Voices for Good

BRAND FEDERATION | 2025 Donor Sentiment Index

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Foreword

At Brand Federation, we've had the privilege of partnering with many nonprofit organizations whose missions inspire change across communities and around the world. Through this work, we've seen the nonprofit landscape evolve rapidly, marked by tighter resources and intensified competition for funding. These pressures are compounded by economic uncertainty, political division, and growing social needs that many donors confront today.

To understand how these forces are reshaping generosity, and to help nonprofit leaders and marketers navigate them, we fielded our first annual Donor Sentiment Index across the U.S. This study examines how the beliefs, motivations, and expectations guiding donor behavior are changing and benchmarks shifts in generosity over time.

The study focuses on three primary objectives:

● Exploring how current sociopolitical dynamics influence donor attitudes and actions

● Assessing how values and identity shape patterns of giving and volunteering

● Identifying the trust and message drivers that help nonprofits earn and sustain support in today's environment

The research was conducted using CultureChat, the world's first AI model trained to conduct deep qualitative interviews at the scale and speed of surveys. More than 500 donors from across the U.S. participated, with balanced representation by region, age, gender, faith background, and income level.

This approach allowed us to move beyond surface statistics to uncover the deeper structure of donor behavior: How community, lived experience, and political climate intersect with practical constraints and moral commitments.

This report presents a clear synthesis of the signals that matter most today. It reveals, for example, how neutrality and transparency broaden donor reach, how storytelling paired with evidence sustains engagement, and how non-financial actions often serve as meaningful entry points for long-term support.

Voices for Good 2025 affirms that generosity endures even in unsettled times. Donors today are not seeking perfection; they are seeking integrity, relevance to their community, and a tangible connection between their contributions and meaningful change.

With this report, we aim to equip nonprofit leaders, fundraisers, and communicators with insights they can use to expand their reach, build lasting partnerships, and amplify their impact.

Methodology

This study was conducted using EmpathixAI's proprietary CultureChat platform, an innovative research tool that enables qualitative interviews at scale, conducted with scientific rigor. Built by PhD-trained social scientists, CultureChat is designed to generate rich, conversational data by engaging participants in authentic, flowing dialogue. Unlike conventional AI-driven survey tools, CultureChat does not rely on scripted prompts or generic models; it facilitates nuanced discussions that surface deep insight into behaviors, attitudes, and lived experiences.

Respondents were sampled from across the United States and screened to include only individuals aged 18 and older who had made at least one charitable donation in the past two years. The sample was quota-balanced by age, gender, income, and region to ensure broad representativeness. This rigorous screening approach enabled us to focus on active donors while capturing a wide spectrum of motivations, values, and engagement patterns across demographic lines.
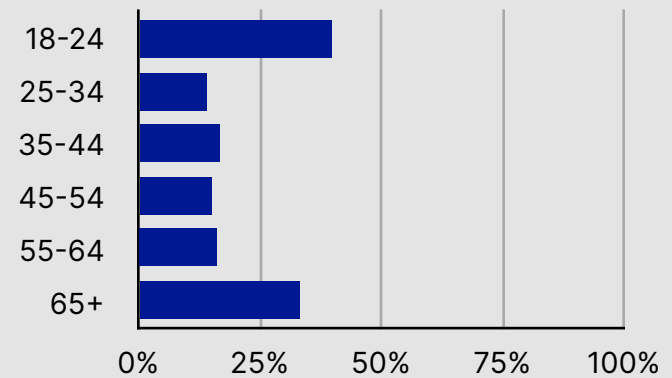
The charts included are based on the answers to closed-ended questions asked before the interviews began and demographic data mapped by the survey panels.

