GIVING IN UNPRECEDENTED TIMES

A Lookback at 2020
U.S. Giving Data & Trends
GivingTuesday Data Commons

The GivingTuesday Data Commons works with partners across sectors and borders to understand the drivers and impacts of generosity, explore giving behaviors and patterns, and use data to inspire more giving around the world. Through our data work, we identify and share innovative practices that can help grow generosity. With over 100 contributing partners and 50 global data labs, the initiative is the largest philanthropic data collaboration ever built.

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Introduction

2020 was a surprising and tumultuous year.

We experienced significant global health, social, and economic shocks due to the pandemic, alongside a groundswell of social movements around racial justice as well as ongoing political turmoil in the United States during one of the most turbulent years in memory. At the same time, 2020 was also remarkable for the ways that people across all borders, sectors and beliefs stepped up to help each other in response to the crises at hand with a renewed spirit of community, solidarity, and generosity.

With access to not only data underlying the largest benchmark of social sector fundraising data of U.S. 501c3 organizations but also other transactional datasets we collect and in-depth survey research to contextualize the trends, we are in a unique position to look back on 2020 and see how charitable giving in the U.S. shifted in response to the year’s unprecedented challenges.

Through additional analysis, this report provides a deeper look into patterns of giving beyond sector fundraising benchmarks to more clearly illustrate the effects of 2020 on a typical organization.

It’s important to note that this lookback primarily focuses on one facet of generosity: monetary giving to nonprofit organizations. We know that the events of 2020 also sparked a wave of generosity in all forms—gifts of time, voice, goods, and skills as well as acts of kindness. Where systems were overwhelmed or unable to meet the demand, neighbors, families, friends and strangers stepped in to weave together their own safety nets through giving circles, mutual aid networks, community fridges, and other acts rooted in reciprocity and mutuality that exist beyond a formalized social sector. While financial support for nonprofits is an important component of support and enrichment for communities, we aim to explore this full landscape of generosity and how it shapes the way we think about community in subsequent reports and research.
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Executive Summary

In the United States, total giving to charitable organizations increased in 2020, but with clear winners and losers, and in ways that bucked previous trends. We saw three key trends in the data:

- **Donor mobility increased more than ever before, particularly in small donations.**
  With a year of marked overall donation growth, we expect to see all metrics increase, but donor retention continued to drop while donor acquisition surged, particularly for donors giving small amounts. This was likely due to increased shifts in where and when donors gave last year, with more donors giving to pandemic-related causes. 2020 was also unique in that it bucked the multi-year trend of fewer donors giving.

- **Cause area winners and losers followed societal challenges.**
  While total giving was up, some cause areas saw significant gains, while others suffered lost revenue. Health and Human Services showed the most growth, which mirrored the increased demand for services due to COVID-19 and the groundswell of response in pursuit of racial justice. Arts and Culture showed clear declines, reflecting lost access due to stay-at-home orders, social distancing, and reduced event-based fundraising opportunities.

- **Widening inequality affects smaller revenue nonprofits, not just lower wealth individuals.**
  Even in cause areas that experienced increased giving in 2020, most of that giving focused on organizations with the greatest fundraising totals. The typical nonprofit experienced much lower results during 2020. We also saw a dramatic increase in the percentage of nonprofits that did not fundraise each month, particularly for smaller nonprofits.
Based on the trends we saw in the past year, we predict a few likely trends in 2021:

- **Charitable giving patterns will return to pre-2020 trends.**
  We expect fewer and weaker giving moments to drive fundraising. We anticipate this may result in a decrease in YOY revenue, huge retention drops for human services, and a spike in recapture rates for other causes.

- **Smaller organizations will appear to do better in 2021.**
  Organizations that saw a drop in annual revenue, but remained solvent, will rebound.

- **Small repeat/recurring donations will be an important tactic to upgrade donors.**
  However, prevalence of repeat donations will stagnate as there may be fewer giving moments that lead to fewer concrete reasons for donors to activate within a year.

These are factors we plan to measure and track, and we will continue to design metrics and methodologies to support additional learning.

Based on these trends, here are our top recommendations for engaging donors in 2021 (and beyond):

- **Create and share giving moments.**
  Highlight events that reinforce the urge to give. Shared moments, such as giving days, crisis response, holidays, awareness days, and community events, tap into a sense of community and urgency that inspire increased giving of all types.

