

**GIVE.ORG
DONOR TRUST
REPORT | 2021**

Profiles in Charity Trust and Giving

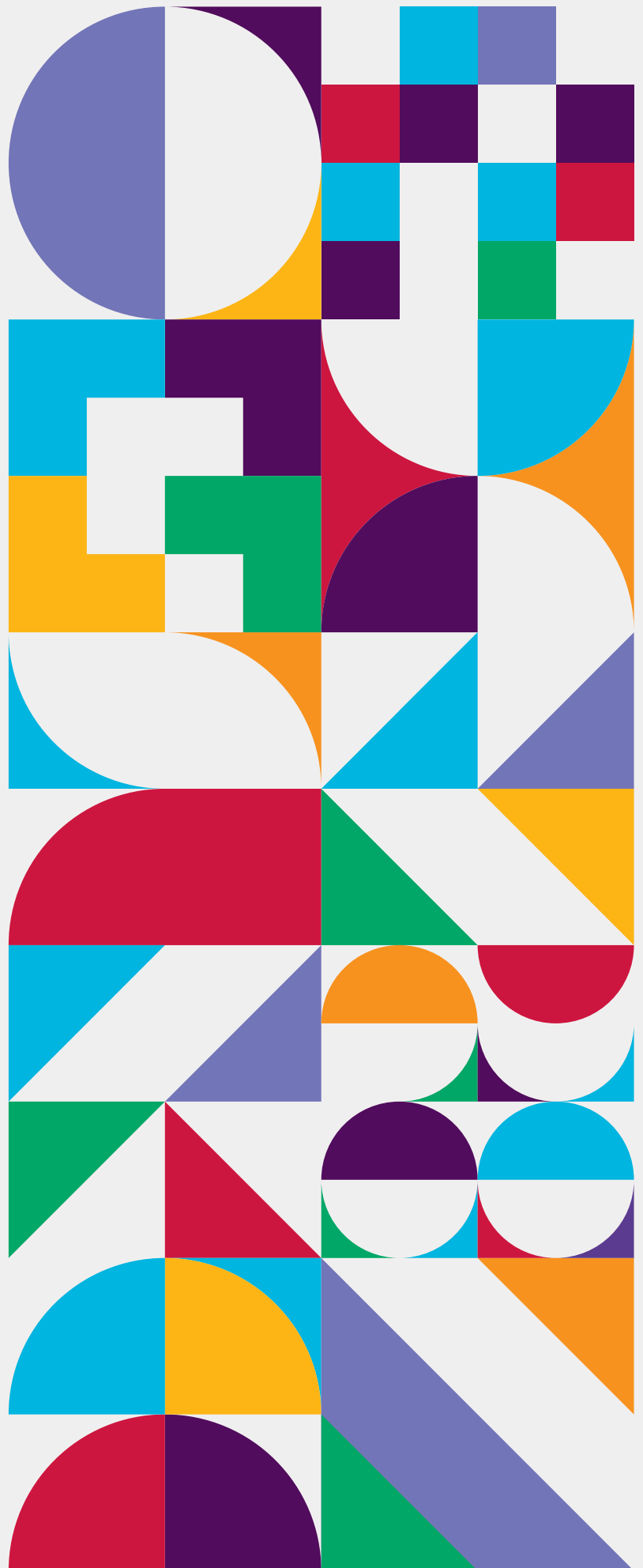




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Profiles in Charity Trust and Giving

As much as we all want to get away from it, 2020 and 2021 have been marked by COVID-19 and all its health, economic, and social repercussions. With the effects of the pandemic hitting vulnerable populations hardest, and with heightened attention on racial injustice in the United States, the significance of the moment is palpable.

For charities, 2020 was a historically rocky year. Back in March 2020, our BBB® Give.org Special Report on COVID-19 revealed some hope, as one-third of survey participants intended to increase their giving that year. Still, charities were very nervous, as most anticipated harsh decreases in revenue and many anticipated an increase in demand for their services.¹ A lot has happened since, but uncertainties about the ongoing effects of the pandemic on individual charities, the sector, and the donating public are still pressing.² **Our report explores how donor attitudes are changing (or not) during this extraordinary time.**

Before we start digging into our survey results, it is useful to consider some recently released information about the philanthropic environment before and during 2020. First, we want to keep in mind that, **“before the onset of the pandemic and the increased awareness of social and racial justice issues,”³ overall giving to charities was increasing but the share of American households who donated to charity (among almost all socio-economic groups) declined steadily over 18 years.** In 2018, 49.6% of American households donated to charity... down from 66.2% of American households donating in 2000.”⁴

Second, we want to be mindful of recently released giving results for the year 2020. This year, the sector was particularly anxious to see the results of the *Giving USA 2021* report (covering philanthropic giving during the year 2020).⁵ The report showed that total estimated charitable giving for 2020 in the United States was \$471.44 billion, representing a 3.8% increase in inflation-adjusted contributions as compared to the previous year. The report also revealed that “foundations were the fastest-growing source of giving, with grantmaking soaring 17.0% over 2019” and that “many wealthier households were more insulated from the effects of COVID-19 and...may have had greater capacity to increase their charitable giving.” Another fast-growing source of giving came in the form of bequests,

¹ Give.org Special Report on COVID-19 (2020)

² For example, in late August, an article in *The Chronicle of Philanthropy* discussed how the COVID-19 Delta variant affects consumer confidence and how that could affect the “environment for charities and fundraisers seeking support from average donor households.” Theis, M., “Consumer Confidence ‘Collapses’ as Delta Variant Cases Rise,” *The Chronicle of Philanthropy*, August 30, 2021.

³ The Indiana University Lilly Family School of Philanthropy in *The Giving Environment: Understanding Pre-Pandemic Trends in Charitable Giving*, July 2021.

⁴ The Indiana University Lilly Family School of Philanthropy, *The Giving Environment: Understanding Pre-Pandemic Trends in Charitable Giving*, July 2021.

⁵ *Giving USA 2021: The Annual Report on Philanthropy for the Year 2020*. Chicago: Giving USA Foundation.



which grew 9.0%, adjusted for inflation. Giving by individuals increased by 1.0%, adjusted for inflation. Generally, **the report brought good news, but continues to point toward higher—but more concentrated—giving.**

As noted in *Giving USA 2021*, “although giving in 2020 followed patterns generally seen in recessionary years, such as increases in basic needs giving and decrease in contributions to the arts, additional factors were at play. The pandemic shutdown likely affected giving to religious congregations, cultural institutions, and disease specific health organizations as their fundraising often is tied to in-person services, events, and activities.” Overall, the report identifies increased giving during 2020 for: public society-benefiting organizations, environmental and animal organizations, international affairs, and education. On the flip side, giving to health, and arts, culture, and humanities organizations decreased. **With that in mind, our report is particularly curious about these organization types, as well as charities associated with civil rights and community action or police and firefighter organizations.**

Importantly, giving by individuals (including through bequests) continues to account for the bulk (78%) of charitable giving. However, as explained by *Giving USA 2021*, information about the amount given to each charity type by individuals, and giving amounts by specific donor types, are outside the scope of the report.⁶ While the scope of BBB Give.org’s annual survey is more modest, **we hope to provide a sense of self-reported giving by individuals to different charity types.** That is, our survey results are limited to individual donors and their self-reported attitudes and behavior. Self-reported giving is not directly comparable to overall giving (by individuals, foundations, and corporations). However, it can provide insights about participation rates from one year to the next and about differences across donor groups.

At the same time, the *2021 Edelman Trust Barometer* revealed that trust for institutions continues to erode, with trust inequality (of wealthier, more educated people trusting institutions significantly more than the general population) spreading even further than in previous years.⁷ **Our report aims to contribute to the understanding of how trust for different charity types is changing (or not) during the pandemic.**

In this edition of the Give.org Donor Trust Report, we offer: (1) our usual indicators for public trust in the charitable sector, highlighting charity types that have experienced noteworthy shifts; (2) donor profiles for different charity types, with special attention on how donors for specific charity types differ from the overall donor sample and self-reported contribution rates; and (3)

⁶The *Giving USA 2021* report explains that it “doesn’t include... (x) regional and state-level giving, (x) cross-analysis of giving by source and use (such as the amount given to health by individuals), (x) giving amounts by specific donors or to specific organizations, or (x) pathways of gifts made (such as through giving vehicles).”

⁷Ries, T., et al. *2021 Edelman Trust Barometer Global Report*. Chicago: Edelman. 2021.





information about the public’s openness to solicitation and giving preferences by different generation, racial, and giving-level categories.

BBB®’s Give.org⁸ 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.⁹ In this report, we reference data gathered through the December 2020, 2019, 2018, and 2017 Donor Trust Surveys,¹⁰ each with more than 2,100 adult respondents in the United States (and, in 2020 and 2019, 1,000 additional Canadian respondents). In some cases, we also reference a special survey conducted in March 2020 with results published in the *Give.org Special Report: COVID-19 and the Charitable Sector*.

⁸ Also known as BBB Wise Giving Alliance or BBB WGA.

⁹ BBB’s Give.org conducts a Donor Trust Survey annually since December 2017. The survey includes a set of core questions intended to measure the health of public trust in the charitable sector and to identify shifts across time. Each year, the survey also includes a set of questions on special topic of interest. The first Give.org Donor Trust Report, *The Give.org Donor Trust Report: An In-Depth Look into the State of Public Trust in the Charitable Sector*, was released in 2018. Since then, special topics have included disaster relief, sexual harassment, COVID-19, and charity impact.

¹⁰ Results from the survey conducted in December 2020 are first released in this report. Results from the December 2019, 2018, and 2017 surveys may have also been published in former Give.org Donor Trust Reports.





Summary of Results

Public Trust in Charities

- **There is ample space to build trust** in the sector, with 63.0% of respondents rating the importance of trusting a charity before giving as 9 or 10 (Essential) on a 10-point scale, and only 18.5% 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 4 years**, with the portion of respondents who rate the importance of trusting a charity before giving decreasing steadily from 73.0% in December 2017, to 63.0 % in December 2020.
- **Between December 2017 and December 2020, the portion of respondents that highly trust charities overall has been relatively steady** (the highest portion being 19.0% in December 2018, and the lowest 16.8% in December 2019).¹¹
- **As exemplifies by 2020 results, donors with higher contribution levels are more likely to report high trust in charities.** For example, only 10.6% of respondents that did not donate in 2020 say they highly trust charities. In comparison, 1 in 4 (25.0%) of people who report giving \$5,000 or more in 2020 report high trust for charities.
- Respondents were asked to assess their trust for 13 different charity categories. Most charity categories—including charity categories that experienced significant increase or decrease in contributions during 2020—did not experience significant changes in high donor trust. **The most noteworthy shifts in “high trust” for specific charity types involve: (1) religious organizations, (2)**

¹¹BBB’s Give.org focuses on high trust indicators based on the Net Promoter Score (NPS), a metric system that argues that a 9 or 10 on a 10-point scale indicates the most loyal and enthusiastic customers. With other trust trackers showing that overall trust for institutions, including charities, has been declining, a steady “high trust” finding may point to a core constituent group that continues to highly trust the sector.





civil rights and community action organizations, (3) police and firefighter organizations, and (4) environmental organizations. Between December 2017 and December 2020, religious organizations and police and firefighter organizations saw a steady drop in the portion of people who highly trusted them (7.4 and 5.5 points respectively). Civil rights and community action organizations experienced a significant (12.3-point) drop between December 2017 and December 2019, but then saw a noteworthy (3.4-point) upward turn between December 2019 and December 2020. Environmental organizations experienced a 3-point increase in “high trust” within 2020.

2020 Giving Profiles by Charity Type

- **Out of 13 charity categories in our survey, eight saw a drop in the portion of participants that report giving during 2020 as compared to 2019.** Youth development organizations experienced the largest drop, with 13.1% of participants giving to a youth development organization during 2020, as compared to 18.3% in 2019.
- **Out of 13 charity categories in our survey, five saw no change or a slight increase in the portion of participants that report giving during 2020 as compared to 2019:** social service charities (with 26.9% in both 2020 and 2019), health organizations (with 24.7% in 2020 and 24.0% in 2019), environmental organizations (with 16.1% in 2020 and 14.6% in 2019), and arts and culture charities (with 13.0% in 2020 and 10.2% in 2019).
- **For each of the 13 charity categories in the survey, we look at the race, generational, and giving level of their 2020 contributors (and compare that to the overall sample of people who report giving to charity).** In addition, we look at the portion of participants in each demographic group (race, generations, and giving level) that report high trust for the charity type. Donor profiles for each charity type are bound to deviate from the overall donor sample. In fact, concentration in certain demographic groups can be a sign of diversity in donor preferences or a successful targeted strategy. On the other hand, it can reflect gaps in outreach or opportunities for engagement.





We found the following:

- People who donated to **animal welfare organizations** are more likely to be White (and less likely to be African American) than the general donating sample. Among Gen Xers and Matures, and among people in donation levels between \$1 and \$5,000, animal welfare organizations receive relatively high trust.
- People who donated to **arts and culture charities** are more likely to report annual contributions above \$1,000 and less likely to report annual contributions of \$200 or less. They are also more likely to be young, with 41.1% of people who report giving to arts and culture charities during 2020 being Millennials. Among Boomers and Matures, arts and culture charities have a relatively small portion of people who report high trust for the charity type.
- People who report donating to **civil rights and community action organizations** are more likely to be African American or Hispanic (and less likely to be White). They are also more likely to be younger than the general donor sample. Civil rights and community action organizations are more likely to have a high portion of people report high trust among African Americans and Gen Zers. On the flip side, these organizations have a relative low portion of people expressing high trust among White participants, people donating \$201 and up, and Matures and Boomers.
- People who donated to **educational organizations** are likely to be younger than the overall donor sample. They are also more likely to have donated more than \$5,000 during the year. On the flip side, people who donated to educational organizations are less likely to be in the lowest contribution bracket (between \$1 and \$50). Educational organizations have a relatively low portion of people highly trusting them among all generational and donation levels.
- People who donated to **environmental organizations** tend to be younger and more diverse than the general donor population. Among people who report donating more than \$5,000, and among Boomers and Matures, participants are less likely to say they highly trust environmental organizations as compared to other charity categories.
- People who report giving to **health organizations** are more likely to be White and tend to be older than the overall donor population. Among African Americans and Matures, health organizations are more likely to be perceived as highly trustworthy.
- People who donated to **international relief organizations** tend to be younger and in a higher giving bracket. They also have a lower portion of White and African American respondents who report





giving, as compared to the overall donor sample. As compared to the portion of people who report high trust for charities overall, Baby Boomers and people who report giving between \$1,000 and \$5,000 are less likely to perceive international relief organizations as highly trustworthy.

- People who report giving to **not-for-profit hospitals** have similar race and generational demographics than the general donor sample. Among African Americans and Gen Xers, not-for-profit hospitals are more likely to be perceived as highly trustworthy.
- People who report donating to **police and firefighter organizations** are more likely to be White (and less likely to be African American, Asian, or Hispanic) than the overall donor sample. They are also more likely to be Matures or Boomers, and less likely to be Gen Xers, Millennials, or Gen Zers. Compared to the overall donor sample, people who report giving to police and firefighter organizations are more likely to report annual contribution levels between \$1,000 and \$5,000, and less likely to report contributions levels between \$1 and \$50. Among most race, giving-level, and generation groups, the portion of people that highly trusts police and firefighter organizations is similar to that of all charity types combined. The exception is among people who report annual contributions of \$5,000 or more, who have a relatively low portion of participants reporting high trust for this charity category.
- People who report giving to **religious organizations** tend to be older (and in a higher giving bracket) than the general giving population. Religious organizations enjoy relative high trust among White and Hispanic groups, and among mature and boomer generations. On the other hand, Gen Z participants trust religious organizations much less than they do other charity types.
- People who donate to **social service charities** are less likely to be in the \$1–\$50 or \$51–\$200 giving brackets as compared to the overall donor sample. They are more likely to be White, to report donating between \$1,000 and \$5,000 during the year, and to belong to the Baby Boomer generation.
- People who donated to **veterans organizations** are more likely to be White and to be older than the overall donor sample. In particular, 44% of people who reported giving to veterans organizations are Boomers. Veterans organizations are also highly trusted among Boomers.
- People who report giving to **youth development organizations** tend to be younger than the general donating sample, with 40.8% being Millennials. Among people donating more than \$5,000 a year, and among older generations (Matures and Boomers), this charity category has relatively few respondents reporting high trust.