- *Total interviews completed: 512*
- *Total of 213 hours of conversation*
- *Interviews followed a 17-question semi-structured guide*
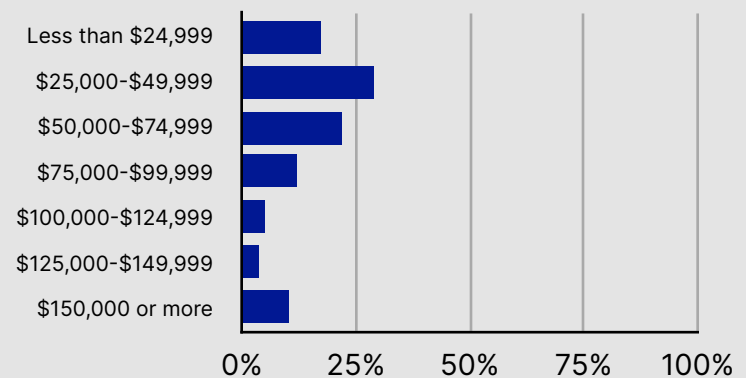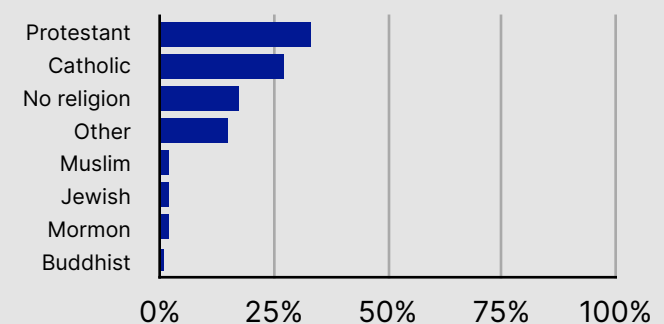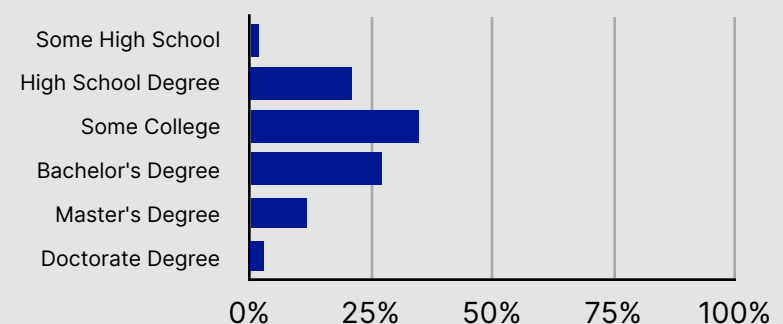- *Interviews were conducted across the United States*

