COVID-19: THE EFFECTS ON MINISTRY GIVING - SURVEY RESULTS

Deo Volente

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Deo Volente

WHO WE ARE AND WHAT WE DO

Deo Volente (www.deo-volente.org) is a 501(c)3 ministry focused on assisting ministries with strategy, research, and project initiation. Our work is non-fee based. Our intent is Kingdom growth. Our team's background is steeped in business, ministry, research, and project delivery. Our sole orientation is to add value to Kingdom ministries.

SUMMARY

We at Deo Volente have implemented our "COVID-19: The Effects on Ministry Giving" project to help leaders of ministry organizations navigate the challenges of pandemic-induced economic downturn. The project includes a paper available here as well as a discussion among leaders from across the country over the medical aspects of the pandemic, its potential economic implications, and what leaders should be doing now to prepare for the future.

This installment of our project is a national survey of churches and mission organizations to identify how the pandemic has affected organizational effectiveness, organizational process, and giving. Our effort adds understanding to how the effects differ by organization type, church culture, and church size.

Organizational Effectiveness and Process

Organizations that have experienced decreases in effectiveness are more likely to have changed their processes. Among those that agreed that they have experienced a negative impact on effectiveness, 75 percent indicated that they had changed their processes. However, a substantial portion of the organizations that have not experienced a decrease in effectiveness realized the need to change business as usual as well. Among those that strongly disagreed that effectiveness had been impacted, 50 percent strongly disagreed that they were conducting business as usual and another 25 percent disagreed.

There was remarkable agreement between churches and mission organizations that the pandemic has impacted effectiveness. Approximately 54 percent of churches either agreed or strongly agreed compared to 55 percent of mission organizations. Both churches and mission organizations are challenged to change their approaches as over 70 percent of both either strongly disagreed or disagreed with the statement that they are continuing to do business as usual.

The pandemic has posed stronger organizational challenges to small churches than to larger churches. Sixty-nine percent of small churches either agreed or strongly-agreed that their ability to achieve their strategic goals has been negatively affected compared to only 46 percent of large churches, 17 percent of very large churches and 17 percent among mega churches. Fifteen percent of small churches reported that they are conducting business as usual compared to 33 percent of both very large and mega churches.

The economic downturn has had a similar impact organizationally on small African American churches and small White churches. Approximately the same percent of small White and small African American churches (71 and 72 percent, respectively) reported that the downturn has impacted effectiveness. Similarly, there was not a remarkable difference in the percent who either disagreed or strongly disagreed with the proposition that 'business as usual' has been disrupted (78 percent for small White vs 85 percent for small African American churches).

Giving

Relative to what had happened to giving to date, organizations are more optimistic about giving in 6 months. Only 60 percent of those that had experienced decreases of greater than 50 percent anticipated that the same will be true in 6 months.

The optimism about funding in six months becomes even more pronounced in 2021. Only 35 percent of those organizations that experienced decreases more than 50 percent to date think that the same will be true in 2021.

Mission organizations are disproportionally affected relative to churches. Approximately 33 percent of mission organizations reported that giving had decreased more than 50 percent compared to only 15 percent of churches. Mission organizations are more pessimistic than churches about giving in the future. Thirty-three percent of mission organizations predict giving will decrease between 26 and 50 percent within 6 months compared to only 12 percent of churches. For the year 2021, differences become even more stark. Twenty-nine percent of mission organizations predict funding will decrease more than 50 percent in the year 2021 compared to only 5 percent of churches.

The pandemic has affected giving to smaller churches more than larger churches. Sixty-two percent of small churches reported a decrease in giving compared to only 8 percent of large churches, 17 percent of very large churches, and 0 percent of mega churches. Fifty-three percent of small churches anticipate that their giving will decrease at least 10 percent in the next six months compared to only 17 percent of very large churches and 0 percent of mega churches.

Small African American churches have suffered, and expect to suffer in the future, larger decreases in giving than their small White counterparts. Sixty-five percent of small African American churches reported that giving had decreased at least 26 percent, compared to only 21 percent of small White churches. Seventy-two percent of small African American churches expect giving to decrease at least 26 percent in the next 6 months compared to only 7 percent of small White churches. For giving in 2021, 31 percent of small African American churches expect giving to decrease at least 26 percent compared to only 7 percent of small White churches.

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BACKGROUND

COVID-19. God, in His Sovereignty, has allowed this major disruption to enter our ministries, our economy, our very lives. Our focus is consumed with survival and the realities of dealing with a new normal. Things are confusing and fluid. Most ministry organizations do not have research functions to provide input to future decisions. We at Deo Volente do; that is our calling.

The uncertainty of economic forecasts contrasts sharply with the certainty of God's sovereignty. God has appointed leaders and given them wisdom. Leaders look at the dynamics around them, interpret, and set, or adjust, directions. It is important that we consider the future and that we position ourselves accordingly. The purpose of this paper is to assist you in that process.

We are sobered by the economic dynamics that are setting up before us. We think that these dynamics could have short-term and long-term negative consequences for ministry organizations, both churches and mission organizations (MOs), that are stewards of the resources that God provides them. Towards this end, we have published a paper that provides a perspective of the economic dynamics setting up before us, how those dynamics interact with each other, and possible outcomes or implications that await us. In addition, Deo Volente hosted a discussion from across the country to discuss the pandemic and its economic implications on ministry organizations.

In uncertain times such as these it is critical to get a sense of what is actually happening. The purpose of this paper is to provide critical information regarding how the pandemic is affecting – and anticipated to affect – ministry organizations across the country through a survey. The distinctive contribution of this effort compared to other surveys from Barna and LifeWay is an intentional effort to sample and report organizations of varying size and cultures. Importantly, we also sampled MOs.

We conducted this survey to explore the following questions:

1. *How have ministry organizations been affected in terms of their organizational effectiveness and response?*
2. *How have ministry organizations been affected in terms of giving to date, and predictions for giving in the next 6 months and in the year 2021?*

METHODOLOGY

In all, we sent the survey via email to about 3,900 churches, predominately in the following metro areas, using the church list from Deo Volente's ministry partner, City Vision's.

- Greater Twin Cities Metro Area, MN
- Greater Dallas/Fort Worth Metro Area, TX
- Greater Tupelo Metro Area, MS
- Greater Sioux Falls Metro Area, SD
- Greater Fargo/Moorhead Metro Area, ND/MN
- Greater Elkhart Metro Area, IN

In addition, we sent emails to churches, pastors, and mission's organizations in the following cities and states using other email lists provided from City Vision and other Deo Volente team members:

- Rochester, MN
- Charlotte, NC
- Phoenix, AZ
- Los Angeles, CA
- Portland, OR
- Orlando, FL
- Boston, MA
- Montgomery, AL
- Austin, TX
- Louisville, KY
- Philadelphia, PA

Thus in all, we emailed churches in 15 different states to take the survey and encouraged recipients to pass along to others in their own church and ministry networks. We also posted the links to the economics paper and to the survey on both the Facebook pages for Deo Volente and City Vision.

We sent the emails beginning on Saturday May 2, 2020 and closed responses at midnight on May 17, 2020. We received 127 survey responses for a response rate of 3.3%.

Table 1 list each item of the survey along with the response choices. We held the number items to a minimum out of respect for time. The organizational items capture the extent to which the pandemic has induced changes in operations and impacted effectiveness as measured the ability to achieve progress on organizational goals. The giving items capture the extent to which giving has been affected as of the survey as well as medium (6 months) and long term (2021) predictions.

Table 1: Survey items and response choices

ITEM				
ORGANIZATIONAL				
Your organization has continued "business as usual" in the wake of the pandemic.				
Strongly Disagree	Disagree	Neither	Agree	Strongly Agree

Your organization has continued "business as usual" in the wake of the pandemic.