- **When considering alternative channels used to donate during the past year (including mailed appeals, charity websites, fundraising events, and 10 other options), the portion of participants who report not contributing through any channels increased from 16.4% in December 2018, to 20.0% in December 2019, and to 24.9% in December 2020.** The portion of participants who report participating in a fundraising event or contributing at the checkout counter were also unusually low during 2020. For example, while 18.7% of respondents reported participating in a fundraising event during 2017, only 9.2% reported the same for 2020.

Openness to Solicitation and Diverse Donor Preferences

- Among all respondents, 12.7% expressed a desire to be approached more by charities and another 20.4% said that they might be willing to give more if approached. **Racial minorities and younger respondents express a higher desire to be approached by charities.** For example, 22.0% of African Americans said they would like charities to approach them more and another 28.1% said they would be willing to give more if approached. Similarly, 18.6% of Gen Zers said they would like charities to approach them more, and another 37.2% said they would be willing to give more if approached.
- **Racial minorities show higher openness to solicitation than they did in 2018 and 2019.** For instance, In December 2018, 44.7% of African Americans expressed a desire to be approached more by charities (15.5%) or willingness to give more if approached (29.3%). By December 2020, 49.8% of African Americans expressed a desire to be approached more by charities (21.8%) or willingness to give more if approached (28.0%).
- **Racial minorities also express a higher preference to donate to a charity serving specific needs affecting their ethnic community.** Overall, 33.6% prefer donating to a charity serving specific needs in their ethnic communities. Among African Americans, 51.4% prefer to support charities serving other African Americans. Among Gen Zers, 42.1% say they prefer donating to a charity serving their ethnic community.
- Respondents were asked to identify the top three most impactful ways to make a difference (with choices including donating money to a charity, donating items, volunteering time, contributing to 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, participants most frequently choose donating items (44.8%); donating money to a charity (40.6%); volunteering time (38.5%); and giving to an individual in need directly (25.9%). **With some differences, this ranking has held relatively stable since 2017 and across racial categories. The most significant differences occur across generational lines. For instance, while 55.3% of Matures rank donating to charity among their top three most impactful ways to make a difference, only 28.4% of Gen Zers do the**





same. Similarly, while 23.5% of Gen Zers rank “raising money for a cause through your network” among their top three most impactful ways to make a difference, only 4.5% of Boomers do the same.

- **When asked what most signals that a charity is trustworthy, the top factors in December 2020 were: (1) accomplishments shared by the organization, (2) third-party evaluation by an independent organization, and (3) name recognition.** When the same question was asked in August 2020, accomplishments shared by the organization had dropped significantly – making trust signals like third-party evaluations, name recognition, and opinions expressed by family and friends relatively more important. By the end of 2020, top signals of trust seem to be getting closer to pre-pandemic numbers, with 47.2% of respondents rating accomplishments shared by the organization as a top signal of trust.
- **Accomplishments shared by the organization was most frequently chosen as a top signal of trust across race groups, generations, and giving levels.** However, **different generations and racial groups say they assess trust differently.** For example, 30.1% of Millennials pick appealing stories as a top trust signal, as compared to only 9.6% of Matures. Similarly, 33.3% of African Americans pick passion and sincerity of the appeal, as compared to only 19.7% of White participants. **Some trust signals, like third-party evaluations and financial rations, tend to be more important for higher giving levels.** For example, 48.1% of people who donated more than \$5,000 in 2020 report that third-party evaluations are a top trust signal, as compared to 24.2% among people who donated between \$1 and \$50.





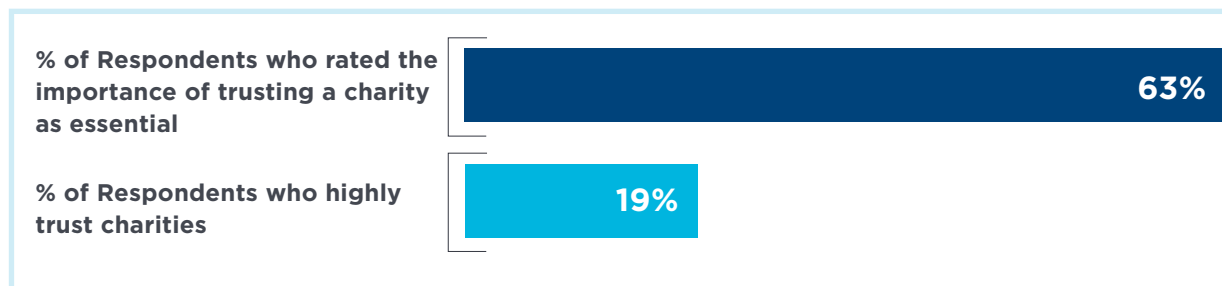
Canadian Donor Trust

- **There is ample space to build trust for charities in Canada**, with 58.4% of respondents rating the importance of trusting a charity before giving as 9 or 10 (Essential) on a 10-point scale, and only 13.4% of respondents highly trusting charities. As with U.S. results, our findings suggest that reliance on trust as a giving indicator eroded significantly, with the portion of respondents who attribute high importance to trust before giving dropping from 67.0% in December 2019 to 58.4% in December 2020.
- **The portion of Canadians that highly trust charities (13.4%) is significantly lower than in the United States (18.5%).**
- **The most trusted charity types in Canada are: (1) health organizations, with 23.4% expressing high trust; (2) not-for-profit hospitals, with 21.2% expressing high trust; and (3) animal welfare organizations, with 19.6% expressing high trust.** Their U.S. counterparts place higher relative trust for religious organizations, the category which holds the top spot, with 24.6% of participants reporting highest trust.
- When asked what most signals that a charity is trustworthy, **the top factors for Canadians in December 2020 were (1) accomplishments shared by the organization, (2) third-party evaluation by an independent organization, and (3) name recognition.** These are the same top factors identified by their American counterparts.
- When asked to identify the charity categories Canadians donated to during 2020, **the most frequent responses were (1) health organizations, (2) social service charities, and (3) animal welfare organizations.** Out of 13 charity categories in our survey, 10 saw a drop in the portion of participants that report giving during 2020 as compared to 2019. The exceptions were health organizations, social service charities, and educational organizations.
- **As compared to their U.S. counterparts, the rates for Canadian contributions to health organizations (41.5%) and social service charities (33.6%) are very high.** The highest contribution rate reported by U.S. participants is 26% for social service charities.
- **About one-third of Canadians (32.8%) say they would like charities to approach them more (10.3%) or might be willing to give more if approached (22.6%).**

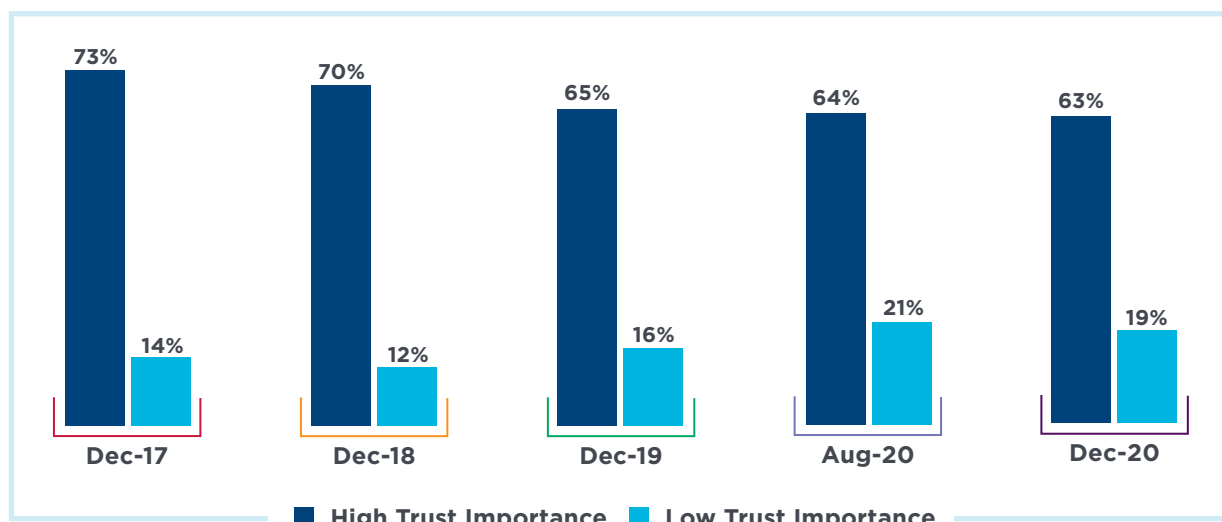


Public Trust in Charities

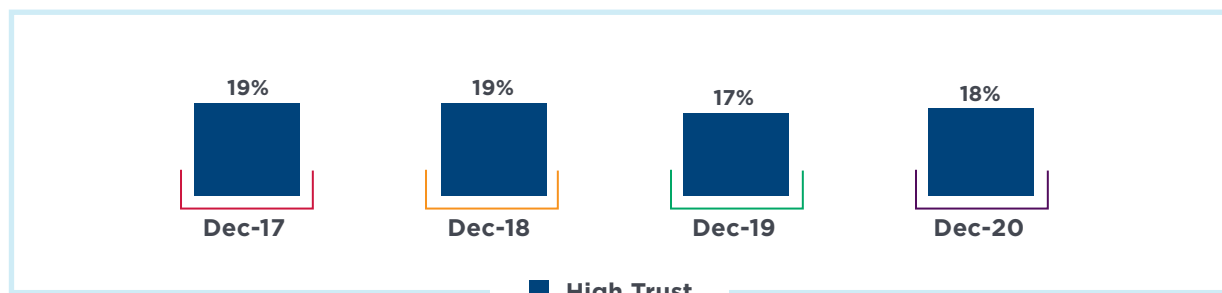
There is ample space to build trust in charities.



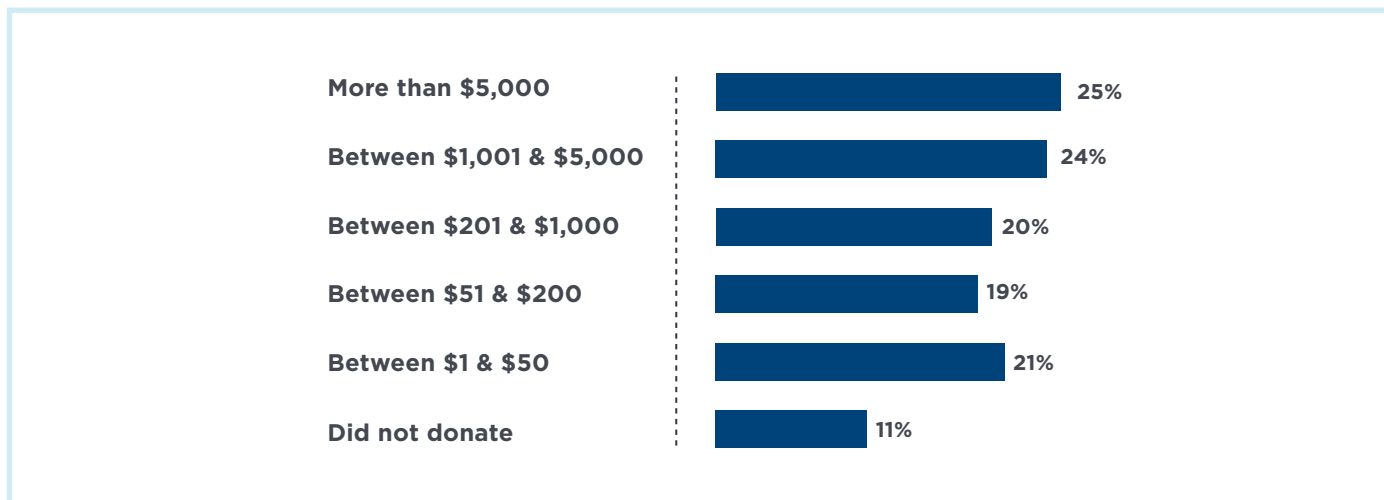
Trust is considered highly important in the giving process. However, self-reported reliance on trust as a giving indicator has eroded over the past 4 years.

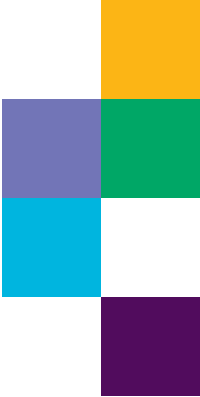


Between December 2017 and December 2020, the portion of respondents that highly trust charities has maintained relatively steady.



As exemplified by 2020 results, donors with higher contribution levels are more likely to report high trust.





Respondents were asked to assess their trust across 13 different charity categories. Most charity categories—including charity categories that experienced significant increase or decrease in overall contributions from individuals, foundations, and corporations during 2020—did not experience significant changes in donor trust.

The most noteworthy shifts (of 6 percentage points or more) when it comes to “high trust” over the past 4 years involve: (1) civil rights and community action organizations, (2) religious organizations, and (3) police and firefighter organizations.

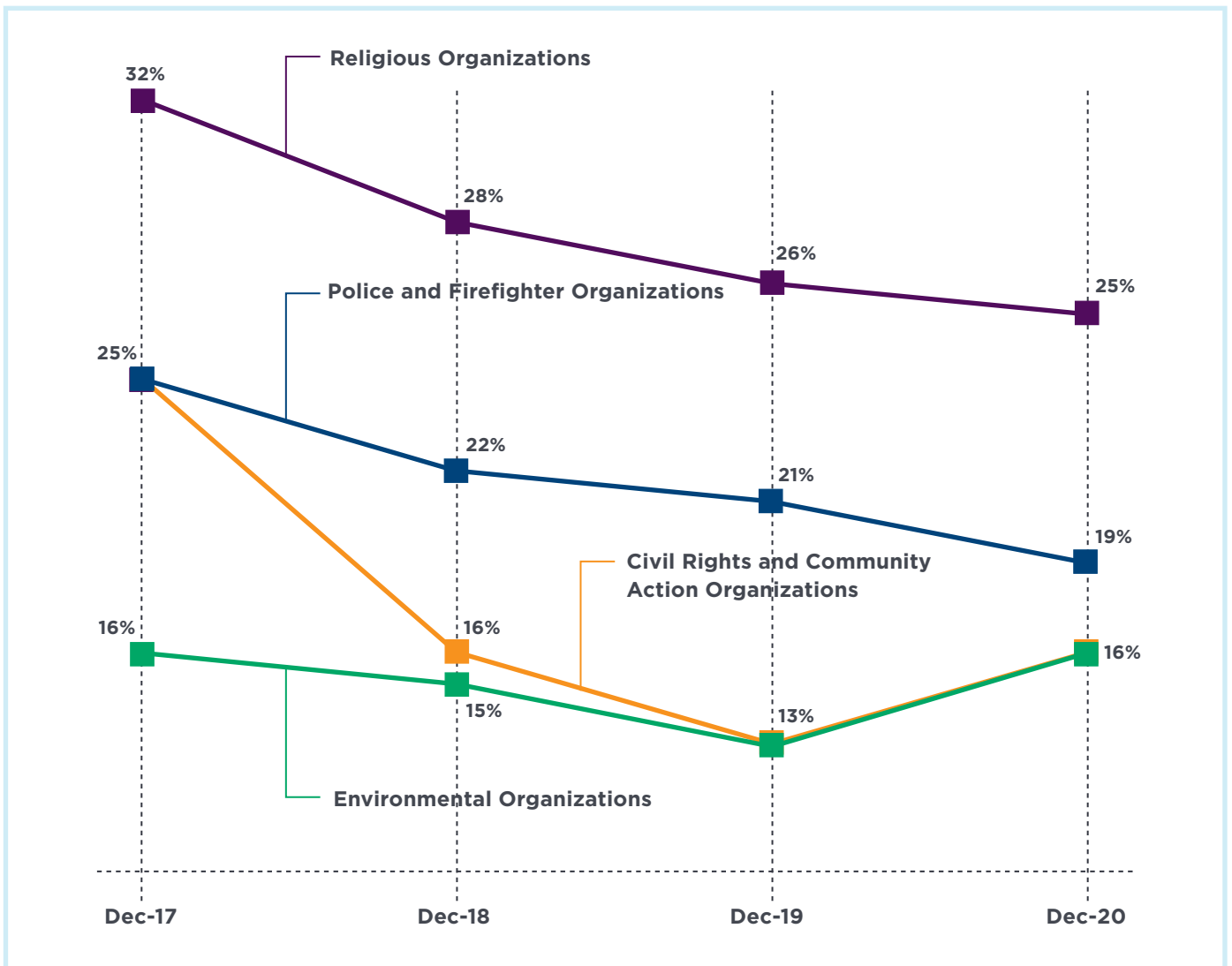
The most significant changes (of 3 points or more) between December 2019 and December 2020 involve (1) environmental organizations and (2) civil rights and community action organizations.



