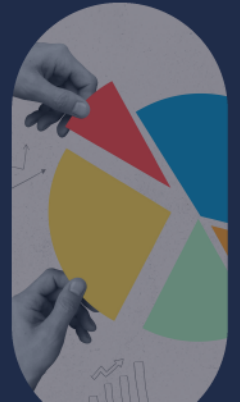
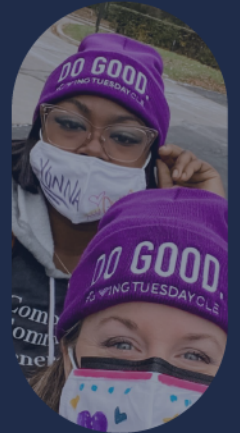
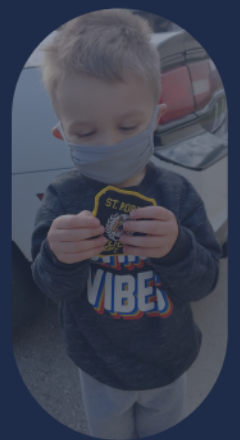


GIVING
TUESDAY

FROM SCARCITY TO ABUNDANCE: MAPPING THE GIVING ECOSYSTEM

A Lookback at 2021 Trends
in Global Generosity



GivingTuesday Data Commons

We measure generosity and its substantial actual impact, saving and improving lives.

The GivingTuesday Data Commons is a groundbreaking research collaboration between 300+ organizations and 50+ global data labs focused on uncovering new trends and insights on giving and generosity. We explore giving behaviors, contexts and patterns, movement growth, and altruistic motivations in order to identify and share the best practices that help drive increased generosity at a global scale. The Data Commons' design and structure models the distributed leadership and peer learning environment that are the foundations of the GivingTuesday movement.

In the United States, the project has generated an unprecedented level of collaboration between stakeholders including academics, donation platforms, and payment processors. Through nine Data Commons working groups, as well as 12 research hubs on our collaborative online data platform, we are unearthing new insights about the social sector and the giving economy and have produced tools to help improve effectiveness across these sectors. GivingTuesday is able to provide our Data Commons collaborators with access to the data collected for their own research, analysis and benchmarking, giving them freedom to create their own reports and to visualize trends.

Learn more: www.givingtuesday.org/data

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Introduction

Giving is *not* in decline.

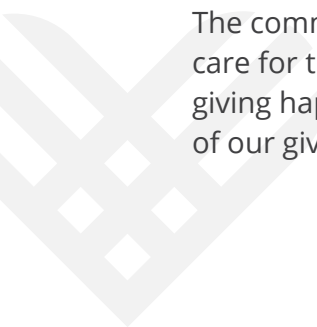
Despite concerns from across the social sector, the reality is that the giving ecosystem is characterized by abundance, with the overwhelming majority of people actively participating in it through acts of generosity of all shapes and sizes.

Yet it's not surprising that many in the nonprofit sector think the opposite. For years we have clung to an increasingly reductive perspective, focusing on the cutthroat pursuit of a shrinking pool of high-value donors and myopic proof points that exclude most givers and most giving, with predictably precarious results. If we continue to see generosity solely through the lens of a shrinking pool of high-value donors, the sector will increasingly struggle to effectively engage broad support. Furthermore, we rob the majority of givers of agency by affording more voice to those wealthy donors over all others.

It is understandable that the nonprofit sector would be hyper-focused on large donor stewardship, as steadily increasing pressures, as well as unexpected crises, drive us toward short-term solutions. We shouldn't be surprised when we get the results we optimized the system for - fewer donors giving more dollars. However, going where the money is in the immediate, at the expense of broad engagement, sets us up for long-term failure. Organizations with a broad base of donors, including grassroots givers, are more resilient to economic shocks. Diversifying support is proof against recession and doing that means meeting a more diverse base where they are.

I What we need is an expanded horizon based on a rethinking of how we measure giving.

The commitment people show to supporting their communities is not an abstract and separate culture - when communities care for themselves, they need institutions less. We need a robust and relevant data environment that captures all of the giving happening around us. And we need outreach activities that reflect and leverage the true richness, diversity, and strength of our giving ecosystem.





In the pages that follow, we set out our approach to measuring and understanding the generosity ecosystem. We establish new baselines and new metrics and begin to draw new conclusions. Our report offers a snapshot of the past year in giving, yet more importantly it lays a foundation that will permit us to track trends and generate real-time insights in the future.

We are confident that our approach will increase giver agency and engagement, enable a deeper understanding of the nature of giving, and – ultimately – improve fundraising results.

For, contrary to the prevailing wisdom, the data do not support the hypothesis that we operate in a context of scarcity. In fact, *giving begets giving*, and generosity is in abundance.

Our challenge as a sector is to figure out how to use this new data and this new understanding to cultivate and leverage the generosity that is already present all around us.

Woodrow Rosenbaum
Chief Data Officer, GivingTuesday





Executive Summary

The **giving ecosystem** is far more complex and diverse than we generally realize.

In fact, according to our research, **over 76% of acts of generosity are non-monetary** and **65% do not involve nonprofit entities**.

That is why it is so important to measure the quantity, character, and value of acts of generosity across the entire giving ecosystem.

It's true that there has already been useful research into what our sector calls "informal giving", but **our approach is unique** in that its taxonomy captures and compares behaviors across contexts and cultures.

At this point, **we are establishing baselines** that will allow us to track trends in the future. In the meantime, however, this report into 2021 giving behaviors should **help our entire sector begin rethinking how to locate and cultivate philanthropic value**.

One thing we learned about giving in 2021 is that in the area where we have the most complete data (giving money to nonprofits), the **long-term trends of decreased donors, increased dollars, and dropping retention returned** despite new 2020 donors retaining at levels higher than normal.

Why did monetary giving revert to these pre-2020 trends in 2021?

Our data debunks two commonly heard hypotheses used to explain this trend:

- **The decline in fundraising is driven by giving sentiment.**
Our findings indicate that interest in giving is extremely high and extremely consistent. People give repeatedly-and in many forms.
- **The decline in fundraising is due to a mix-shift in giving.**
Giving across types and recipient groups is not cannibalistic; instead, it's clearly inspiring and accretive.



We have different hypotheses.

If cause-based giving is in decline – and we are not certain that it is – it may be mostly because **fundraisers are engaging donors less around causes they care about**. We believe that **fundraising results reflect fundraiser assumptions, expectations, and tactics** far more than is generally recognized.

Despite an understandable focus on large donor stewardship at the expense of acquisition, **we see the following opportunities in 2022:**

- 1. We should talk about generosity more broadly, opening our doors to the full diversity of giving** and reflecting all the ways that people express their generous spirit naturally. Traditional fundraising approaches shut out the vast majority of people by focusing on large monetary donors, driving us towards the same inequitable trends and outcomes we've seen in other sectors.
- 2. We should move from a scarcity mindset to an abundance mindset, to increase giving sentiment.** Those who give, are more willing to give again. People find giving to be rewarding; it drives their sentiment even higher, and we should lean into this.
- 3. We should mobilize along lines that naturally engage people** (e.g. causes, communities, and generosity), rather than along artificial boundaries that we set (e.g. giving type, 'how we've always done it', wealth thresholds, etc.)

In 2022, we will begin to have the data needed to show year-over-year trends in giving type and structure. We're excited with the baselines we've set in 2021 and look forward to a deeper discussion in the coming year!



Dataset and Definitions

As mentioned above, this report reflects the integration of a number of new datasets into our [Data Commons](#). Please visit each link to learn more about each dataset, and to request access to the data or our dashboards.

Datasets

- [Growth in Giving Fundraising Data](#), with the [Association of Fundraising Professionals](#) - transaction-level fundraising data with more than 241 million transactions, and is continuously updated by fundraising software partners (in alphabetical order) Bloomerang, DonorPerfect, Keela, and NeonOne.
- [2021 US Giving Survey](#) - Our landmark survey on Giving in the USA. In 2021, we expanded this to include: giving types, giving structures, giving sentiment, and demographics. It is an online survey of Americans with a sample size of 5,000, weighted against age and income.
- [2021 Giving Behaviors Omnibus Survey](#) - Similar to the US Giving Survey, but less detailed and across 7 countries. It is an online survey of 1,000 people for each country. Respondents are weighted differently for each country, with typical weighting profiles factoring in age, income, and education.
- [2021 Global GivingTuesday Awareness Survey](#) - Our original survey, asking about attitudes towards giving and GivingTuesday awareness. It is an online survey conducted on 15,000 online respondents across 21 countries.
- [Citizen Action Research](#), in partnership with [VolunteerMatch](#) - data on volunteer signups, going back to 2017.

Partnerships

- [Mailchimp](#) - we partnered on an analysis of email behavior across the nonprofit sector.