- **Don’t shy away from engaging givers, especially in tough times.**
  We know that, even when fundraising is dramatically down and presents a lower return on investment during hard times, organizations that continue to engage givers regularly and diversify what and how they ask are more likely to reap outsized rewards when economic, health, and social crises subside.

- **Increase focus on recaptured donors and mid-size donors.**
  As fundraising returns to pre-2020 levels, there will be a larger-than-ever pool of recently lapsed (and likely highly engaged) donors. Look for ways to steward and engage them while also re-engaging mid-size donors who stagnated in 2020.
Dataset and Definitions

This report leverages the Growth in Giving dataset, a unique, longitudinal database of individual donation transactions in the United States representing millions of donors and billions of dollars donated to thousands of organizations. It is aggregated from many sources and not limited to a single platform, which allows us to see a more complete view of giving trends.

We also use other transaction data we have collected, volunteer behavior data, and survey research to provide a deeper understanding of the trends. To contextualize the results, we need to share four unique aspects of the transaction data:

- **We focus on relatively stable organizations.**
  Organizations need to appear in our dataset for three consecutive years, and we limit year-over-year growth across those three years to be within three standard deviations of organizations in the dataset.

- **Our data focuses on 501c3 nonprofit organizations with no more than $25M in contributions.**
  By size, we represent small-to-medium sized organizations only—we eliminate any organization with over $25M in our dataset in the previous year.

- **We know limited information about each donation.**
  We know how much was given and approximately when. We know to which organization it was given and can separate between individuals giving to that organization. However, the data doesn't show whether the gift was online or offline, if it's an automated recurring gift, its location, nor other specific details.

- **Data from CRM systems may be slow to be entered, and entries are variable in how they are dated.**

Throughout this report, the terms “donor,” “acquisition” and “retention” refer to donors to an organization—acquired donors are new to that organization, not necessarily new givers to charity. Likewise, retained and recaptured donors refer specifically to the donors who have given to the organizations, irrespective of whether they are also giving elsewhere.
**Dollars**

**TOP TAKE AWAYS**

- We estimate 2020’s tumultuous fundraising to be up 5.2% year-over-year when compared to 2019.
- Super-sized retained donors (~50% of growth) and **recaptured donors** of all sizes (~35% of growth) drove this dollar increase.
- **Donors shifted their giving to pandemic-related causes**, with big gains in “new donor” acquisition (+53% of total revenue gain) largely offset by big drops in decreased “donor retention” (-38% of total revenue gain).
- **Growth was highest in repeat donors**, accounting for 82% of growth despite representing 46% of dollars donated.

**ENGAGEMENT OPPORTUNITIES**

- **Explore options for cultivating mid-size donors.**
  They showed a decline in their giving, but giving from small and supersize donors grew substantially.

- **Offer more opportunities for donors to give additional gifts over time.**
  When donors are given good reasons to give again, they will do so! It doesn't take a pandemic to make this work, but it will require being proactive in sharing compelling opportunities with donors.
To best understand what drove growth in 2020, we examined specific donor types along with donor sizes.

DATA METHODS

- We summed up donor value across the year and split it into 5 segments that balance nicely between donation counts and dollar values.
- We further split this matrix by our four donor types.
- We also split the four donor types by organization cause.

DATA SUMMARY: DOLLARS

Looks can be deceiving. The above chart seems to show a typical year of giving—fairly flat weekly trends, tax-motivated giving at the middle and end of the year, and a GivingTuesday bump to kick off year-end fundraising.
When we examine year-over-year growth trends, we see a bump in giving in April, as COVID-19 fundraising and demand for services grew. We see a downward trend until October, and then an upward growth trend in November and December.

Taking a closer look at this year-over-year growth data, we saw that the aggregate graph hides an extremely volatile year in fundraising, with bigger “winners” and “losers” than we’ve experienced before. These details help tell the story of giving in 2020 and which donors drove the year’s growth.

The major driver in revenue growth is the largest donor size.

- Giving from mid-size donors outright decreased in dollars and donations. There isn't a clear indicator of what is driving this trend.
- Small donors dramatically increased in number, but they make up less than 10% of the total dollars.
Looking at this over time:

- All donors were responsive to COVID-19, either increasing revenue or stopping losses with their giving to nonprofits in April.
- Larger donors did not sustain early pandemic-level giving, as year-over-year percentage increases dropped off post-April.
- This was not true at smaller sizes, which did maintain the April bump, suggesting post-April fundraising was comparable to 2019 at this donor size.
- We see upticks at most donor levels in November and December, which we will examine more closely.