Gender
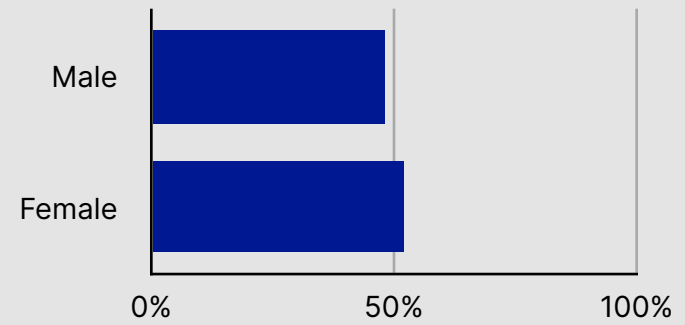
Age

Household Income

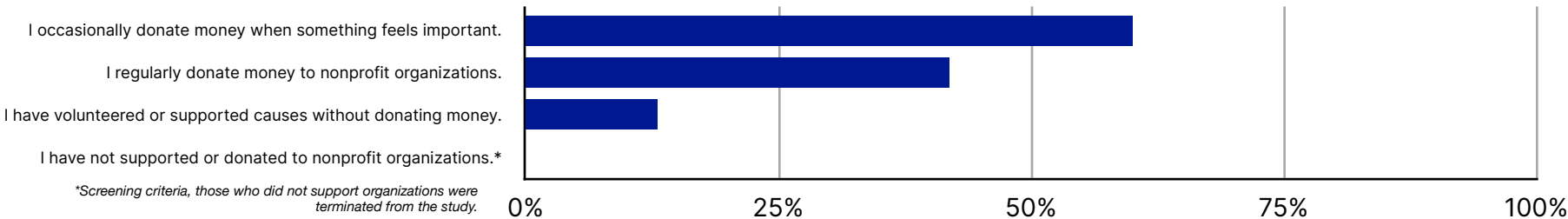## Religious Identification

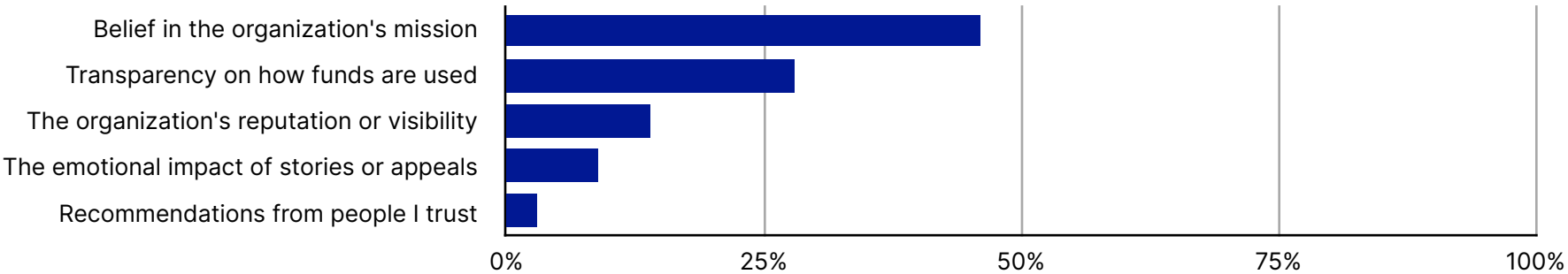## Education

Closed-ended Questions

The charts included are based on the answers to closed-ended questions asked before the interviews began.
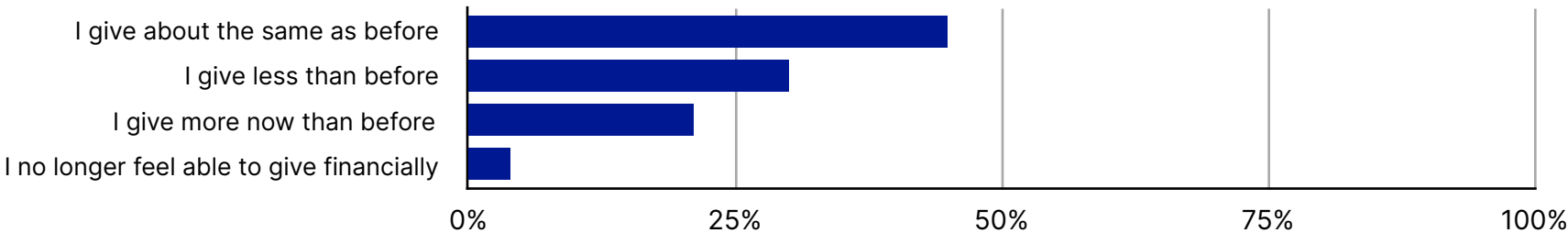
N= 512

In the past two years, which of the following best describes your experience with charitable giving or support for causes? Select all that apply.

- I occasionally donate money when something feels important.
- I regularly donate money to nonprofit organizations.
- I have volunteered or supported causes without donating money.
- I have not supported or donated to nonprofit organizations.*

Screening criteria, those who did not support organizations were terminated from the study.

When deciding where to donate, which factor matters most to you?

- Belief in the organization's mission
- Transparency on how funds are used
- The organization's reputation or visibility
- The emotional impact of stories or appeals
- Recommendations from people I trust

Thinking about your current financial situation, how has it affected your willingness to give vs. 5 years ago?

- I give about the same as before
- I give less than before
- I give more now than before
- I no longer feel able to give financially

When you think about the causes that matter most to you, which types stand out as most important? Select all that apply

- Hunger alleviation
- Animal welfare
- Children's healthcare access
- Alleviation of homelessness
- Eliminating child abuse
- Child and family support
- Poverty reduction
- Clean water
- General healthcare access
- Education access
- Environmental protection
- Firefighters / emergency response
- Historic preservation
- Academic institution growth and success
- Other
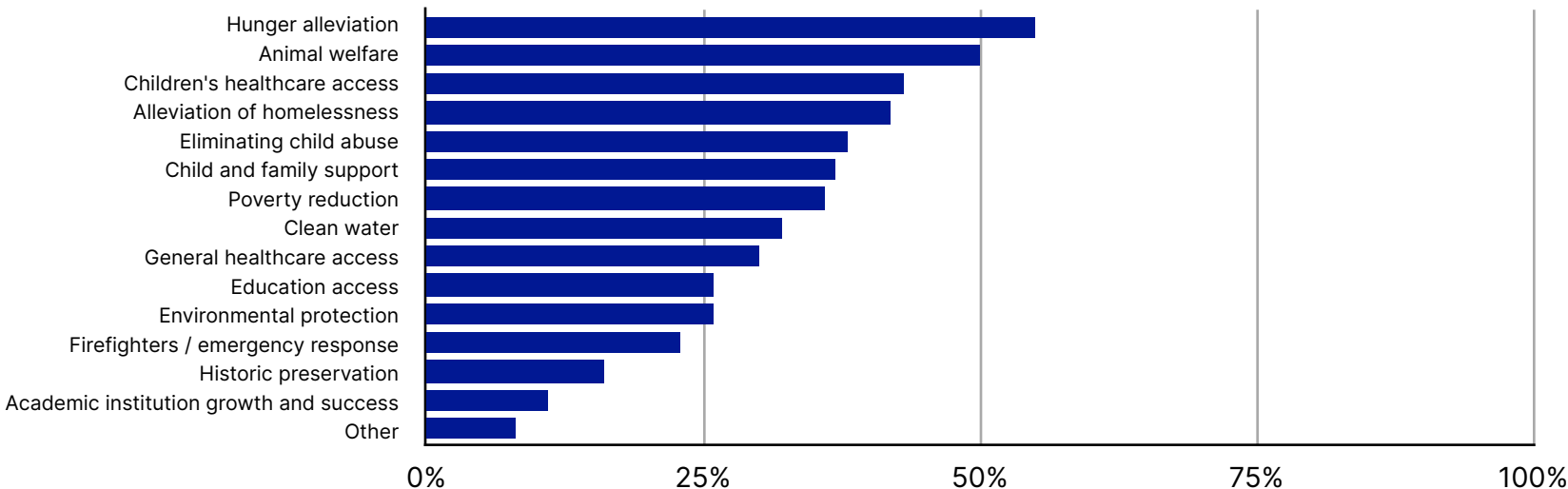
Executive Summary

