



Yolo Donor Survey 2022: Report on Findings

Summary: The Yolo Donor Survey 2022, conducted by the Yolo Community Foundation, found that 2022 giving is likely to remain strong. It predicted that 2023 giving is likely to remain flat, but economic uncertainty is a cause for concern.

- 2022 giving remains strong: 55% of survey respondents reported that their 2022 giving will be about the same as 2021, while 25% said it is up, and 14% said it is down. Among major donors, 33% said 2022 giving will exceed 2021; none said it will fall.
- Year-end giving is likely to remain flat to strong: 60% planned to give about the same in November and December 2022 as they gave at year-end 2021, 17% expected to give less, and 13% more. Among major donors, 17% expected to give more and none less.
- The biggest factor that impacted giving in 2022 was community need: 47% said this led them to give more. Economic factors decreased giving, but not substantially.
- Due to economic concerns and weakening giving by major donors, survey respondents, as a group, will likely maintain but not grow their giving in 2023. 21% of respondents expected to increase giving in 2023, 17% expected to decrease, and nearly half expected giving to remain flat. However, among major donors, none planned to increase giving.
- In 2023, economic factors will likely have a much bigger impact on giving: 25% of respondents reported that changes to their income are likely to drive their giving down; 24% say the same for changes to their assets, 17% for stock market performance, and 33% for inflation. These figures suggest that, if economic conditions are worse than respondents anticipate, 2023 giving may weaken; of course, the reverse is also true.
- Survey respondents are strongly committed to Yolo-based nonprofit organizations: 46% give primarily to Yolo-based organizations.
- When considering whether and how much to give, respondents are especially focused on the organization's cause or mission, reputation, impact on the community, the anticipated impact of the donation on the nonprofit or program, and peer support.
- Respondents prefer to learn about prospective recipients from the organization's website, from a friend who is involved with the organization, and from email.

The Yolo Donor Survey was conducted by the Yolo Community Foundation in October/November 2022. With 104 respondents from Yolo County, the survey results are not conclusive, but we believe we can draw useful insights from this data.

Interested in learning more about the Yolo Donor Survey 2022 or the Yolo Community Foundation? Visit www.yolocf.org, email us at info@yolocf.org, or call 530-312-0593.

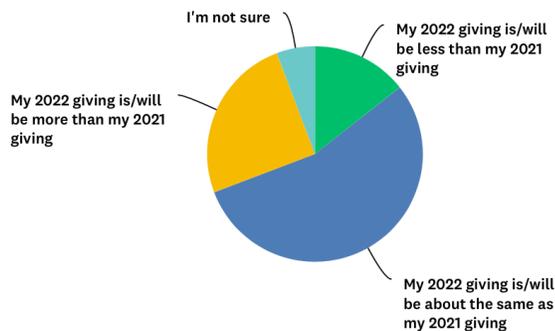
Findings

Overall, 2022 giving by Yolo County donors remains strong. In response to the COVID-19 pandemic and resulting economic conditions, local donors increased giving; now, survey respondents indicated that they are maintaining and, in some cases, increasing their giving in 2022. However, while giving is strong, respondents reported that current economic challenges, like stock market performance and inflation, exert downward pressure on donations.

Specifically, 55% of survey respondents reported that their 2022 giving will be about the same as their 2021 giving, while 25% reported giving is up, 14% said it is down, and 6% weren't

How much are you donating this year, compared to last year? (Please answer including your estimated giving through Dec. 31, 2022.)

Answered: 104 Skipped: 0



sure. These figures are similar to those collected by the Yolo Donor Survey 2021, when 60% percent expected 2021 giving to be about the same as 2020 giving, 24% said it would be more, and 16% less. Among those that haven't given at all so far in 2022, which amounted to just 11% of respondents, 5% said they can't afford to give at this time, 4% just haven't gotten around to it yet, and 5% selected "other." For those respondents that gave at least \$25,000 in 2021 (just 6% of all respondents, but a disproportionate share of total giving), 33% said their 2022 giving will exceed 2021; none said it will fall. (In this report, we will refer to those respondents that gave \$25,000+ in 2021 as "major donors.")