In assessing trust for charities, BBB’s Give.org focuses on “high trust” indicators—the portion of respondents who rate their trust as a 9 or 10 on a 10-point scale. This approach is based on the idea of a Net Promoter Score (NPS), which holds that a 9 or 10 on a 10-point scale captures the most loyal and enthusiastic customers. This group is likely harder to sway than the average participants. BBB’s Give.org believes these consumers—or, in our case, donors—form a constituent group that is more likely to engage, contribute, and promote a charity.

Religious organizations and police and firefighter organizations saw a steady drop in the portion of people who highly trusted them between December 2017 and December 2020.

Civil rights and community action organizations experienced a significant drop between December 2017 and December 2019, but then saw an upward turn between December 2019 and December 2020. Environmental organizations experienced a 3-point increase in “high trust” within 2020.

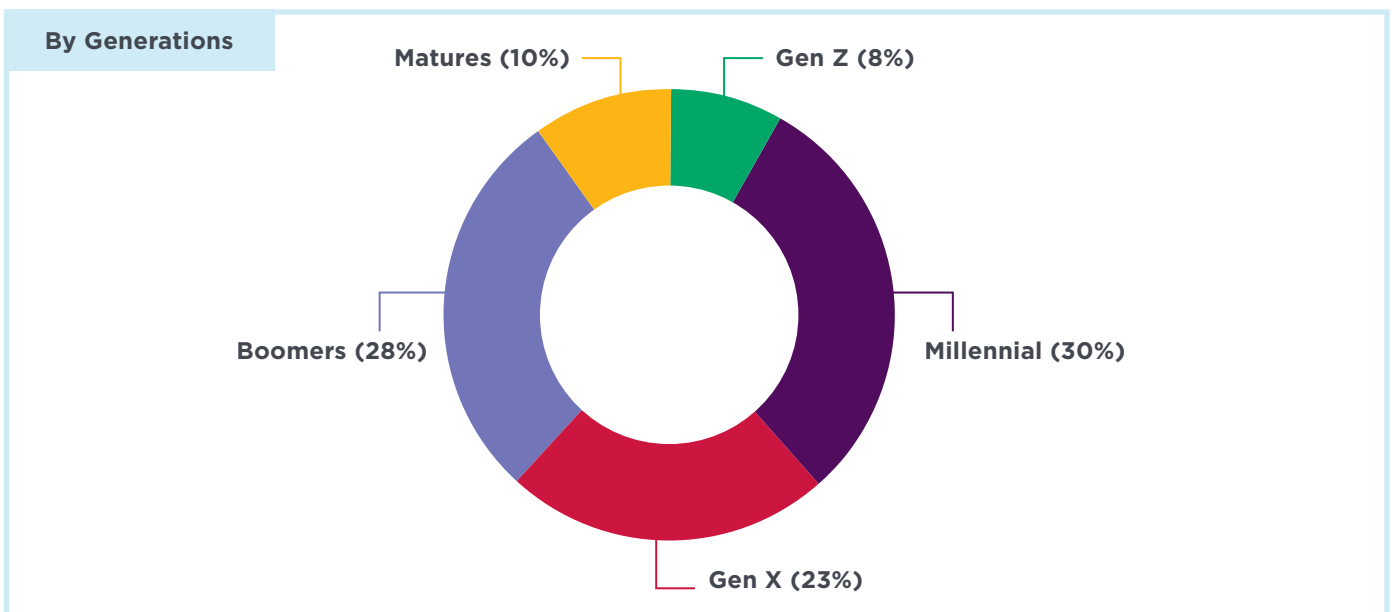
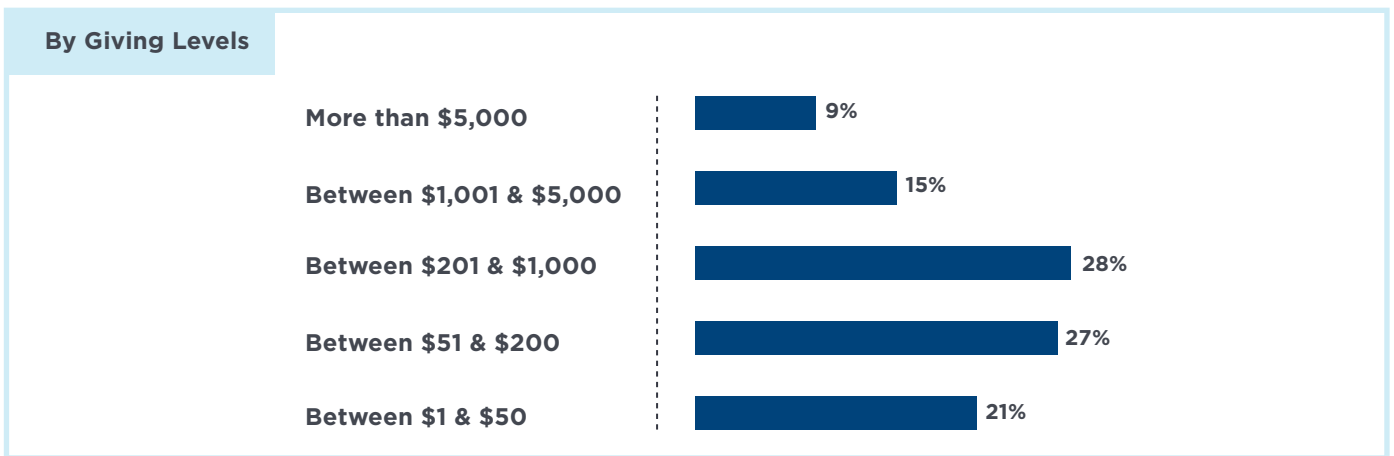
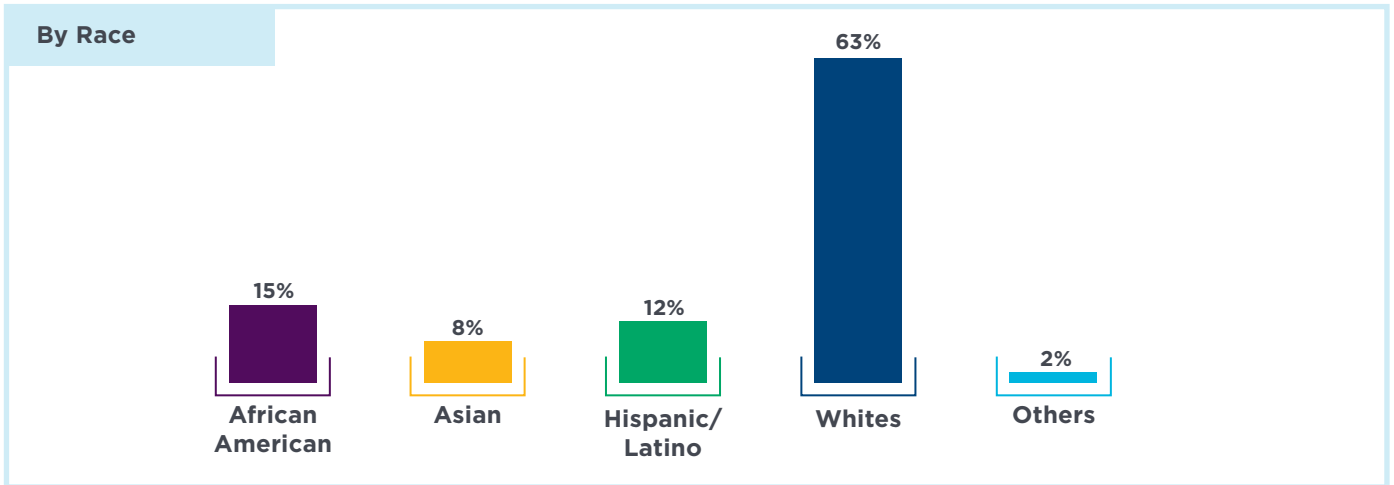


Giving Profiles by Charity Type

Out of 13 charity categories in our survey, 8 saw a drop in the portion of participants that report giving during 2020 as compared to 2019, with youth development organizations experiencing the largest decline. Five charity categories saw no change or a slight increase in the portion of participants that report giving during 2020 as compared to 2019.

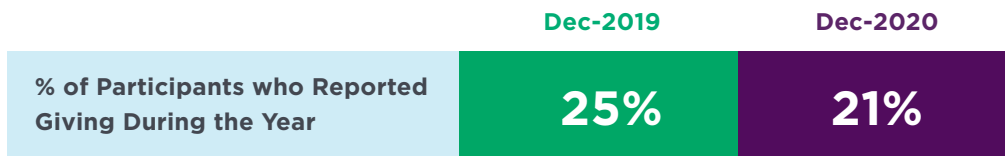
	Portion of participants that reported giving in 2019	Portion of participants that reported giving in 2020	Difference in portion of individuals who report giving in 2019 and 2020
Social Service Charities	26%	26%	0%
Religious Organizations	28%	25%	-3%
Health Organizations	24%	25%	1%
Animal Welfare Organizations	25%	21%	-4%
Veterans Organizations	19%	17%	-2%
Educational Organizations	18%	16%	-2%
Environmental Organizations	15%	16%	2%
International Relief Organizations	16%	15%	-1%
Arts and Cultural Charities	10%	13%	3%
Youth Development Organizations	18%	13%	-5%
Police and Firefighter Organizations	14%	11%	-3%
Civil Rights and Community Action Organizations	7%	9%	2%
Not-for-profit Hospitals	11%	8%	-3%

According to the December 2020 survey, below is the profile of self-reported donors:





People who report giving to **animal welfare organizations** are more likely to be White (and less likely to be African American) than the general donating sample. Among Gen Xers and Matures, and among people in donating levels between \$1 and \$5,000, animal welfare organizations receive relatively high trust.



Profile of people who report donating during 2020		
Compared to overall donor sample		
African American	9%	-6%
Asian	5%	-3%
Hispanic/Latino	13%	1%
White	72%	9%
Other	9%	0%
Compared to overall donor sample		
\$1-\$50	20%	-1%
\$51-\$200	26%	-1%
\$201-\$1,000	31%	2%
\$1,001-\$5,000	18%	3%
>\$5,000	6%	-3%
Compared to overall donor sample		
Gen Z	7%	-1%
Millennial	27%	-4%
Gen X	25%	2%
Boomers	31%	3%
Matures	10%	0%

23% of survey participants reported high trust (Dec 2020)		
Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined
African American	22%	-3%
Asian	15%	0%
Hispanic/Latino	25%	3%
White	19%	1%
Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined
Did not donate	9%	-2%
\$1-\$50	28%	7%
\$51-\$200	22%	4%
\$201-\$1,000	23%	3%
\$1,001-\$5,000	30%	5%
>\$5,000	22%	-3%
Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
Gen Z	25%	3%
Millennial	30%	5%
Gen X	21%	4%
Boomers	17%	3%
Matures	15%	1%



People who donated to **arts and culture charities** are more likely to report annual contributions above \$1,000 and less likely to report annual contributions of \$200 or less. They are also more likely to be young, with 41% of people who report giving to arts and culture charities during 2020 being Millennials. Among Boomers and Matures, arts and culture charities have a relatively small portion of people who report high trust in the charity type.



Profile of people who report donating during 2020

Compared to overall donor sample			Compared to overall donor sample			Compared to overall donor sample		
African American	17%	3%	\$1-\$50	15%	-7%	Gen Z	14%	6%
Asian	8%	0%	\$51-\$200	19%	-8%	Millennial	41%	11%
Hispanic/Latino	11%	-1%	\$201-\$1,000	30%	1%	Gen X	15%	-8%
White	61%	-3%	\$1,001-\$5,000	23%	8%	Boomers	21%	-7%
Other	3%	1%	>\$5,000	14%	5%	Matures	9%	-1%



15% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined
African American	22%	-3%
Asian	14%	-1%
Hispanic/Latino	17%	-5%
White	13%	-5%

Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined
Did not donate	10%	-1%
\$1-\$50	14%	-7%
\$51-\$200	13%	-6%
\$201-\$1,000	18%	-2%
\$1,001-\$5,000	17%	-8%
>\$5,000	22%	-3%

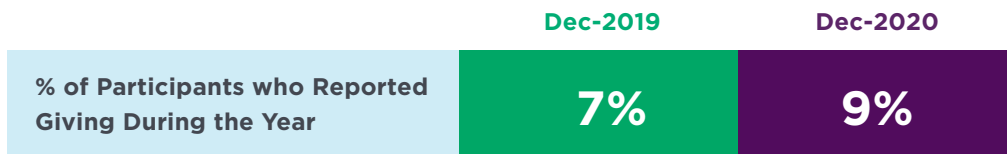
Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
Gen Z	20%	-2%
Millennial	21%	-4%
Gen X	15%	-2%
Boomers	8%	-7%
Matures	10%	-5%

Note: Our survey shows that arts and culture organizations experienced a 2.4-point increase in the portion of donors who report "high trust" for the charity category within 2020. We also found an increase in the portion of participants who report giving to arts and culture charities, from 10.4% in 2019 to 13.1% in 2020. This finding is surprising, considering *Giving USA 2021's* results showing that giving to arts, culture, and humanities decreased by 8.6% in 2020.¹² It is worth noting that the change in contributions reported by Giving USA could be driven by foundations, corporations, or bequests which are not included in this survey. Even among individual contributions, the portion of participants that report donating to a charity type is not necessarily a solid predictor of revenue for that charity category. Instead, it is a gauge of participation. Our survey findings suggest that art and culture charities may have seen an increase in individual participation (as reported by survey takers), despite the overall decrease in contribution amounts overall.

¹² *Giving USA 2021: The Annual Report on Philanthropy for the Year 2020*. Chicago: Giving USA Foundation.



People who report donating to **civil rights and community action organizations** are more likely to be African American or Hispanic (and less likely to be White). They are also more likely to be younger than the general donor sample. Civil rights and community action organizations are more likely to have a high portion of people report high trust among African Americans and Gen Zers. On the flip side, these organizations have a relative low portion of people expressing high trust among White participants, people donating \$201 and up, and Matures and Boomers.