The interviews reported herein reveal a nuanced landscape in which donors across socioeconomic, geographic, and religious lines demonstrate 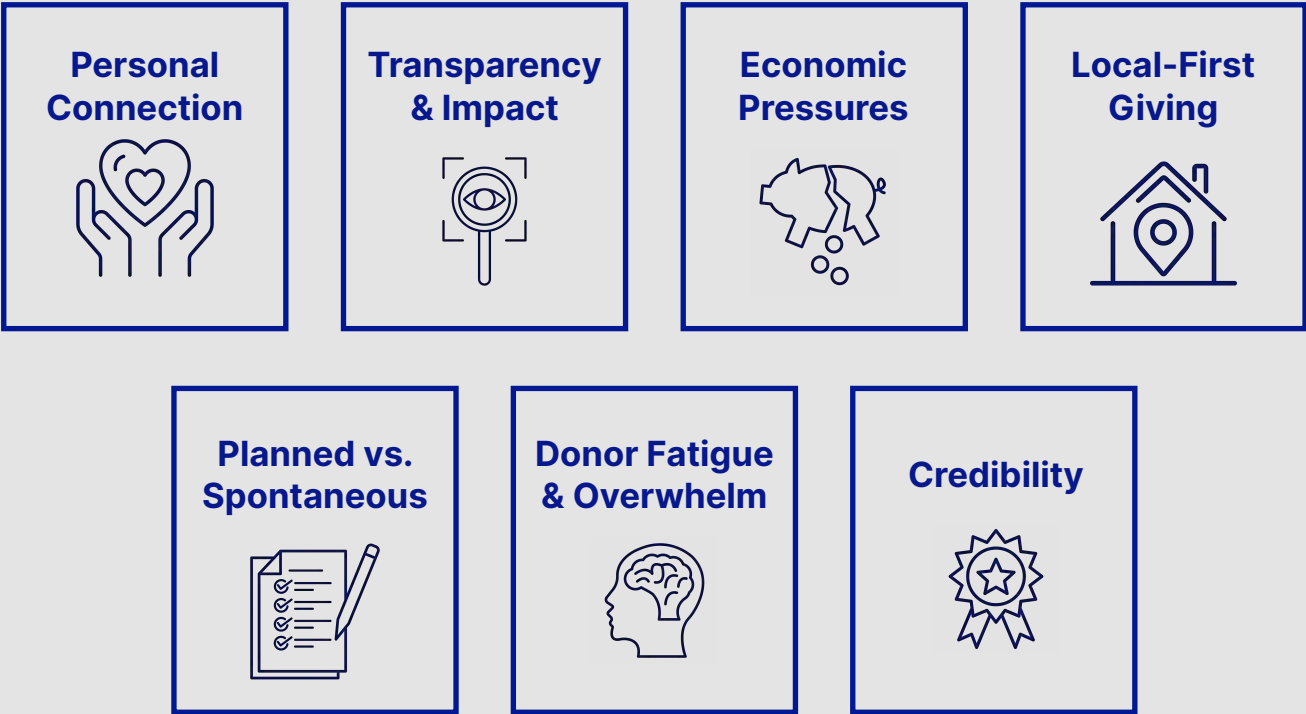a strong, sustained commitment to giving, even in the face of economic and social strain. A consistent theme across the sample is the interplay of personal experience, emotional connection, and moral conviction in shaping donation behavior.

Donors emphasized that belief in a nonprofit's mission, paired with transparent financial practices, is central to their decision-making. While many acknowledged that economic pressures sometimes require them to scale back contributions, the underlying motivation to contribute meaningfully remains intact.

Additional patterns emerged with trust in established organizations, the balance between planned and spontaneous giving, and the role of community networks in reinforcing generosity. Collectively, these insights underscore that giving is not merely a financial act. It is deeply embedded in identity, values, and an ongoing negotiation with external realities.

Key Findings

Personal Connection	Transparency & Impact	Economic Pressures	Local-First Giving

Planned vs. Spontaneous	Donor Fatigue & Overwhelm	Credibility

Personal Connection

Donors engage most when a cause connects to their experiences or those of someone close.

Key Statistics

- 77% say personal connection increases interest in donating.

- 74% say stories and testimonials directly trigger gifts.

- 68% state knowing someone affected boosts willingness to support.

- 60% have donated because of their own/family experience.

- 42% state prior volunteering/being helped increases likelihood to donate.

Photos by Joel Muniz on Unsplash

Across donor segments, personal connection consistently emerged as a powerful driver of generosity. Whether through direct experience, such as caregiving, illness, financial hardship, receiving help, or through close ties to someone affected, donors described a strong emotional and moral pull toward causes that reflect their own life stories. These experiences often instill a "pay-it-forward" mindset, in which giving becomes not just an act of goodwill, but a way to honor past hardships and uphold personal values. The presence of either a firsthand or a vicarious personal tie raises the urgency to act.