Strongly Disagree	Disagree	Neither	Agree	Strongly Agree

GIVING

The pandemic has affected financial giving to your organization in the following way:

Decrease 50% or More	Decrease Between 26% and 50%	Decrease Between 10% and 25%	Decrease 10% or Less	No Change	Increase

The pandemic is projected to affect financial giving to your organization in the following way over the next six months (from pre-pandemic giving levels):

Decrease 50% or More	Decrease Between 26% and 50%	Decrease Between 10% and 25%	Decrease 10% or Less	No Change	Increase

The pandemic is projected to affect financial giving to your organization in the following way in calendar year 2021 (from pre-pandemic giving levels):

Decrease 50% or More	Decrease Between 26% and 50%	Decrease Between 10% and 25%	Decrease 10% or Less	No Change	Increase

Lastly, we analyze open-ended comments to provide insight into the rationale behind responses to the items listed in Table 1.

SAMPLE DESCRIPTION

The overwhelming sample of our survey includes churches as Figure 1 indicates at 87 percent, 7 percent MOs and 6 percent other. Although the sample size for MOs is small, the survey still provides insight into how they have been affected by the pandemic. For the purposes of discussion, we review the results regarding MOs. However, we urge caution in extrapolating these results due to the low number of respondents that are MOs (n=9).

Figure 1: Type Organization.

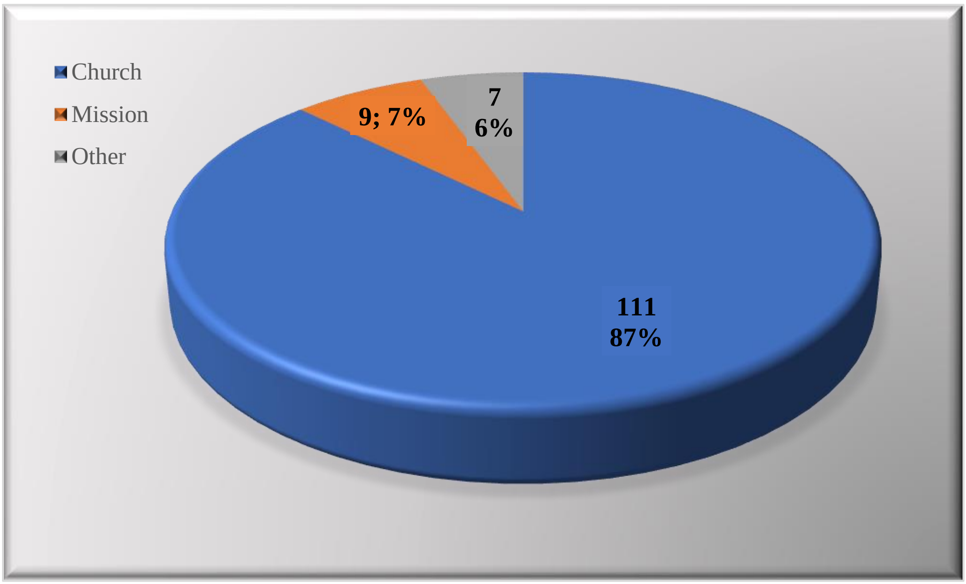


Table 2 provides the breakdown of churches by size for the sample as compared to churches nationally. The sample under-represents small and intermediate sized churches and over-represents medium, large, very large and mega churches. The size classifications are based upon self-reported average weekly attendance. Note that 98 of the 111 churches provided attendance information.

Table 2: Church size of sample (n=98)

SIZE	AVERAGE WEEKLY ATTENDANCE	SAMPLE (%)	NATIONAL (%)*	DIFFERENCE
Small	100 or Less	41	65	-24
Intermediate	101-299	6	20	-14
Medium	300-499	28	7	+21
Large	500-999	13	4	+9
Very Large	1,000-1,999	6	3	+3
Mega	2,000 or More	6	1	+5
TOTAL		100	100	

* Source: City Vision

Table 3 shows the distribution of churches by culture compared to that of the nation. White, Multi-Ethnic/Culture, and Other Language/Culture churches are over-represented in the survey sample relative to the nation, while African American, Hispanic/Latino, and House churches are under-represented.

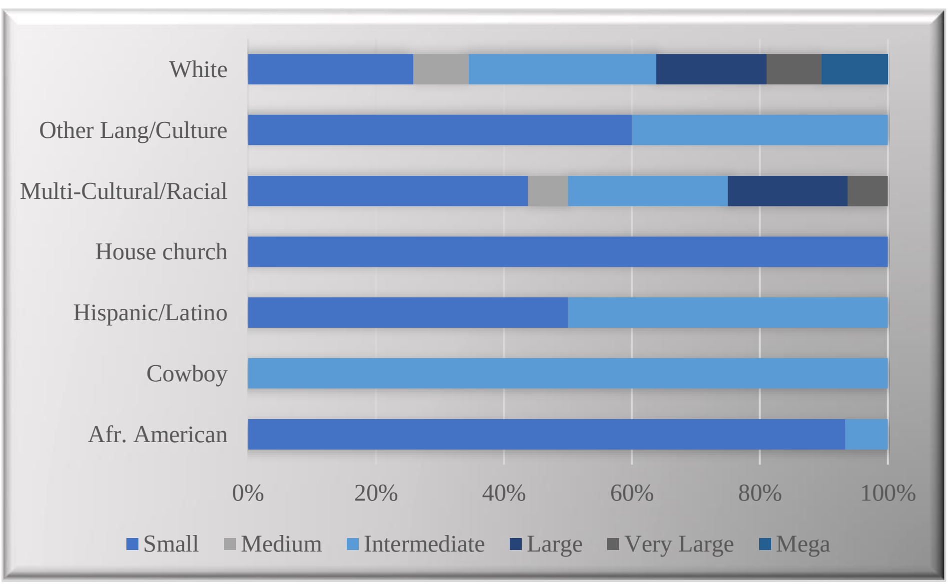
Table 3: Church culture of sample (n=109)

CULTURE	SAMPLE (%)	NATIONAL (%)*	DIFFERENCE
White	57	48	+9
African American	16	24	-8
Multi-Ethnic/Culture	16	7	+9
Other Language/Culture	5	4	+1
Hispanic/Latino	4	10	-6
House Church	2	7	-5
Cowboy	1	1	0
TOTAL	100	101**	

* Source: City Vision ** Error due to rounding.

Figure 2 reveals that the size distribution of White churches is broad as can be expected given that they comprised over half of the survey respondents. The vast majority (93 percent) of the African American churches are small. Half of the Hispanic/Latino churches are small, and the other half are intermediate. The multi-racial/culture churches range from small (43 percent) to very large (7 percent).

Figure 2: Church culture and size.



The sample also consisted of representation from a broad cross-section of denominations. Forty percent were Non-denominational/independent, 8 percent CONV, 8 percent EFCA, 5 percent AOG, 5 percent CMA, 4 percent each for Independent Baptists, LCMS, and SBC. In addition, there was at most a 2 percent representation from 24 other denominations.

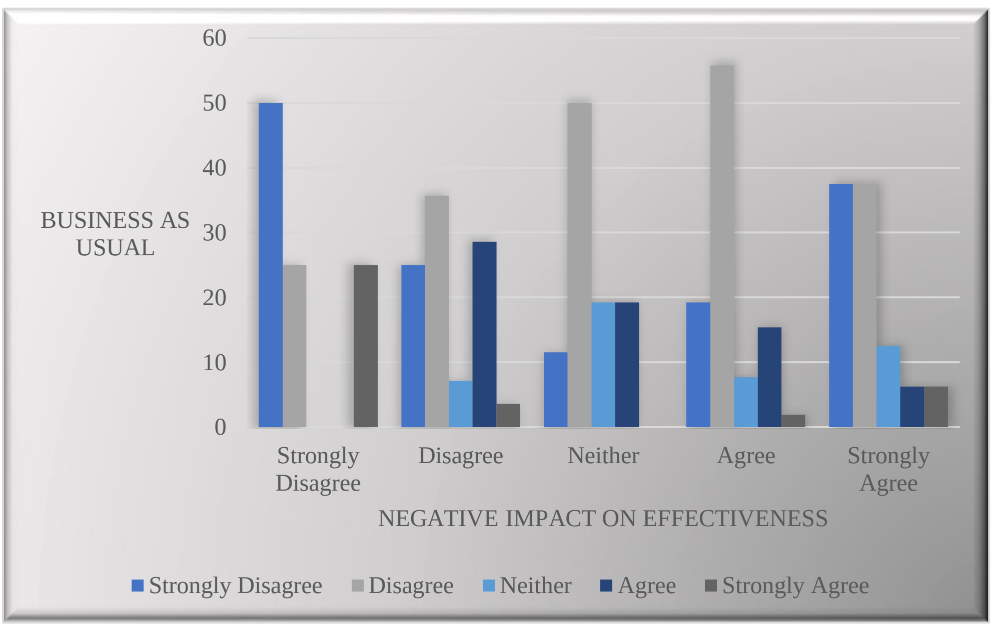
RESULTS

We present results generally on the impacts on effectiveness, process, and giving, followed by a treatment of these across the type of organization, and lastly among churches. The same in-depth treatment is not warranted among MOs due to the low sample size among the survey respondents. We present the results for Other organizations but do not discuss as the focus on this paper is on churches and MOs.

