



O'BRIEN • GARRETT

COVID-19 AND BEYOND: HOW DONORS ARE WEATHERING THE CRISES OF 2020

AN O'BRIEN GARRETT SURVEY
JUNE 2020

Introduction

This memo summarizes the results of the second in a series of O'Brien Garrett surveys to help track the ways in which donors are experiencing and responding to the extraordinary events of 2020.

917 respondents completed the eight-minute online survey, which was initially launched on May 26. We conducted an additional 300 interviews between June 1 and June 5, specifically adding questions about the protests after George Floyd's murder and the rising importance of racial justice for US donors.

As with our initial survey in April, participants were selected based on their responses to screening questions about giving behavior and quota'd for demographic profiles consistent with direct response donors. The resulting audience is intentionally representative of a wider direct response donor audience than just progressive organizations, including donors to some large mainstream charities.

The sample is, however, large enough to break out subsets across the ideological spectrum, and, where those breaks are informative, we have included them throughout this report.

This report opens with a brief demographic profile of the respondents. It then recaps the top results from our April survey followed by a summary of the current study presented in the form of 13 key findings.

The memo concludes with a series of observations and recommendations. An appendix to the memo presents the survey methodology in more detail.

We hope that our clients will find the survey a useful point of reference as we all navigate a year of multiple extraordinary developments.

Recapping the April Survey

The findings of our April study can be summarized in five major points:

- 1) No one has been spared by COVID-19.** While the burden is far from evenly distributed, the pandemic is impacting virtually everyone's life in significant, disruptive ways. Its universal impact is a defining characteristic.
- 2) Over a third of donors reported reduced income in April.** This fact alone presages some level of impact on direct response giving throughout 2020.
- 3) By and large, donors expressed an intent to keep giving,** but the data indicated that, for a significant cohort of donors, the willingness to contribute might collide with limits on people's capacity to do so.

4) Donors were paying closer attention to communications. In a locked-down world, people were more attentive to the messages they were receiving both in the mail and online.

5) There was some hope that the crisis could lead to positive change. While it didn't extend to all issues, donors did express a measure of hope that the experience of the crisis would lead to progress on some fronts.

Demographic Overview

As with our April survey, the demographics reflect those of a typical mainstream direct response donor audience:

- 70% over the age of 50
- 60% women, 39% men, 1% transgender, nonbinary, or gender queer
- 50% earn more than \$100,000 per year
- 43% progressive, 31% moderate, 26% conservative
- 45% Democrat, 28% Republican, 19% independent

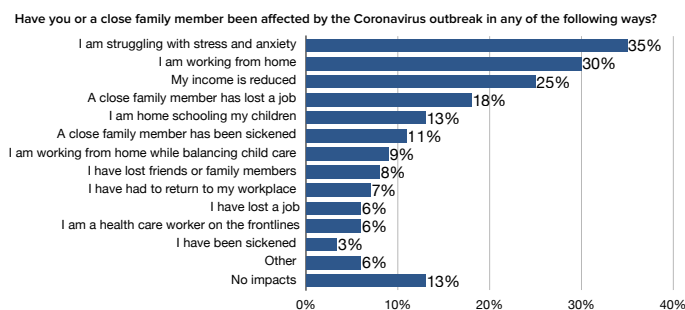
The majority of respondents (59%) consider the area where they live suburban, while 26% live in urban areas and 15% in rural ones. Progressive donors are more urban than the overall sample — 49% suburban, 39% urban, and 12% rural.

Key Findings from Our May/June Survey

#1: At this point in the crisis, stress and anxiety are overwhelming economic impacts.

Overall, donors are reporting fewer impacts from COVID-19 in June than they were in April. However, more than one-third now report that they are dealing with increased stress and anxiety due to the crisis. That's a significant, and relatable, finding and provides some guidance on messaging during this crisis.

Very few have escaped a direct impact from COVID-19.



In another important shift from April, the number of respondents reporting a loss of income has dropped from 35% to 25% — still significant in terms of its potential fundraising impact, but on the decline.