**CONCERN ABOUT COVID-19 CORRELATES WITH INCREASED GIVING**

Our 2020 U.S. Giving Survey showed that the more concerned givers were about the effects of COVID-19, the more likely they were to take action by giving. While financial uncertainty impacted donors’ ability and willingness to give, the opportunity to help with charitable giving was a motivator for donors.
## DOLLARS: BY DONOR TYPE

<table>
<thead>
<tr>
<th>DONOR TYPE</th>
<th>% 2020 DOLLARS</th>
<th>% OF TOTAL DOLLAR GROWTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>22%</td>
<td>53%</td>
</tr>
<tr>
<td>Retained (all but below)</td>
<td>37%</td>
<td>-38%</td>
</tr>
<tr>
<td>Repeat-Retained ($50,000+ donors)</td>
<td>29%</td>
<td>49%</td>
</tr>
<tr>
<td>Recaptured</td>
<td>12%</td>
<td>36%</td>
</tr>
</tbody>
</table>

We looked closely at donor types along with donor size to understand what drove growth:

- Dollars were driven most by repeat-retained “supersize” donors, the only retention category that increased year-over-year.
- Recaptured donors returned to donate at every donation size, contributing to over one-third of the overall growth in dollars.
- While “new” donors showed up, these gains were largely offset by retention losses. Because we see clear evidence of donor mobility—donors shifting where they gave—throughout the data, we think it’s most appropriate to consider these two numbers together.

To understand donor mobility, we calculated year-over-year dollar growth for each cause and donor type. While not all dollar mobility is explained by the impact of COVID-19 and pandemic-related response, we do see the greatest new and recaptured dollars in human services, with top-range dollar retention as well.

### IN THIS REPORT WE EXAMINE 4 TYPES OF DONORS THAT GAVE IN 2020:

- **Repeat-retained**: Donors who gave to the organization in 2018 and 2019, in addition to their 2020 gift.
- **New-retained**: Donors who gave to the organization for the first time in 2019, then gave again in 2020.
- **Recaptured**: Donors who gave before 2019 to the organization, did not give in 2019, then gave again in 2020.
- **New**: Donors who never gave to this organization before, but gave in 2020 for the first time.
Despite making up only 46% of revenue, donors giving two or more donations made up 70% of the year-over-year growth in donation dollars.

The fundraising spike in April was spread across donors who gave once as well as multiple times. While growth in one-time donors fell off over the rest of the year, donations continued well into the rest of the year, with a peak in givers giving for the second to sixth time in November and December.
LARGER GIFTS GOING ONLINE?

Our analysis in mid-2020 showed substantial growth in online giving driven by the need to pivot from “traditional” fundraising. While online fundraising methods tend to be optimized for lower-level gifts, survey responses indicate that high-value donors are very likely to use online mechanisms as well. This suggests there may be ample opportunity to increase donation asks when using online fundraising tools.

The fundraising spike in April was spread across donors who gave once as well as multiple times. While growth in one-time donors fell off over the rest of the year, donations continued well into the rest of the year, with a peak in givers giving for the second to sixth time in November and December.
Donors

TOP TAKE AWAYS

- A 1.3% top-line gain in donors was driven almost completely by an 11% growth in small donations between $101 and $500—higher growth than seen in the past five years in this size bracket.
- The smallest donations (<$100) also broke a five-year trend of losses, increasing by 0.5%.
- Unlike in dollars, new donors grew beyond the drops in retention, with 59% of growth accounted for by new-minus-retained donors. The rest of the year’s donor growth (41%) was driven by recaptured donors.

ENGAGEMENT OPPORTUNITIES

- Use frequent asks for smaller donors, as they are more willing to give incrementally.
  We see this in giving throughout the year, and small donor giving maintains its year-over-year growth after April.

- New donor acquisition is an effective strategy to increase awareness among donors but does not increase dollars alone.

- Effective recapture works to increase the number of donors giving to an organization.
  Given the high level of donor mobility, we expect this to be a critical strategy for 2021.
By far, the largest driver of total donors are small donations.

As we saw above, these small donors sustained their giving throughout the year; unlike large donors, they gave in April and then continued to give at or above 2019 rates, thereby maintaining year-over-year gains. Surprisingly, unlike revenue gains, the smallest donations did not show substantial year-over-year growth; only the $101-$500 range did.