Profile of people who report donating during 2020								
Compared to overall donor sample			Compared to overall donor sample			Compared to overall donor sample		
African American	20%	5%	\$1-\$50	18%	-3%	Gen Z	16%	8%
Asian	8%	0%	\$51-\$200	26%	-1%	Millennial	34%	4%
Hispanic/Latino	16%	4%	\$201-\$1,000	23%	-5%	Gen X	22%	-2%
White	54%	-10%	\$1,001-\$5,000	18%	3%	Boomers	19%	-9%
Other	3%	0%	>\$5,000	14%	5%	Matures	9%	-1%



16% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined
African American	28%	4%
Asian	11%	-5%
Hispanic/Latino	20%	-1%
White	13%	-5%

Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined
Did not donate	11%	0%
\$1-\$5	19%	-2%
\$51-\$200	16%	-3%
\$201-\$1,000	16%	-4%
\$1,001-\$5,000	19%	-6%
>\$5,000	17%	-8%

Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
Gen Z	26%	4%
Millennial	23%	-2%
Gen X	15%	-2%
Boomers	8%	-6%
Matures	9%	-6%

Note: In the previous section (Public Trust in Charities), civil rights and community action organizations were identified as one of three charity categories that have experienced a significant shift in donor trust since 2017; and one of two charity categories that saw a 3-point increase in the portion of donors who reported high trust between December 2019 and December 2020. The decrease in the portion of participants who reported high trust from 25.0% in December 2017 to 12.7% in December 2019, followed by the increase from 12.7% in December 2019 to 16.1% in December 2020, is likely affected by the attention placed on social and racial justice during these years. That is, public trust for civil rights and community action organizations (as well as police and firefighter organizations) are likely affected, at least in part, by the broader social justice tension that culminated with the racial awareness movement of 2020.



People who donated to **educational organizations** are likely to be younger than the overall donor sample. They are also more likely to have donated more than \$5,000 during the year. On the flip side, people who donated to educational organizations are less likely to be in the lowest contribution bracket (between \$1 and \$50). Educational organizations have a relatively low portion of people highly trusting them among all generational and donation levels.

	Dec-2019	Dec-2020
% of Participants who Reported Giving During the Year	18%	16%

Profile of people who report donating during 2020

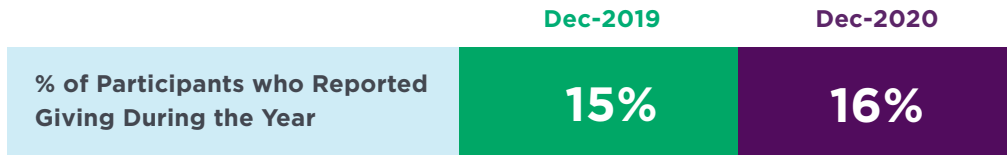
	Compared to overall donor sample		Compared to overall donor sample		Compared to overall donor sample			
African American	16%	1%	\$1-\$50	13%	-9%	Gen Z	12%	4%
Asian	12%	4%	\$51-\$200	24%	-3%	Millennial	38%	8%
Hispanic/Latino	10%	-2%	\$201-\$1,000	29%	0%	Gen X	15%	-8%
White	60%	-4%	\$1,001-\$5,000	17%	3%	Boomers	24%	-3%
Other	2%	0%	>\$5,000	17%	9%	Matures	10%	0%

15% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined	Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined	Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
African American	22%	-3%	Did not donate	9%	-2%	Gen Z	19%	-3%
Asian	16%	0%	\$1-\$50	13%	-7%	Millennial	23%	-3%
Hispanic/Latino	15%	-6%	\$51-\$200	15%	-4%	Gen X	11%	-6%
White	13%	-4%	\$201-\$1,000	16%	-4%	Boomers	10%	-4%
			\$1,001-\$5,000	18%	-6%	Matures	9%	-6%
			>\$5,000	24%	-1%			



People who report giving to **environmental organizations** tend to be younger and more diverse than the general donor population. Among people who report donating more than \$5,000, and among Boomers and Matures, participants are less likely to say they highly trust environmental organizations as compared to other charity categories.



Profile of people who report donating during 2020

Compared to overall donor sample			Compared to overall donor sample			Compared to overall donor sample		
African American	18%	3%	\$1-\$50	16%	-6%	Gen Z	13%	5%
Asian	8%	1%	\$51-\$200	24%	-3%	Millennial	42%	12%
Hispanic/Latino	15%	3%	\$201-\$1,000	31%	3%	Gen X	16%	-7%
White	55%	-8%	\$1,001-\$5,000	18%	3%	Boomers	21%	-6%
Other	4%	2%	>\$5,000	12%	3%	Matures	7%	-3%



16% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined	Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined	Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
African American	22%	-3%	Did not donate	9%	-2%	Gen Z	24%	2%
Asian	17%	2%	\$1-\$50	19%	-2%	Millennial	24%	-1%
Hispanic/Latino	21%	-1%	\$51-\$200	15%	-4%	Gen X	15%	-2%
White	14%	-3%	\$201-\$1,000	18%	-2%	Boomers	9%	-6%
			\$1,001-\$5,000	24%	-1%	Matures	9%	-6%
			>\$5,000	17%	-8%			

Note: In the previous section (Public Trust in Charities), environmental organizations were identified as one of two charity categories that saw a 3-point increase in the portion of respondents who reported high trust for the charity type within 2020. The increase in the portion of participants who expressed high trust from 13.3% in December 2019 to 16.4% in December 2020 is likely affected, at least in part, by broader attitudes about environmental causes. For example, 2020 saw increased awareness of the link between environmental causes and human health, attention given to environmental changes associated with the economic slowdown tied to the COVID-19 pandemic, and news about extreme weather events. Environmental organizations also enjoy relative high trust from younger generations.



People who report giving to **health organizations** are more likely to be White and tend to be older than the overall donor population. Among African Americans and Matures, health organizations are more likely to be perceived as highly trustworthy.



Profile of people who report donating during 2020

Compared to overall donor sample			Compared to overall donor sample			Compared to overall donor sample		
African American	12%	-3%	\$1-\$50	15%	-6%	Gen Z	10%	1%
Asian	8%	0%	\$51-\$200	25%	-2%	Millennial	25%	-5%
Hispanic/Latino	11%	-1%	\$201-\$1,000	30%	2%	Gen X	20%	-3%
White	68%	5%	\$1,001-\$5,000	18%	4%	Boomers	31%	3%
Other	2%	0%	>\$5,000	11%	2%	Matures	14%	4%

22% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined	Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined	Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
African American	30%	5%	Did not donate	12%	1%	Gen Z	25%	3%
Asian	18%	2%	\$1-\$50	25%	5%	Millennial	26%	1%
Hispanic/Latino	24%	2%	\$51-\$200	23%	4%	Gen X	21%	4%
White	20%	3%	\$201-\$1,000	23%	3%	Boomers	17%	2%
			\$1,001-\$5,000	27%	2%	Matures	24%	9%
			>\$5,000	27%	2%			

People who report giving to **international relief organizations** tend to be younger and in a higher giving bracket. They also have a lower portion of White and African American respondents who report giving, as compared to the overall donor sample. As compared to the portion of people who report high trust for charities overall, Boomers and people who report giving between \$1,000 and \$5,000 are less likely to perceive international relief organizations as highly trustworthy.

Dec-2019

Dec-2020

% of Participants who Reported Giving During the Year

16%

15%

Profile of people who report donating during 2020

	Compared to overall donor sample	
African American	11%	-4%
Asian	11%	4%
Hispanic/Latino	15%	3%
White	58%	-5%
Other	4%	2%

	Compared to overall donor sample	
\$1-\$50	10%	-11%
\$51-\$200	22%	-5%
\$201-\$1,000	31%	2%
\$1,001-\$5,000	20%	5%
>\$5,000	18%	9%

	Compared to overall donor sample	
Gen Z	13%	4%
Millennial	35%	5%
Gen X	15%	-8%
Boomers	28%	0%
Matures	9%	-1%

18% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined
African American	23%	-2%
Asian	19%	3%
Hispanic/Latino	22%	1%
White	16%	-2%

Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined
Did not donate	11%	0%
\$1-\$50	21%	0%
\$51-\$200	18%	0%
\$201-\$1,000	19%	-1%
\$1,001-\$5,000	18%	-6%
>\$5,000	25%	0%

Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
Gen Z	23%	1%
Millennial	26%	1%
Gen X	16%	-2%
Boomers	11%	-4%
Matures	14%	-1%

People who report giving to **not-for-profit hospitals** have similar race and generational demographics to the general donor sample. Among African Americans and Gen Xers, not-for-profit hospitals are more likely to be perceived as highly trustworthy.



Profile of people who report donating during 2020

	Compared to overall donor sample		Compared to overall donor sample		Compared to overall donor sample			
African American	16%	1%	\$1-\$50	21%	-1%	Gen Z	5%	-3%
Asian	7%	-1%	\$51-\$200	23%	-4%	Millennial	29%	-2%
Hispanic/Latino	9%	-3%	\$201-\$1,000	30%	2%	Gen X	25%	2%
White	65%	2%	\$1,001-\$5,000	18%	3%	Boomers	30%	3%
Other	2%	0%	>\$5,000	9%	0%	Matures	11%	1%

22% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined	Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined	Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
African American	29%	4%	Did not donate	12%	1%	Gen Z	25%	3%
Asian	18%	3%	\$1-\$50	25%	5%	Millennial	27%	2%
Hispanic/Latino	24%	3%	\$51-\$200	23%	4%	Gen X	21%	4%
White	20%	3%	\$201-\$1,000	21%	1%	Boomers	18%	3%
			\$1,001-\$5,000	24%	0%	Matures	15%	0%
			>\$5,000	29%	4%			

People who report donating to **police and firefighter organizations** are more likely to be White (and less likely to be African American, Asian, or Hispanic) than the overall donor sample. They are also more likely to be Matures or Boomers, and less likely to be Gen Xers, Millennials, or Gen Zers. Compared to the overall donor sample, people who report giving to police and firefighter organizations are more likely to report annual contribution levels between \$1,000 and \$5,000, and less likely to report contributions levels between \$1 and \$50. Among most race, giving level, and generation groups, the portion of people that highly trusts police and firefighter organizations is similar to that of all charity types combined. The exception is among people who report annual contributions of \$5,000 or more, who have a relatively low portion of participants reporting high trust for the charity type.



Profile of people who report donating during 2020

Compared to overall donor sample			Compared to overall donor sample			Compared to overall donor sample		
African American	8%	-7%	\$1-\$50	14%	-7%	Gen Z	5%	-4%
Asian	3%	-4%	\$51-\$200	24%	-3%	Millennial	24%	-6%
Hispanic/Latino	9%	-3%	\$201-\$1,000	28%	0%	Gen X	15%	-8%
White	78%	14%	\$1,001-\$5,000	21%	7%	Boomers	36%	8%
Other	2%	0%	>\$5,000	12%	3%	Matures	21%	10%



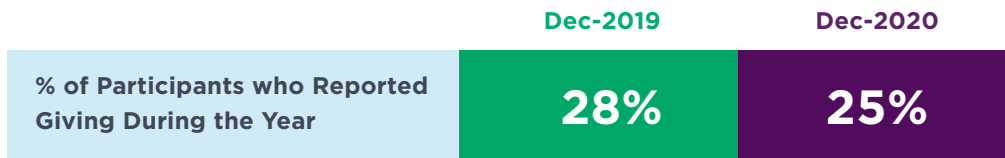
19% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined	Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined	Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
African American	23%	-2%	Did not donate	11%	1%	Gen Z	23%	1%
Asian	14%	-2%	\$1-\$50	21%	1%	Millennial	26%	1%
Hispanic/Latino	20%	-1%	\$51-\$200	19%	0%	Gen X	16%	-1%
White	19%	2%	\$201-\$1,000	21%	1%	Boomers	15%	1%
			\$1,001-\$5,000	26%	2%	Matures	14%	0%
			>\$5,000	21%	-4%			

Note: In the previous section (Public Trust in Charities), police and firefighter organizations were identified as one of three charity categories that experienced a significant shift in donor trust since 2017. The decrease in the portion of participants who reported high trust for police and firefighter organization from 25.0% in December 2017 to 19.5% in December 2019 is likely affected by broader public sentiment about the police. That is, police and firefighter organizations (as well as civil rights and community action organizations) are likely affected by the broader social justice awareness that found its most concrete expression in the 2020 Black Lives Matter movement.



People who report giving to **religious organizations** tend to be older (and in a higher giving bracket) than the general giving population. Religious organizations enjoy relative high trust among White and Hispanic groups, and among the Mature and Boomer generations. On the other hand, Gen Z participants trust religious organizations much less than they do other charity types.



Profile of people who report donating during 2020

Compared to overall donor sample			Compared to overall donor sample			Compared to overall donor sample		
African American	14%	-1%	\$1-\$50	12%	-9%	Gen Z	3%	-5%
Asian	7%	-1%	\$51-\$200	19%	-8%	Millennial	20%	-10%
Hispanic/Latino	11%	-1%	\$201-\$1,000	27%	-1%	Gen X	23%	1%
White	66%	3%	\$1,001-\$5,000	26%	11%	Boomers	38%	11%
Other	2%	0%	>\$5,000	16%	8%	Matures	16%	6%



25% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined	Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined	Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
			Did not donate	11%	0%	Gen Z	13%	-9%
African American	26%	1%	\$1-\$50	23%	2%	Millennial	27%	1%
Asian	17%	1%	\$51-\$200	20%	2%	Gen X	20%	3%
Hispanic/Latino	25%	4%	\$201-\$1,000	25%	6%	Boomers	27%	13%
White	26%	8%	\$1,001-\$5,000	38%	14%	Matures	33%	19%
			>\$5,000	49%	24%			

Note: In the previous section (Public Trust in Charities), religious organizations were identified as one of three charity categories that experienced a significant shift in donor trust since 2017. The decrease in the portion of participants who reported high trust for religious organization from 32.0% in December 2017 to 24.6% in December 2020 is, at least in part, driven by change in donor attitudes across generations. Specifically, among Gen Zers, religious organizations are considered relatively untrustworthy. As more Gen Zers enter the adult survey sample (and population), overall trust for the charity category is likely to decrease.



People who report giving to **social service charities** are less likely to be in the \$1 - \$50 or \$51 - \$200 giving brackets as compared to the overall donor sample. They are more likely to be White, to report donating between \$1,000 - \$5,000 during the year, and to belong to the Baby Boomer generation.



Profile of people who report donating during 2020

Compared to overall donor sample			Compared to overall donor sample			Compared to overall donor sample		
African American	13%	-2%	\$1-\$50	17%	-5%	Gen Z	6%	-2%
Asian	6%	-1%	\$51-\$200	22%	-5%	Millennial	28%	-2%
Hispanic/Latino	11%	-1%	\$201-\$1,000	30%	1%	Gen X	21%	-2%
White	68%	5%	\$1,001-\$5,000	20%	5%	Boomers	33%	5%
Other	2%	0%	>\$5,000	12%	3%	Matures	12%	1%

20% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined	Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined	Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
African American	28%	3%	Did not donate	10%	-1%	Gen Z	25%	3%
Asian	15%	0%	\$1-\$50	21%	1%	Millennial	26%	1%
Hispanic/Latino	25%	3%	\$51-\$200	21%	2%	Gen X	19%	2%
White	19%	1%	\$201-\$1,000	21%	1%	Boomers	16%	2%
			\$1,001-\$5,000	27%	3%	Matures	13%	-2%
			>\$5,000	30%	5%			





People who donated to **veterans organizations** are more likely to be White and to be older than the overall donor sample. In particular, 44% of people who reported giving to veterans organizations are Boomers. Veterans organizations are also highly trusted among Boomers.