Effectiveness and Process

Figure 3 reveals the organizations that have experienced decreases in effectiveness are more likely to have changed their processes. Among those that agreed that they have experienced a negative impact on effectiveness, 75 percent indicated that they had changed their processes. Among those that strongly agreed, 72 percent changed their process. However, a substantial portion of the organizations that have not experienced a decrease in effectiveness realized the need to change business as usual as well. Among those that strongly disagreed that effectiveness had been impacted, 50 percent strongly disagreed that they were conducting business as usual and another 25 percent disagreed.

Figure 3: Business as usual and effect on effectiveness.



Thirty-one of the 127 respondents made comments regarding business as usual. The qualitative analysis of the comments affirm that the pandemic has posed tremendous challenges organizationally. Forty-five percent of the comments referenced either going online or enhancing online services. One church responded that it has "had to make changes to the way we do everything." In spite of the challenges, there is a spirit of gratitude. One church noted that it was "…extremely grateful for the refining spiritually speaking."

Thirty-four of the 127 respondents provided comments regarding impact on effectiveness, most of which indicated a negative effect especially when it comes to ongoing programs. One church responded that they have had difficulty ministering to the poor who often do not have internet access, another responded that their outreach to youth development and racial healing had been negatively affected, and yet another mentioned their programming for elderly, families, and youth. One respondent expressed frustration that the digital approach to their operations made it difficult to assess where people were spiritually.

Not all comments were negative, however. One comment referenced an abiding faith in God: "The Lord has been so gracious in opening up other doors." Others mentioned how moving online has expanded their reach: moving online "…allows us to reach further outside of current sphere." Another church responded that it had allowed them to practice friendship evangelism and yet another mentioned that the pandemic had allowed them to accelerate some items previously planned.

Giving

Table 4 shows that relative to what had happened to giving to date, organizations are more optimistic about giving in 6 months. Only 60 percent of those that had experienced decreases of greater than 50 percent anticipate that the same will be true in 6 months. Twenty percent anticipated a drop in giving between 26 percent and 50 percent. Five percent expect an increase. There are cases, however, where there is more pessimism. For example, 30 percent of those who had experienced a decrease in giving to date between 10 percent and 25 percent anticipate their giving in 6 months to drop to a decrease between 26 percent and 50 percent. Of those who had already experienced an increase, 68 percent expect there to be no change in giving in 6 months and 23 percent actually expect a decrease of varying magnitudes.

Table 4: Giving to Date and in Six Months

	DECREASE 50% OR MORE	DECREASE BETWEEN 26% AND 50%	DECREASE BETWEEN 10% AND 25%	DECREASE 10% OR LESS	NO CHANGE	INCREASE
Decrease 50% or More	60	20	0	5	5	10
Decrease Between 26% and 50%	0	75	0	13	13	0
Decrease Between 10% and 25%	0	30	50	15	5	0

Decrease 10% or Less	0	0	31	54	15	0
No Change	2	2	10	32	44	10
Increase	0	5	0	18	68	9

Of the 127 total responses, 28 commented how their giving has been affected to date. There were a number of responses that indicated it was too soon to tell. A number of the respondents that have not experienced a major change cited the faithfulness of God and their congregation, particularly committed individuals and partners. One response offered a more nuanced understanding, citing that offerings were up but that capital and program revenue had suffered.

Regarding projections for giving six months out, uncertainty is the main themes. There were 19 comments, many of which admitted it was too difficult to estimate but that it depended upon how long churches were not allowed to meet. One church feared the loss of interest in churches if the lockdown persisted for more than a few months. Another felt that giving would suffer only as long as the lockdown. One church that had not suffered a decrease credited their long-standing focus on tithing and stewardship.

Seventeen provided comments about the outlook for giving in 2021, with 4 responding that there is no way to tell and another linking their giving to the job market in 2021. Interestingly, one church linked their future giving to the number of H1B visa holders, citing uncertainty with government policy around the issue as a result of the pandemic. One church that expected an increase due to new directives and outreach programs. Consistent with this focus on growth, one stated that their prayer was that the church will reconnect and grow as a result of the pandemic. Three churches that anticipate either the same or an increase in funding cited faith in God's provision. Another church referenced that they had received a PPP loan from the federal government and expressed hope that they would be able to leverage it to expand their work.

Table 5 shows that the optimism generally revealed in Table 4 becomes even more pronounced for anticipated giving in 2021. Only 35 percent of those organizations that experienced decreases more than 50 percent to date think that the same will be true in 2021. Twenty percent anticipate that giving will increase. Of those organizations that had experienced increases to date, 27 still expect increases in 2021, but 50 percent expect no change and 23 percent expect a decrease.

Table 5: Giving to Date and in 2021

	DECREASE 50% OR MORE	DECREASE BETWEEN 26% AND 50%	DECREASE BETWEEN 10% AND 25%	DECREASE 10% OR LESS	NO CHANGE	INCREASE
Decrease 50% or More	35	20	10	5	10	20
Decrease Between	14	14	14	29	29	0

26% and 50%						
Decrease Between 10% and 25%	0	20	25	20	25	10
Decrease 10% or Less	0	0	15	38	23	23
No Change	0	0	10	25	40	25
Increase	0	5	0	18	50	27

Type of Organization

Figure 4 indicates that there was remarkable agreement between churches and MOs that the pandemic has negatively affected effectiveness. Approximately 54 percent of churches either agreed or strongly agreed compared to 55 percent of MOs. In contrast, however, evidence suggests that the effectiveness of MOs had not been affected to the same extent as churches, as they were far less likely than MOs to strongly disagree (2 vs 11 percent, respectively) that their effectiveness had been impacted. Similarly, only 21 percent of churches disagreed compared to 34 percent of MOs.

Further analysis suggests that these results are in part due to the fact that churches were no longer able to hold in-person services and were navigating the transitions to online services. Eighty-three percent of the very large and mega churches – those most likely to have already had an online capacity prior to the pandemic – responded that there has not been a negative impact on effectiveness. In contrast, only 35 percent of the small and medium churches – those least likely to have an online presence prior to the pandemic – indicated that their effectiveness had not been affected.

