ways to endure financially and sustain a prosperous workforce and volunteer body. Some charities thrived during 2020, many are struggling, and some charities may lamentably become dormant.

Donors, too, faced an extraordinary year, and their giving attitudes and preferences are naturally changing. **A core challenge for charities in 2020 and 2021 is to be responsive to changing donor needs while juggling significant competing demands.**

While most donors still plan to maintain or increase their giving to charities in 2020, overall intent to "give more" decreased from 31% in March to 24% in August 2020. As COVID-19 shook the sector, donors may have reacted as they normally would during an episodic disaster, but as the crisis continues indefinitely, giving preferences are likely to shift.

¹⁷ Rendon, J. (2020). Reimagine Everything. *The Chronicle of Philanthropy*. September 22, 2020.



For instance, Gen Zers (who tend to be more emotive givers) are less likely to intend to “give more” now (42%) than they were in March (61%). Matures, on the other hand, are more likely to want to “give more” now (17%) than they were in March (12%).

Just as a crisis can nudge a charity to reimagine its programs, COVID-19 can also be an opportunity to be introspective about engaging younger donors.

Since March, Gen Zer’s impetus to “give more” is slowing. Among Gen Zers who intend to give less to charities, 29% said they are giving money to support business in their community instead (as compared to 0% of Matures or 2% of Boomers). Perhaps most importantly, among those who intend to give more via crowdfunding, **more than one out of four Gen Zers (26%) report being dissatisfied with traditional charitable donations.** On the other hand, many charities identify “young donor support” as a fundraising goal that they are unable to focus on due to limited resources. Ultimately, the inability to segment by different donor preferences spells trouble in the longer term.

Another trend that should spark concern is the growing distrust for institutions and the effects on people’s confidence in trust as a signal for engagement. Our survey shows that **public reliance on trust is eroding.** This is important because donor trust can lead to engagement and giving; that is, a person that loses confidence in trust as an effective indicator may be less trusting and more apathetic. Indeed, our results show that individuals who place “high importance” on trust are more likely to donate to charities and to contribute more. That person may also be easier prey to untrustworthy organizations.

Between December 2017 and August 2020, the portion of people who thought trusting before giving was highly important dropped steadily from 73% to 64%. During 2020 alone, the portion of respondents that assign low importance to trust before giving grew from 16% to 21%.

Part of the trust shift within 2020 can be attributed to changing attitudes among African American and Hispanic respondents.

The portion of African Americans who consider trust before giving to be highly important dropped from 57% to 50%. During the year, African Americans and Hispanics also became less likely to say assessing charity trust is “easy,” going from 24% to 15% and from 26% to 10% respectively.

Different generations and racial groups tend to assess their trust differently and place their trust in different types of charities.

For instance, while civil rights and community action organizations are among the least trusted charity types overall (and have tended to be less trusted over the past few years), these organizations are among the most trusted by Gen Zers and African Americans.

BBB’s Give.org encourages charities to be deliberate in their efforts to build trust and strengthen their bond with different donors.

Survey results reiterate that donor preferences are diverse, making segmenting and targeting not only appropriate, but perhaps central to the sector’s future. Many charities feel they don’t have the bandwidth to speak and appeal to different audiences, but COVID-19 may provide a case study in how, as a sector, we are not reaching all.

Methodology



In this report, we reference data gathered through the December 2018 and 2017 Donor Trust Surveys, each with more than 2,100 adult respondents in the United States. Results from the December 2018 survey were published in the *2019 Donor Trust Report*, and results for the survey conducted December 2017 were published in the *Give.org Donor Trust Report: An In-Depth Look into the State of Public Trust in the Charitable Sector*.

We also commissioned an electronic panel survey of more than 2,100 adults across the United States and 1,000 adults in Canada during December 2019. (See Table 1 for the profile of U.S. respondents and Table 2 for the profile of Canadian respondents.) The margin of error for the December 2019 survey in the United States is of 2% (with a 95% confidence level), and the margin of error for the December 2019 Canadian survey is of 3% (with a 95% confidence level).

Table 1 - Profile of December 2019 U.S. Respondents

By Age		By Ethnicity		By Annual Household Donation	
Gen Z	6.7%	White/Caucasian	69.5%	Did not donate	26.1%
Millennials	31.4%	Hispanic/Latino	12.6%	Between \$1 & \$50	17.9%
Gen X	26.4%	African American	11.4%	Between \$51 & \$200	18.9%
Boomers	28.9%	Asian	5.7%	Between \$201 & \$1,000	19.2%
Matures	6.6%	Other	0.8%	Between \$1,001 & \$5,000	11.9%
				More than \$5,000	6%

By Region		By Gender	
Northeast	12.5%	Female	54.4%
Southeast	29.9%	Male	43.9%
Southwest	10.5%	Other (non-binary, prefer not to say, transgender)	1.6%
Midwest	20.3%		
West	26.8%		