Profile of people who report donating during 2020

	Compared to overall donor sample		Compared to overall donor sample		Compared to overall donor sample			
African American	9%	-6%	\$1-\$50	12%	-10%	Gen Z	3%	-5%
Asian	4%	-4%	\$51-\$200	22%	-4%	Millennial	17%	-14%
Hispanic/Latino	7%	-5%	\$201-\$1,000	33%	4%	Gen X	18%	-5%
White	79%	15%	\$1,001-\$5,000	22%	8%	Boomers	44%	17%
Other	2%	-1%	>\$5,000	11%	2%	Matures	18%	7%

21% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined	Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined	Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
African American	27%	2%	Did not donate	14%	3%	Gen Z	20%	-2%
Asian	15%	0%	\$1-\$50	23%	2%	Millennial	25%	-1%
Hispanic/Latino	20%	-1%	\$51-\$200	22%	3%	Gen X	18%	1%
White	21%	3%	\$201-\$1,000	21%	1%	Boomers	21%	7%
			\$1,001-\$5,000	26%	2%	Matures	16%	2%
			>\$5,000	22%	-3%			



People who report giving to **youth development organizations** tend to be younger than the general donating sample, with 41% being Millennials. Among people donating more than \$5,000 a year, and among older generations (Matures and Boomers), this charity category has relatively few respondents reporting high trust.



Profile of people who report donating during 2020

	Overall Donor Sample	Compared to overall donor sample
African American	19%	4%
Asian	8%	0%
Hispanic/Latino	10%	-2%
White	62%	-1%
Other	2%	0%

	Overall Donor Sample	Compared to overall donor sample
\$1-\$50	18%	-4%
\$51-\$200	22%	-5%
\$201-\$1,000	32%	4%
\$1,001-\$5,000	15%	0%
>\$5,000	14%	5%

	Overall Donor Sample	Compared to overall donor sample
Gen Z	9%	1%
Millennial	41%	11%
Gen X	21%	-3%
Boomers	20%	-7%
Matures	9%	-1%

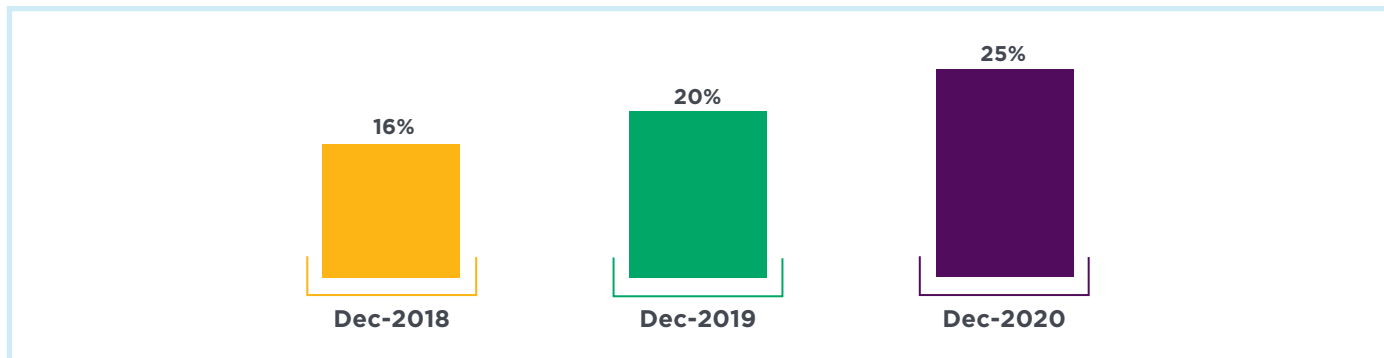
16% of survey participants reported high trust (Dec 2020)

Among...	Highly Trust	Compared to "high trust" by each race for all charity types combined
African American	23%	-2%
Asian	14%	-2%
Hispanic/Latino	22%	0%
White	14%	-3%

Among...	Highly Trust	Compared to "high trust" by giving level for all charity types combined
Did not donate	10%	-1%
\$1-\$50	18%	-3%
\$51-\$200	16%	-3%
\$201-\$1,000	17%	-3%
\$1,001-\$5,000	22%	-2%
>\$5,000	20%	-5%

Among...	Highly Trust	Compared to "high trust" by each generation for all charity types combined
Gen Z	19%	-3%
Millennial	25%	-1%
Gen X	15%	-3%
Boomers	10%	-4%
Matures	11%	-4%

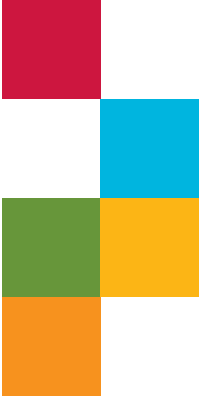
When considering alternative donation channels used to donate during the past year, the portion of participants who report not contributing through any channels increased from 16.4% in December 2018, to 20.0% in December 2019, and to 24.9% in December 2020.



The portions of participants who report participating in a fundraising events or contributing at the checkout counter were also unusually low during 2020.

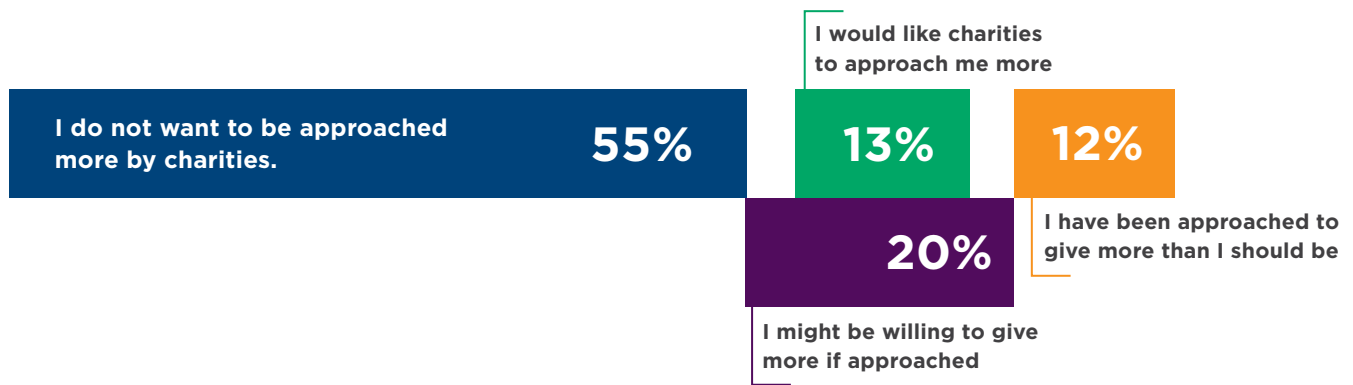


¹³ The option to specify that the participant did not donate through any of the 13 different channels was not available within this question in the first version of the survey.

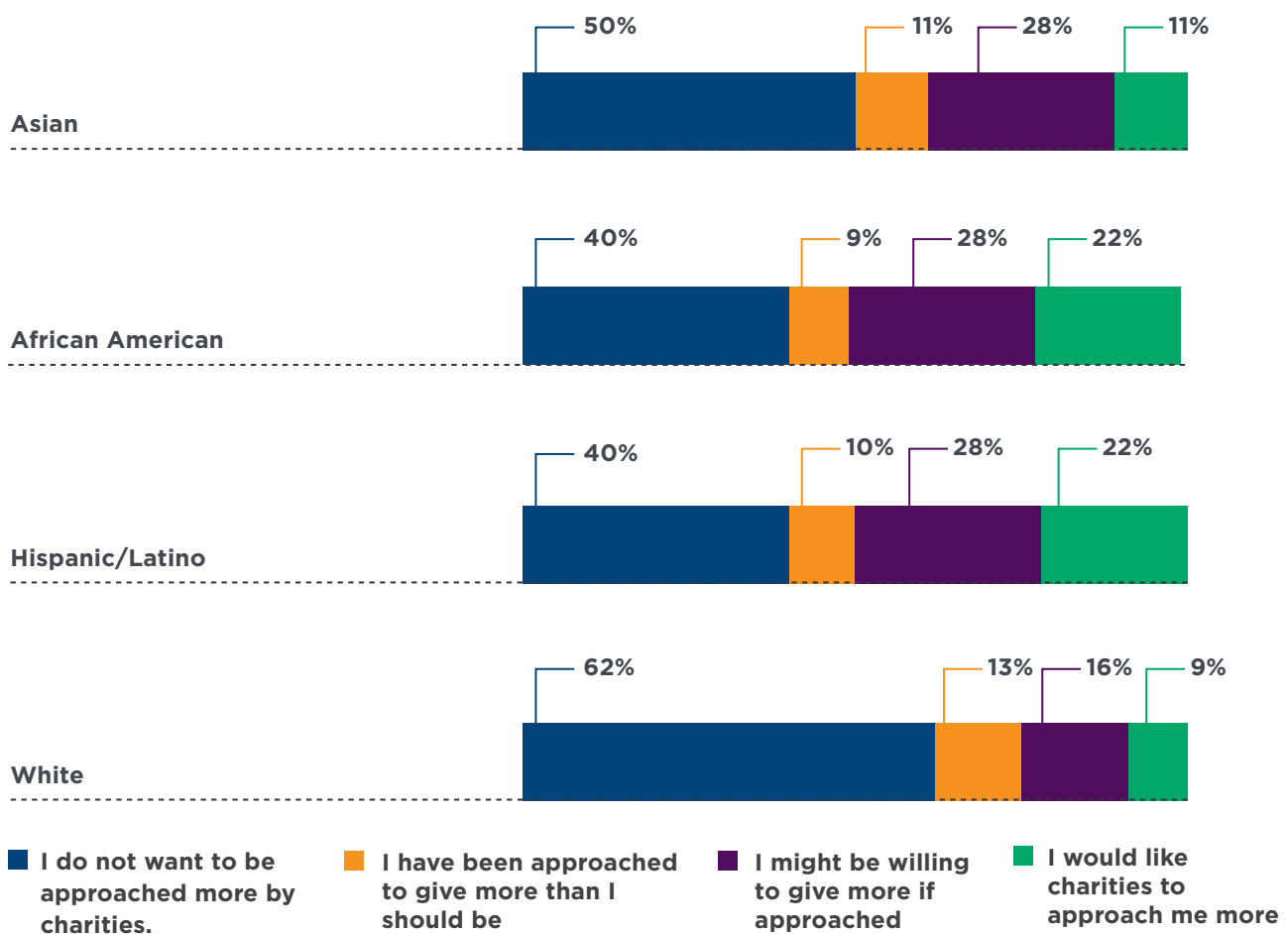


Openness to Solicitation and Giving Preferences

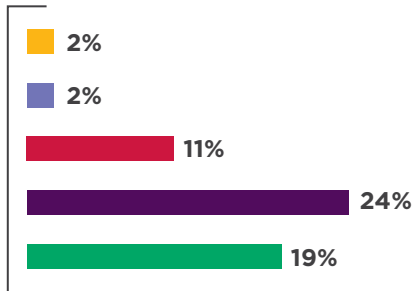
Among all respondents, 12.7% expressed a desire to be approached more by charities and 20.4% expressed that they might be willing to give more if approached.



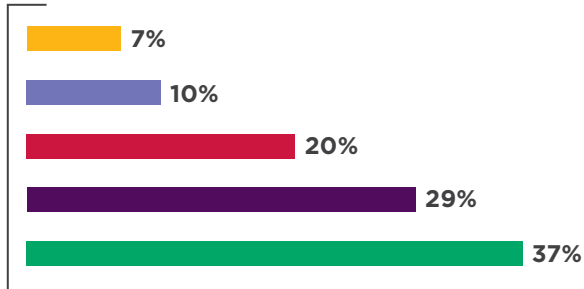
Racial minorities and younger respondents express greater desire to be approached by charities.



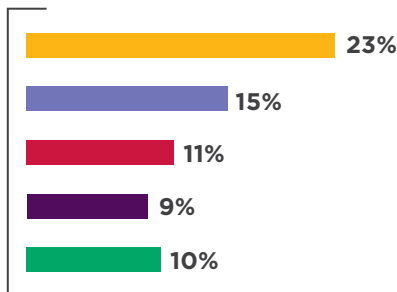
I would like charities to approach me more



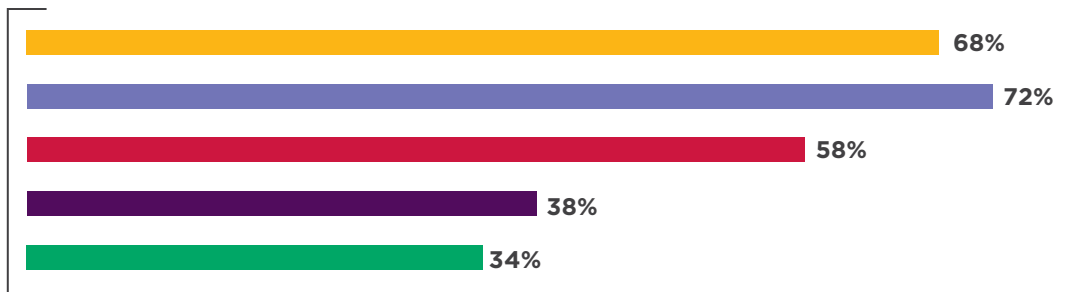
I might be willing to give more if approached



I have been approached to give more than I should be



I do not want to be approached more by charities.