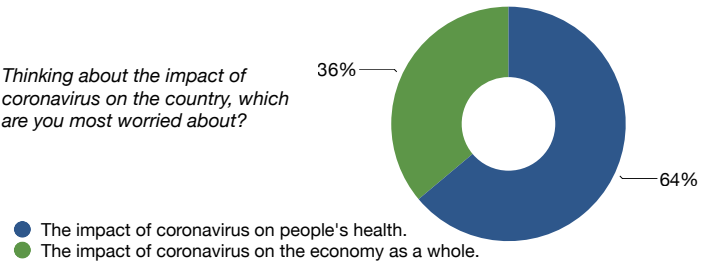
Donors don't believe we're out of the woods yet, though. In fact, almost half (49%) told us that they fear the worst is yet to come, while only 26% thought the worst was behind us. For donors living in urban areas, which have been the hardest hit, almost 60% think the worst is ahead.

Given the fear that the worst is yet to come, it is not surprising that donors have mixed feelings about reopening the country. Only one-third say that reopening is being handled responsibly in their area, while a quarter believe it's too soon to reopen.

As a guide to donors' state of mind, **it is important to note that health concerns are overwhelming economic ones at the moment.** Only 10% felt that states needed to fully reopen to put people back to work. And when we asked which impact of the coronavirus they are most worried about, 64% cited "the impact of coronavirus on people's health," compared to 36% choosing "the impact of coronavirus on the economy as a whole." For urban and progressive donors, those numbers were even higher (75% and 83%).

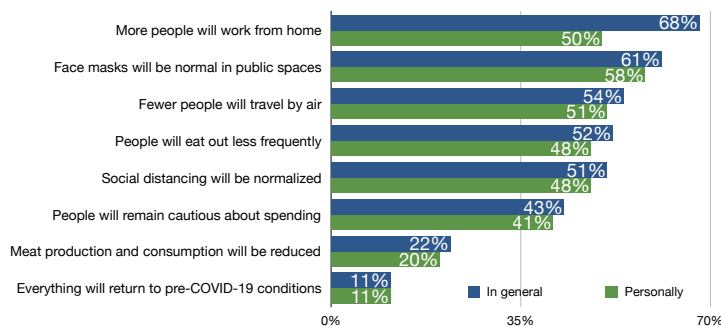
The vast majority are more concerned about people's health than about the economy.

Thinking about the impact of coronavirus on the country, which are you most worried about?



#2: Many of the lifestyle changes to prevent the spread of COVID-19 may change long-term behavior.

There is a wide belief among donors that many of the lifestyle adjustments employed to address the pandemic will endure into the future. This is likely to be reflected in donors' expectations about how the organizations they support are adjusting their work and approaches to reflect new realities.



First, we asked donors which changes they thought would continue beyond the pandemic. We then asked donors if they thought these changes would apply to their own lives — and the responses are remarkably similar. Social distancing, face masks, and caution about travel are threats to event-based fundraising, as well as challenges for major donor relationship building.

Notably, only 11% believe that things will return to pre-COVID-19 conditions. There is no magic reset button here.

#3: Donors are much more confident about their own economic future than about the economy as a whole.

We asked donors whether they feel confident or uneasy about the future of the economy over the next year, and about their own financial situation. The table on the following page reflects overall results — as well as those among midlevel donors. **The midlevel audience reflects substantially more confidence on both fronts, in large part because their economic condition makes them immune to most crises.**

Confidence Level	All Donors on US Economy	All Donors on Personal Finances	Midlevel Donors on US Economy	Midlevel Donors on Personal Finances
Very Confident	11%	18%	25%	35%
Somewhat Confident	20%	40%	20%	38%
Somewhat Uneasy	36%	31%	29%	22%
Very Uneasy	32%	10%	26%	5%

#4: The intention to keep giving is stronger than ever — and especially strong among midlevel donors.