Table 2 – Profile of December 2019 Canadian Respondents

By Age

Gen Z	5.7%
Millennials	28.9%
Gen X	30.2%
Boomers	31.6%
Matures	3.6%

By Ethnicity

White/Caucasian	76.0%
Hispanic/Latino	1.4%
African American	2.2%
Asian	17.2%
Other	2.3%

By Annual Household Donation

Did not donate	14.1%
Between \$1 & \$50	20.3%
Between \$51 & \$200	25.1%
Between \$201 & \$1,000	27.2%
Between \$1,001 & \$5,000	10.1%
More than \$5,000	3.3%

By Region

Alberta	30.0%
Atlantic Canada	8.4%
British Columbia	12.5%
Manitoba & Saskatchewan	10.5%
Ontario	20.3%
Quebec	26.8%
Northern Canada	0.3%

By Gender

Female	49.6%
Male	49.4%
Other (non-binary, prefer not to say, transgender)	0.93%



To better understand the effects of the COVID-19 outbreak on donor attitudes, we commissioned two donor surveys during 2020, each with more than 1,000 adult respondents in the United States. Responses from the first of these surveys were gathered between March 27 and 30, 2020; and the results have already been published in the *Give.org Special Report: COVID-19 and the Charitable Sector* (see Table 3). The second survey was gathered between August 25 and 28, 2020 (see Table 4). The margin of error for the March and August 2020 surveys in the United States is of 3% (with a 95% confidence level).

Table 3 – Profile of March 27-30, 2020, U.S. Respondents

By Age		By Ethnicity		By Annual Household Donation	
Gen Z	10.3%	White/Caucasian	67.0%	Did not donate	23.4%
Millennials	28.8%	Hispanic/Latino	9.5%	Between \$1 & \$50	19.0%
Gen X	29.3%	African American	14.4%	Between \$51 & \$200	20.0%
Boomers	27.2%	Asian	7.5%	Between \$201 & \$1,000	21.3%
Matures	4.5%	Other	1.6%	Between \$1,001 & \$5,000	11.4%
				More than \$5,000	4.9%
By Region		By Metropolitan Area			
Northeast	8.5%	Large (1.5 million or more)	53.6%		
Southeast	28.3%	Small	46.4%		
Southwest	10.0%				
Midwest	21.5%				
West	31.7%				

Table 4 – Profile of August 25-28, 2020 U.S. Respondents

By Age

Gen Z	7.1%
Millennials	28.6%
Gen X	22.7%
Boomers	30.6%
Matures	11.0%

By Ethnicity

White/Caucasian	69.5%
Hispanic/Latino	12.6%
African American	11.4%
Asian	5.7%
Other	0.8%

By Annual Household Donation

Did not donate	23.4%
Between \$1 & \$50	19.0%
Between \$51 & \$200	20.0%
Between \$201 & \$1,000	21.3%
Between \$1,001 & \$5,000	11.4%
More than \$5,000	4.9%

By Region

Northeast	20.4%
Southeast	28.3%
Southwest	9.4%
Midwest	19.6%
West	22.2%

By Metropolitan Area

Large (1.5 million or more)	46.9%
Small	53.1%



Through our survey, we seek to measure donor beliefs, feelings, and behavioral intentions toward charity trust and giving. Our report identifies some aggregate findings and digs into the heterogeneity of donor perceptions. For instance, we reference results based on age or race to illustrate differences in donor attitudes and gain understanding of the diversity of attitudes toward the sector.¹⁸ We use the self-reported information of survey takers. While there is no one consistent date range for generational divides, the generational ranges used in this report mirror those used by the Pew Research Center and are shown below (see Table 5):

Table 5 – Generational Ranges

Generation	Year Born	Age (in 2020)
Generation Z (18 and older)	1998 to 2002	18 to 22
Millennial Generation	1981 to 1997	23 to 39
Generation X	1965 to 1980	40 to 55
Baby Boomers	1946 to 1964	56 to 74
Silent Generation	1928 to 1945	75 to 92

We recognize there are differences among people of the same race and generation. By identifying differences in donor preferences and attitudes across these categories, we aim to find untapped opportunities that support the sector’s efforts to be in tune with the America of the present and future, strengthening the bond between donors and charities.

¹⁸ Our report joins other studies that have recognized untapped opportunities by the philanthropic community in engaging racial minorities and younger generations. For instance, the Giving USA Foundation and the Lilly Family School of Philanthropy at Indiana University highlight that younger generations differ from older people in the way they prefer electronic communication, express different values, and value experiences and voicing their opinions. *Diversity in Giving: The Changing Landscape of American Philanthropy* (a 2015 report by Blackbaud) found that White donors are overrepresented, and that donor values and habits differ by ethnic or racial groups. A study by *The Chronicle of Philanthropy* found that giving patterns vary by location and income level, with red states more generous than blue states and the middle class giving a larger portion of their income than the rich.