Definitions

- **Giving Types** - In this report we provide data that captures a range of giving behaviors. These behaviors have been organized into 4 categories that we call Giving Types:
 - **Money** - any gift of money to an individual or organization outside of family
 - **Time** - all forms and contexts of voluntary giving of time to an individual or organization outside of family
 - **Items** - any gift of a material object - such as such as food, clothing, personal products, or furniture - to an individual or organization outside of family
 - **Advocacy** - any proactive advocacy or public endorsement of a cause

For improved legibility, we sometimes refer to Giving Types as 'types of giving' or 'ways of giving'.

- **Recipient Groups** - In this report we also provide data that captures giving to a range of recipients. These recipients have been organized into 3 categories that we call Recipient Groups:
 - **Registered Organizations** - legally registered charitable organizations
 - **Structured Organizations** - organized and structured community groups, associations, clubs, etc. that are not legally registered entities
 - **Unstructured Giving** - unstructured community groups and individuals

For improved legibility, we sometimes refer to Recipient Groups as 'types of recipients'.

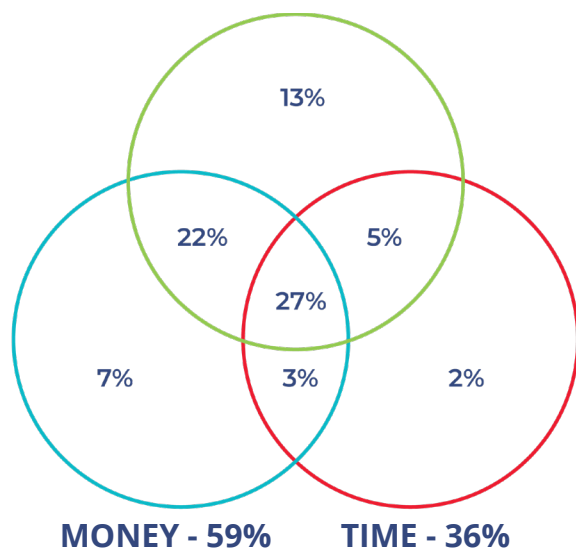


What Happened in Global Generosity?

TOP TAKE AWAYS

- **Almost everybody gave, and gave across all types** - 85% of people surveyed globally gave; non-monetary giving was 2x more common than monetary giving. Globally, only 5% of people who gave, gave money only.
- **Giving happened broadly across all recipient groups** - In the USA, giving to non-registered entities was over 2x more common than giving to registered entities; with most people giving to multiple types of recipients. Only 2.5% of people who gave, only gave money to nonprofits.
- **Volunteering for nonprofits has followed its own unique two-year trend** vs giving of money - increasing 7.4% in 2021 after a severe drop in 2020, remaining far below pre-COVID-19 levels in the USA.

ITEMS - 67%



MONEY - 59%

TIME - 36%

% of Americans who have donated by giving type

ENGAGEMENT OPPORTUNITIES

- **ENGAGE PEOPLE ACROSS ALL TYPES OF GIVING AND NON-GIVING BEHAVIORS.**
A spirit of generosity begets giving, including giving dollars.
- **ENGAGE GIVERS BASED ON CAUSE, NOT BASED ON RELATIONSHIP TO YOUR ORGANIZATION.**
Donors give to causes through a variety of means and structures.



85% of people surveyed globally gave in some form in 2021.

DATA METHODS

Data from this section is based largely on analysis of the following datasets:

- US-based statistics in this section are from the **2021 US Giving Survey**
- Global statistics in this section are from the **2021 Giving Omnibus Survey**
- Volunteering signup statistics on page 15 are from the **Citizen Action Research Hub**, in partnership with **VolunteerMatch**

Around the world, the vast majority of people gave.

82% of surveyed Americans affirmed that they gave.

Given the almost exclusive focus on giving money in the philanthropic sector, you might assume that people give money, and only give money. This is simply not so - engaging in any type of giving is a strong predictor of giving in general. Of the 82% of Americans who gave:

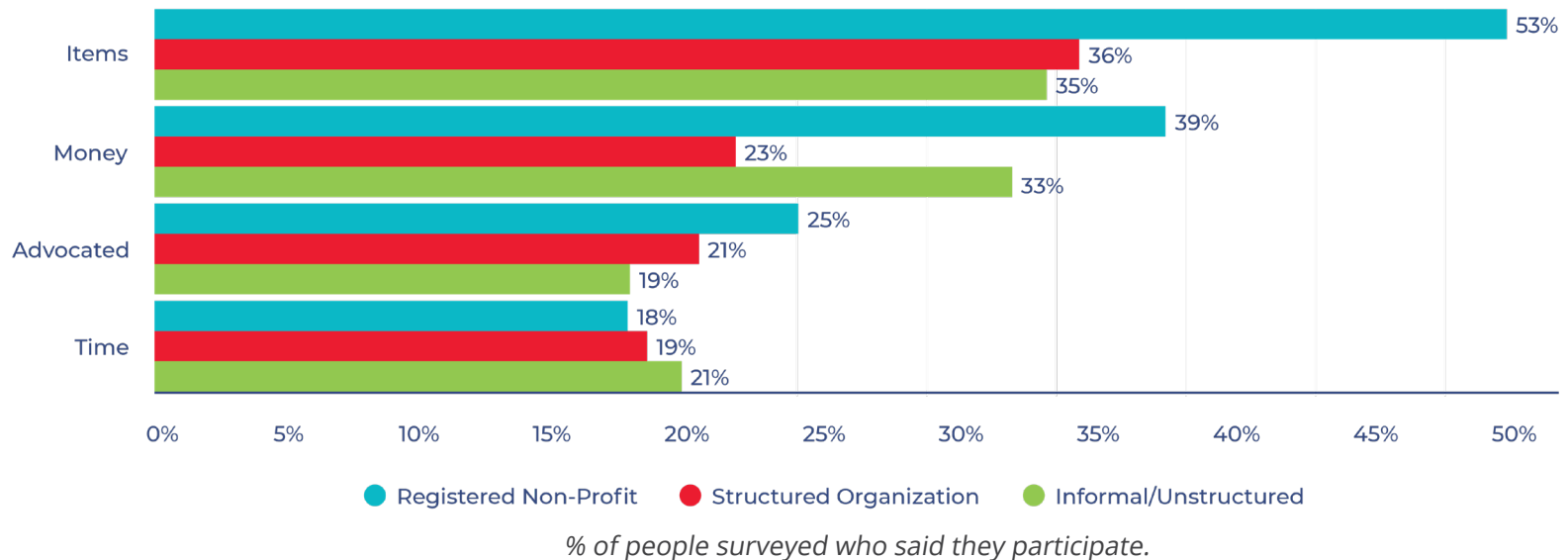
- *Only 7% gave money exclusively*
- 80% engaged in 2 of our tracked types of giving (money, items, advocacy, and time).
- 27% (over 3x those who only give money) gave in either 3 or all 4 of our tracked types

Given the focus on giving to nonprofit organizations in our sector, you also might assume that people only gave to nonprofits. Again - not so. In the US:

- Only 15% gave *only* to nonprofits.
- Almost 75% gave to 2 of our 3 tracked recipient groups
- 40% (over 2.5x those who only give to nonprofits) gave to all 3 recipient groups.



GIVING PARTICIPATION (USA)



Given this, it may not be surprising to learn that:

- The majority of givers (over 50%) gave at least 5 different ways (giving in a variety of ways to a variety of recipient groups).
- Only 13% of people gave one way to one recipient

Only 2.5% of people who gave, only gave money to nonprofits.

Different people clearly gave in many different ways to different groups, yet giving trends across the range of giving types and recipient groups are bound to vary. As we begin to generate yearly data, these trends – along with associated opportunities – will be identified and shared.

In the meantime in this 2021 lookback report we will lay out what we have learned about types of giving. We will share year-over-year trends for giving of money and time to nonprofits, and set baselines for all other recipient groups.

In our 2022 lookback report, we will return with year-over-year trends across all giving types and recipients.



Giving is done through a number of different types: **items** (giving of physical goods), **money, time** (e.g. volunteering), and **advocacy** (e.g. actively endorsing a cause).