Figure 4: Negative Effect on Progress Towards Goals by Type Organization

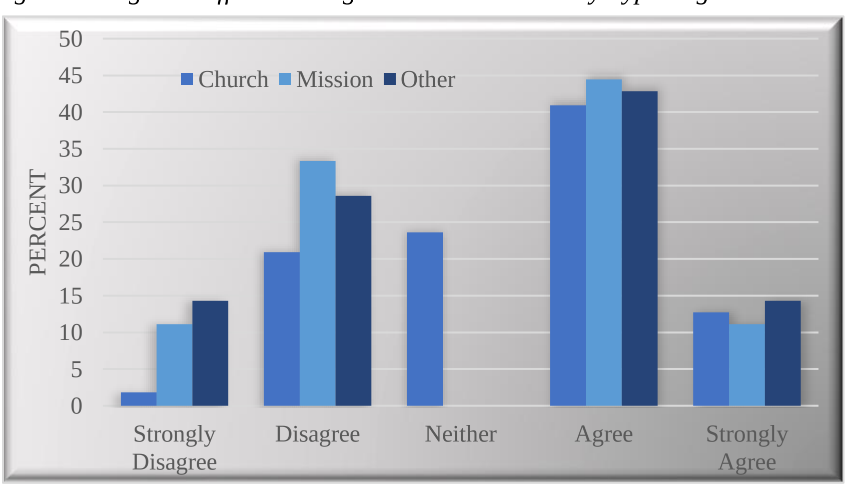


Figure 5 shows that the pandemic challenged the organizational processes of both types of organizations. Seventy-percent of churches and 79 percent of MOs indicated that the pandemic had caused them to change their processes. Only 18 percent of churches and 21 percent of MOs, on the other hand, indicated that they maintained business as usual.

Figure 5: Percent of Business as Usual by Type Organization.

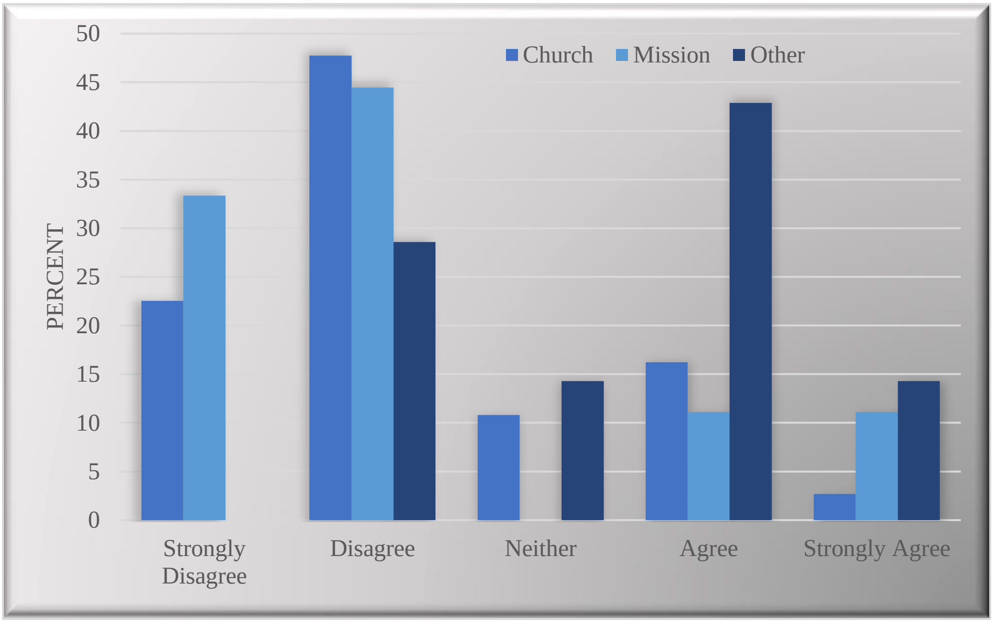


Figure 6 reflects that MOs had been hit harder than churches in terms of giving so far. Thirty-three percent had experienced a decrease in giving of more than 50 percent compared to only 15 percent of churches. The same percent of churches and MOs (approximately 33 percent) indicated that they had not experienced a change in giving and 19 percent of churches had experienced an increase compared to 11 percent of MOs.

Figure 6: Effect on Giving by Type Organization.

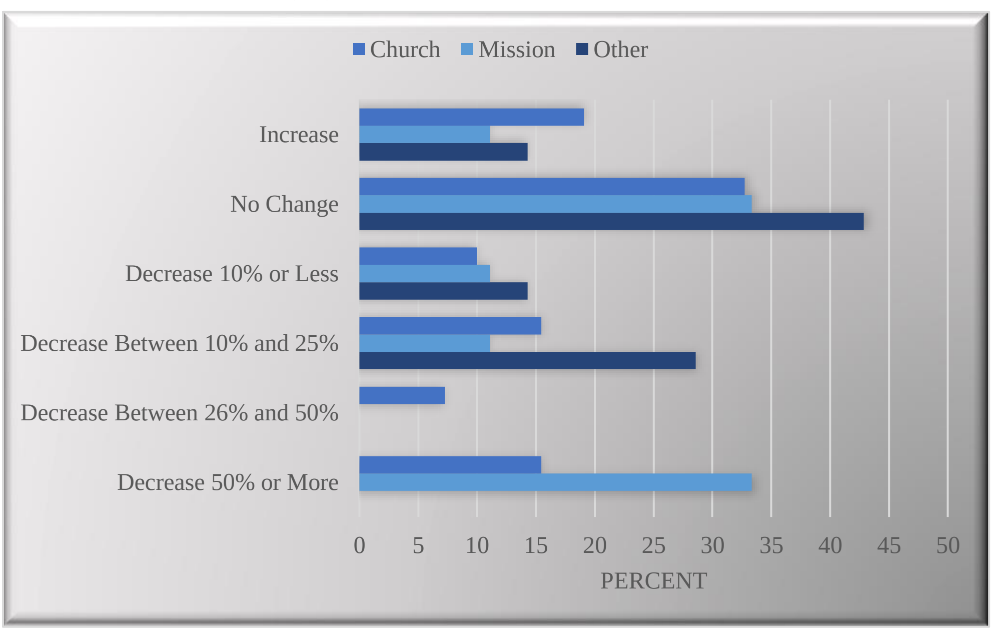
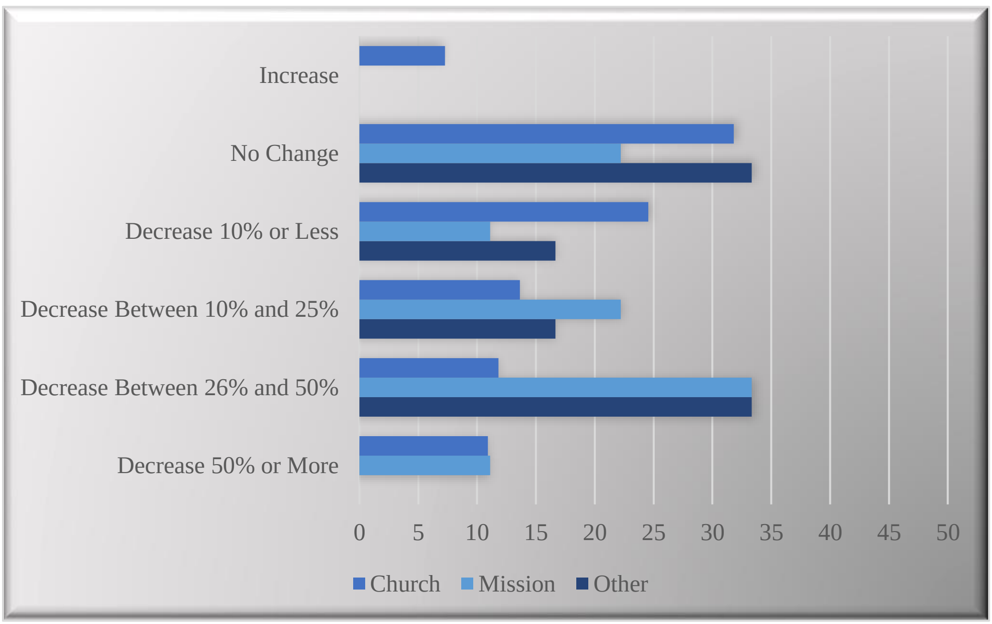