This survey was conducted before year-end 2022 and asked respondents to include their planned year-end donations in their estimates. November and December are typically active times for giving, as many nonprofits conduct fundraising campaigns as the holidays and end of the tax year approach. Sixty percent of respondents expected to give about the same in November and December 2022 as they gave in the same timeframe in 2021. Seventeen percent expected to give less this year-end, while 13% planned to give more, and 10% weren't sure. These figures are slightly less optimistic than the same figures from the 2021 Yolo Donor Survey, in which 59% of respondents expected that their year-end giving would be about the same as in 2020, 15% expected to give more, and 11% expected to give less. Among major

donors, expectations were a bit more optimistic: 83% anticipated giving about the same this year-end and 17% expected to give more; none expected to give less.

In 2022, respondents were most influenced by community need, which drove their giving up; economic factors generally exerted downward pressure on giving, but the impact so far is fairly minimal. By far the biggest factor that impacted respondent’s total giving in 2022 was levels of community need, with 47% of respondents reporting that this caused them to increase giving. (This figure was 66% among major donors.) The level of community attention focused on nonprofits, such as reporting in local media, also increased giving, with 18% of respondents reporting that drove their giving up.

Economic factors generally decreased giving, though not to an extensive degree (so far). Twenty-four percent of respondents say that inflation drove their 2022 giving down, while 18% said the same for changes to their assets, and 14% for stock market performance. Changes to respondents’ income had a more mixed impact – 18% said this drove their 2022 giving down, while 14% said it drove it up. Interestingly, among major donors, none reported that these economic factors impacted their 2022 giving in either direction.

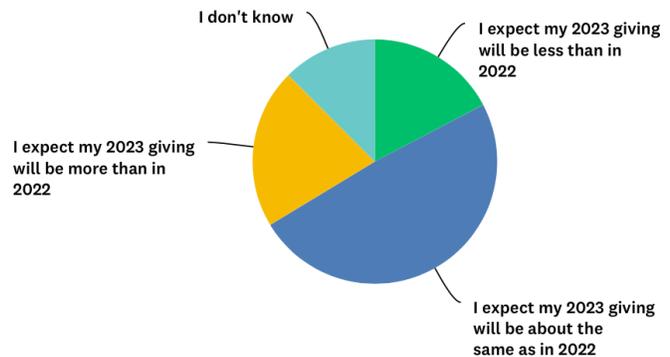
Which of the following has impacted your giving in 2022, compared to 2021?

Answered: 104 Skipped: 0

	DROVE MY GIVING UP	NOT APPLICABLE OR DID NOT IMPACT MY GIVING	DROVE MY GIVING DOWN	TOTAL
Changes (or potential future changes) to my income	13.86% 14	68.32% 69	17.82% 18	101
Changes (or potential future changes) to my assets	7.84% 8	74.51% 76	17.65% 18	102
Stock market performance	2.94% 3	83.33% 85	13.73% 14	102
Inflation	3.00% 3	73.00% 73	24.00% 24	100
Levels of need in my community	47.06% 48	50.00% 51	2.94% 3	102
Level of community attention focused on nonprofits (e.g., in local media)	17.65% 18	79.41% 81	2.94% 3	102
Number of fundraising requests by nonprofits	11.76% 12	81.37% 83	6.86% 7	102
Number of nonprofit fundraising events	7.84% 8	84.31% 86	7.84% 8	102

Due to economic concerns and weakening giving by major donors, it seems reasonably likely that giving by survey respondents, as a group, will remain fairly flat in 2023. Twenty-one percent of respondents expected to increase their giving in 2023, while 17% expected to decrease their giving. Nearly half expected their giving to remain flat, which is relatively good news, since 38% of survey respondents reported that their giving is up from pre-pandemic levels. Thirteen percent don't yet know what their 2023 giving will look like. By comparison, in the Yolo Donor Survey 2021, 54% of respondents expected their 2022 giving to be about the same as 2021, 28% expected to give more, 4% expected to give less, and 14% weren't sure.