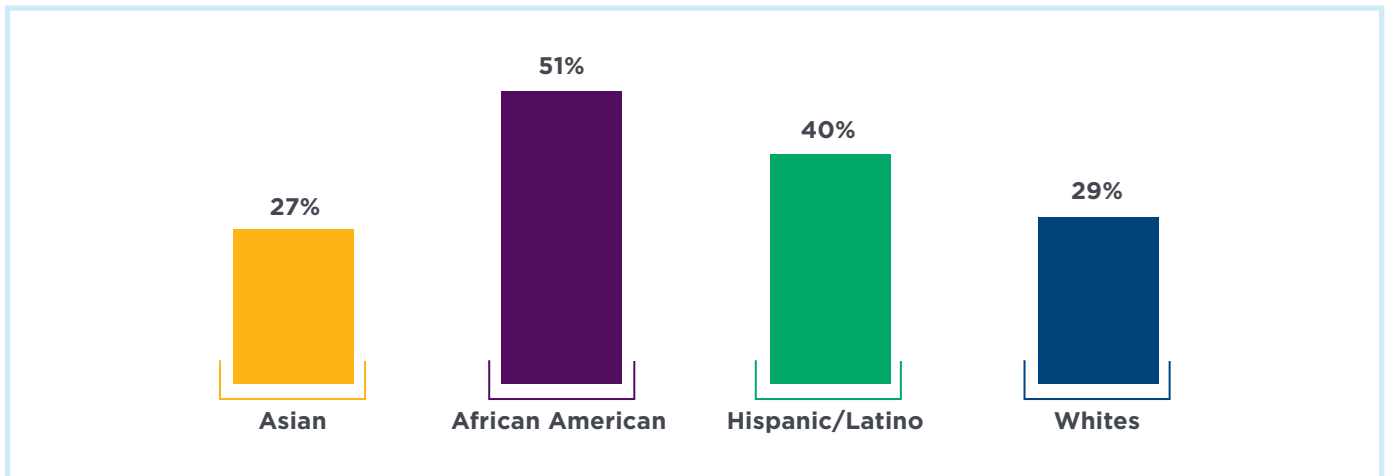
■ Matures ■ Baby Boomers ■ Gen X ■ Millennial ■ Gen Z



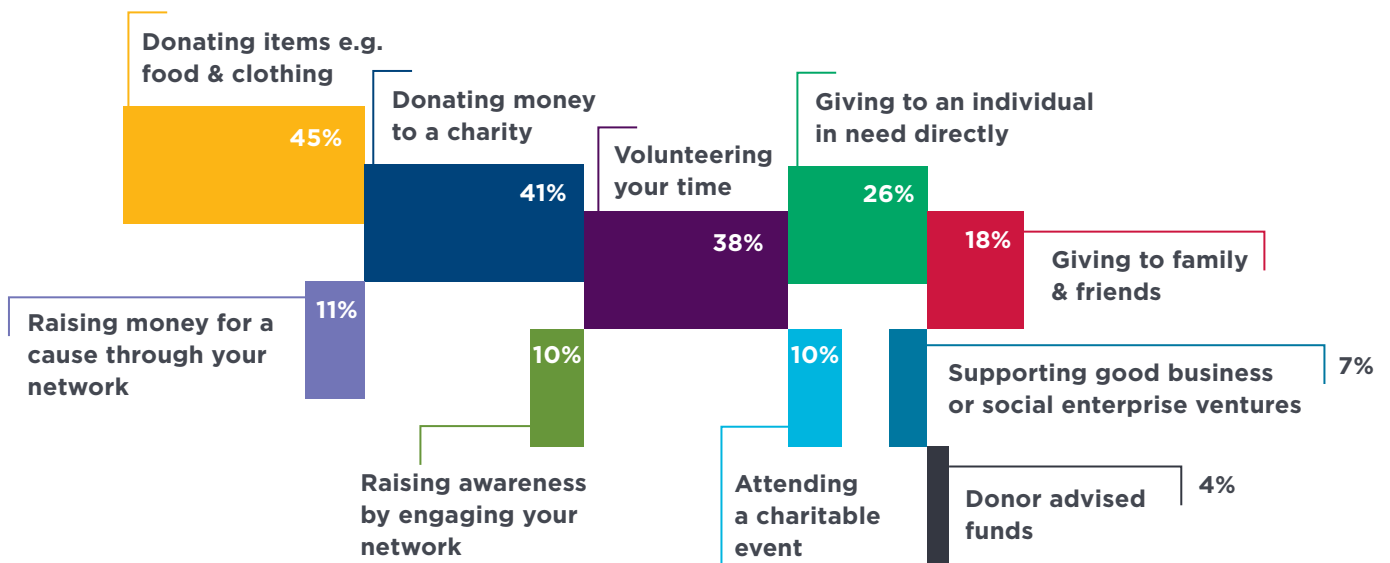
Racial minorities show higher openness to solicitation than they did in 2018 and 2019.



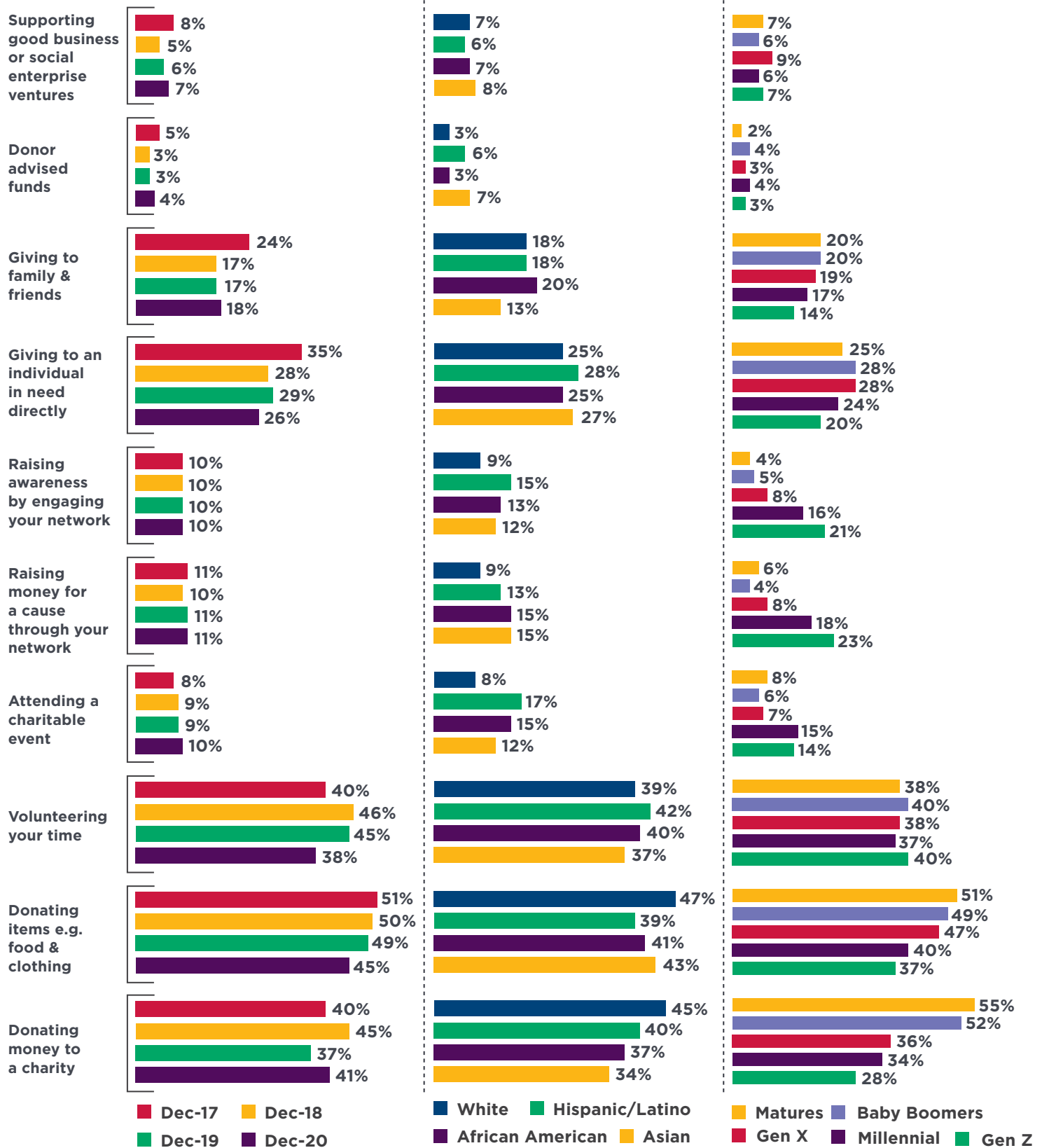
Racial minorities also express higher preferences to donate to a charity serving specific needs affecting their ethnic community.



Respondents were asked to identify the top 3 most impactful ways to make a difference. Below are their choices:



With some differences, this ranking has held relatively stable since 2017 and across racial categories. The most significant differences occur across generational lines.



When asked what most signals that a charity is trustworthy, the top factors in December 2020 were:

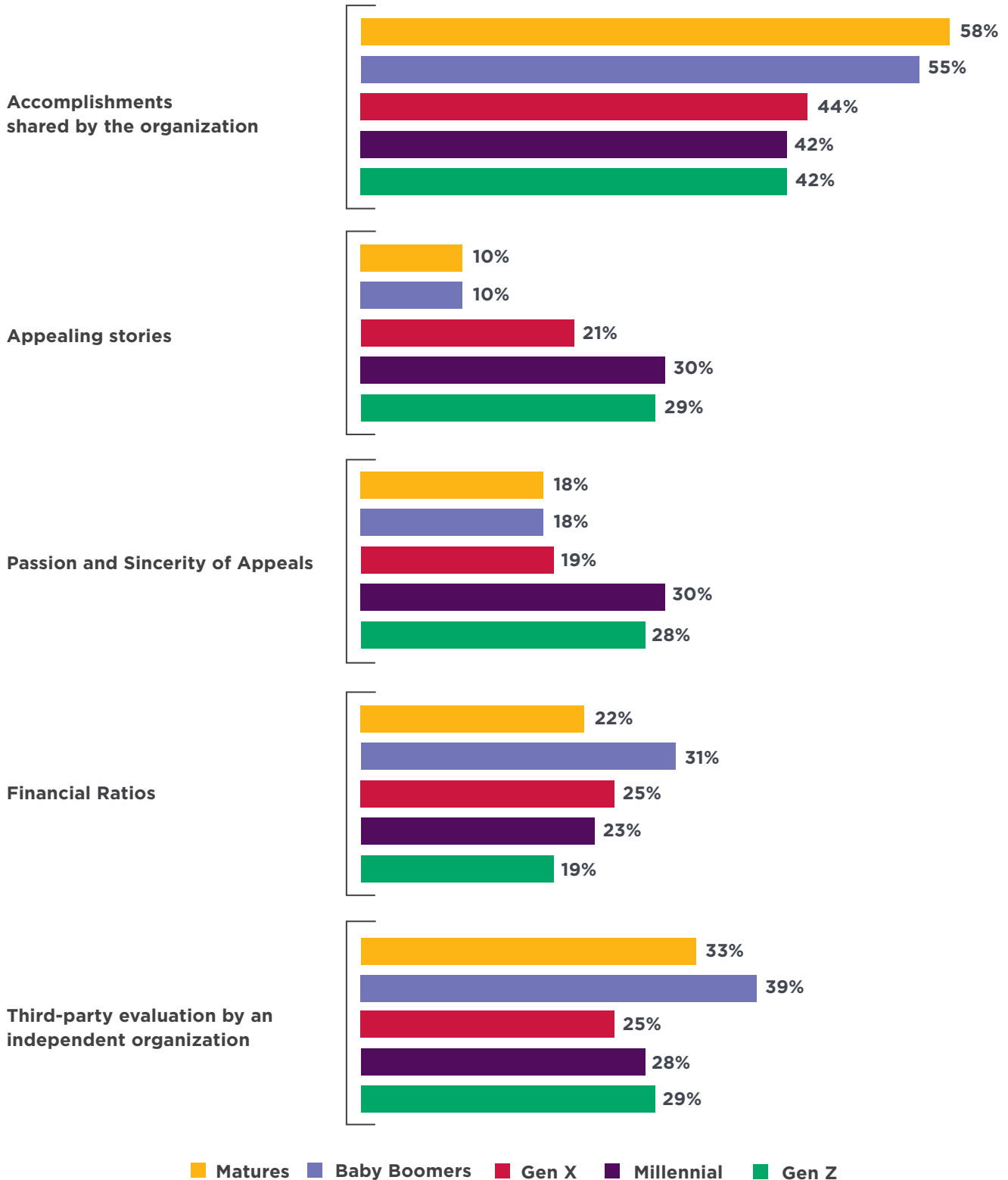


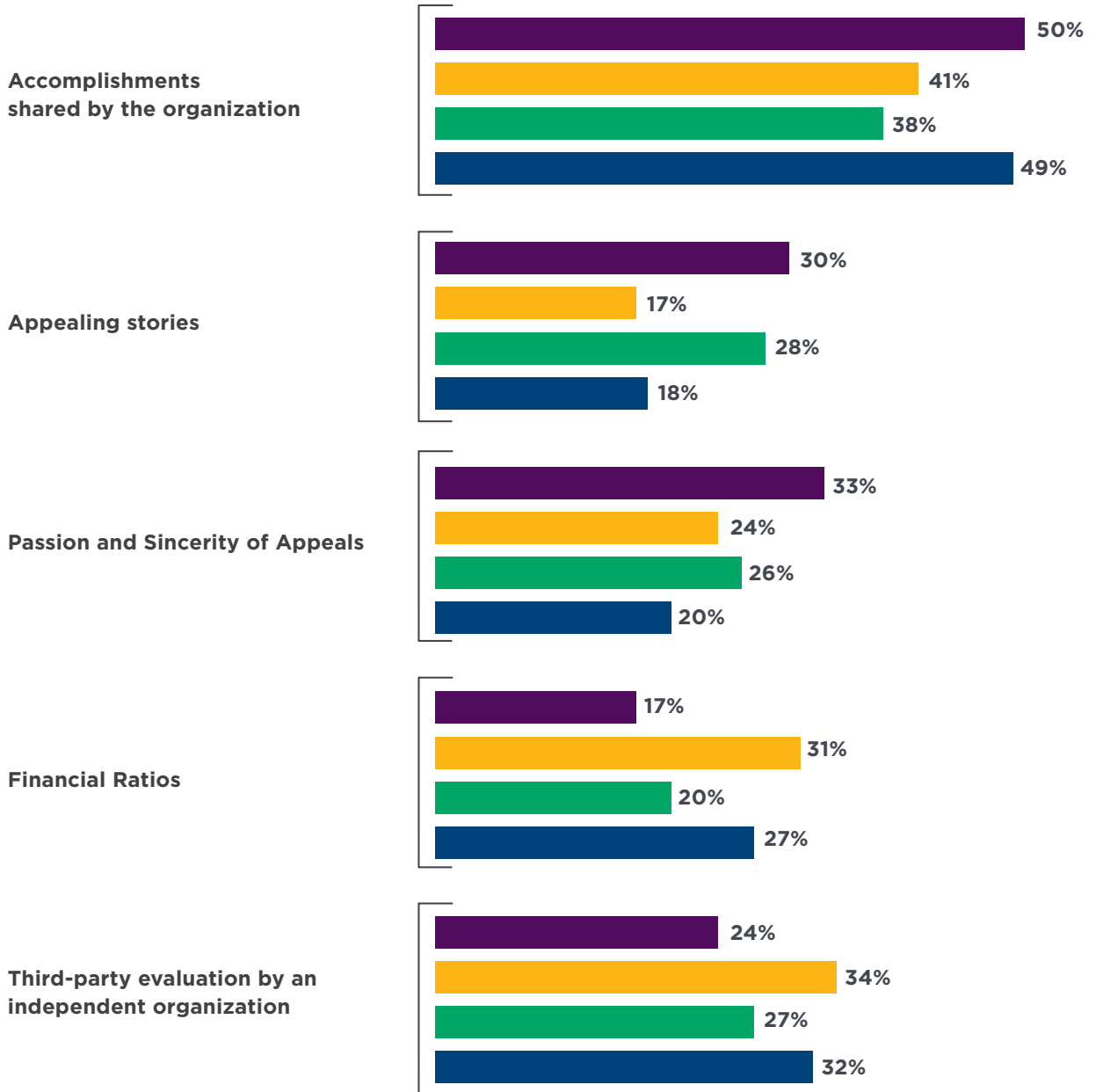
When the same question was asked in August 2020, accomplishments shared by the organization had dropped significantly—making trust signals such as third-party evaluations, name recognition, and opinions expressed by family and friends relatively more important. By the end of 2020, the top signals of trust seem to be getting closer to pre-pandemic numbers:

	Dec-20	Aug-20	Dec-19	Dec-18	Dec-17
#1	Accomplishments shared by the organization 47%	Third-party evaluation by an independent organization 36%	Accomplishments shared by the organization 50%	Accomplishments shared by the organization 54%	Accomplishments shared by the organization 44%
#2	Third-party evaluation by an independent organization 31%	Name Recognition 34%	Third-party evaluation by an independent organization 32%	Third-party evaluation by an independent organization 33%	Third-party evaluation by an independent organization 39%
#3	Name Recognition 29%	Accomplishments shared by the organization 30%	Financial Ratios 28%	Financial Ratios 30%	Financial Ratios 35%
#4	Financial Ratios 25%	Opinions expressed by friends & family 21%	Name Recognition 28%	Name Recognition 27%	Name Recognition 27%
#5	Passion and Sincerity of Appeal 23%	Financial Ratios 19%	Passion and Sincerity of Appeal 22%	Passion and Sincerity of Appeal 22%	Opinions expressed by friends & family 22%



Accomplishments shared by the organization was most frequently chosen as a top signal of trust across race groups and generations. However, different generations and racial groups say they assess trust differently.