We asked donors how confident they are about continuing to support the causes and organizations to which they donate. Here’s how they responded:

- Very Confident 29%
- Somewhat Confident 44%
- Somewhat Uneasy 18%
- Very Uneasy 6%

This 73% to 24% margin in the direction of confidence is quite encouraging given the context. However, we shouldn’t dismiss the fact that nearly one in four donors are uneasy about their ongoing ability to keep supporting causes they care about.

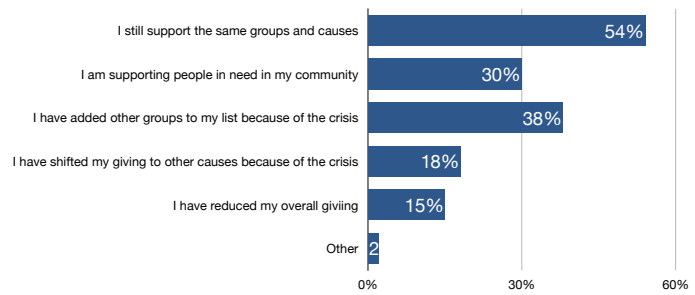
Here is another measure of people’s generosity of spirit in this crisis situation: Almost 40% of those who are still giving to their existing groups have added new causes or are also helping in their communities.

Intention to keep giving is another area where midlevel donors stand out in a positive direction. They are much more confident about their ability to keep supporting causes and organizations to which they donate.

- Very Confident 55%
- Somewhat Confident 29%
- Somewhat Uneasy 11%
- Very Uneasy 3%

As the response at right indicates, midlevel donors are doing their very best to rise to the occasion.

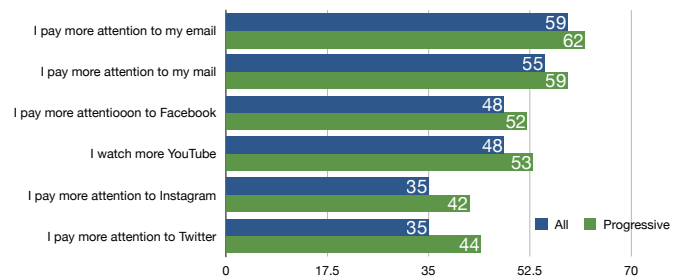
Midlevel donors are really extending themselves to meet the need.



#5: There's value in being in front of donors right now. They are paying close attention.

During the crisis, we've been tracking whether people are more open to our communications while they are at home. We've found that donor appetite for communication just keeps growing, up 3% from April to June. Progressive donors are even more invested, as the chart to the right shows.

Progressive donors are paying even more attention.



We shouldn't be afraid of being in front of donors in every way we can, and that includes donor acquisition. Both recent performance and these survey results tell us that it's worth the investment.

#6: COVID-19 isn't the lens through which most donors are evaluating their giving.

The charts below reflect the issue priorities of various donor audiences.

Most of the top issues are least impacted by the crisis.

	Important to me	Affected by COVID-19	Variance
Animal protection	28	13	-15
Hunger	36	42	6
Children	33	22	-11
Environment	19	7	-12
Homelessness	18	29	11
Climate change	17	8	-9
Poverty	17	33	16
2020 elections	16	12	-4
Access to health care	16	30	14
Education	11	19	8
Racial justice	11	10	-1
Voting rights	10	8	-2
Gun violence prevention	9	4	-5
Civil liberties	7	9	2
Reproductive rights	5	3	-2
Criminal justice reform	5	5	-
International relief	5	8	3
Immigrants' rights	5	8	3
LGBTQ rights	4	2	-2

Here are the main takeaways:

- For the most part, donors continue to focus on the same array of issues as they did pre-COVID-19.
- Indeed, they see most of their priorities as not highly impacted by the pandemic.
- The one important exception may be hunger. It is the highest-ranking issue overall and scores the highest when it comes to being impacted by COVID-19.
- This could be especially significant if a global hunger crisis emerges as the next wave of COVID-19's impact.

Progressive donors have a slightly different list of key issues, ranking climate change, racial justice, and the 2020 elections closer to the top. They also worry more about the impact of COVID-19 on racial justice.