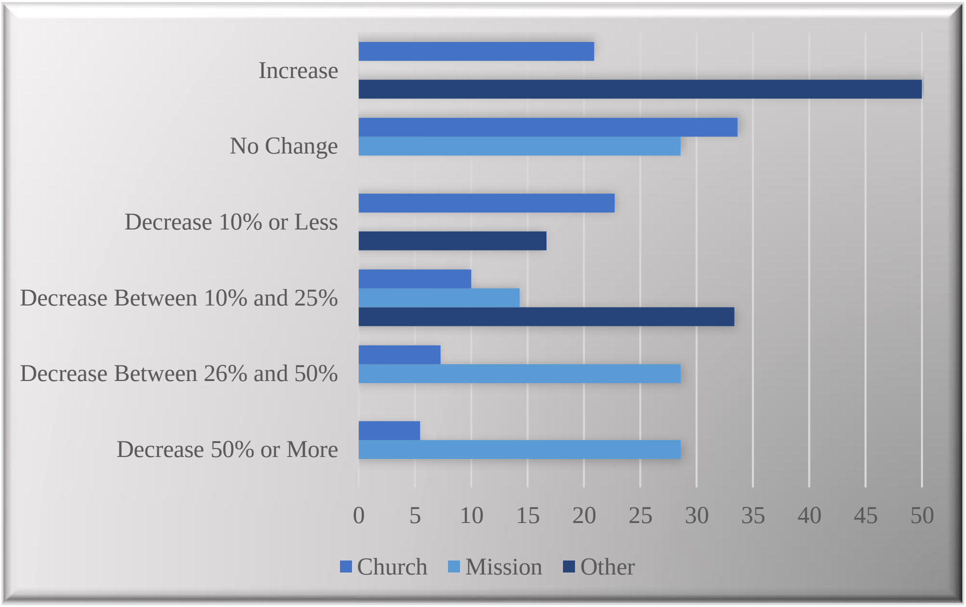
Figure 7 reveals projections for giving in the medium term, the next 6 months. Notably, no MOs expected an increase while 8 percent of churches did. Thirty-three percent of churches expect giving to remain the same compared to 24 percent of MOs. A higher percentage of churches (25 percent) anticipated a mild decrease of less than 10 percent than did MOs (12 percent). A higher percent of MOs (23) expect a downturn in giving between 10 percent and 25 percent than do churches (13). The difference is even larger when it comes to decreases between 26 percent and 50 percent. Thirty-three percent of MOs expect a decrease in this range compared to 12 percent of churches. Interestingly, approximately 11 percent of both churches and MOs expect giving to decrease by more than 50 percent.

Figure 7: Projected Giving in 6 Months by Type Organization.



In regards to the long-term projections for funding in 2021, MOs are even more pessimistic relative to churches than the medium-term projections (See Figure 8). Approximately 28 percent of MOs expect giving to decrease more than 50 percent compared to only 5 percent of churches. About the same percent (28 percent) of MOs expect giving to decrease between 26 and 50 percent compared to 8 percent of churches. For churches, 33 percent expect that giving will remain the same compared to 29 percent of MOs. None of the MOs indicated that giving would increase in 2021 but 21 percent of churches expect an increase.

Figure 8: Projected Giving in 2021 by Type Organization.



<u>Churches</u>

<u>Size</u>

The extent to which the pandemic has impacted effectiveness depends on church size. Figure 9 illustrates that only 15 percent of small churches either strongly disagreed or disagreed that they had experienced a negative impact on their progress towards goals compared to 50 percent of very large and mega churches. Somewhat out of step with this pattern, only 15 percent of large churches strongly disagreed or disagreed that their effectiveness had been impacted.

Conversely, almost 70 percent of small churches agreed or strongly agreed compared to only 17 percent of very large and mega churches that agreed that the pandemic negatively impacted effectiveness.

Figure 9: Negative effect on progress towards goals by church size.

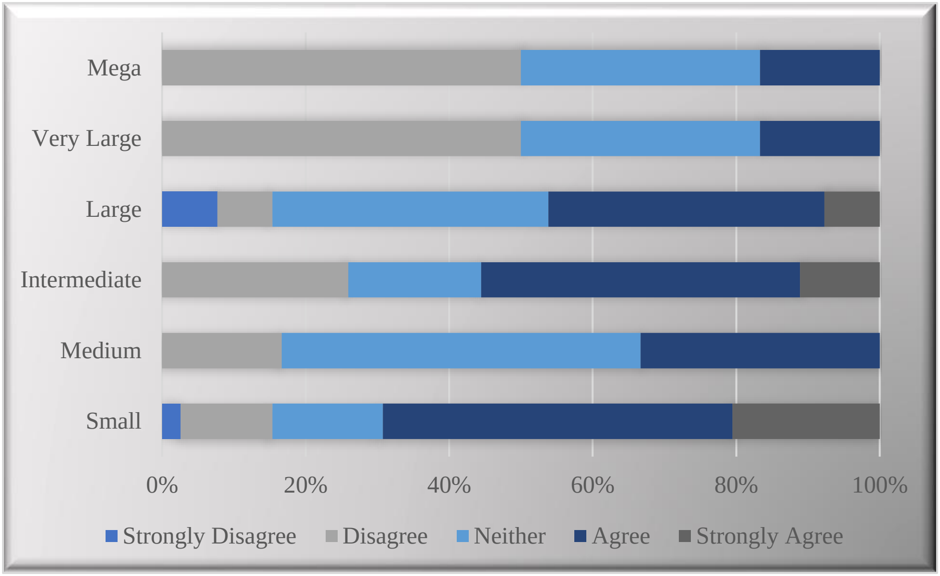


Figure 10 reveals that across the size spectrum, churches were faced with changing the way they do business. At least 65 percent of churches of all sizes, except very large, indicated that they have had to change their processes. The one minor deviation from this claim is among very large churches, only 50 percent of which indicated that they were not doing business as usual. There is a general pattern, however, in that as church size increases, the percent of churches that are continued to do business as usual increased. About 15 percent of small churches either agreed or strongly agreed that processes had not changed, increasing to 16 percent of medium, 18 percent of intermediate, 22 percent of large, and 33 percent for both very large and mega churches.

Figure 10: Business as usual by church size.

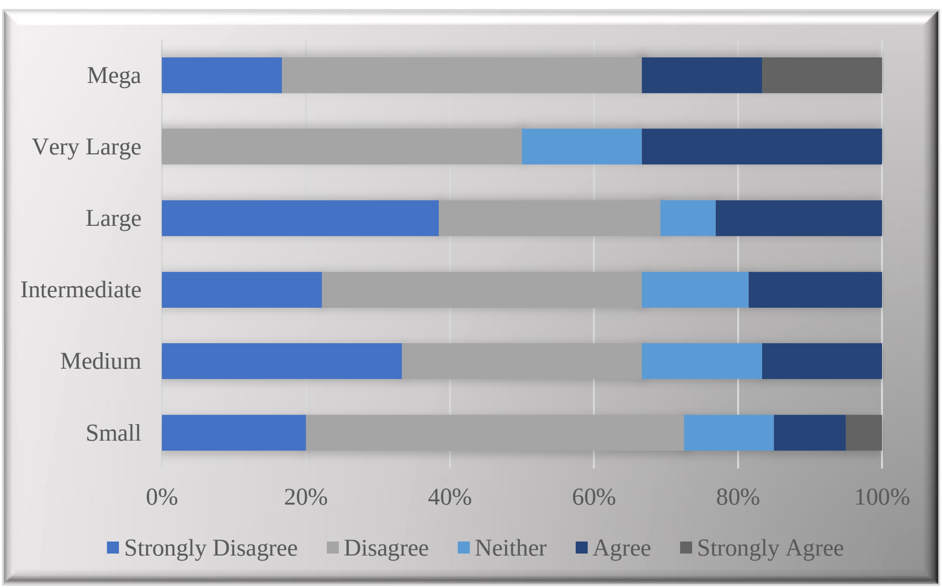


Figure 11 indicates that the larger the church, the less of an impact on giving churches had experienced. Only 10 percent of small churches reported an increase in giving, increasing gradually to 32 percent of very large and mega churches. Over 70 percent of small churches had experienced a decrease compared to 15 percent of medium, 45 percent of intermediate, 25 percent of large, 50 percent of very large, and no mega churches.

Figure 11: Effect on giving by church size.