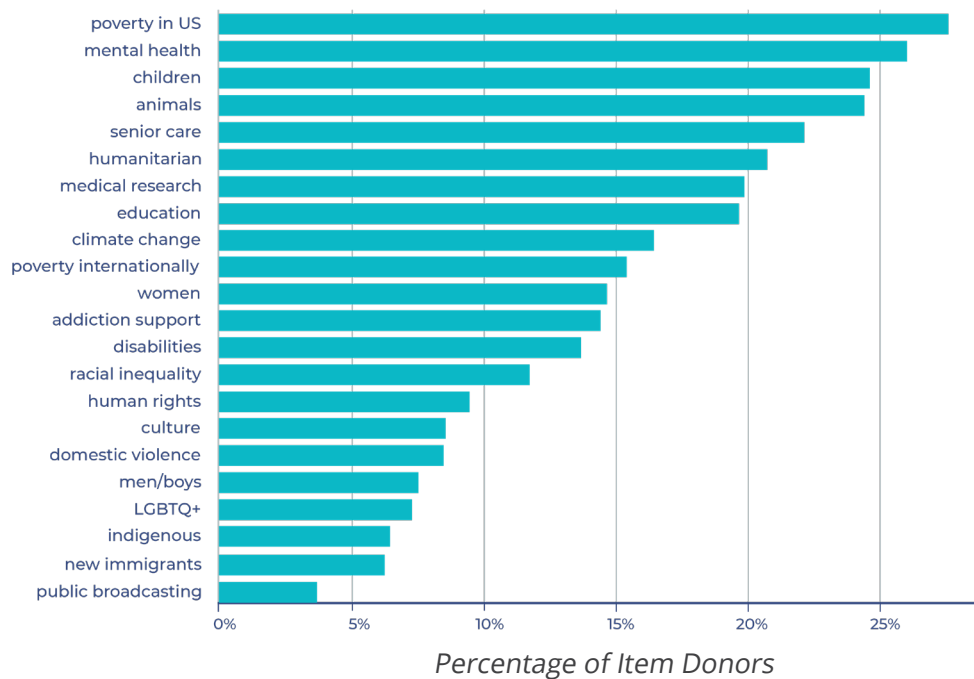
We will examine the giving of money through the lens of nonprofit fundraising in a dedicated section below. In this section, however, we will focus on non-monetary giving.

ITEMS



Giving items was the most popular form of giving in the USA. Around 67% of the population engaged in donating items, compared to 59% of the population which donated money. Early indications from our Giving Pulse survey (launched in January 2022) are that giving of money may be more seasonal than giving of items.

CAUSES OF IMPORTANCE TO ITEM DONORS (USA)



The giving of items was by far the most popular type of giving for those who engaged in only one type of giving. Twice as many people gave only items as gave only money.

The top four causes differ by giving type. Those who donated items care about poverty (as with advocates), mental health (uniquely), children (uniquely), and animals (as with volunteering). For the other giving types:

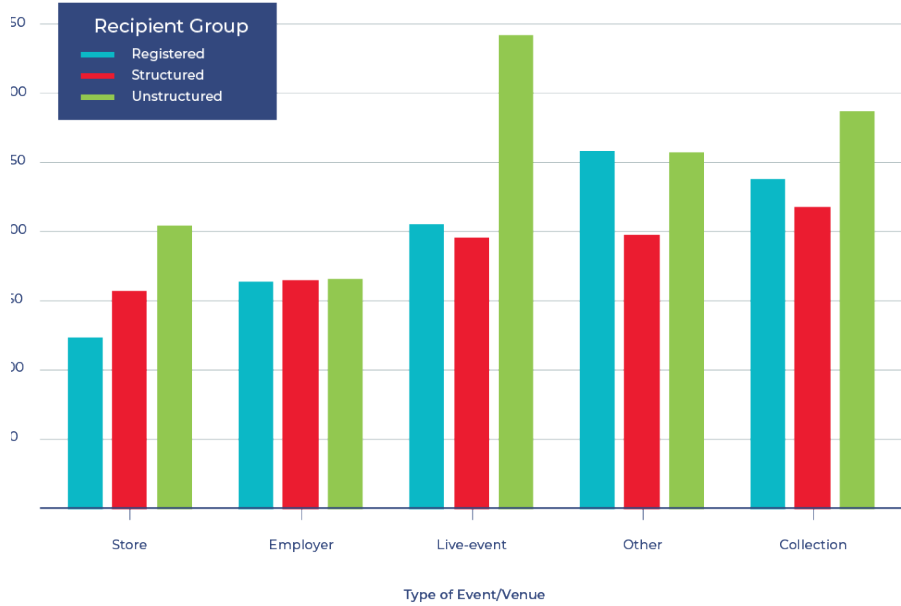
- Volunteering: religion, community, health, animals, education
- Advocates: senior care, poverty, medical, humanitarian.
- Money: human services, education, health, foreign affairs.



People donated on average \$400 worth of items throughout the year.

This was distributed across a variety of venues/events such as in-store, via an employer, at a live-event (including religious services), via collections from drop-offs or residential collections, and others. People generally gave the most through collections, and item donations overall were largely through registered charities.

AVERAGE VALUE OF ITEMS GIVEN AT EVENTS 2021 (USA)



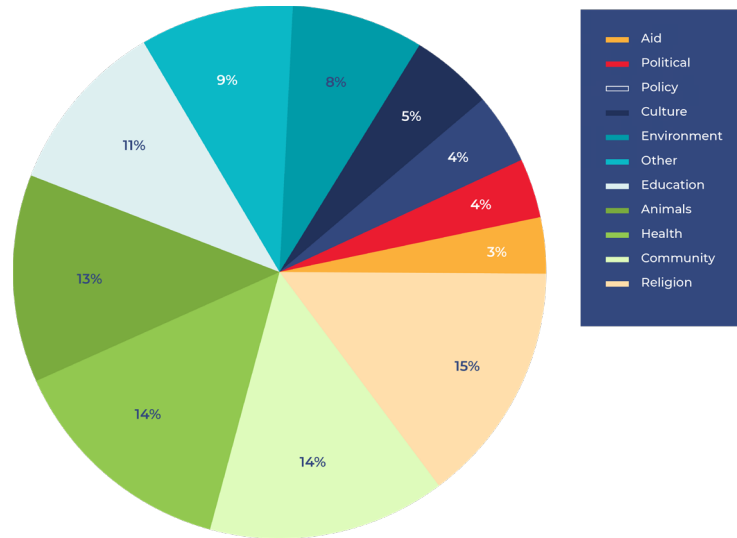
TIME

People volunteered on average 43 hours in the USA in 2021.

This was distributed among various cause areas, with the most popular categories being religion, community, and health related causes. Over 75% of volunteers said they focused their time on at most two organizations or groups.

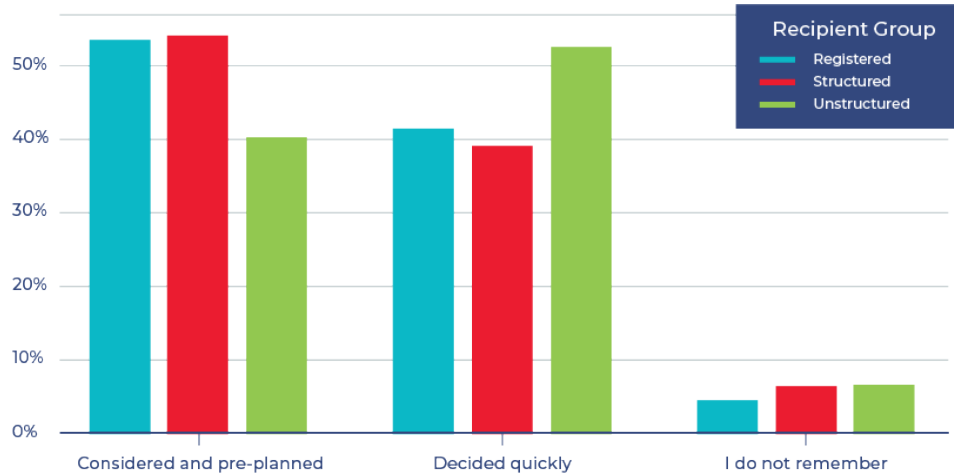
The majority of volunteers gave their time proactively, with 59% of people saying that their acts of volunteering were not solicited.

VOLUNTEERING BY CAUSE (USA)





SPONTANEITY BY RECIPIENT GROUP (USA)



Overall spontaneity of volunteering was roughly even, with 49% of volunteers reporting having pre-planned their activities while 45% said they had volunteered spontaneously.

Spontaneity of giving shifted significantly depending on the recipient group, however. Volunteering for registered and structured charities was generally pre-planned, while informal/unstructured volunteering was more spontaneous.

Volunteering signups decreased by 28% in 2020 from 2019 with the arrival of COVID-19, but saw a rapid return to growth in 2021, despite lingering COVID-19 concerns.