How do you expect your giving to change in 2023?
How do you expect your giving to change in 2023?
Answered: 104 Skipped: 0



When looking only at major donors, 2023 giving looks weaker. Eighty-three percent anticipated that their 2023 giving will be about the same as their 2022 giving, while 17% anticipated their giving will drop (the same figure as all respondents). Significantly, though, none of the major donors that responded to the survey expected their 2023 giving to increase over 2022 levels; this is substantially less than the 21% share of all respondents who expected it to increase. It is also substantially less than the 40% of major donors who, in the Yolo Donor Survey 2021, anticipated that their 2022 giving would exceed 2021. Only 6% of respondents to the survey reported giving over \$25,000 (classified in this report as major donors), but these major donors contribute a disproportionate share of total giving, so this finding is concerning. However, given the small number of respondents in this group (104 total respondents, 6 of whom report 2021 giving over \$25,000), these respondents may not be representative of their peers.

While these figures suggest that 2023 giving may remain reasonably healthy, it is clear that the economy is on donors' minds as they consider their philanthropy. Twenty-five percent of respondents reported that changes to their income are likely to drive their giving down in 2023; 24% say the same for changes to their assets, 17% for stock market performance, and a whopping 33% for inflation – all notably higher than the reported impact of those same factors on 2022 giving. These economic factors resonated a bit differently for major donors – 33% each said that changes to their income or assets is likely to drive their giving down, while 17% said the same for both stock market performance and inflation. These figures suggest that, if 2023



economic conditions are worse than respondents currently anticipate, their 2023 giving may weaken; of course, the reverse is also true.

On the other hand, 47% of respondents (83% of major donors) say that community need is likely to drive their giving up, the same number as said drove their 2022 giving up. Twenty-four percent said that the level of community attention focused on nonprofits (e.g., in local media) is likely to increase their 2023 giving, which is considerably more than the 18% that said that factor increased their giving in 2022.

Which of the following is likely to impact your giving in 2023, compared to 2022?

Answered: 103 Skipped: 1

	LIKELY TO DRIVE MY GIVING UP	NOT APPLICABLE OR UNLIKELY TO IMPACT MY GIVING	LIKELY TO DRIVE MY GIVING DOWN	TOTAL
Changes (or potential future changes) to my income	19.61% 20	54.90% 56	25.49% 26	102
Changes (or potential future changes) to my assets	9.71% 10	66.02% 68	24.27% 25	103
Stock market performance	3.88% 4	78.64% 81	17.48% 18	103
Inflation	1.00% 1	66.00% 66	33.00% 33	100
Levels of need in my community	46.53% 47	51.49% 52	1.98% 2	101
Level of community attention focused on nonprofits (e.g., in local media)	24.00% 24	72.00% 72	4.00% 4	100
Number of fundraising requests by nonprofits	11.88% 12	80.20% 81	7.92% 8	101
Number of nonprofit fundraising events	12.87% 13	83.17% 84	3.96% 4	101

Looking forward to 2023, the largest number of survey respondents expect to increase their giving to the following sectors: Civil Rights, Social Action, & Advocacy (30%), Community Improvement (23%), Environment (22%), Youth Development (22%), and Housing/Shelter (20%). The largest number of respondents expected to decrease their giving to the following sectors: Recreation (13%), Economic Development (13%), Arts & Culture (13%), Animals (11% - but 10% expected to increase their giving to Animals), and Food, Agriculture, & Nutrition (10% - but 20% planned to increase their giving to this cause).

In 2023, how do you expect your giving to the following sectors to change, compared to your giving in 2022?