It is worth noting that both of the above gains are reversals of the five-year trend of fewer people giving more.

Over the last five years, donation growth has varied with donation (and therefore donor) size, with the largest sizes growing more than the smallest. In fact, the smallest donations have flattened or even decreased growth, while mid-size and large donations continue to grow. This year, these trends were disrupted: Micro donations showed growth for the first time in three years, small donations showed an explosion in growth, and major donations contracted for the first time.
Looking at donor type, we see no types are neutral—new and recaptured are up (~8% each), retained donors are down (repeat-retained decreased 5%, new retained decreased 15%). This is also consistent with the trend of increased donor mobility in 2020.
Looking at giving throughout the year, new and recaptured donors increased significantly in April, while the losses for retained donors happened both before and after April.

This suggests donors are mobile in not just who they give to, but when they give. For example, a donor who gave to an arts organization in September 2019 may have shifted their giving to support Human Services in April 2020.
Donor Retention

**TOP TAKE AWAYS**

- For the first time in our dataset, **retention dropped year-over year, while donors grew year-over year**. This indicates donors shifting giving across organizations.
- **Retention of donors to the same organization was down across the board for all donor sizes.**
- **Year-over-year growth in retention rates peaked in April at all donor sizes**, but did not sustain—consistent with donor mobility in cause and time. At the same time, recapture rates were higher for most cause areas.

**ENGAGEMENT OPPORTUNITIES**

- **Remind donors of the impact of their gifts. Thank and update them frequently to establish a stronger connection to your work.**
  The events of 2020 sparked a wave of generosity, reawakening many to the importance of charitable giving. Organizations have the opportunity to build on this to create repeat givers who can continue to meet the needs of their communities.

- **Consolidate newly acquired donors and continue to engage broadly.**
  2020 saw substantial mobility of donors across causes and organizations. It will be important for organizations to continue to engage newly acquired donors to improve retention rates.
SUMMARY: DONOR RETENTION

In the past few years, year-over-year change in retention of a donor to an organization has been oscillating between growth and contraction. Unlike in past years, year-over-year changes in retention did not correspond to changes in donors. Instead, we saw the second-largest drop in retention over the past ten years, while seeing the greatest growth in donors during the same time period.

DONOR RETENTION: BY DONOR TYPE

We saw conflicting trends in donor retention. Donor retention declined all year, except for a substantial spike in April.

<table>
<thead>
<tr>
<th>DONOR TYPE</th>
<th>% RETAINED</th>
<th>% YOY CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>New (last year)</td>
<td>19.8%</td>
<td>-8.2%</td>
</tr>
<tr>
<td>Recaptured</td>
<td>1.5%</td>
<td>-</td>
</tr>
<tr>
<td>Retained (last year)</td>
<td>60.5%</td>
<td>-2.2%</td>
</tr>
</tbody>
</table>

This happened despite upticks in new donors, newly retained donors, and recaptured donors, as well as an ongoing trend of increased repeat donations and recurring donations. Given our specific definition of a “donor” (a person giving to an organization), and clear winners and losers for causes and organization sizes, we believe that donations for COVID-19 relief were both additive and cannibalistic in 2020.
DONOR RETENTION: BY DONOR SIZE

Donor retention was highest for the largest donations. Retention loss was highest in the midrange. Given the lack of acquisition at these donor sizes to compensate for year-over-year dollar growth above, these donors may have upgraded to larger sizes when changing organization gifts, or dropped out of the dataset overall. Our US Giving Survey showed an increase in the percentage of donors who reported that they gave to 11 or more organizations. This may be an indication that some large donors were spreading their support among many causes during this turbulent period.

<table>
<thead>
<tr>
<th>DONOR TYPE</th>
<th>% RETAINED</th>
<th>% YOY CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1 - 100</td>
<td>36.3%</td>
<td>-1.1%</td>
</tr>
<tr>
<td>$101 - $500</td>
<td>51.5%</td>
<td>-5.5%</td>
</tr>
<tr>
<td>$501 - $5,000</td>
<td>60.8%</td>
<td>-6.9%</td>
</tr>
<tr>
<td>$5,001 - $50,000</td>
<td>67.2%</td>
<td>-6.7%</td>
</tr>
<tr>
<td>$50,000+</td>
<td>71.9%</td>
<td>-3.2%</td>
</tr>
</tbody>
</table>

NUMBER OF NONPROFITS DONATED TO

"GIVERS‘ SAMPLE  
\[\text{JAN 2019} \quad \text{OCT 2020}\]

\text{MEAN} = 3.9 \text{ NPs IN 2020}
Looking at these measures throughout 2020, we can also see that retention gains were highest in April, but didn’t sustain through the year.