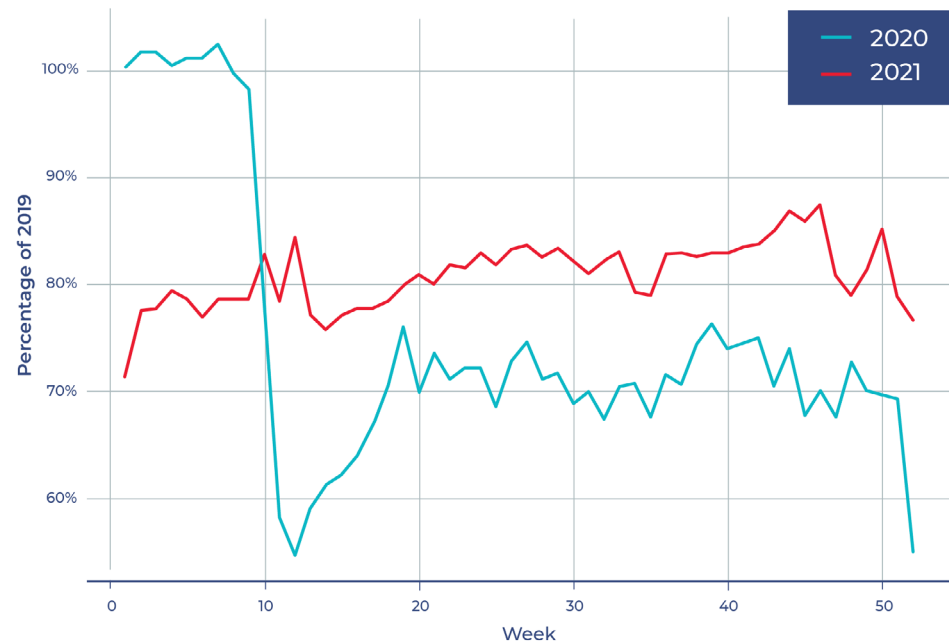
Overall, 2021 saw a 7.4% increase in the number of volunteer signups in the US over 2020.

Nonetheless, volunteer signups remain far below pre-COVID-19 levels

- 23% drop in number of signups in the US from 2019 to 2021
- 19% drop in the number of unique volunteers in the US from 2019 to 2021

Volunteering continued to be seasonal, with a rise in spring and summer and decline through the fall and winter.

PERCENTAGE OF VOLUNTEER SIGN UPS PER WEEK, RELATIVE TO 2019 (USA)





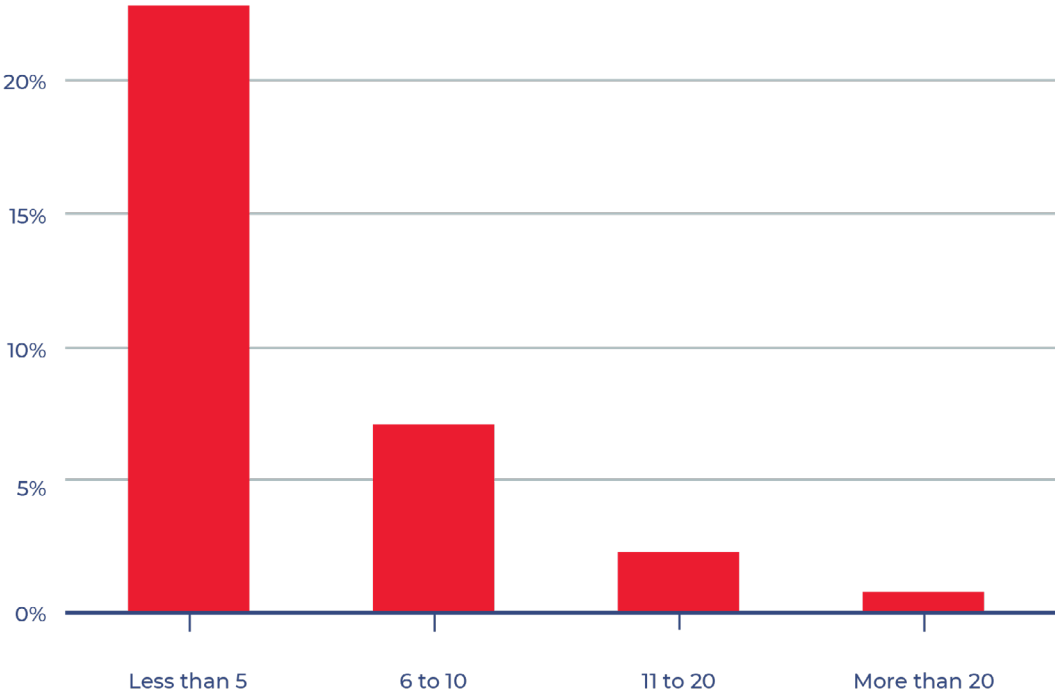
ADVOCACY

In the USA, 35% of people said they engaged in some form of advocacy.

This includes recommending, encouraging others, endorsing, "liking" or socially publicizing an activity in support of a charity or nonprofit or to help others (excluding family).

Most people did this less than five times per year.

NUMBER OF TIMES ENGAGED IN ADVOCACY (USA)

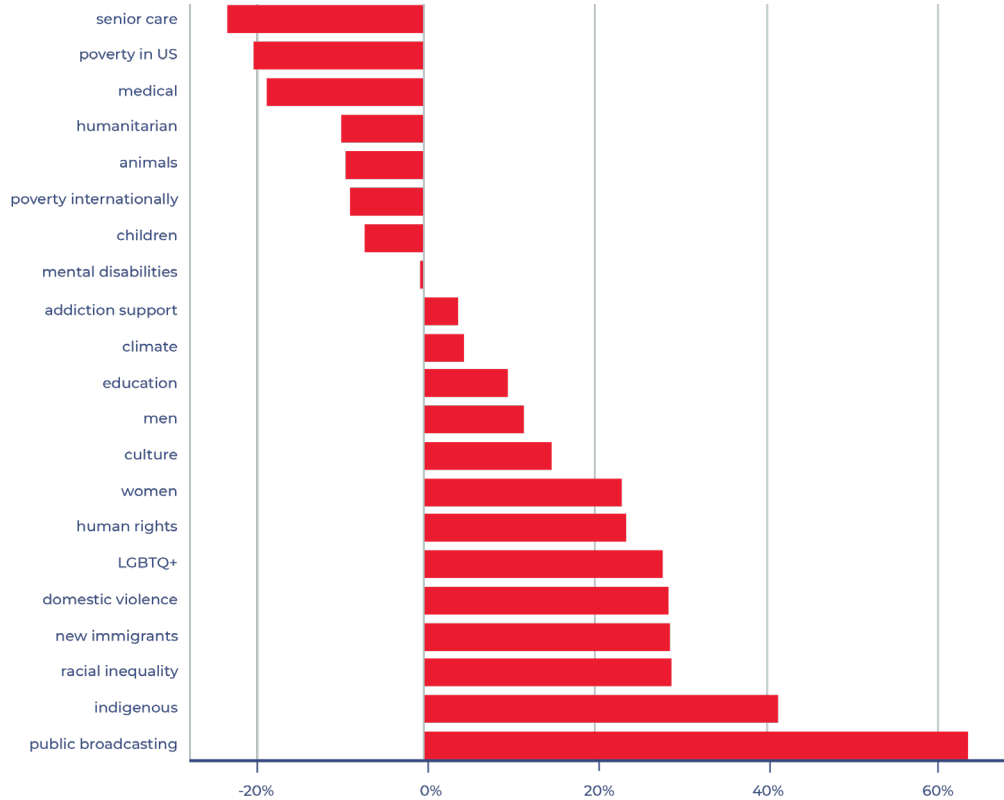




People who engaged in advocacy typically care about different cause areas than those who do not. For example, advocates were 60% more likely to be passionate about public broadcasting. This indice likely reflects the widespread use of social media platforms by younger people for advocacy, and therefore may emphasize causes that are popular in younger demographics.



ADVOCATES RELATIVE MISSION PREFERENCES TO NON-ADVOCATES, %-DIFFERENCE



Percentage difference in number of people who state a cause is important to them, advocate to non-advocate ratio (USA)



Giving is aimed at a diverse range of recipients, whose organizational structures vary. People give to **registered groups** (giving to registered charities), **structured groups** (giving to other organizations and formal groups), **unstructured groups** (informal groups) and **individuals**.

Unstructured giving can take many forms. It includes giving time or money to informal community groups, as well as helping out friends or strangers in need in various ways.