Progressive donors are more concerned about the effect of COVID-19 on racial justice and the 2020 elections.

	Important to me	Affected by COVID-19
Hunger	28	36
Access to health care	16	30
Racial Justice	16	15
Climate change	21	10
Environment	23	10
Homelessness	17	27
Poverty	17	31
2020 elections	18	11
Voting rights	14	9
Reproductive Rights	7	6

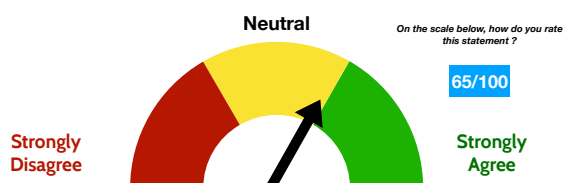
#7: What COVID-19 has exposed in the United States could shift how international relief donors balance US and global concerns.

Traditionally, donors have tended not to equate poverty and hunger in the United States with those same issues globally. They have seen them through different lenses.

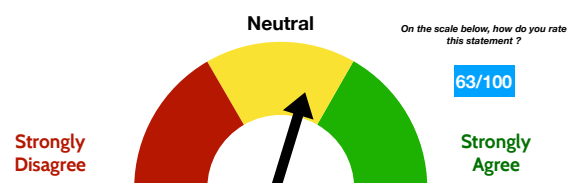
But there is some evidence that the inequality and hardship that COVID-19 has exposed and deepened in the United States is leading to a re-evaluation.

The tension between US and global concerns that donors seem to be experiencing is reflected in their conflicting answers to two survey questions. Each question asked donors to rank their agreement or disagreement with the statement on a 100-point scale.

The COVID-19 pandemic has changed the way I think about donating to international relief. The need in the United States is just as deep as that in developing nations.



While COVID-19 is having a terrible impact on the United States, I still believe that donating to help combat international crises and disasters is important.



It's notable that both midlevel donors and progressive donors still feel strongly that the need is greater internationally. But donors to more mainstream international relief groups are more conflicted by what they are seeing.

#8: There is some cautious optimism that COVID-19 could spur positive change.

As we saw in April, donors have a certain degree of hope that the crisis will result in progress. This is most true on issues such as access to health care, living wages, and voting rights.

But issues such as racism, reproductive rights, and climate change seem more intractable.

	Very optimistic	SW optimistic	Net pessimistic
Access to health care	15	47	38
Access to education	14	42	44
Voting rights	14	42	44
Living wages for workers	11	44	45
Personal freedoms	12	40	48
Poverty & hunger	11	36	53
Climate change	11	34	55
Reproductive rights	9	35	56
Criminal justice reform	9	35	56
Racism and discrimination	10	32	58
Immigration reform	11	28	61
Homelessness	9	27	64

COVID-19 has exposed a great many challenges in American society.

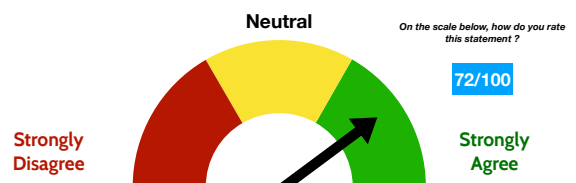
How optimistic are you that the crisis will push us to make progress in each of these areas?

It's worth noting that the responses on racism and discrimination before the first weekend of protests and those after were remarkably different. Prior to June 1, only 7% were very optimistic that we could see progress on racism. After June 1, that number jumped to 15% — another indication that this time feels different.

#9: But as responses on climate change and racial justice make clear, optimism and hope don't have to run in tandem.

The drop in emissions due to the global shutdown gives donors hope that climate change isn't inevitable. For them, it's both proof that we are causing climate change (and more evidence that the deniers are wrong) and proof that we can stop it — if we have the will.