Messaging that connects to common life hardships like health crises, family caregiving, and housing insecurity resonates. Donors respond to seeing people like themselves or their loved ones reflected in the narrative.

"The last time I donated was to NYC Rescue Mission. Homelessness is something dear to me because I had a loved one who lost everything and was homeless for months."

— Male, 24, New York

"My son was a regular giver to St. Jude. He passed away two years ago, so I feel like continuing giving honors his life."

— Male, 74, Kentucky

"Because [I am] a victim myself and hearing the stories of the children, I donated $250."

— Female, 25, Florida

Transparency & Impact

Donors engage and stay when they see where funds go and what good they create.

Key Statistics

- 83% say they need to see clear impact or outcomes to donate or continue donating.

- 75% prefer neutral, non-political reporting and focus on results.

- 60% say transparent reporting on how funds are used increases their likelihood of donating.

- 28% have reduced or withheld donations due to lack of transparency or unclear impact.

Photos by Kenan Kitchen and Claudia Raya on Unsplash

Transparency and impact reporting are foundational to donor trust and, ultimately, donor retention. Donors want to understand how their contributions are used, with clear distinctions between administrative costs and direct program investment. When organizations offer straightforward, frequent updates that show both financial stewardship and real-world outcomes, donors feel respected and reassured. In contrast, ambiguity around fund use or sparse reporting can quickly erode confidence and lead to disengagement.

Trust deepens when transparency is paired with proof. Donors respond strongly to a combination of concise data, tangible results, and personal stories that demonstrate progress. Neutral, outcome-focused messaging free from ideological cues broadens appeal, particularly in politically charged environments. Regular, accessible reporting builds a sense of partnership rather than obligation, reinforcing the donor's role in driving impact and strengthening their connection to the cause over time.

"I like when they have a website where they show how much they have collected and where and when that money will be allocated. This builds trust for me."

— Female, 47, Maryland

"Be transparent about where the money goes. Show documentation that the money has been used properly."

— Male, 71, Florida

"Before I donate, I want to know where my money is going, and to be assured that is what it is going for."

— Female, 66, Alabama

Economic Pressures

Donors are torn between the piggy bank and the desire for impact.

Key Statistics

- 58% now require strong impact or value-per-dollar (e.g., low overhead, clear outcomes) before giving.

- 54% feel torn between their own financial needs and the desire to donate or have social impact.

- 45% have reduced or paused charitable donations due to economic pressures (e.g., inflation, cost of living, financial strain).

- 41% give to fewer organizations with more targeted gifts to maximize impact under constraints.

- 36% substitute volunteering time or in-kind support when money is tight.

Photos by Angels for Humanity and Getty Images on Unsplash

Economic pressures are prompting donors to make more intentional and measured choices, but not to disengage. Many now treat giving as a planned expense, integrating donations into their household budgets alongside essential costs. In a tighter financial environment, donors are narrowing their focus, concentrating support on fewer nonprofits with a track record of impact, and stepping back from those seen as less effective or opaque.

Even as cash gifts are constrained, generosity continues in other forms. Donors increasingly channel their support through time, skills, in-kind contributions, and peer fundraising. These non-monetary actions serve as meaningful impact proxies, especially when nonprofits clearly show how such efforts contribute to program success.

"Yes, money has become very tight, so now I have a monthly budget and can only give to one organization per month."

— Female, 66, Ohio

"Inflation and the cost of groceries has impacted my budget. But I still try to donate even if it is a little less."

— Female, 73, California

"I don't donate as much as I used to, but I volunteer more to make up the difference."

— Male, 31, New Jersey

Local-first Giving

Donors tend to lean toward causes that have an impact they can see and feel in their communities.

Key Statistics

- 81% are motivated to give when the impact is local or close to home.
- 78% gave to at least one locally focused organization in the past year.
- 51% prioritize local over national when they feel budgets are tight or overwhelmed *(within the subgroup that reported feeling financially constrained/overwhelmed, n=261)*.
- 43% expressed a clear preference for locally focused organizations.
- 22% expressed a clear preference for nationally focused organizations.

Photos by Joel Muniz on Unsplash

Across the donor landscape, local organizations hold an advantage in both recall and preference. The appeal of local giving is rooted in its visibility and immediacy. Donors are drawn to causes where they can witness change, connect with the people involved, and feel a direct sense of responsibility for their communities. Seeing a program in action, knowing the staff or volunteers, or hearing a neighbor's story of impact creates a relational trust that is hard to replicate at scale.

That said, national organizations play a distinct and necessary role, especially in times of crisis or when addressing systemic issues. Donors often turn to well-known national brands for disaster relief, large-scale advocacy, or long-term initiatives like medical research. These gifts tend to be planned and sustained, anchored in confidence that the organization can deliver at scale and report outcomes with credibility. The most effective strategies recognize this dynamic and help donors build a giving portfolio that spans both domains, meeting immediate, local needs while supporting national missions that require reach and expertise.