USA

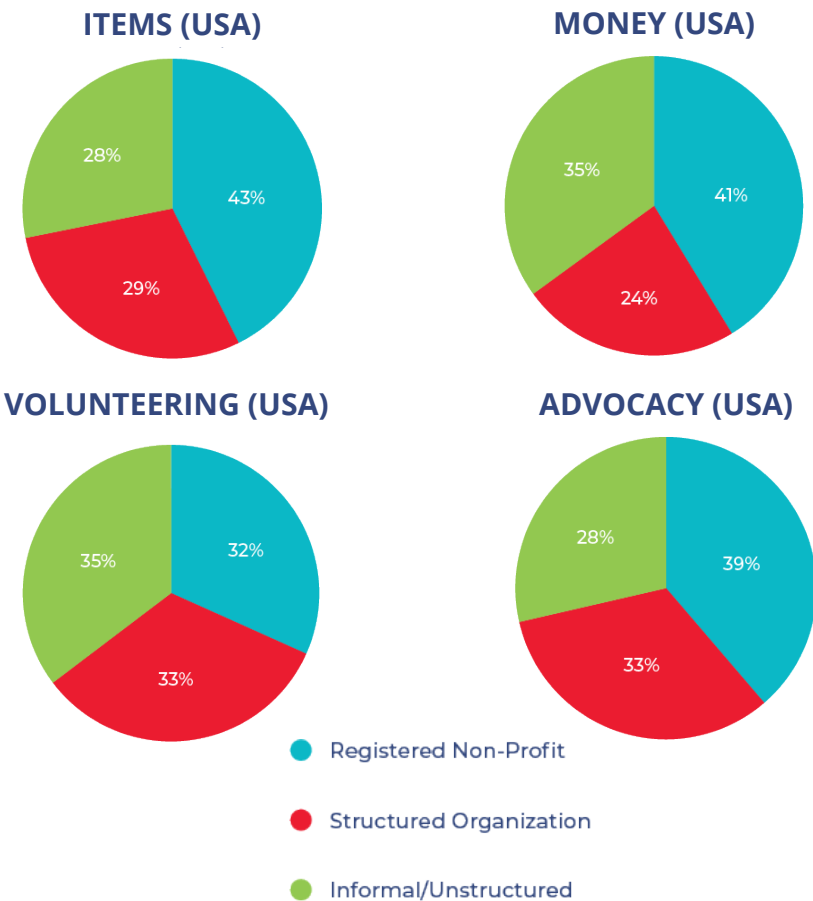
Though philanthropic media coverage and industry discussion is dominated by monetary donations to registered charities, the reality is that last year **only 10% of giving in the US was of money to registered charities.**

In fact, only 28% of giving in the US consisted of giving money. Moreover, less than 50% of any type of giving in the USA was given through registered charities.

Each type of giving tracks a bit differently:

- Items: 43% went through registered charities
- Money: 41% went through registered charities
- Volunteering: 32% went through registered charities

Only 10% of acts of giving in the US were money being given to registered charities. Giving is highly correlated among all three Recipient Groups: when a person gives to one recipient group it is likely they also give to one or more of the others. Only 22% of people give to one recipient group, whereas over 60% of people give to two or all three groups of recipients.





Giving widely is the norm: 60% of people gave to two or all three types of recipients; only 22% of people gave to one recipient group



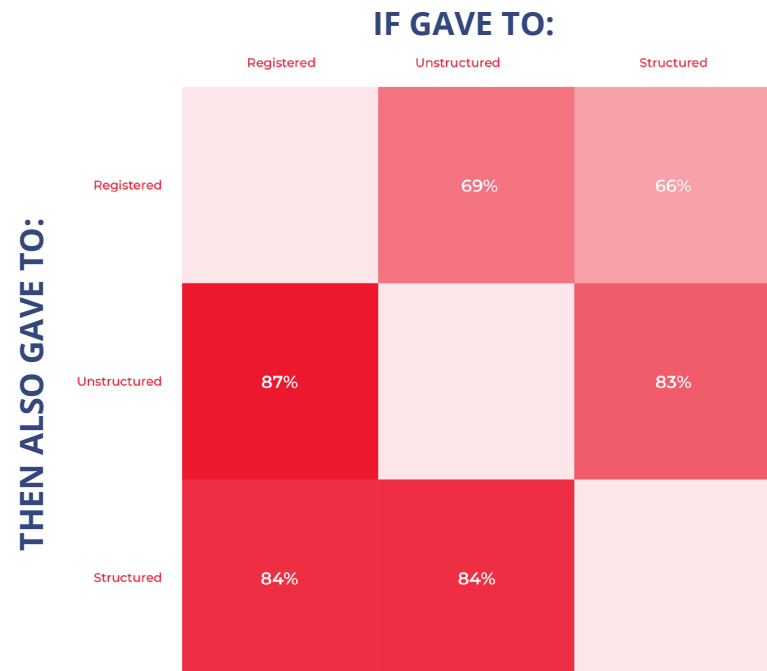
INTERNATIONAL

This story isn't unique to the USA; this same story played out globally. Giving money was only 29% of giving internationally by participation. Second, less than 33% of any type of giving internationally was given through registered charities.

Each type of giving tracks quite similarly:

- Money: 34% went through registered charities
- Volunteering: 30% went through registered charities
- Items: 30% went through registered charities

When we combine these, we see that less than 10% of international giving consisted of giving money to registered charities.



If gave to (column), then also gave to (row).



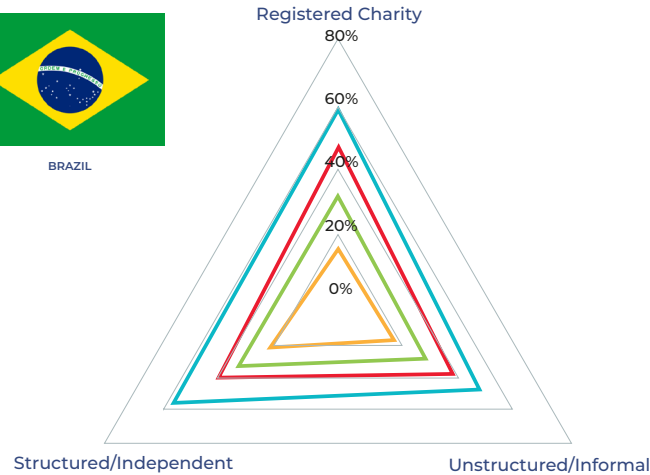


GIVING TYPE BY RECIPIENT TYPE

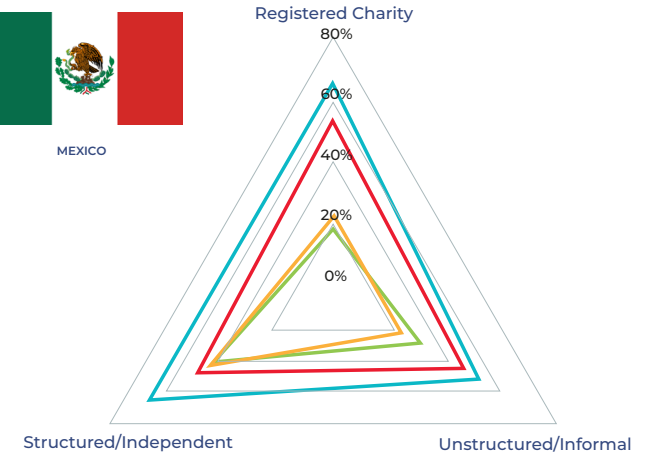
We can visualize this per country, using triangle charts - where each triangle represents a giving type, and each corner of the triangle represents the percent of giving of that type to each type of recipient. Here's how this looks in four large countries in which monetary donations to registered organizations proved not to be the key mode of giving.



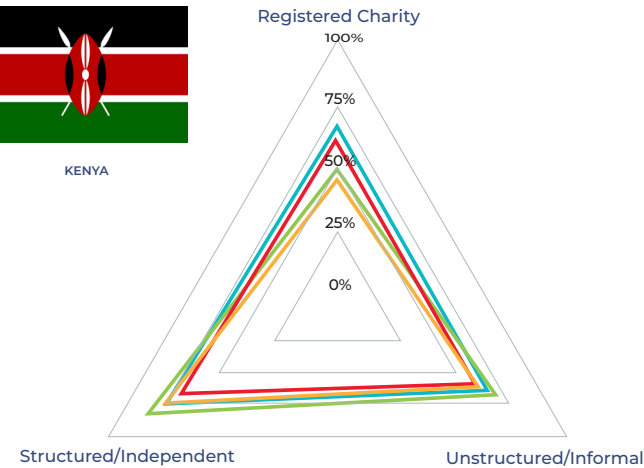
BRAZIL



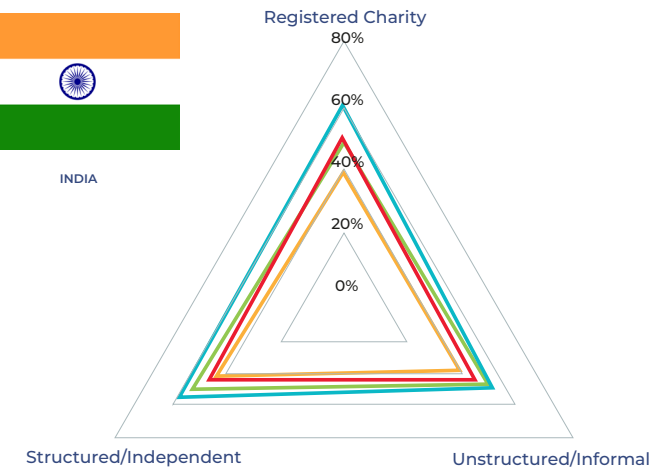
MEXICO



KENYA



INDIA





What Happened in Nonprofit Fundraising?