Small new donor retention continued through June, then decelerated for the rest of the year, as the smallest donors continued to be the most mobile, and organizations as a whole struggled to retain donors.
For the first time in our dataset, retention dropped year-over year, while donors grew year-over year. This indicates donors shifting giving across organizations.

Retention of donors to the same organization was down across the board for all donor sizes.

Year-over-year growth in retention rates peaked in April at all donor sizes, but did not sustain—consistent with donor mobility in cause and time. At the same time, recapture rates were higher for most cause areas.

Remind donors of the impact of their gifts. Thank and update them frequently to establish a stronger connection to your work. The events of 2020 sparked a wave of generosity, reminding donornimportance of charitable giving. Organizations have the opportunity to build on this to create repeat givers who can continue to meet the needs of their communities.

Consolidate newly acquired donors and continue to engage broadly. 2020 saw substantial mobility of donors across causes and organizations. It will be important for organizations to continue to engage newly acquired donors to improve retention rates.
SUMMARY: BY ORGANIZATION SIZE

<table>
<thead>
<tr>
<th>ORGANIZATION SIZE</th>
<th>% ORGS(#)</th>
<th>% 2020 DONORS</th>
<th>% YOY GROWTH</th>
<th>% OF TOTAL DONOR GROWTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>up to $100K</td>
<td>12.0%</td>
<td>0.8%</td>
<td>9.1%</td>
<td>-0.8%</td>
</tr>
<tr>
<td>$100k-$250K</td>
<td>19.4%</td>
<td>3.8%</td>
<td>5.3%</td>
<td>-4.3%</td>
</tr>
<tr>
<td>$250k-$1M</td>
<td>43.0%</td>
<td>26.1%</td>
<td>5.4%</td>
<td>-1.9%</td>
</tr>
<tr>
<td>$250k-$1M</td>
<td>23.7%</td>
<td>51.7%</td>
<td>4.3%</td>
<td>-1.5%</td>
</tr>
<tr>
<td>$5M-$25</td>
<td>2.0%</td>
<td>17.6%</td>
<td>6.3%</td>
<td>1.1%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>100%</td>
<td>100%</td>
<td>5.4%</td>
<td>-</td>
</tr>
</tbody>
</table>

In 2020, while total giving increased for all organization sizes, on a case-by-case basis the typical organization contracted, with smaller organizations showing greater contraction.

As we look at the time series, we see that this contraction happened largely early in the year, and maintained across the rest of the year.
For the first time, we saw appreciable numbers of organizations failing to fundraise each month.

While this number is typically around 1% in prior years—dropping to negligible levels in December—this number rose steadily throughout the year and hit 4% in Q4. This failure to fundraise is an important factor in the overall fundraising contraction for typical organizations in 2020.
Not surprisingly, 2020 saw disruptions in some traditional and event-based giving modes and an increase in online giving, in both incidence and value according to our survey. Organizations retreated from fundraising in 2020 for many reasons, including disruptions to their work due to COVID-19, inability to pivot from existing models (in-person events, for example), lack of digital infrastructure, and a misplaced pessimism about donors’ willingness and ability to give.
SUMMARY: BY ORGANIZATION CAUSE