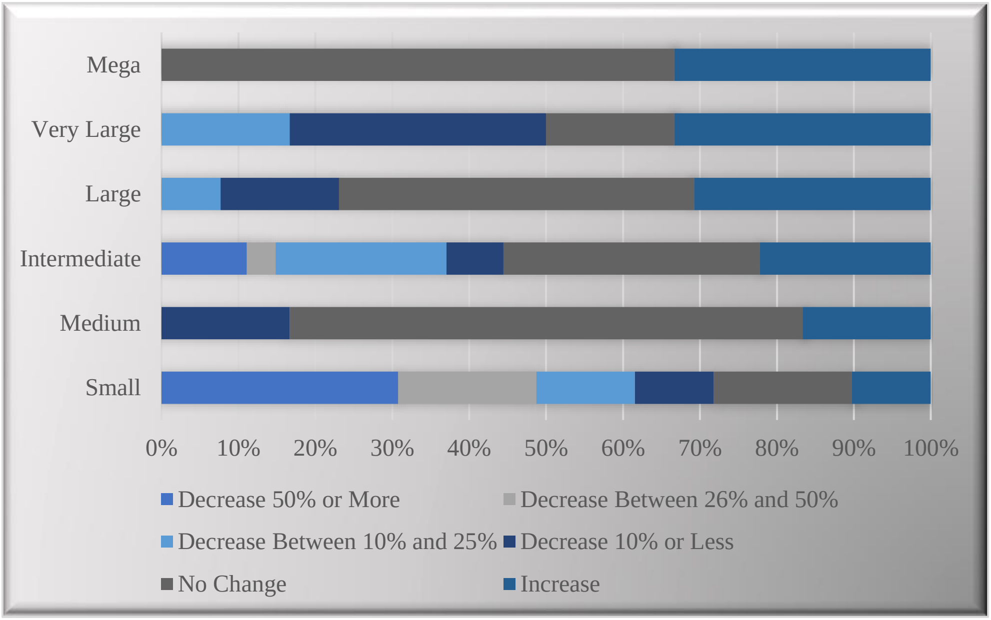


Figure 12 suggests that although a sizable percentage of all churches expect some type of decrease within the next 6 months, the smaller churches expect much larger cuts. About 18 percent of small churches expect giving to decrease by more than 50 percent compared to 11 percent of intermediate churches and none of the other churches. Approximately 20 percent of small churches expect giving to decrease between 26 and 50 percent, compared to about 15 percent of intermediate churches. None of the other church sizes anticipated a drop of this magnitude. Mega churches was the only size category that not did have any expectation of a drop between 10 and 25 percent.

Figure 12: Projected giving in 6 months by church size.

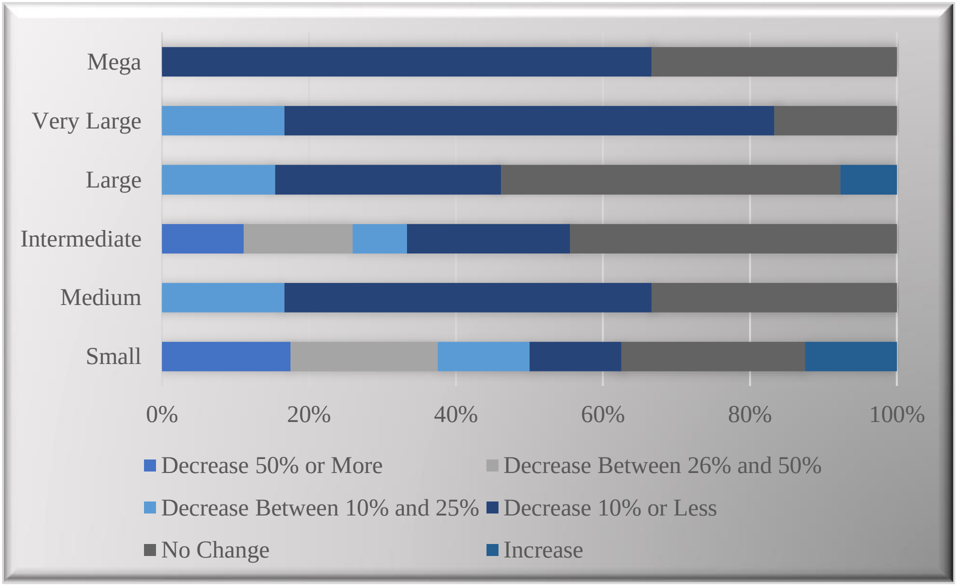
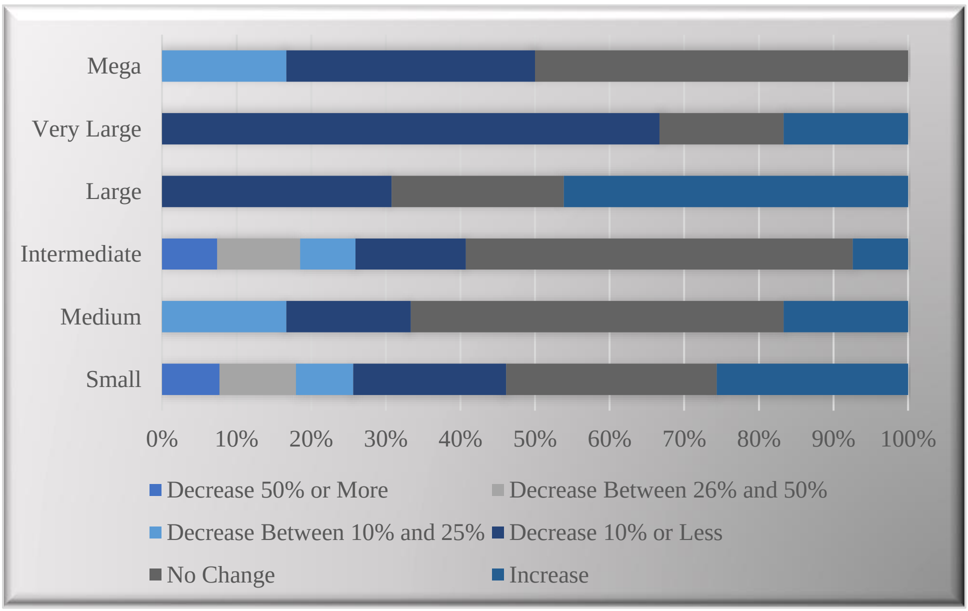


Figure 13 indicates that there is not the same general pattern for projected giving in 2021 between giving and size as shown in Figure 11 and

Figure 12. This is understandable since forecasts become inherently more difficult as the window extends further into the future. None of the mega churches were expecting an increase in funding, compared to 45 percent of large churches and even 25 percent of small churches. However, 9 percent of small churches foresaw a dramatic decrease of over 50 percent while none of the medium, large, very large, and mega churches did. A full 50 percent of mega churches foresaw a drop of some kind compared to only 47 percent of small churches.

Figure 13: Projected giving in 2021 by church size.



Culture

Our analysis of culture is restricted to White, multi-cultural, and African American churches due to sample size although we present results for all cultures. Figure 14 indicates that White and multi-cultural churches did not suffer a decrease in effectiveness to the same extent as African American churches. Seventy-seve percent of African American churches either agreed or strongly agreed that their effectiveness had been impacted by the coronavirus compared to 55 percent of multi-cultural churches and 43 percent of White churches. None of the African American churches strongly disagreed and 10 percent disagreed that effectiveness had been affected compared to over 30 percent among multi-ethnic churches and 25 percent of White churches.

Figure 14: Negative effect on progress towards goals by church culture.