TOP TAKE AWAYS

- **Topline dollars increased and donations decreased**, returning to pre-2020 trends
- Increase in dollars was driven by large donors as has come to be typical, but also surprisingly from donors who gave for the first time in 2020. This is in stark contrast with prior trends, where new donor retention has been a challenge.
- While offset somewhat by new donor retention, **decrease in donors was largely driven by poor acquisition and recapture rates**
- **Small nonprofit organizations have stopped reporting fundraising data at a higher rate than ever before**, indicating tool attrition and perhaps insolvency

ENGAGEMENT OPPORTUNITIES

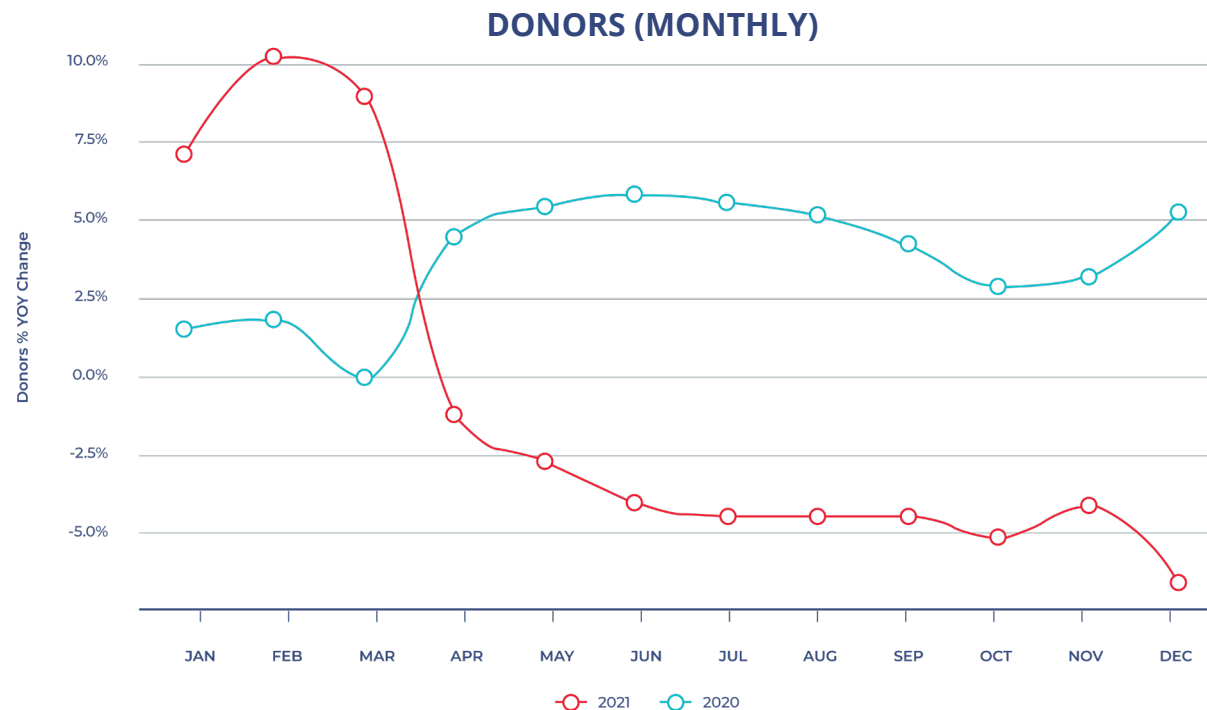
- **Don't think about donor stewardship and acquisition as an "either/or."**
Acquisition, engagement, and recurring small donors are important donor segments that are being neglected. Sustainable long-term fundraising likely involves targeting a diverse set of donors, which means it is important to spread talent around and invest in broad engagement as well as major gifts
- **Engage often and with variety.**
Most people are giving in many ways, not just donations, and your donors want to feel like part of your mission. Move from transactional engagement to relationship-building with all your supporters and give them a variety of ways to get involved. New donors from 2020 stuck around at much higher rates than cohorts from other years in a year where many organizations re-evaluated their approach.
- **Recapture remains an untapped opportunity.**
These donors have shown affinity for your cause. Look at how you originally acquired them, what did they respond to, what problem were they solving, and what was the channel?



DATA METHODS

Based largely on analysis of the Growth in Giving Dataset (2005 - 2021).

The surge in donors in 2020 ended in the first quarter of 2021 as donor numbers retreated to pre-2020 trends of decline. Not only was there a large loss in donors throughout the year (-6%), but also, it was so large that all the gains in 2020 were lost. In other words, we saw fewer total donors in 2021 than we saw in 2019 - a net loss (-1%) of donors through COVID.



DONORS BY DONOR TYPE

NAME	% YOY CHANGE	% OF TOTAL
Micro (<\$100)	-9.0%	55.6%
Small (\$101 - \$500)	-6.8%	28.5%
Midsize (\$500 - \$5K)	-1.5%	13.5%
Major (\$5K - \$50K)	+1.9%	2.2%
Supersize (>\$50K)	-3.3%	0.3%

Small donors drove this decline; **85% of donors gave less than \$500**. Impact was largely driven by failure of acquisition of small donors - acquisition dropped 15% YOY, and acquisition represents 42% of the total.

Some of these results are not a surprise but a drop in total recaptured donors (-14%) combined with a leap forward in total new retained donors (+26%) last year was unusual. What is equally unusual is that those new donors were retained at a higher rate than before.



DONOR BY LIFECYCLE

NAME	% YOY CHANGE	% OF TOTAL
New donors	-15.1%	41.8%
New retained donors	+26.1%	10.6%
Repeat retained donors	-1.1%	34.5%
Recaptured donors	-14.2%	13.1%

Despite the large drop in donors, one area stood out - the continued rise of monthly recurring donations.

Though we can only observe highly frequent donations here (7+ donations in a year), this population grew 2.2% in a year when overall donor counts were down. This is consistent with [M+R Benchmarks](#) key finding of a 24% growth in monthly recurring revenue.