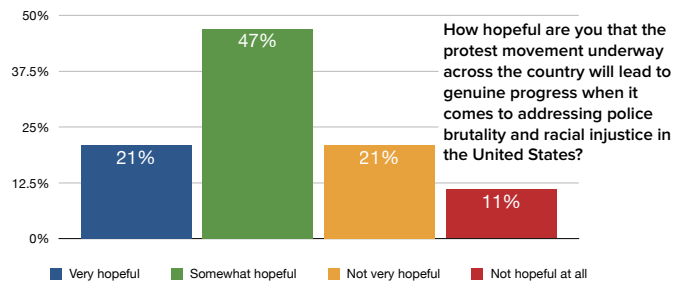
The global shutdown caused by COVID-19 has led to an unprecedented drop in emissions, proving that we can take collective action to stop climate change.



And, by a 68% to 32% margin, donors express real hope that the current protest movement will result in real change on racial justice.

Hope for progress runs even higher among progressive donors, who responded as follows: 30% very hopeful, 47% somewhat hopeful, 11% not very hopeful, and 12% not hopeful at all.

There is a real hope that this moment could finally create change.



Those hopes are combined with a profound sense of urgency.

72% of respondents agree with the statement that “there is no more important issue in our country right now than the need to address the deep racial injustices at the heart of our criminal justice system.”

Among progressive donors, that level of agreement jumps to 81%.

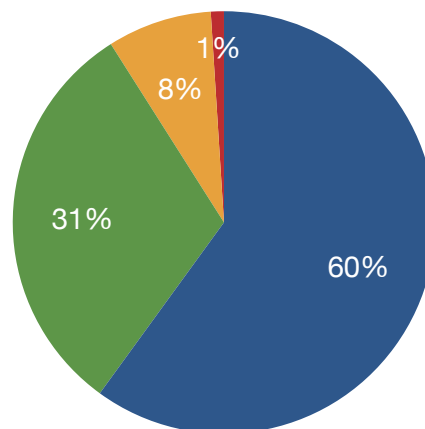
#10: The 2020 elections loom larger than ever.

To say that donors are following the 2020 elections closely would be an understatement. Six out of ten donors report following “very closely.”

The election can’t come soon enough for most donors.

How closely are you following the 2020 presidential election today?

- Very closely
- Somewhat closely
- Not closely
- Not at all



On the issue of Donald Trump’s handling of COVID-19, the majority of donors express strong disapproval. His overall disapproval rating on the issue has dropped 10 percentage points since our April survey. Among progressives, disapproval of Trump’s handling of the pandemic is at 77%.

When it comes to the election itself, in a sample that is 45% Democratic and 19% independent, the candidate preferences look like this:

Candidate	Percentage
Biden	61%
Trump	34%
Other	5%

Among progressives, that 27% margin for Biden more than doubles to a 66% margin:

Candidate	Percentage
Biden	82%
Trump	16%
Other	2%

But donors are equally divided on how likely it is that Trump will win re-election: **51% think a Trump victory is very or somewhat likely.** 49% think Trump winning another term is somewhat unlikely or very unlikely.

This combination of a strong preference for Trump’s defeat and deep uncertainty about whether he will win or lose portends a fall of high anxiety and heavy focus on electoral activity.

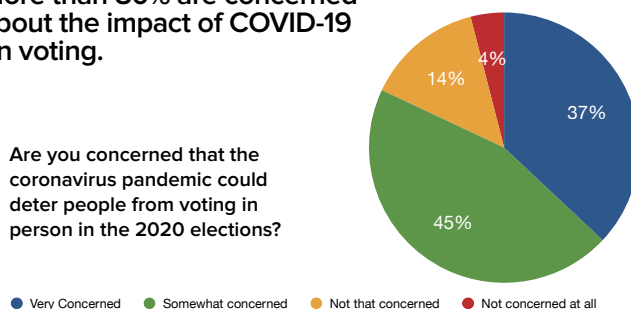
#11: Access to voting is a big concern.

More than 80% of respondents are concerned that COVID-19 will deter people from voting in person.

Couple this with progressive donors’ concerns about voting rights, and we have a perfect storm for an anxious election season. In our last outing, the Wisconsin primary had just happened, and donor concern about voting rights was even higher. Since then, Georgia primaries were a disaster, and Kentucky promises to be equally challenging.