<table>
<thead>
<tr>
<th>ORGANIZATION CAUSE</th>
<th>% TOTAL ORGS</th>
<th>% 2020 DONORS</th>
<th>% DOLLAR GROWTH (MEAN)</th>
<th>% DOLLAR GROWTH (MEDIAN)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Arts, Culture, and Humanities</td>
<td>8.8%</td>
<td>3.8%</td>
<td>-6.9%</td>
<td>-16.3%</td>
</tr>
<tr>
<td>II. Education</td>
<td>11.9%</td>
<td>14.7%</td>
<td>-2.9%</td>
<td>-12.6%</td>
</tr>
<tr>
<td>III. Environment and Animals</td>
<td>6.8%</td>
<td>4.2%</td>
<td>-2.4%</td>
<td>-6.0%</td>
</tr>
<tr>
<td>IV. Health</td>
<td>10.4%</td>
<td>11.8%</td>
<td>-1.6%</td>
<td>-9.9%</td>
</tr>
<tr>
<td>V. Human Services</td>
<td>28.3%</td>
<td>30.7%</td>
<td>21.7%</td>
<td>1.9%</td>
</tr>
<tr>
<td>VI. International, Foreign Affairs</td>
<td>2.0%</td>
<td>2.9%</td>
<td>-5.4%</td>
<td>-6.5%</td>
</tr>
<tr>
<td>VII. Public, Societal Benefit</td>
<td>5.6%</td>
<td>6.2%</td>
<td>-7.5%</td>
<td>-9.1%</td>
</tr>
<tr>
<td>VIII Religion Related</td>
<td>5.2%</td>
<td>9.7%</td>
<td>6.5%</td>
<td>-2.9%</td>
</tr>
<tr>
<td>X. Unknown, Unclassified</td>
<td>21.0%</td>
<td>16.1%</td>
<td>3.5%</td>
<td>-8.8%</td>
</tr>
</tbody>
</table>

Giving across causes diverged dramatically in 2020 (+46%), as retained, recaptured, and new donors focused on giving to Human Services organizations.

This corresponded to drops in virtually all other causes (e.g., Arts, Environment & Animals, and International) in our dataset, except for Religion-related.
These drops followed different monthly trajectories:

- Human services peaked in April and pulled back most of the rest of the year.
- Arts dipped in April and then again in August when fundraising events did not open.
- Public & Societal Benefit dropped in March, then recovered the rest of the year.
Giving Moments

TOP TAKE AWAYS

- Giving moments in these datasets are driven largely through the smallest donors.
- New donor acquisition is typically driven through the smallest donors, making these moments important opportunities for organizations to grow their donor base.

ENGAGEMENT OPPORTUNITIES

- **Create new giving moments for your donors to take action.**
  Connect the clear impact of a gift with a timely event or milestone to create a sense of urgency.

- **Tap into the spirit of community.**
  For key moments such as giving days, holidays, awareness days, or response to a crisis, find opportunities to help donors feel a sense of connection to others.

- **When donors have more available dollars, they are willing to share with the causes they care about.**
  Look for moments to encourage donors to create more impact through your work with their additional funds.

DATA METHODS

- The timestamps of donations entered into CRM systems may not reflect the exact time/date the gift was given. We do not have explicit markers of online vs. offline donations to help us filter.
- Currently, our best method to discover giving moments is to plot new donors, as giving moments are a strong driver for new donor acquisition.
- To track the impact of government policy (for the CARES act and original stimulus), we tracked movements of donations of the policy size ($300 and $2,400 respectively) vs. baseline of similar donations.
**SUMMARY**

A few key giving moments in 2020 are clear in the data across all causes. When we look at donation trends for Environment & Animals, for example, the time series shows a highly canonical time series across all causes.

- A clear COVID-19 bump.
- Also, there were bumps for #GivingTuesdayNow on May 5, 2020 and for GivingTuesday’s annual event, which took place on December 1, 2020. In our dataset, these bumps are most visible for small donations, likely due to timestamp fidelity.

**GIVING MOMENTS: BY CAUSE**

Comparing all causes, we saw trends that fit the overall narrative for key events in 2020:

- Health nonprofits showed a bump as the coronavirus started to emerge and become a concern in the US.
- Religion-related nonprofits showed normal fundraising until April, when most places of worship were closed to in-person gatherings.
- Giving to human services nonprofits spiked in April in response to increased demand due to COVID-19.
- As racial justice and systemic inequity dominated the public conversation, so did giving to public and societal benefit nonprofits.
Interestingly, we see the impact of additional spikes in COVID-19 infections appear in corresponding changes in the giving data during those time periods:

- Health nonprofit fundraising ramped back up in September.
- Religious nonprofit fundraising ramped back up in October as areas began to open up.
- As COVID-19 cases rose in October and November, Human Services nonprofit fundraising ramped back up and sustained an increased level of giving, while religious and health fundraising declined again.
- Public and societal benefit nonprofits also show a fundraising bump during the US 2020 election season.
GIVING MOMENTS BY GOVERNMENT POLICY

We have done separate analyses to examine the impact of two aspects of the CARES Act: the $1200/$2400 per person stimulus and a $300 charitable deduction. For each, we looked specifically at those donation sizes, as compared to similar donation sizes.