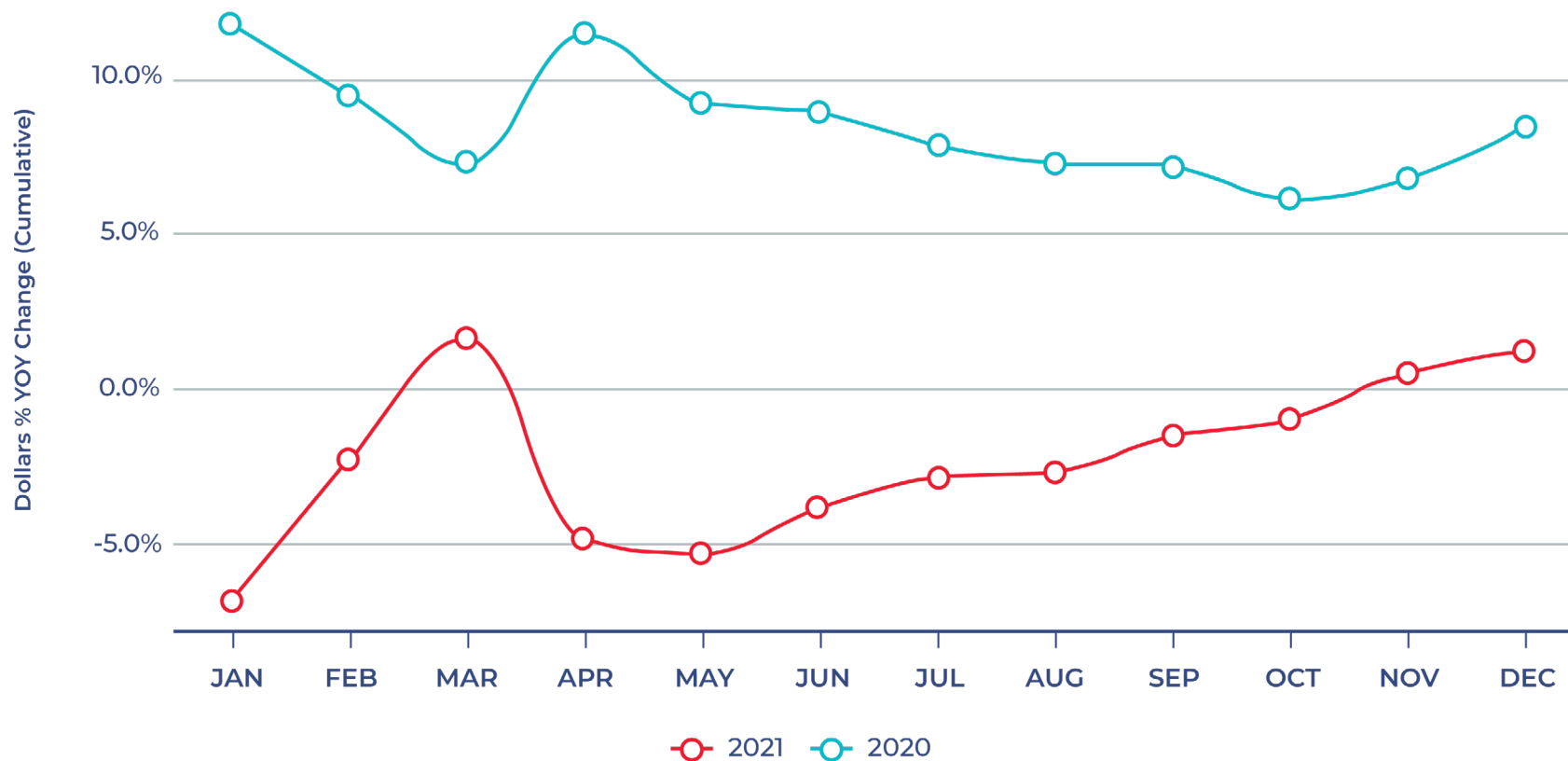
DONOR BY DONATION COUNT

NAME	% YOY CHANGE	% OF TOTAL
1 donation	-5.9%	70.3%
2 donations	-12.3%	13.5%
3-6 donations	-16.1%	8.8%
7+ donations	+2.2%	7.4%





DOLLARS CUMULATIVE YOY CHANGE (MONTHLY)



Dollars are estimated to be up 2.7% this year, measured as up 1.2% with data collected so far.

The Year on Year increase in dollars is very impressive, given the growth that already occurred in 2020.

Most of this can be attributed to large donors, who ended up funding just as much as 2020 by the end of 2021. Dollars from small donors (<\$500 total in the year) - which drive less than 10% of the total - fell off sharply (estimated >-6%).



DOLLARS BY DONATION COUNT

NAME	% YOY CHANGE	% OF TOTAL
Micro (<\$100)	-9.3%	3.0%
Small (\$101 - \$500)	-6.1%	6.5%
Midsize (\$500 - \$5K)	+0.4%	17.5%
Major (\$5K - \$50K)	-0.2%	26.1%
Supersize (>\$50K)	-0.2%	47.4%

Repeat retained donors make up 60% of dollars, showing that retained donors from 2020 are the main drivers of high dollar performance.

In fact, donors acquired in 2020 showed the largest YOY change in dollars (~20%), with new donors giving over 10% less dollars in 2021.

DOLLARS YOY CHANGE MONTHLY

NAME	% YOY CHANGE	% OF TOTAL
New donors	-11.9%	19.8%
New retained donors	+17.7%	9.5%
Repeat retained donors	+0.8%	58.9%
Recaptured donors	0.0%	11.9%





Surprisingly, with such high acquisition last year, and less focus on COVID fundraising this year, **new donor retention increased YOY by 6.2%**.

Overall, donor retention was down (-4% YOY, -8% since 2019).

Surprisingly, with such high acquisition last year, and less focus on COVID fundraising this year, new donor retention increased YOY by 6.2%. It is the repeat donor retention rate that dropped the total. Again, surprisingly, repeat retention was lower across most donor sizes, showing an upside-down U pattern (-8-9% for the smallest and largest donors, -2-4% for the next tier, and an increase in retention for the mid-size donor).

It is also interesting to note that donor retention dropped across all frequencies of donations - most for one-time donors (-7%), and better - but still dropping - for all frequencies to the highest frequency donors (7+ donations in 2021, -1.5% in retention).





Organization dropout - the rate at which organizations shared data in 2020, but did not in 2021 - is much higher in 2021, hovering around 10%.

We surmise that this increased organization dropout rate is likely a result of reduced fundraising across organizations which struggled in the COVID-19 crisis, and became insolvent. It may also be due to reduced or insufficient staffing as a result of the pandemic.

This is because organization dropout was highest among small organizations and those whose mandate was least relevant to the COVID-19 crisis.

Though smaller organizations (< \$100k) stopped reporting at a disproportionately higher rate in 2021, there was more growth in giving to small organizations than large. Total giving to organizations under \$250K in revenue grew by over 15% despite the higher frequency of dropout. On the other side, total dollars raised dropped for larger organizations (-8%).

Note that, while this was true on average, the typical case was different - most small orgs were closer to flat in fundraising, and larger organizations experienced dollar pull-backs closer to -3%.

ORGANIZATION IMPACT SIZE

ORGANIZATION SIZE	% 2021 DOLLARS	% GROWTH (MEAN)	% GROWTH (MEDIAN)	DROPOUT RATE
<=\$100K	2.0%	15.8%	-0.1%	5.7%
\$100K - \$250K	5.9%	15.2%	4.5%	3.2%
\$250K - \$1M	18.1%	7.1%	1.0%	2.8%
\$1M - \$5M	36.1%	0.4%	-0.1%	2.1%
\$5M - \$25M	37.9%	-8.6%	-3.2%	2.5%



ORGANIZATION SIZE	% 2021 DOLLARS	% GROWTH (MEAN)	% GROWTH (MEDIAN)	DROPOUT RATE
I. Arts, Culture and Humanities	3.6%	5.6%	1.2%	3.3%
II. Education	15.1%	1.7%	2.0%	3.1%
III. Environment & Animals	5.2%	20.2%	9.1%	2.4%
IV. Health	12.3%	-1.9%	2.8%	2.8%
V. Human Services	30.0%	-5.4%	-1.8%	2.4%
VI. International, Foreign affairs	10.0%	-2.0%	6.6%	5.0%
VII. Public, Societal Benefit	2.9%	1.5%	6.3%	3.0%
VIII. Religion Related	6.4%	-3.0%	-1.2%	4.4%
IX. Unknown, Unclassified	14.5%	1.5%	-0.2%	3.1%

By cause, we saw environment and animals and arts, culture and humanities sectors rebound from their severe drops in 2020.

Human services and public/societal benefit experienced the largest pull-backs in 2021. This did not correspond to where organizations tended to not report this year - Foreign Affairs and Religious Related causes show higher dropout proportions whereas Health and Human Services show lower dropout proportions.



Why Did Giving Change in 2021?

TOP TAKE AWAYS

- **Decline in fundraising donors not driven by giving sentiment** - people's interest in giving was extremely high, with people giving repeatedly, and in many forms.
- **This decline in fundraising is also not due to a mix-shift in giving.** Giving across types is not inherently adversarial; instead, it's clearly inspiring.
- Instead, **fundraisers are asking less and engaging donors less on causes they care about.**

ENGAGEMENT OPPORTUNITIES

- **Give supporters simple ways to engage in a positive fashion**
Foster a sense of care, giving, and celebration. Most forms of engagement are a positive step towards giving in the type and structure you wish.
- **Engage donors on their terms**
(e.g. in relation to causes), not on our terms
(e.g. in relation to our organization)

DATA METHODS

Based largely on analysis of the 2021 Global GivingTuesday Awareness Survey and 2021 US Giving Survey.





SUMMARY

This section is our editorial section - where we take the data we shared above, mix in additional data, and make our best guesses on what's really going on with generosity and giving.

The first thing we discovered in 2022 was a deep and steady commitment to giving.

Over 90% of people report giving as important to them in 18/21 of countries surveyed (and over 97% in 8/21 of countries surveyed).

So if giving is so important to people, why are we reporting declines in key areas of giving here? And why have we seen a consistent, 20 year decline in the number of monetary donors to nonprofits in the US?

Second, we found evidence that giving is not “adversarial,” and does not suffer from “mix-shift” - where an act of generosity today means one tomorrow is less likely. It's quite the opposite - those who give non-monetary gifts are more likely to give money (72%) than those who do not (23%).

People feel good when giving (77% report using their heart when giving), and that leads to more giving! It is the norm for people to give multiple times, in multiple ways, to multiple entities and recipients.

We found evidence that the **declines we see are specific to where we're looking**, and **are due more to how we're engaging people than anything about generosity itself**. Specifically, we believe that we are seeing declines in monetary donors to nonprofits because:

- 1. We're engaging small donors less (and when we engage them more, donations go up)**
- 2. We're engaging donors on our terms** (e.g. the relationship to our organization), and less on their terms (e.g. their relationship to their cause). Donors are promiscuous - they give in many ways, and to many recipients. **Relationships to causes are motivating and strong; relationships to organizations are weaker and less compelling.**

Let's dive in!