More than 80% are concerned about the impact of COVID-19 on voting.

Are you concerned that the coronavirus pandemic could deter people from voting in person in the 2020 elections?

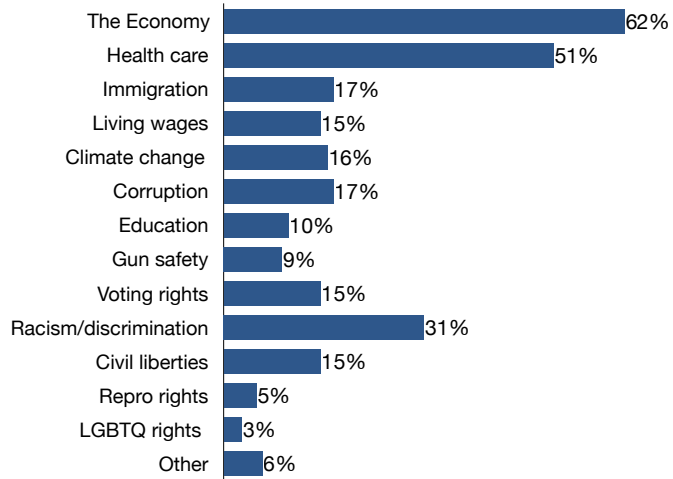


Organizations working on protecting the vote have a captive audience and should be aggressive about the work they are doing to protect election integrity and voter rights.

#12: The COVID-19 crisis and the national movement for racial justice are shifting the key issues donors think will decide 2020.

Racism and discrimination have moved into the #3 slot as critical election issues. In April, only 7% named racism and discrimination as an election issue. It was number 10 on the list.

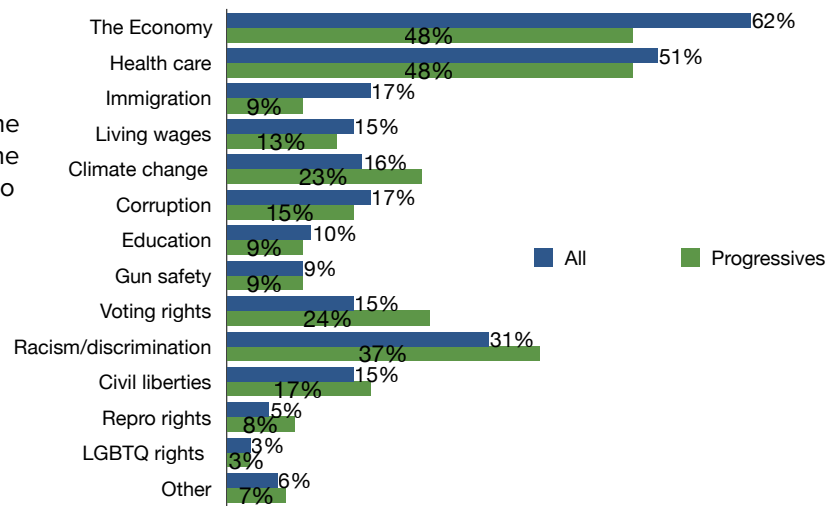
When you think about the issues that will decide the 2020 elections, which do you think will be most important?



Here, that 31% hides the upward trajectory after the protests. Even before the Movement for Black Lives protests began the weekend after George Floyd’s murder, 25% said that racism would be a factor in the election. After June 1, that number skyrocketed to 45%.