DONATION SIZE OVER TIME

% of the year’s total donations at four gift sizes, per week. Each shows that donations of $1200 and $2400 essentially doubled in volume during late April, May and June.

- Stimulus payments evoked a clear increase in donations of $1200 and $2400. Although the total impact of those donations is not huge, the added funds from the stimulus also may have driven up other donation amounts.

- The impact of the $300 charitable deduction was less clear in the data, as all temporal fluctuations in $300 donations were similar to those of donations in the same size range. Instead, we saw evidence of a small spike in $300 donations on December 31 above the expected range, but well below the value of what we saw from stimulus checks.
Next Steps

In the coming months, the GivingTuesday Data Commons will deepen our measurement and evaluation of global giving trends, while also developing research to observe a broader range of generosity behaviors and indicators.

Some of our immediate priorities include:

- Collaborating with our partners at AFP to release the Fundraising Effectiveness Project Q1 2021 Report, which incorporates new methodologies and includes more in-depth metrics;
- Publishing our 2020 US Giving Survey Report as well as providing access to the raw data for academic researchers;
- Supporting novel analysis of DAF fundholder activity, behavior, and trends conducted by the Donor Advised Funds Research Collaborative and led by researchers at University of North Carolina Wilmington and DePaul University;
- Convening our working groups and more than 100 collaborators in the US to identify priorities and scope new research opportunities;
- Opening at least six collaborative research workspaces on the Data Commons Platform; and
- Conducting an analysis of social media content to identify content trends, and behavior indicators.
The Fundraising Effectiveness Project and the Growth in Giving database are both administered by the Association of Fundraising Professionals in collaboration with GivingTuesday. Together, we co-produce the Quarterly Fundraising Report™, a deep dive into a wide variety of year-to-date fundraising metrics. Each of our organizations also uses this dataset to publish independent analyses of giving trends and opportunities for the social sector. We encourage others to use these data to explore trends and inform their donor engagement strategies.
Methods

In this document, we've developed a new set of methods for working with Growth in Giving data. These have been validated here and will be used to update the 2021 FEP reports.

Our selection of organizations, and computation of metrics has changed:

- **We are more inclusive of organizations**, including those below $100k raised for the first time and up to $25M, and those reporting fundraising in the past 3 consecutive years (vs 5 in FEP)
- **We reweight data to be more representative of the IRS data.** We do this by filtering IRS contributions data (from the 2018 Tax Extract dataset) via our same criteria above, then determining distribution across our org size and causes (via the IRS EOBMF). This also allows us to use all of the relevant data, rather than keeping a 10% (or larger) holdout.

Using this data, we examine 4 types of donors that gave in 2020:

- **Repeat-retained**: Donors who gave to the organization in 2018 and 2019, in addition to their 2020 gift.
- **New-retained**: Donors who gave to the organization for the first time in 2019, then gave again in 2020.
- **Recaptured**: Donors who gave before 2019 to the organization, did not give in 2019, then gave again in 2020.
- **New**: Donors who never gave to this organization before, but gave in 2020 for the first time.
In this report, we examine NTEE major groups ("causes"), eliminating one (Mutual Membership) due to low data.

- I. Arts, Culture, and Humanities
- II. Education
- III. Environment and Animals
- IV. Health
- V. Human Services
- VI. International, Foreign Affairs
- VII. Public, Societal Benefit
- VIII. Religion Related

This report also references findings from our 2020 US Giving Survey to provide additional context for these donation trends. In October 2020, the GivingTuesday Data Commons, in partnership with Sector3Insights, conducted a

- A representative sample of American adults (n=1,340) between ages 18 and 85
- An extra sub-sample to reach more “Givers”—those who claimed to have donated at least $50 in the past 12 months (n=3,008)
  - “Non-Givers” (n=805) are defined as those who did not donate at least $50 in the past 12 months
Key Contributors

Andrew Koo has worked in data science for over eight years, primarily with major-league baseball teams to predict player performance. His experience in data-driven storytelling was instrumental in panel selection, donor segmentation, and other aspects of this report.

Dr. Ben Cipollini is a Data Scientist who has worked in social good in the private and social sectors, with experience in edtech, fundraising, and generosity broadly. His and his team’s work has been featured in publications at Classy.org and NextAfter.com, in addition to previous work with GivingTuesday.