"I look at local and regional differently as the cause and potential effect are visible to me... about 75% of my giving is within an hour of where I live."

— Male, 53, Connecticut

"These causes are more local to my community, and I can see the results of helping in these areas."

— Female, 70, South Dakota

"I like to give more locally if possible."

— Female, 48, South Carolina

Planned vs. Spontaneous

Donors budget small recurring gifts, then act on emotion when urgency hits.

Key Statistics

- 72% use a hybrid approach: a planned baseline plus spontaneous one-offs.

- 57% primarily give spontaneously when moved by a story, appeal, or need.

- 56% plan or budget their donations (e.g., set monthly/annual amounts).

- 35% report an urgent appeal or crisis (e.g., disaster, medical emergency) triggered a spontaneous gift.

- 31% make recurring donations (sustaining monthly gifts or payroll deductions).

Photos by Ahmed and Tim Mossholder on Unsplash

Donors increasingly blend planned and spontaneous giving. Planned giving provides structure and continuity: Many donors treat recurring contributions as a stable budget line, often automating small monthly gifts to organizations they trust. This approach reduces decision fatigue and reinforces long-term commitment, offering nonprofits a more predictable revenue stream. Especially in times of economic pressure, planning helps donors prioritize core causes while maintaining a sense of financial control.

At the same time, emotional appeals continue to drive spontaneous action. Personal stories, visible local needs, and time-sensitive appeals, such as disaster response or medical fundraisers, consistently trigger ad-hoc giving, even among disciplined planners. Donors may tighten their regular giving, but they still tend to leave room for moments that move them.

It can be spontaneous, for example if I see an ad or respond to a natural disaster. However, when I budget, I support organizations on a monthly basis, and the same amount is withdrawn automatically, so I can plan for the expected expense, as I would with any other monthly obligation.

— Male, 36, Virginia

"I usually give when something really affects my emotions. But I sometimes plan a donation as well."

— Female, 72, Arizona

"I give every month automatically deducted from my checking account."

— Male, 59, Maryland

Donor Fatigue & Overwhelm

Donors are likely to trust and commit to an organization that sends fewer, targeted, impact-first communications.

Key Statistics

- 84% respond better to impact updates than to repeated solicitations.

- 62% give to fewer organizations to concentrate impact and reduce overwhelm.

- 56% use planned/recurring giving to reduce decision burden or fatigue.

- 37% prefer fewer, less frequent, or more targeted solicitations.

- 14% explicitly said they feel overwhelmed by the amount of need in the world.

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Many donors describe a sense that the needs around them are constant and unrelenting, but instead of disengaging entirely, they adapt. Common strategies include narrowing their focus to fewer organizations, automating core giving, and expecting stronger evidence of impact. These behaviors act as coping mechanisms that help donors stay engaged while managing cognitive and emotional load.

What undermines donor engagement is frequency without relevance. Donors are quick to disengage when they encounter repeated asks across multiple channels (especially soon after giving) or receive impersonal appeals that ignore their history and interests. In tight economic conditions, high-frequency outreach feels especially intrusive. By contrast, planned giving offers a degree of relief, lowering decision fatigue and softening the emotional burden of continual asks.

"I receive so much mail from organizations. Once you give to one, they must pass on your name... I get at least one, if not two, per week wanting a donation."

— Female, 76, Indiana

"Since I first signed petitions of a political nature, I am bombarded with unsolicited email. More than I could ever afford to support."

— Female, 72, Nevada

"I do not need to seek them out; they are in my email and texts daily. Sometimes it is so annoying."

— Male, 78, Florida

Credibility

Donors lean on track record, reputation, and local roots to decide who to trust.

Key Statistics

- 61% prefer donating to organizations with a long track record or established history.

- 56% say local organizations with deep community roots signal credibility.

- 53% are hesitant to donate to new or unknown organizations due to a limited track record.

- 37% say larger or national organizations seem more reliable.

Photos by Getty Images and Ahmet Kurt on Unsplash

Credibility is one of the strongest predictors of donor willingness to give, especially when time, attention, or trust is limited. Familiarity functions as a shortcut: Donors often equate name recognition, longevity, and a visible presence in their community with dependability. Local reputation furthers the effect. When people hear positive word-of-mouth from their communities and networks, it lowers the perceived risk of giving. In urgent situations, donors tend to default to well-established organizations with a proven track record of crisis response, trusting that their infrastructure and readiness will yield effective results.

For newer or lesser-known organizations, credibility is something built and borrowed over time. A consistent presence in local settings, partnerships with trusted institutions, and endorsements from community leaders all contribute to perceived legitimacy. Brand recognition also matters: a clear, consistent identity across channels helps donors remember, refer, and return. Critically, credibility is not earned through transparency alone, but it is reinforced by it. When a nonprofit's public story aligns with what donors see and hear on the ground, and when outcomes and financials are easily accessible, credibility compounds and becomes a durable asset.