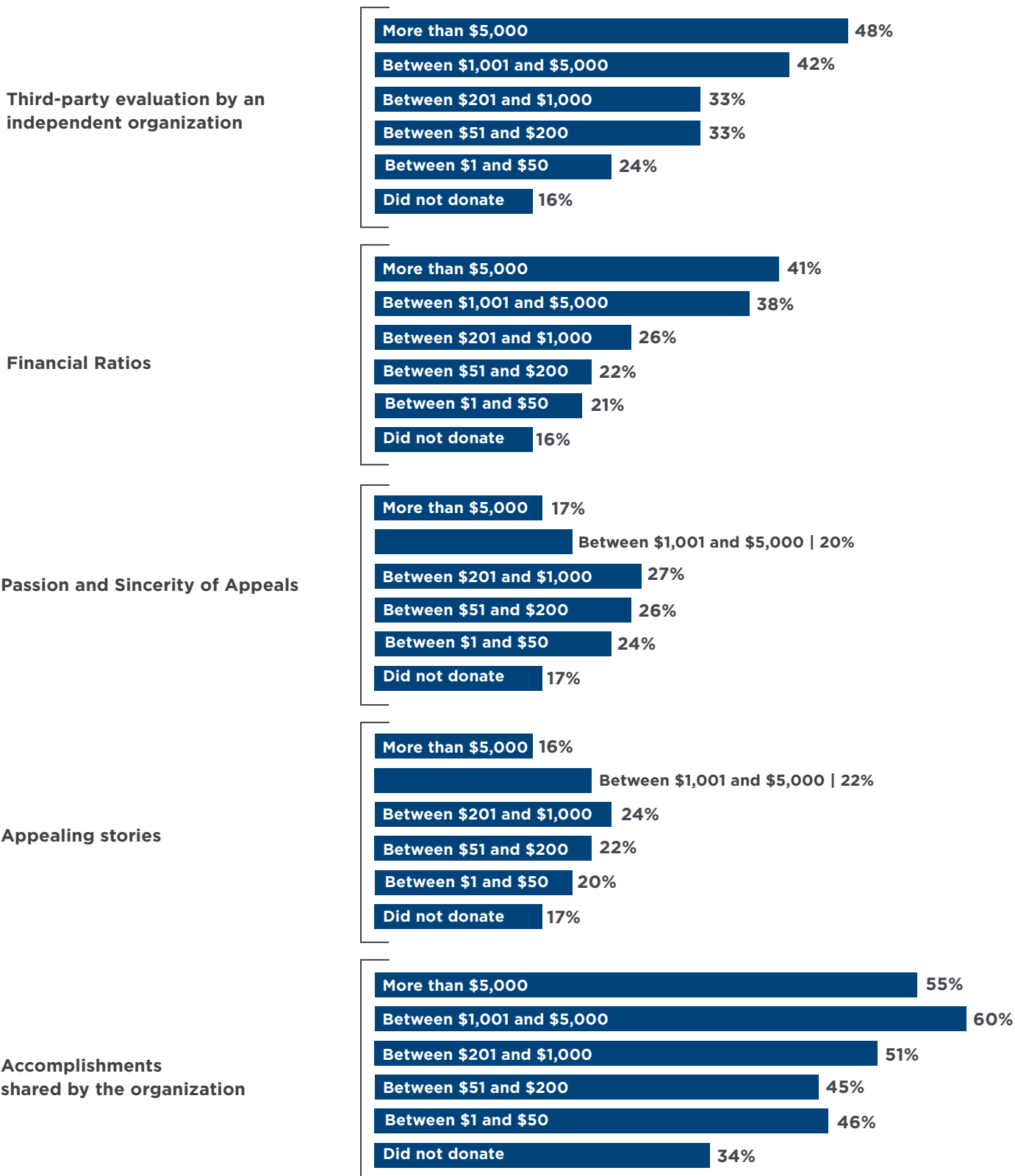




■ African American
 ■ Asian
 ■ Hispanic/Latino
 ■ White



Some trust signals, like third-party evaluations and financial ratios, tend to be more important for higher giving levels:

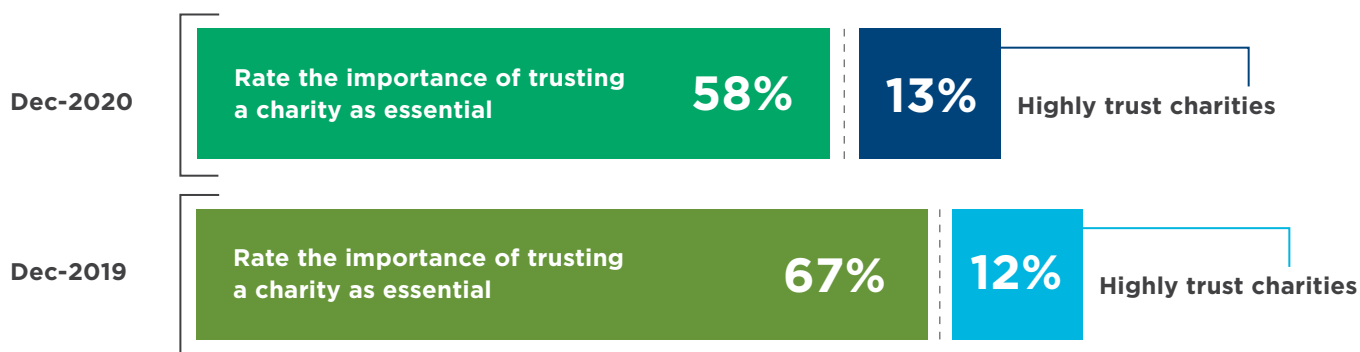




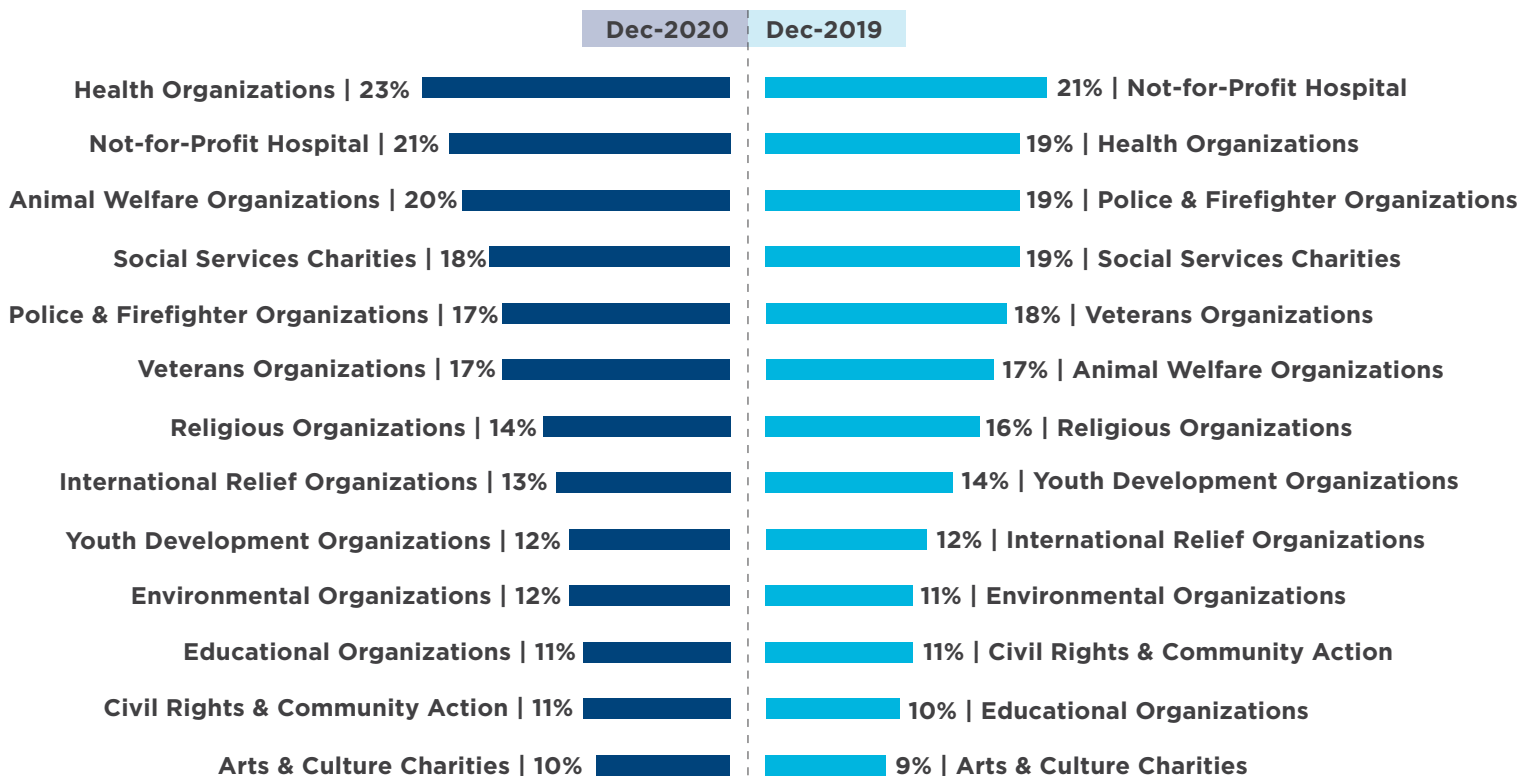
Canadian Donor Trust

There is ample space to build trust for charities in Canada, with only 13% of respondents highly trusting charities, even though 58% of respondents rate the importance of trusting a charity before giving as 9 or 10 (Essential) on a 10-point scale.

As with U.S. results, our findings suggest that there has been a significant erosion in reliance on trust as a giving indicator, with the portion of respondents who attribute high importance to trust before giving dropping from 67% in December 2019 to 58% in December 2020.



The most trusted charity types in Canada are: (1) health organizations, (2) not-for-profit hospitals, and (3) animal welfare organizations.

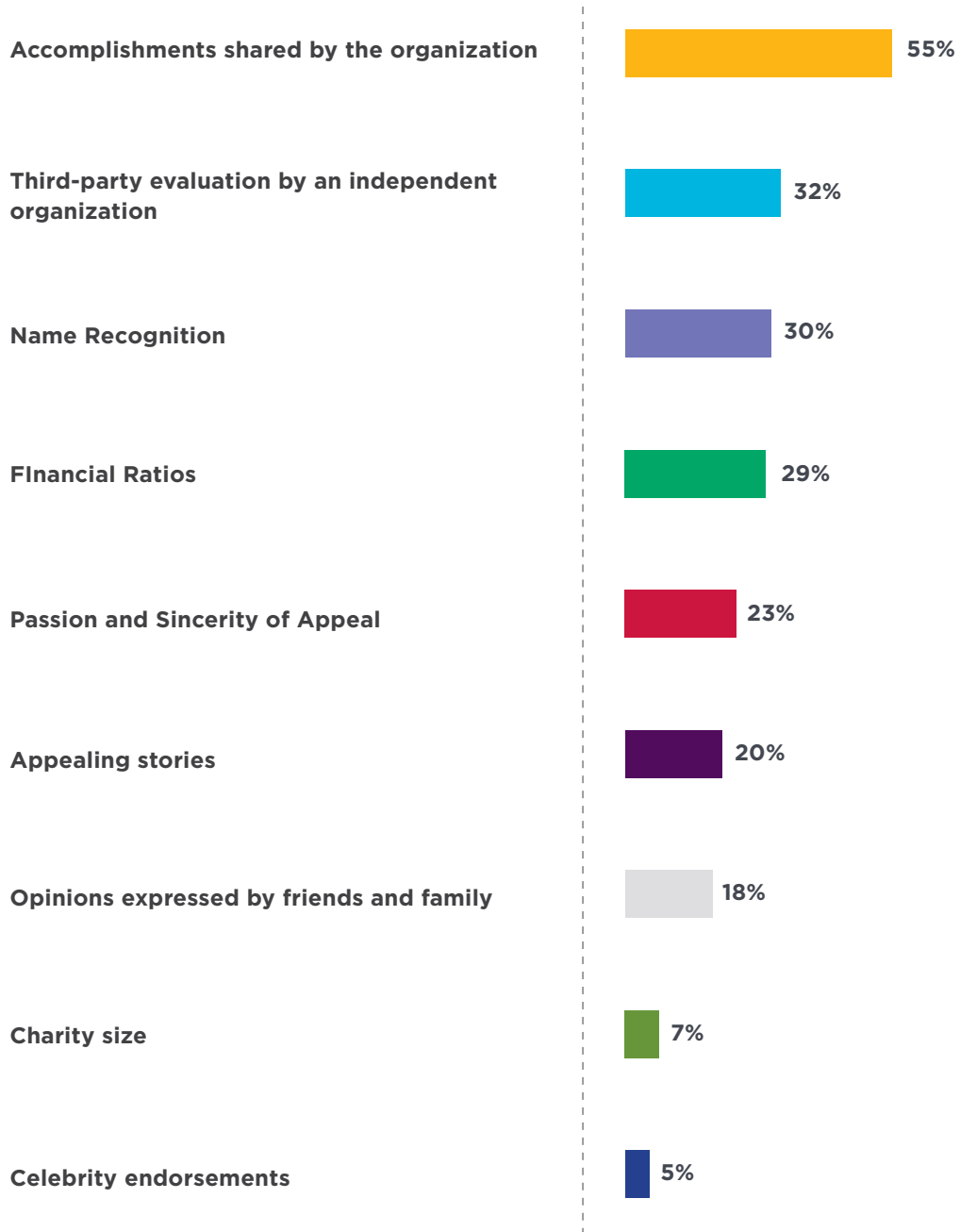


U.S. respondents place higher relative trust in religious organizations, the category which holds the top spot with 24.6% of participants reporting highest trust.