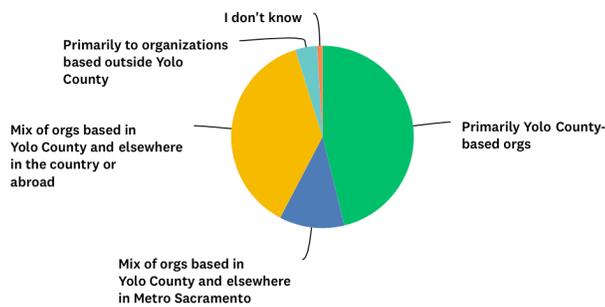
Answered: 102 Skipped: 2

	GIVE LESS IN 2023	GIVE ABOUT THE SAME IN 2023	GIVE MORE IN 2023	I DON'T KNOW	TOTAL
Animal	10.87% 10	57.61% 53	9.78% 9	21.74% 20	92
Arts & Culture	12.63% 12	63.16% 60	4.21% 4	20.00% 19	95
Civil Rights, Social Action, & Advocacy	7.53% 7	49.46% 46	30.11% 28	12.90% 12	93
Community Improvement	8.70% 8	51.09% 47	22.83% 21	17.39% 16	92
Economic Development	13.04% 12	51.09% 47	2.17% 2	33.70% 31	92
Education	9.68% 9	50.54% 47	19.35% 18	20.43% 19	93
Environment	7.53% 7	53.76% 50	21.51% 20	17.20% 16	93
Food, Agriculture, & Nutrition	9.89% 9	46.15% 42	19.78% 18	24.18% 22	91
Health	7.78% 7	53.33% 48	10.00% 9	28.89% 26	90
Housing/Shelter	8.51% 8	48.94% 46	20.21% 19	22.34% 21	94
Human Services	5.62% 5	56.18% 50	12.36% 11	25.84% 23	89
Mental Health & Crisis Intervention	8.51% 8	47.87% 45	19.15% 18	24.47% 23	94
Philanthropy	7.78% 7	52.22% 47	6.67% 6	33.33% 30	90
Public Safety & Disaster Preparedness	7.78% 7	48.89% 44	5.56% 5	37.78% 34	90
Recreation	13.48% 12	49.44% 44	1.12% 1	35.96% 32	89
Youth Development	5.38% 5	50.54% 47	21.51% 20	22.58% 21	93

Survey respondents are strongly committed to Yolo-based nonprofit organizations. Forty-six

In general, about how much of your giving goes to Yolo County-based nonprofits?

Answered: 104 Skipped: 0



percent give primarily to Yolo-based nonprofits, followed by 38% that give to a mix of organizations based in Yolo County and elsewhere in the country or abroad, and 12% that give to a mix of those based in Yolo County and elsewhere in the Metro Sacramento region. Less than 4% give primarily to organizations based outside Yolo County.

When considering whether and how much to give, respondents are especially focused on the organization’s cause or mission (82%), along with their reputation, their impact on the community, the anticipated impact of the donation, and peer support. Forty-one percent of respondents indicated that the organization’s reputation is a primary driver of whether and how much they give, followed by whether the donor thinks their gift would make a difference for this project or organization (38%), the organization’s impact as measured by data and statistics (31%), the organization’s impact as measured by stories and testimonials (26%), and whether people the donor knows and trusts give to or volunteer with the organization (26%).

When deciding whether and how much to give to a particular nonprofit, which of the following factors influence you? Please select up to three answers that influence you the most.

Answered: 104 Skipped: 0

ANSWER CHOICES	RESPONSES	
▼ The organization's reputation - I hear good things about this nonprofit	41.35%	43
▼ The organization's visibility - I hear a lot about this nonprofit	2.88%	3
▼ The organization's impact on the community it serves, as measured by data and statistics	30.77%	32
▼ The organization's impact on the community it serves, as measured by stories and testimonials	25.96%	27
▼ The organization's cause or mission - my interest in a particular cause or causes drives my giving	81.73%	85
▼ The organization's overhead - whether it spends most of its funding on programs	15.38%	16
▼ The organization's stability - whether it is big and/or long-established	6.73%	7
▼ Whether people I know and trust give to or volunteer with this organization	25.96%	27
▼ Whether I believe my gift would make a difference for this project or organization	38.46%	40
▼ I attended an event put on by the organization	4.81%	5
▼ I have volunteered with the organization	24.04%	25
▼ Whether I was asked to give to this organization	10.58%	11
▼ The organization's communications and outreach (website, social media, direct mail, etc.)	5.77%	6
▼ Whether I've given to this nonprofit before	16.35%	17
▼ Other (please specify)	Responses 1.92%	2
Total Respondents: 104		

When asked how they prefer to communicate with a nonprofit they are learning about and/or considering supporting, respondents prefer to obtain information from the organization's website (67%), from a friend who is involved with the organization (53%), and from email (33%). The least preferred options were a national platform like Charity Navigator (8%) and large group events (11%). Respondents also expressed an interest in learning about local nonprofits and causes from presentations by nonprofits on their work (21% very interested, 55% somewhat interested) and speakers/panels on particular causes or community needs (15% very interested, 59% somewhat interested).