"I give to established charities, with established track records, so I trust that they will use the money wisely."

— Male, 57, Kentucky

"We usually donate to the Red Cross because we know they are a reliable company."

— Female, 72, California

"I usually give to organizations that have been around for a long time."

— Female, 60, Rhode Island

The Impact of Donor Demographics

Photo by Curated Lifestyle on Unsplash

Age, region, and religious identity shape donor behavior.

A few key differences emerged when considering how donors with different demographic profiles behave. Age, region, and religious identity all shape how people experience appeals, plan their giving, and evaluate where to give. While preferences vary, one pattern is clear: Effective donor engagement requires nuance, not one-size-fits-all messaging. This study revealed consistent, projectable differences across key demographic groups, which can help nonprofits tailor their strategies with greater precision.

Age: *Stewardship vs. Spontaneity*
Older donors (65+) are more likely to feel overwhelmed by frequent asks and significantly more likely to manage that overload by narrowing their support to a few trusted organizations and using recurring gifts to simplify decisions. This reflects a "stewardship and simplification" mindset, anchoring support in trusted relationships and reducing cognitive load. In contrast, younger donors (under 40) tend to exhibit higher levels of spontaneous giving, often triggered by peer-driven or digital appeals. Still, most maintain a planned giving baseline, suggesting that the next generation blends structure with flexibility, responding when moved while still budgeting for causes they believe in.

Region: *Planned Commitments vs. Community Immediacy*
A key difference surfaced between donors in the Southern US versus those in the Midwest. Southern donors are more likely to give through structured, planned commitments, likely influenced by strong faith and civic networks that normalize routine support. In contrast, Midwest donors show a higher tendency toward spontaneous giving and a stronger preference for local causes, reflecting a "community immediacy" logic and acting quickly when needs arise close to home. Both regions show high use of narrowing and recurring strategies to manage fatigue, underscoring that disciplined giving habits are not limited to a single mindset.

Religious Identity: *Structure, Obligation, and Evidence*
Religious affiliation, particularly within Christian faiths, strongly influences giving norms. Evangelical and Protestant donors tend to anchor support in recurring commitments framed as acts of stewardship or faith. Their trust is often mediated through church leaders or community endorsement. Catholic donors also show strong planned giving patterns, with trust rooted in institutional reputation and parish affiliation. Non-religious donors, by contrast, rely heavily on transparency, outcomes, and independent validation to guide their giving. Their engagement tends to be more reactive and evidence-driven, and they are more likely to report fatigue from repetitive or high-pressure appeals.

Takeaways for Nonprofit Leaders and Marketers

The best research is actionable. This study was designed to help the powerful nonprofits working locally, nationally, and globally adapt and thrive in a time of volatility and constraint. What emerged is a roadmap for how generosity persists and how organizations can earn, sustain, and deepen support across a changing landscape.

1. Design for personal resonance, then validate with proof.

The strongest motivator for giving is personal connection. Donors are most responsive to stories that mirror their lived experiences or those of people they care about. Lead with concise, emotionally grounded narratives and immediately pair each story with visible outcomes. What changed because of their gift? This combination turns emotional interest into lasting loyalty and helps supporters feel seen, not sold to.

2. Make "proof-before-ask" your default rhythm.

Donors don't just want to be inspired. They want to be shown. Organizations that routinely report back on the use of funds and results earn more trust and greater retention. Replace some appeals with plainspoken impact updates: a breakdown of how dollars were used, a core metric (e.g., families housed), and a short beneficiary story. Maintain a practical and results-driven tone that resonates across segments and demographics, minimizing skepticism.

3. Engineer a "core + moments" giving model.

Most donors blend planned and spontaneous giving. Help them set a small, steady monthly baseline, and layer in frictionless, one-tap options when timely stories or crises arise. Avoid overwhelming your most loyal donors with multiple urgent requests. Instead, match high-emotion appeals with clear progress indicators to show that action leads to outcomes. Donors want to feel their responsiveness makes a difference.

4. Acknowledge constraints and offer options for supporters.

Economic pressures are real. Donors are budgeting, consolidating, and expecting more proof per dollar. Acknowledge this in your messaging. Offer flexible giving options, elevate cost-effectiveness data, and provide alternative ways to contribute, like volunteering or in-kind donations. When needs feel overwhelming, a local, tangible impact helps donors stay engaged without burnout.

5. Trade volume for relevance.

Fatigue sets in when communications feel redundant, irrelevant, or pressure-driven. Reduce cross-channel duplication, suppress asks right after gifts, and close the loop with fast, clear impact receipts. At the same time, build credibility as a long-term asset by showcasing your history. Especially in times of crisis, donors tend to gravitate toward organizations they recognize and trust. Credibility is what makes you their first call.