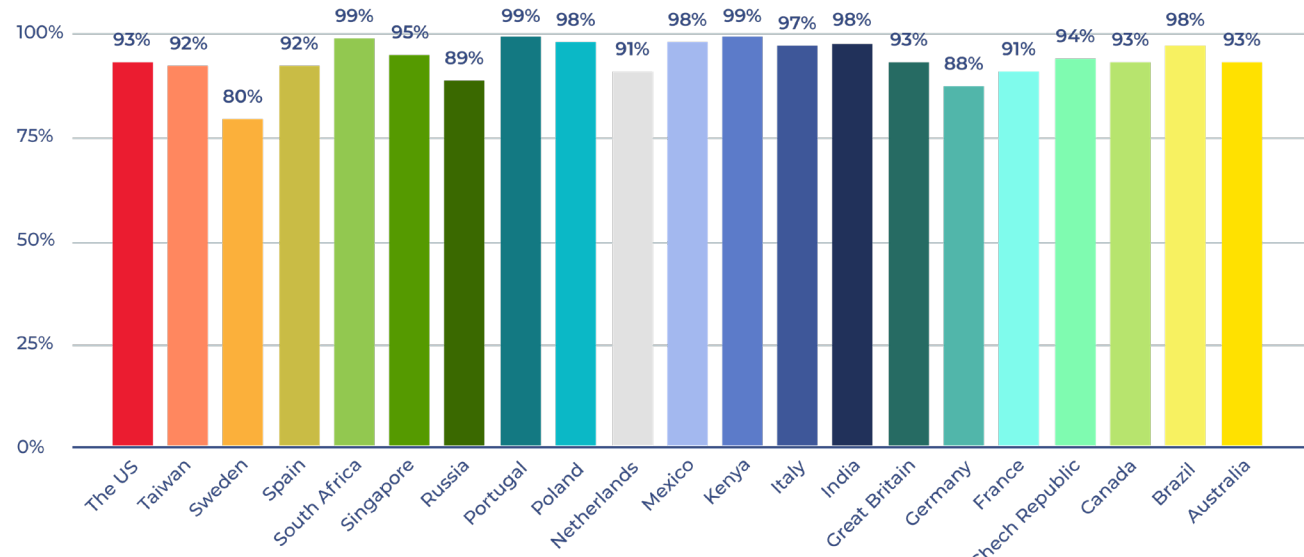


GIVING SENTIMENT

People gave for many reasons. 3 key ones are:

1. 85% of people said they give because they want to make a difference
2. 80% of people globally give due to a personal or emotional connection with a cause
3. 77% of people said they give “with their heart rather than their heads”

PERCENTAGE OF PEOPLE WHO SAY GIVING IS IMPORTANT TO THEM



Generosity plays an important part in the lives of the majority of people worldwide

[Recent analysis](#) in partnership with **Mailchimp** has shown that non-profits are typically too hesitant to reach out through emails. In 2020, only 48% of active nonprofit Mailchimp accounts sent solicitation emails. In 2021, that number dropped to 38%! Even among organizations that send out solicitation emails, the proportion of total emails that are solicitation emails typically hovers around 7-14%.

Given extremely positive giving sentiment and decreasing large scale fundraiser engagement, it is likely that decreased fundraising across certain segments is a self-fulfilling prophecy!

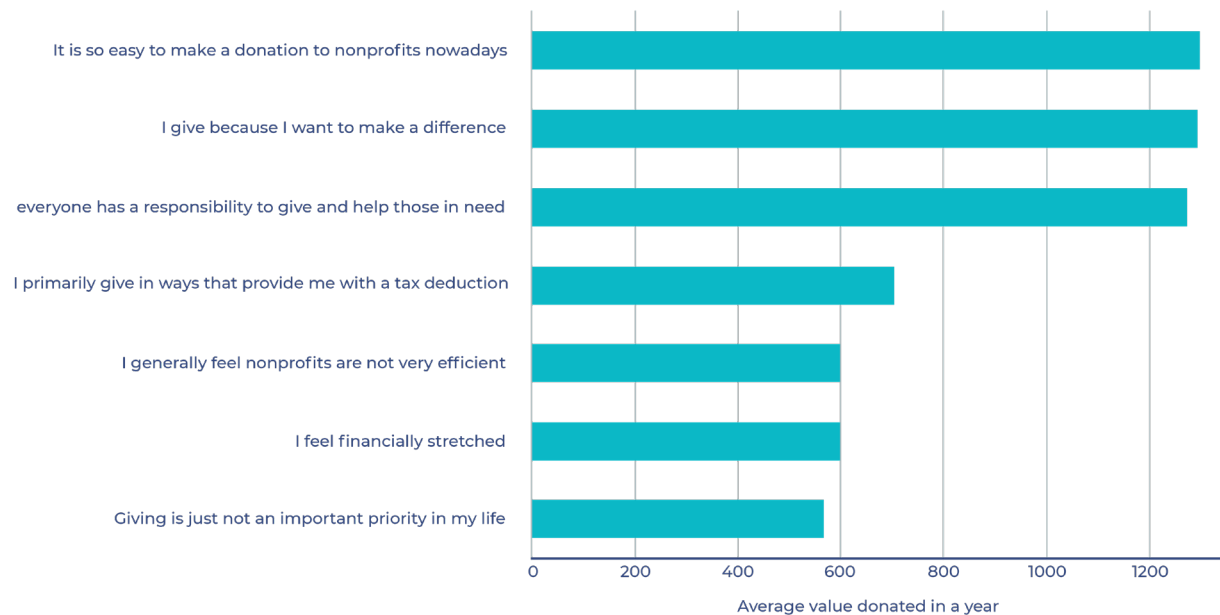


Generosity can be inspired in many different ways

1. The majority of people reported that they were not solicited when they gave money.
2. That said, solicitation was also useful: 40% gave due to solicitation.
3. Even general fostering of generosity and giving, without a specific CTA, proves effective: 82% of people who were aware of GivingTuesday worldwide said it inspired them to give.

This last one is why it's so critical to shine a light on all types and structures of giving - people respond to a general environment of giving, by participating. When we limit visibility and approach with a scarcity mindset, we actively work against people's natural social desire to join in, participate, and give.

AVERAGE VALUE (USD) DONATED IF AGREED WITH THE FOLLOWING STATEMENTS



Positive giving sentiment is correlated with increased giving behavior. Given the overwhelmingly positive attitudes towards giving, the sector has incredible potential to unlock.

Summary/Closing

As we have shown in this report, we need to take a broader view of people's generosity, because giving is happening everywhere, all the time. And we now know with certainty that giving is not cannibalistic by nature, but catalytic.

By not measuring the full range of giving behaviors taking place around us we limit our opportunity to leverage the power of generosity and to engage support for organizations and causes.

To cultivate more impactful giving we need to learn from all giving behaviors. With this report, we launch a new methodology, one that aims to map the entire giving ecosystem today and – more importantly – tomorrow.

This is truly just a beginning. Within the next few months you will already begin to see improvements and innovations as we continue to grow our unique approach to generating actionable insights into the global giving ecosystem.

WHAT'S NEXT?

Giving Pulse is our flagship tool for tracking giving behaviors dynamically. It queries a representative group of US adults weekly about their giving behaviors in the previous 7 days, capturing actions, attitudes, values and concerns. As the data accumulates, GivingTuesday tracks these behaviors and establishes real-time indices.

Our next steps will include building an algorithm and pipelines that automatically produce and update dashboards when new data are received. An API to connect to the weighted data set is also on the short-term roadmap. In addition, raw and structured data, schemas, summary tables, data visualization dashboards, and analysis tools will soon be provided to researchers through the GivingTuesday Data Commons platform. Finally, as we hone our processes and build out our Giving Pulse infrastructure, we will roll out this toolset in other countries.



The 990 dataset includes all information submitted to the IRS by tax-exempt non-profit and charitable organizations. Social sector stakeholders rely on this anonymized data (and the ability to query it) to build products and services and to conduct a wide range of analyses that shed light on sector trends, impact, and health.

Recently, the IRS announced that the Form 990 series data would no longer be uploaded or updated on Amazon Web Services (AWS). This decision brings with it new obstacles for leveraging the information contained within the dataset. Publication delays, poor indexing, and reduced ability to access data programmatically are already negatively impacting stakeholder ability to make use of key 990 data. Above all it exacerbates an existing problem — this core open dataset requires considerable data processing power and capacity to become useful, which means consuming valuable resources for those who have them and excluding those who do not.



That is why Giving Tuesday's Global Data Commons recently stepped in to make the 990 dataset freely available, in order to encourage research, drive innovation, and enable others to create new products and services for the sector.

These are just two of the major initiatives we have in the works as we build out the 21st century data infrastructure that the social sector needs.

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