When communicating with a nonprofit that you are learning about and/or considering supporting, how to you prefer to communicate with and gather information about the nonprofit? (Please select up to three answers that you prefer the most.)

Answered: 103 Skipped: 1

ANSWER CHOICES	RESPONSES
None of the above	0.97% 1
One-on-one meetings (in person, by zoom, or by phone)	15.53% 16
Small group events	20.39% 21
Large group events	10.68% 11
Mail	14.56% 15
Email	33.01% 34
Social media	24.27% 25
Organization's website	66.99% 69
From a friend who is involved with the organization	53.40% 55
Local platforms like GivingEdge and the Yolo County Nonprofit Directory	12.62% 13
National platforms like Charity Navigator	7.77% 8
Local media (e.g., letters to the editor, profiles, etc.)	16.50% 17
Other (please specify)	Responses 1.94% 2
Total Respondents: 103	

About the Respondents

With 104 respondents from Yolo County, the survey results are not conclusive, but we believe we can draw useful insights from this data.

Our respondents are significantly older, whiter, and more likely to live in Davis than the average resident of Yolo County. Of course, this suggests the data may not be broadly applicable to all donors within Yolo County. Specifically, 83% percent of survey respondents are over age 50, with 24% over age 70. Eighty-five percent identified as white, 3% Asian, 0% Native Hawaiian or Other Pacific Islander, 0% Black or African American, 3% American Indian or Alaskan Native, 3% other, and 7% prefer not to state. (Note that respondents could select multiple categories for race.) Nine percent indicated they are of Hispanic or Latino/a/x origin, while 85% are not and 6% prefer not to state. Fifty-five percent of survey respondents report living in Davis, followed by Woodland (27%), Winters (7%), West Sacramento (6%), and elsewhere in Yolo County (6%). (We also had six respondents who live outside of Yolo County or skipped this question, but we excluded those responses from our analysis.)



Our respondents also reported that they are more philanthropic than the average resident of Yolo County. In 2021, 1% of respondents didn't make any donations; 36% gave \$1-2,499; 36% gave \$2,500-9,999; 18% gave \$10,000-24,999; 6% gave \$25,000-99,999; and 0% gave \$100,000+. Three percent weren't sure how much they gave in 2021.

About the Survey

At the Yolo Community Foundation, we know that our community has faced challenging and unpredictable conditions since the COVID-19 pandemic started in early 2020. We created the Yolo Donor Survey to support our local community members in need by: 1) Assessing the overall health of philanthropic giving in Yolo County, 2) Enabling local nonprofits to maximize their impact by improving their understanding of and relationships with local donors, and 3) Allowing local donors and decision-makers to anticipate and react to changes in local giving.

All Yolo County residents, no matter how much they give or whether they give at all, were invited to fill out this anonymous survey. The survey gathered responses from Oct. 28-Nov. 21, 2022. We will share this data with local nonprofits, to enable them to better meet their community impact goals, and with local funders, to enable them to direct their resources to meet local needs.

The survey was conducted as part of YCF's celebration of Yolo Philanthropy Day, which was marked by an event that honored local donors and volunteers and was sponsored by Nugget Markets (title sponsor) and Edward Jones Office of Matt Yancey, Financial Advisor (supporting sponsor). To learn more about the Yolo Community Foundation or the Yolo Donor Survey, or for detailed survey results, email us at info@yolocf.org or visit www.yolocf.org.

About the Yolo Community Foundation

The Yolo Community Foundation inspires and supports giving and provides philanthropic leadership in Yolo County. The organization offers donor-advised funds and other philanthropic vehicles, donates to local nonprofits, fosters volunteerism, and supports local giving. YCF currently has nearly 90 philanthropic funds valued at over \$8 million and is an affiliate of the Sacramento Region Community Foundation. Join us! Visit www.yolocf.org to learn more.