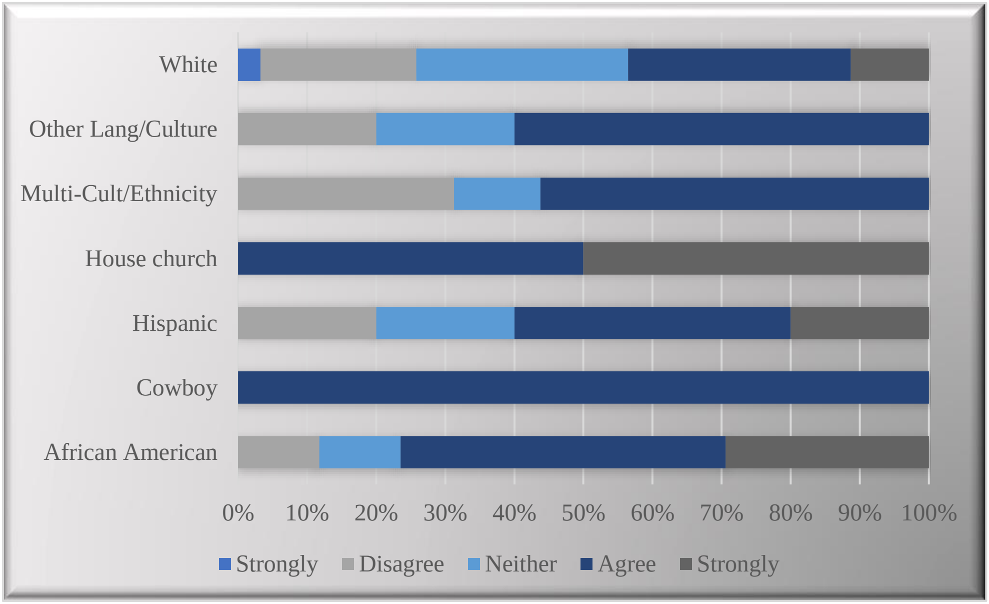
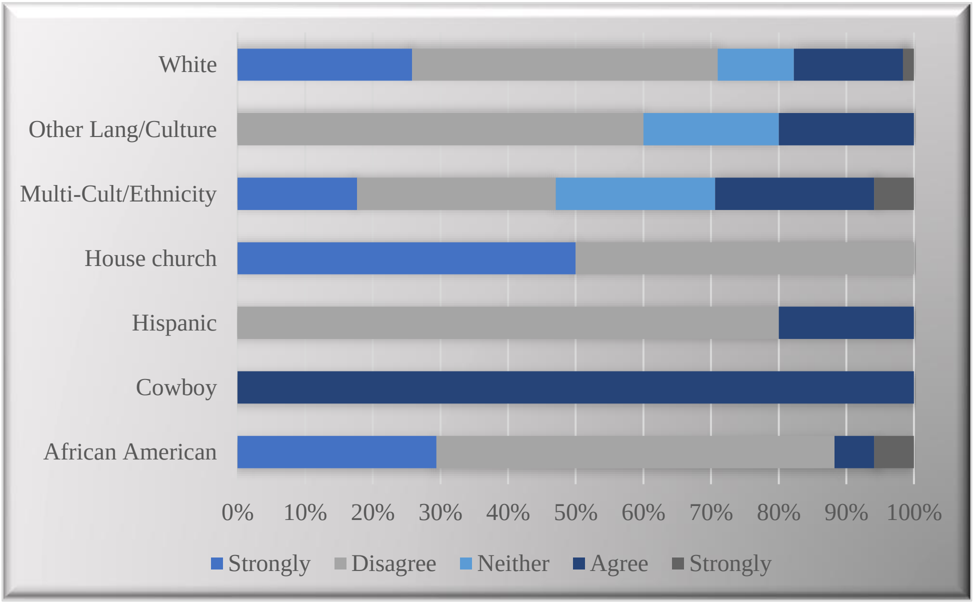

White
Other Lang/Culture
Multi-Cult/Ethnicity
House church
Hispanic
Cowboy
African American
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Strongly
Disagree
Neither
Agree
Strongly

Figure 15 indicates that by and large organizational processes at most all church cultures had changed. There are some patterns to note however. While 11 percent of African American churches either agreed or strongly agreed that things had not changed, just under 30 percent of multi-cultural churches and 19 percent of White churches reported the same. Almost 90 percent of African American churches either agreed or strongly agreed that processes had changed compared to over 70 percent of White churches and only 48 percent of multi-cultural churches.

Figure 15: Business as usual by church culture.



In order to tease out the effect of size, we look at how the pandemic has affected small African American churches (n=14) compared to small White churches (n=14). Similar comparisons for larger congregations are not possible due to the low number of survey responses. Figure 16 reveals remarkable agreement among small African American and White churches that the pandemic has impacted effectiveness with well over 70 percent of each either agreeing or strongly agreeing that this has been the case.

Figure 16: Organizational Effectiveness for Small African American and Small White Churches

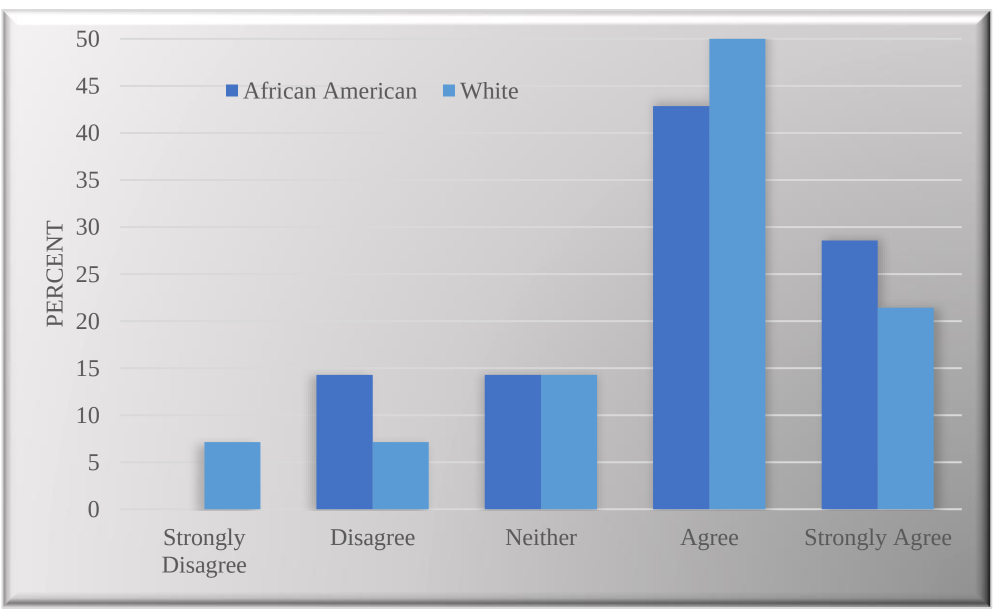
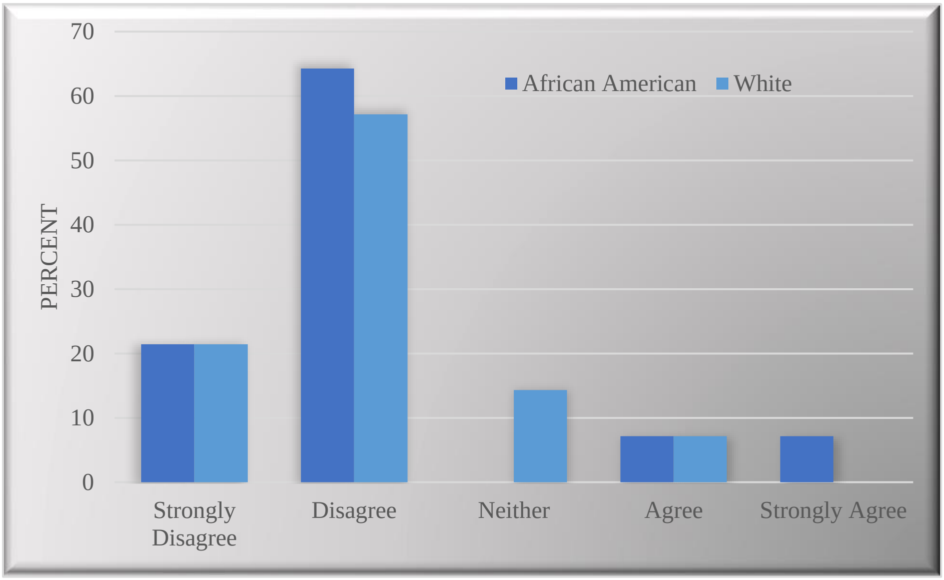


Figure 17 also shows that both small African American and White churches have had to adjust the organizational processes as a result of the pandemic. Over 80 percent of the small African American churches strongly disagreed or disagreed that they have been doing business as usual compared to just under 70 percent for small White churches.