We know that survey responses reflect donor perceptions and are not necessarily an objective measure of the charitable sector's efforts. Still, understanding donor attitudes toward charities and giving can help identify areas of misinformation and ways to better serve donors, furthering trust in the sector and generosity.

In addition, to better understand the effects on charities themselves, we reached out to BBB Wise Giving Alliance (BBB WGA) Accredited Charities to learn from their collective insights. BBB Accredited Charities are those that are found to meet the 20 BBB Standards for Charity Accountability. These standards address charity governance, finances, fundraising practices, results reporting and appeal accuracy. There is no charge to charities for this accreditation. We conducted two COVID-19 charity surveys during 2020. The first was conducted between March 27 and 30, 2020, and the results from 118 BBB Accredited Charities have already been published in the *Give.org Special Report: COVID-19 and the Charitable Sector* (see Table 6). The second survey was gathered between August 27 and September 4, 2020; with responses from 90 BBB Accredited Charities released through this report (see Table 7).

These charities represent a diverse set of missions (including animal protection, civil rights, education, environmental, international relief, health, human services, religious, veterans, and youth development, among others). They also vary in size, as noted in Tables 6 and 7.

Table 6 - Profile of March 27-30, 2020 BBB Accredited Charity survey

Contribution	Portion of Respondents
< \$1 Million	5.9%
\$1M - \$4.9M	30.5%
\$5M - \$9.9M	13.6%
\$10M - \$49.9M	26.3%
\$50M - \$99.9M	7.6%
\$100M - \$499M	11.9%
\$500M and up	4.2%

Table 7 - Profile of August 27-September 4, 2020 BBB Accredited Charity survey

Contribution	Portion of Respondents
< \$1 Million	8.9%
\$1M - \$4.9M	31.1%
\$5M - \$9.9M	13.3%
\$10M - \$49.9M	21.1%
\$50M - \$99.9M	7.8%
\$100M - \$499M	14.4%
\$500M and up	3.3%

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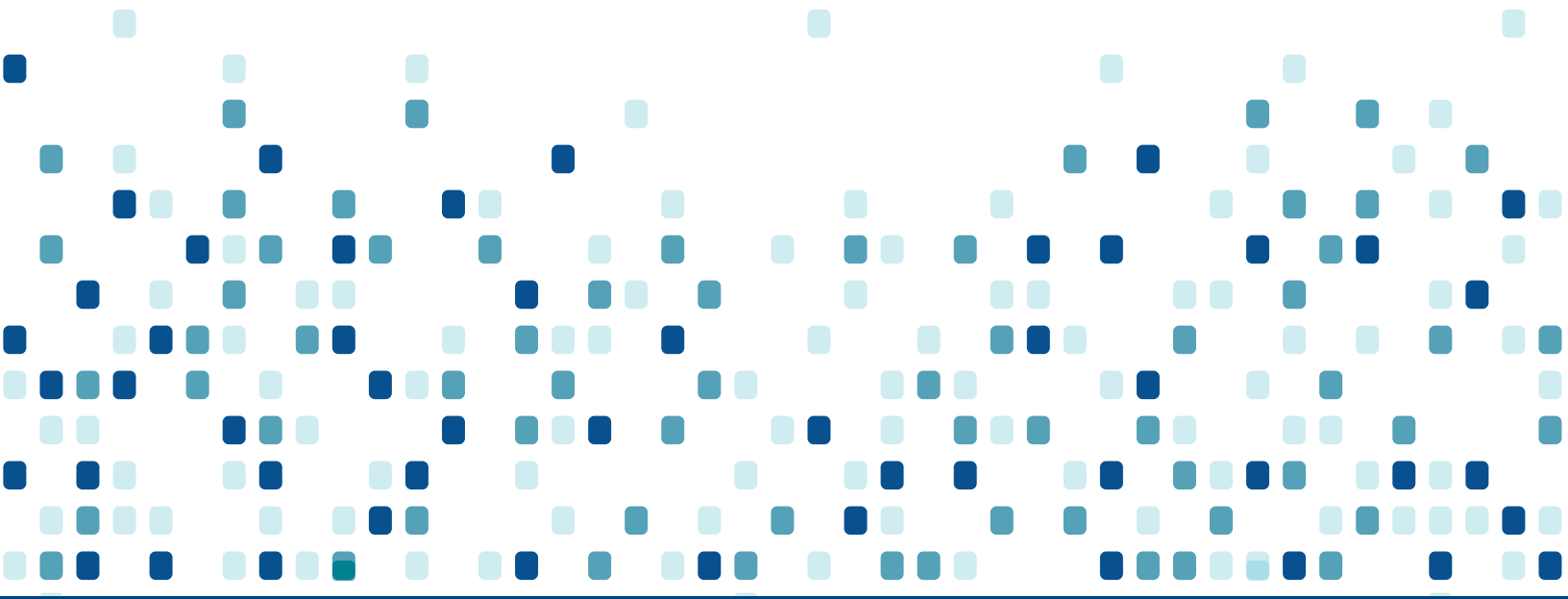
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