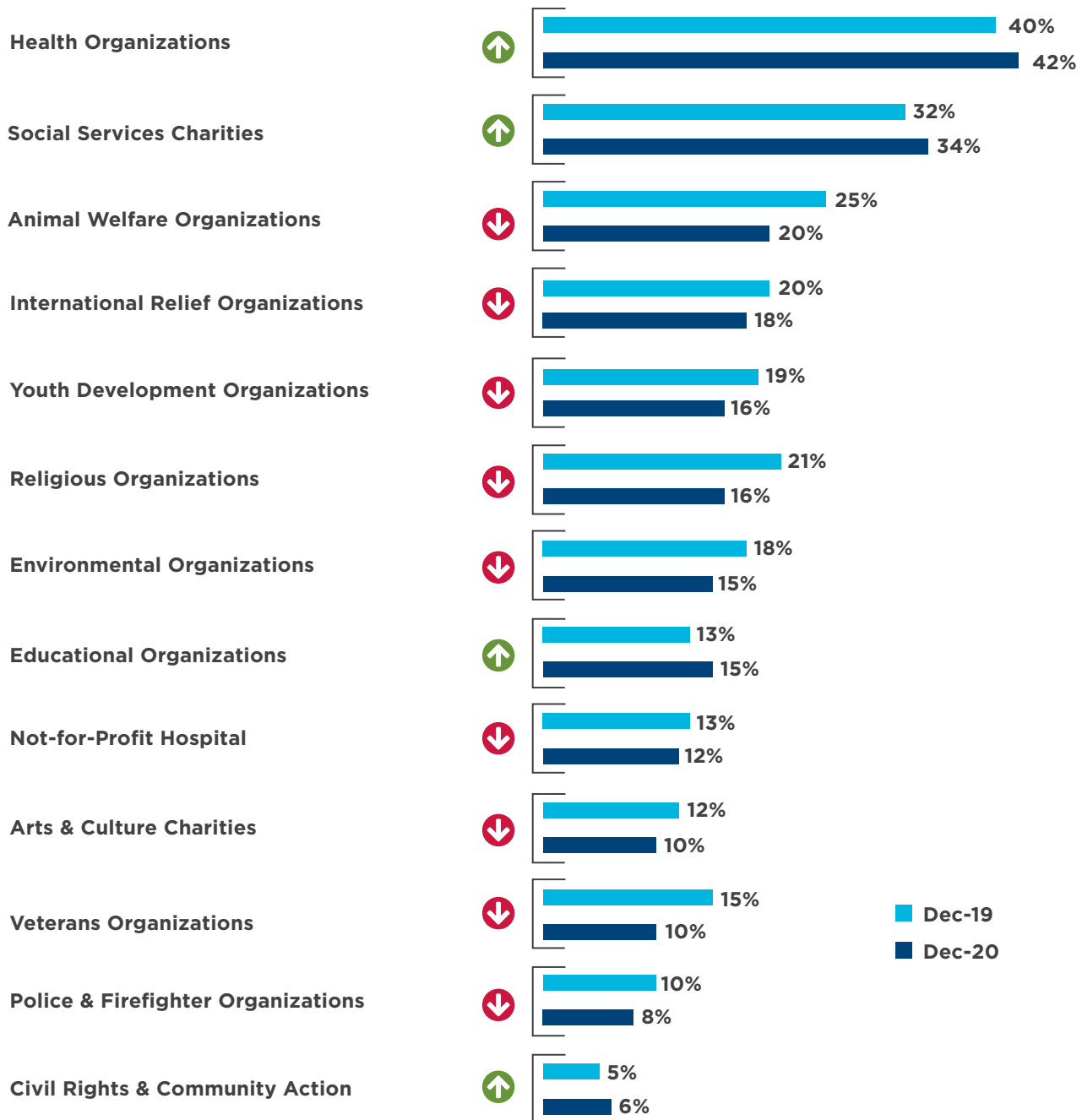
When asked what most signals that a charity is trustworthy, the top factors for Canadians in December 2020 were: (1) accomplishments shared by the organization, (2) third-party evaluation by an independent organization, and (3) name recognition. These are the same top factors identified by their American counterparts.



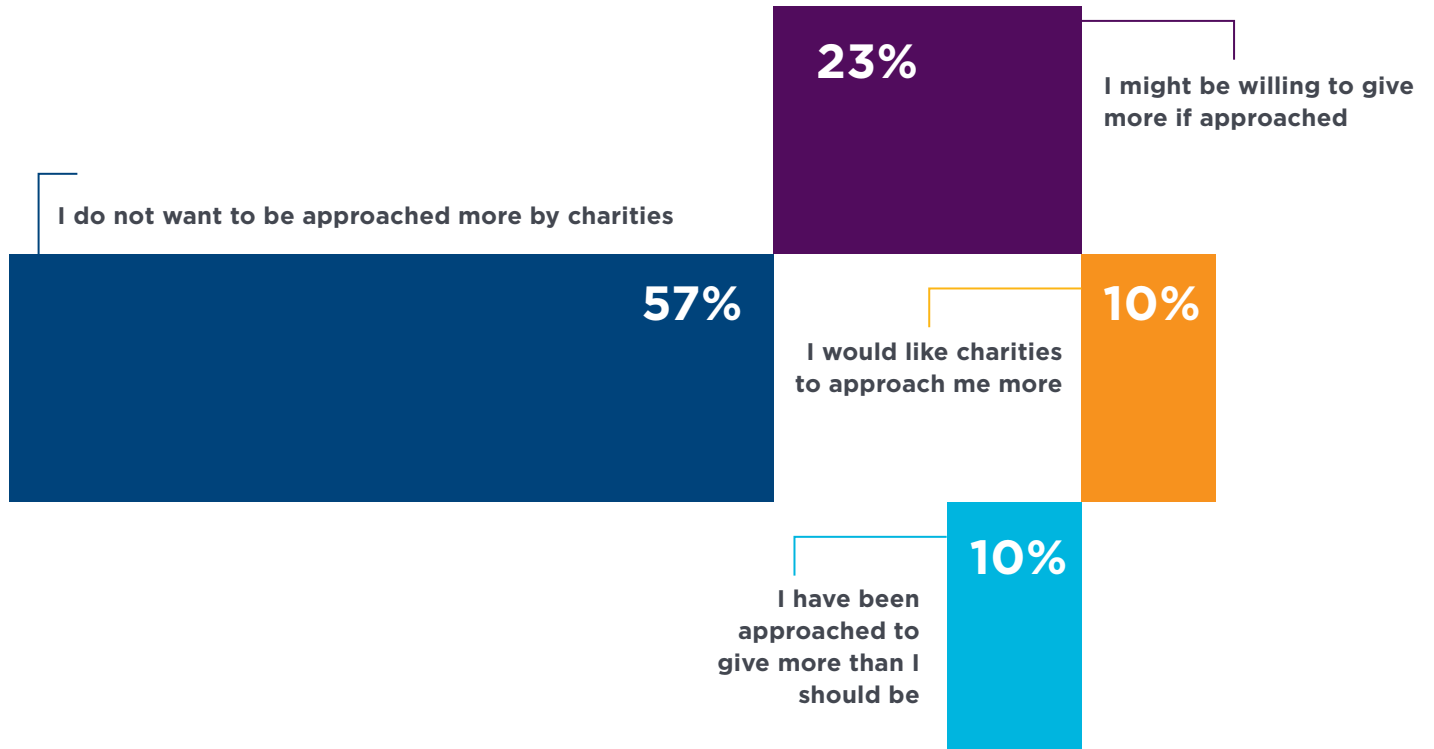


When asked to identify the charity categories Canadians donated to during 2020, the most frequent responses were (1) health organizations, (2) social service charities, and (3) animal welfare organizations. As compared to their U.S. counterparts, the self-reported rates of Canadian contributions for health organizations and social service charities is very high. The highest contribution rate reported by U.S. participants is 26% for social service charities.

However, out of 13 charity categories in our survey, 10 saw a drop in the portion of Canadian participants that report giving to them during 2020 as compared to 2019.



About one-third of Canadians say they would like charities to approach them more or might be willing to give more if approached.





Conclusion

The 2021 Donor Trust Report marks our fourth year tracking public attitudes about charity trust and giving. Knowing the deep and broad repercussions of COVID-19, our report aims to better understand how trust for U.S. charities was affected by the pandemic and to identify important giving trends.

Below are our top takeaways:

The portion of the population that highly trusts different charity types was relatively unchanged during 2020, with the exceptions of environmental organizations and civil rights and community action organizations.

In fact, we found that the portion of respondents who highly trust charities has remained relatively steady between 2017 and 2020. What is more, most charity categories—including charity categories which experienced a significant increase or decrease in contributions during 2020—did not experience significant changes in donor trust. The most significant changes (of 3 points or more) between December 2019 and December 2020 involve environmental organizations (which were impacted by heightened attention on environmental issues in 2020), as well as civil rights and community action organizations (which are likely affected by the increased attention to racial issues during 2020). Other charity categories with noteworthy shifts since 2017 include religious organizations (which face lower trust among younger generations) and police/firefighter organizations.

As pointed out by the Dorothy A. Johnson Center for Philanthropy, the nonprofit sector has a unique opportunity to build public trust by fostering transparency, increasing participation, and demonstrating greater commitment to equity.¹⁴

The ongoing crisis nudges charities to build their virtual presence, a trend that may endure after the COVID pandemic and could help engage younger donors.

Not surprisingly, self-reported donations through channels that traditionally called for in-person interactions (such as fundraising events and contributions at the checkout counter) were low during 2020. In a study tracking Blackbaud nonprofit clients, the organization found that, during 2020, one-time online giving grew by 15.6% and channel disruptions resulted in an email conversion increase of 17.9%.¹⁵ Being responsive to changing donor needs while juggling significant competing demands is an ongoing challenge for charities.


Our survey results suggest that the drop in donor participation rates identified by Indiana University¹⁶ continued during 2020 — even as total contributions from individuals continue to increase. This is a worrisome trend as we strive to build a diverse and inclusive charitable sector.

¹⁴ Dorothy A. Johnson Center for Philanthropy in *11 Trends in Philanthropy for 2021*, January 2021.

¹⁵ Snusz, M., Ahrens, R., Ashmore, D., Leaver, E. (2021). *Blackbaud Luminare Online Benchmark Report 2020 (2021)*.

¹⁶ *The Indiana University Lilly Family School of Philanthropy in The Giving Environment: Understanding Pre-Pandemic Trends in Charitable Giving*, July 2021.





The portion of participants that report donating to a charity type is not necessarily a good predictor of revenue for that charity category. Instead, it is a gauge of participation. The sector is facing a participation crisis where, despite growing overall giving, the portion of Americans contributing to charities is decreasing.¹⁷ Based on 2019 and 2020 self-reported giving to different charity types, our results suggest that the trend continued during 2020.

This is cause for concern, as the ability of charitable organizations to thrive in the future is closely tied to their ability to engage rising (and more diverse) generations. Additionally, the priorities of wealthier donors do not always align with the general public. For instance, in the *Give.org Donor Trust Special Report* on charity impact, we found that, when asked to prioritize either program depth or program reach, people who did not donate were more likely to prioritize depth, while people who donated more than \$5,000 were more likely to prioritize reach.¹⁸

Young people and minorities are not disinterested in charity. In fact, these groups express higher desire to be approached by charities than their counterparts.

When engaging minority and younger donors, the good news is that they express relatively high desires to be approached by charities. What is more, African Americans and Hispanics reported higher openness to solicitation at the end of 2020 than they did the previous 2 years, suggesting an opportunity for charities to engage.

Reaching a diverse set of donors requires a deliberate strategy to connect with their preferences, language, and culture. An authentic effort involves starting from within the organization to build meaningful long-term connections.

In previous reports, we noted that different generations and racial groups tend to assess their trust differently and support different charity types. That continues to be true, but this year we decided to flip the script, focusing on charity types. This report highlights the portion of participants that reported donating to 13 charity types in 2019 and 2020; and then compares donor profiles for each charity type to the general donor population.

Donor profiles for each charity type are bound to deviate from the overall donor sample. In fact, concentration in certain demographic groups can be a sign of diversity in donor preferences or of successful targeted strategies. On the other hand, it can reflect outreach gaps and opportunities for engagement. BBB's Give.org continues to encourage charities to be deliberate in their efforts to build trust and strengthen their bond with different donors. Survey results show that donor preferences are diverse, making segmenting and targeting not only appropriate, but perhaps central to the sector's pluralism and future.

¹⁷ Indiana University Lilly Family School of Philanthropy in *The Giving Environment: Understanding Pre-Pandemic Trends in Charitable Giving*, July 2021.

¹⁸ *The Give.org donor trust special report: Charity Impact* (2021).



Methodology

In this report, we reference data gathered through the December 2020, 2019, 2018, and 2017 Donor Trust Surveys, each with more than 2,100 adult respondents in the United States. Results from the survey conducted in December 2020 are first released in this report. Results from the December 2019, 2018, and 2017 surveys may have also been published in former *Give.org Donor Trust Reports*.





We commissioned an electronic survey of more than 2,100 adults across the United States and more than 1,000 adults across Canada during December 2020 (see Tables 1 and 2). The margin of error for the December 2020 survey in the United States is 2% (with 95% confidence level), and the margin of error for the December 2020 Canadian survey is 3% (with 95% confidence level).

Table 1 — Profile of Respondents in the United States

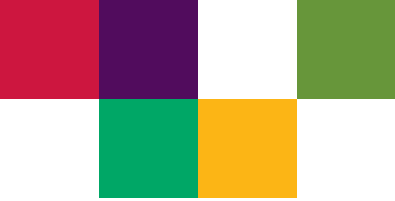
By Age	18-35	36-45	46-55	56-65	>65		
	30.20%	18.70%	15.92%	7.12%	28.06%		
By Gender	Female	Male	Non-binary	Transgender	Prefer not to answer	Other	
	54.52%	44.07%	0.27%	0.5%	0.55%	0.09%	
By Annual Household Income (in thousands)	<30	30-59	60-89	90-119	120-149	150 and more	Prefer not to answer
	17.79%	28.33%	18.80%	12.32%	5.02%	10.77%	6.98%
By Education	Graduate	Bachelor's	Associate's	High School	Prefer not to answer		
	18.29%	28.88%	19.75%	30.66%	2.42%		
By Ethnicity	African American	Asian	Hispanic/Latino	Other	White		
	14.92%	7.98%	11.86%	2.15%	63.09%		
By Religion Attendance	Never	Rarely	Frequently	Occasionally	Don't know	Prefer not to answer	
	30.43%	20.30%	24.45%	20.39%	1.41%	3.01%	
By Region	Northeast	Southeast	Southwest	Midwest	West		
	18.66%	30.84%	10.26%	21.72%	18.52%		



Table 2 – Profile of Respondents in Canada

By Age	18-35	36-45	46-55	56-65	>65		
	29.84%	17.66%	18.56%	18.06%	15.87%		
By Gender	Female	Male	Non-binary	Transgender	Prefer not to answer and other		
	49.5%	49.6%	0.50%	0.30%	0.10%		
By Annual Household Income (in thousands)	<30	30-59	60-89	90-119	120-149	150 and more	Prefer not to answer
	9.67%	28.22%	20.54%	18.25%	7.88%	9.37%	5.98%
By Education	Graduate	Bachelor's	Associate's	High School	Prefer not to answer		
	15.47%	31.14%	20.06%	31.24%	2.10%		
By Ethnicity	African American	Asian	Hispanic/Latino	Other	White		
	3.79%	17.37%	1.20%	4.79%	72.85%		
By Religion Attendance	Never	Rarely	Frequently	Occasionally	Don't know	Prefer not to answer	
	37.23%	24.75%	14.37%	20.86%	1.50	1.30%	
By Region	British Columbia	Alberta	Saskatchewan and Manitoba	Ontario			
	13.17%	12.08%	7.39%	38.12%			
	Quebec	Atlantic Canada	Northern Canada				
	22.36%	6.49%	0.40%				





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 explores the heterogeneity of donor perceptions. For instance, we reference results based on age, race, or giving level to illustrate differences in donor attitudes and gain understanding of the diversity of attitudes toward the sector.¹⁹

We use the self-reported information of survey takers. While there is no single consistent date range for generational divides, the generational ranges used in this report mirror those used by the Pew Research Center and are shown in Table 3.

Table 3 – Generational Ranges

Generation	Generation Z (18 and older)	Millennial Generation	Generation X	Baby Boomers	Matures
Year Born	1998 to 2004	1981 to 1997	1965 to 1980	1946 to 1964	1928 to 1945
Age (in 2019)	18 to 23	24 to 39	40 to 55	56 to 74	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.

We know that survey responses reflect donor perceptions and are not 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 encouraging increased generosity.

To determine whether a charity is accountable and trustworthy, the BBB Wise Giving Alliance (BBB WGA) uses 20 BBB Standards for Charity Accountability, based on charity governance, finances, fundraising practices, and results reporting. BBB WGA produces reports on charities based on these standards, and the reports are available free of charge to the donating public on Give.org. This report aims, in part, to understand disconnects between self-reported triggers and concerted trust criteria. In addition, we hope to identify opportunities that can help the sector build collective trust and succeed in the future.

¹⁹ 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.

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BBB Wise Giving Alliance (BBB's Give.org) is a standards-based charity evaluator that seeks to verify the trustworthiness of nationally soliciting charities by completing rigorous evaluations based on 20 holistic standards that address charity governance, results reporting, finances, fundraising, appeal accuracy and other issues. National charity reports are produced by BBB's Give.org and local charity reports are produced by local Better Business Bureaus - all reports are available at Give.org.

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