Unaided Recall:
Who Comes to Mind First

In this study, we analyzed which organizations and categories donors named spontaneously—before any prompts or recall lists were introduced. These unaided mentions offer valuable insight into which nonprofits are most top-of-mind in today's giving landscape and how donors instinctively navigate the space of charitable choices.

What Donors Recalled Unaided *(N=474)*
Out of 512 total interviews, 474 (92.6%) included at least one unaided mention. In those, respondents most often cited either specific national brands or high-frequency local categories such as churches, food banks, and shelters. All percentages below reflect the share of those 474 interviews in which a given organization or category was mentioned at least once, unprompted.

Top Unaided Mentions
Categories & Causes

- Churches and faith-based organizations – 37%
- Animal welfare organizations (e.g., ASPCA, Humane Society, local rescues) – 33%
- Local homeless shelters/rescue missions – 24%
- Local food banks and pantries – 19%

These broad categories were mentioned more frequently than most individual national brands, underscoring donors' local orientation and cause-first giving patterns.

Top Unaided Mentions
Named National Organizations

- St. Jude Children's Research Hospital – 11%
- Salvation Army – 11%
- American Red Cross – 9%
- Wounded Warrior Project – 4%
- Habitat for Humanity – 3%
- Tunnel to Towers Foundation – 3%
- United Way – 2%
- Make-A-Wish Foundation – 1%
- March of Dimes – 1%
- Toys for Tots – 0.8%
- UNICEF – 0.8%
- Children's Miracle Network – 0.6%
- World Wildlife Fund (WWF) – 0.6%
- Save the Children – 0.4%

St. Jude, Salvation Army, and the Red Cross form the top tier of national brand recall. Veterans' organizations show notable mention but are split across brands. A long tail of other national nonprofits follows at a lower frequency.

Ranked Snapshot Across All Mentions
Categories + Brands

- Churches and faith-based organizations
- Animal welfare organizations
- Local homeless shelters
- Local food banks
- St. Jude
- Salvation Army
- American Red Cross
- Wounded Warrior Project
- Habitat for Humanity
- Tunnel to Towers
  (Followed by a long tail including United Way, Make-A-Wish, and others)

Methods and Considerations

- **Base:** Percentages use N=474
- **Definition:** Only mentions made before prompts were counted
- **Overlap:** Donors often named multiple organizations; percentages reflect recall frequency, not exclusivity
- **Category Handling:** Local entities were grouped by function (e.g., food banks) rather than by brand

How to Interpret This Report

Study Caveats and Interpretation Guide

This report presents findings from a large-scale qualitative interview study designed to reflect the experiences and attitudes of U.S. donors. Our goal is to provide insights that are both rich in narrative context and grounded in analytical rigor. The following explains how to interpret the findings, what the reported percentages represent, and how to apply the insights responsibly.

What the Statistics Represent

Percentages reflect the share of interviewees who described a particular behavior, preference, or attitude. These should be interpreted as indicators of salience, not as weighted statistics representative of the entire donor population.

Overlapping behaviors are expected: Many donors hold multiple giving patterns at once (e.g., automated monthly giving and spontaneous crisis response). Reported themes often overlap intentionally, reflecting the complex and hybrid nature of donor behavior.

Limits of Qualitative Self-Report

Donors may emphasize motives that feel socially acceptable (such as helping locally or seeking transparency) and downplay others (like guilt or brand recognition). Recall of recent gifts may be anchored on notable events or emotionally charged moments.

Quotes are illustrative, not comprehensive. Verbatim quotes included throughout the report serve to exemplify themes. They reflect individual experiences and should not be generalized to entire segments or demographics.

Key Statistics

The "% of respondents..." that are derived from qualitative interviews are coded for binary attributes. Reported percentages are the share of interviews meeting the condition and the attribute definition. Example: "43%" means 43% of coded interviews matched the defined theme; the base is the number of interviews that met the condition. Interview-based percentages are illustrative, not projectable. They show how common a theme is among the interviewed sample.

Scope and Generalizability

These findings reflect donor mindsets during the time of data collection. Economic shifts, major disasters, or political events may influence future giving behaviors and should be taken into account when applying insights.

Analytical Rigor and Confidence

This study draws on a large interview base (N = 512) to represent diverse U.S. donor voices. While not a weighted survey, the sample is balanced and offers robust directional insight.

Findings are presented through a combination of coded prevalence, thematic synthesis, and verbatim illustrations. Where segment sizes are small or evidence is limited, we note that directly and avoid overgeneralization.

Data was analyzed through a combination of human researchers and a proprietary AI, which utilizes advanced algorithms based on human behavior and statistical inference. The results herein have been carefully monitored for quality and rigor.

Let's connect.

www.brandfederation.com

Media and business inquiries on this content, contact:

Rian Chandler-Dovis
Managing Partner and Chief Operations Officer
Brand Federation
rian.chandler-dovis@brandfederation.com