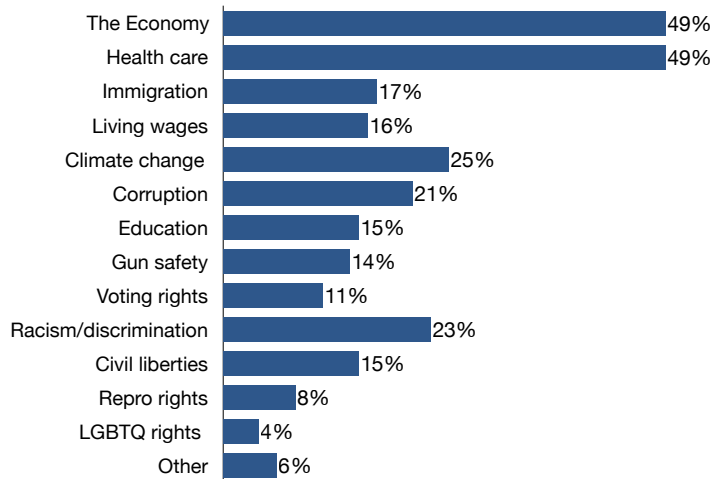
Progressive donors believe there will be less focus on the economy and more on climate change, voting rights, and racism.

When you think about the issues that will decide the 2020 elections, which do you think will be most important?



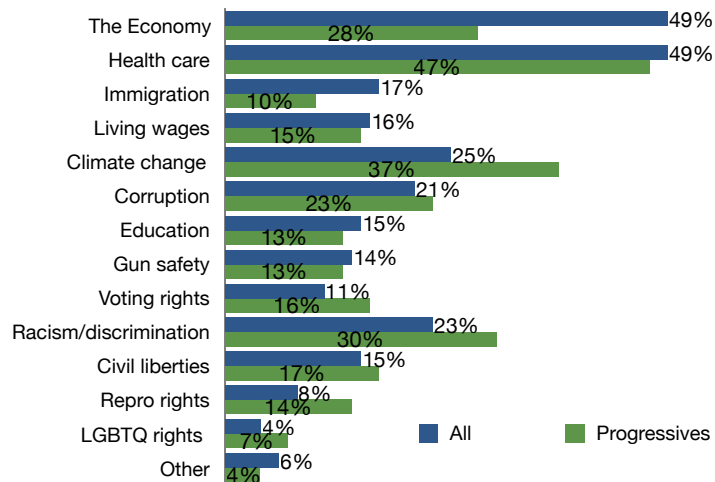
When donors think about their own voting decision, the economy and health care dominate, followed by climate change and racism.

And now thinking about your own decision, which three issues will be most important to you when you cast your vote in the 2020 election?



Progressives are more likely to base their decision on climate change and racism than on the economy.

And now thinking about your own decision, which three issues will be most important to you when you cast your vote in the 2020 election?



#13: On racial justice, Democrats and progressives think the Democratic Party has some real work to do.

The Democratic Party has a long way to go when it comes to demonstrating a strong commitment to ending systemic racism. We asked only the Democratic respondents if they agreed or disagreed with the following statement:

African-American voters have been taken for granted by the Democratic Party for too long. It's time for Democratic leaders to step up and take strong, effective, sustained action to end the systemic racism that afflicts our nation.

94% of Democrats agreed with this statement, including 57% who strongly agreed. That's pretty close to unanimous.

Ways to Act on These Findings

Based on this research, we offer the following recommendations for action:

- Always remember how anxious and potentially overwhelmed donors are in the midst of multiple crises.
- Take into account the fact that financial fears are easing a bit.
- Remember that the donor community has a generous spirit, and people are willing to stretch to meet the moment.
- Don't be afraid to make bigger asks, especially to midlevel donors.
- But keep a close eye on metrics because it is still possible for some donors to see their capacity to give overwhelm their willingness to do so.
- Keep in mind that the 2020 elections are enormously important to donors.
- Expect the August-through-October window to be disrupted by intense electoral giving.
- If your organization has a role in electoral politics, make the case for that role early and often — the more unique and focused your role, the better.
- Remember that, while donors may not be optimistic, they are hopeful. Find the path between those two instincts.
- Don't forget that, in times of crisis and confusion, donors look to organizations for confidence and direction.
- Feed donors' sense of hope, but don't over-reach. They are in a fragile place.

We are in a fluid time, with events and attitudes shifting quickly. O'Brien Garrett is committed to continuing our study of direct response donors as we move into the election window, and will keep you updated on findings.