Figure 17: Business as Usual for Small African American and Small White Churches



Giving to date and projections of giving differ by church culture. Figure 18 indicates that African American churches had been hardest hit by a large margin. Over 40 percent reported that their giving had decreased by over 50 percent compared to only 7 percent among multi-cultural churches and 8 percent of White churches. Almost 90 percent of African American churches reported a decrease of some magnitude compared to 60 percent of multi-cultural churches and 40 percent of white churches.

Figure 18: Effect on giving by church culture.

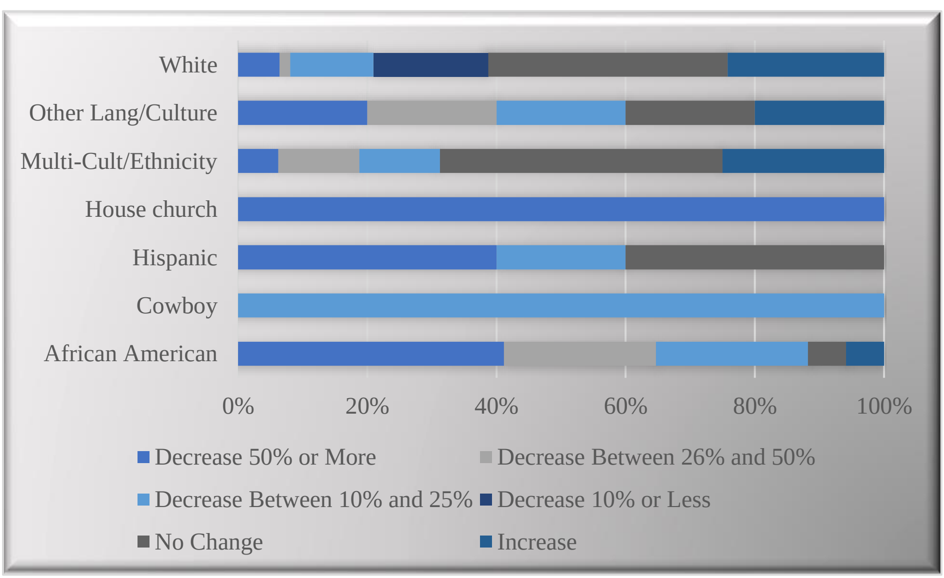


Figure 19 indicates that African American were considerably more pessimistic about giving in the next 6 months relative to their counterparts. Approximately 88 percent anticipated a downturn compared to 35 percent of multi-cultural and 58 percent of White churches.

Figure 19: Projected giving in 6 months by church culture.

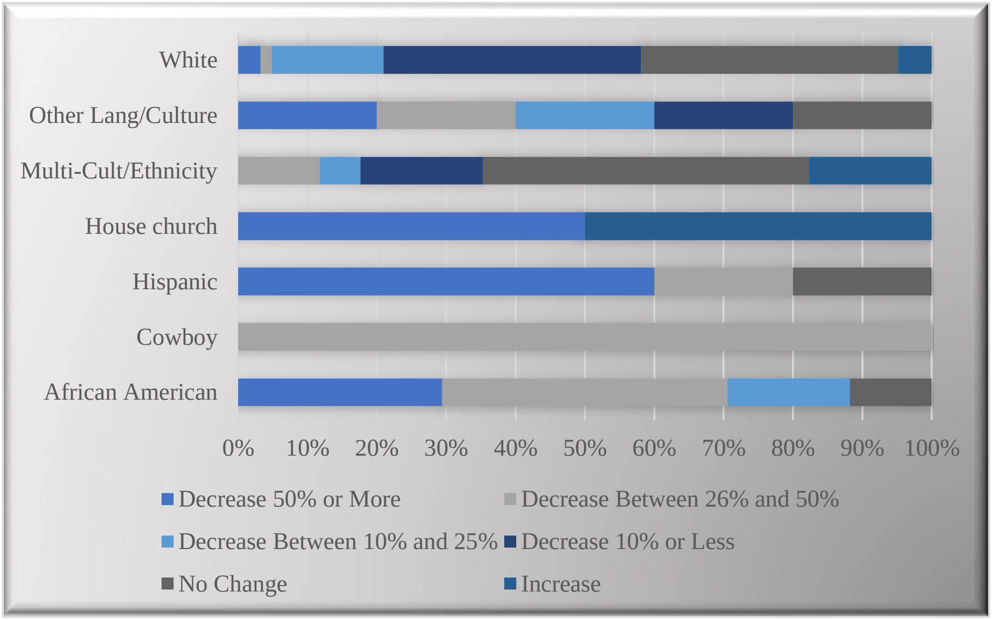


Figure 20 suggests that, relative their 6 month projections, African American churches are more optimistic about giving in 2021, but remain considerably more pessimistic than their counterparts of other cultures. The percent of African American churches that anticipate a decline in giving decreased from almost 90 percent 6 months out to 62 percent in 2021. Interestingly, the multi-cultural churches were the most optimistic with over 40 percent expecting giving to increase compared to only 15 percent of White churches and 19 percent of African American churches.

Figure 20: Projected Giving in 2021 by Church Culture.

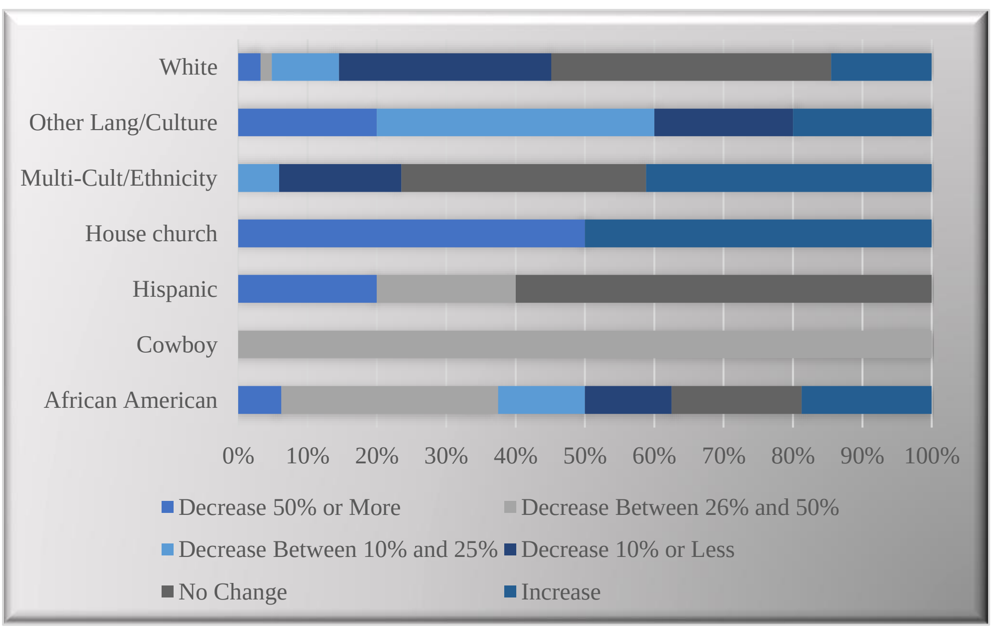


Figure 21 and Figure 22 compare giving between small African American and White churches. Figure 21 reveals that small African American churches have experienced tremendous decreases in giving to date, but they become more optimistic in their projections in the future. For example, 36 percent experienced a decrease of more than 50 percent to date, and expect that to decrease to 28 percent in 6 months and even further to 8 percent in 2021. Approximately 8 percent had actually experienced increases to date. Twenty-two percent expect an increase by 2021. Interestingly, none expects an increase in 6 months.

Figure 21: Giving for Small African American Churches

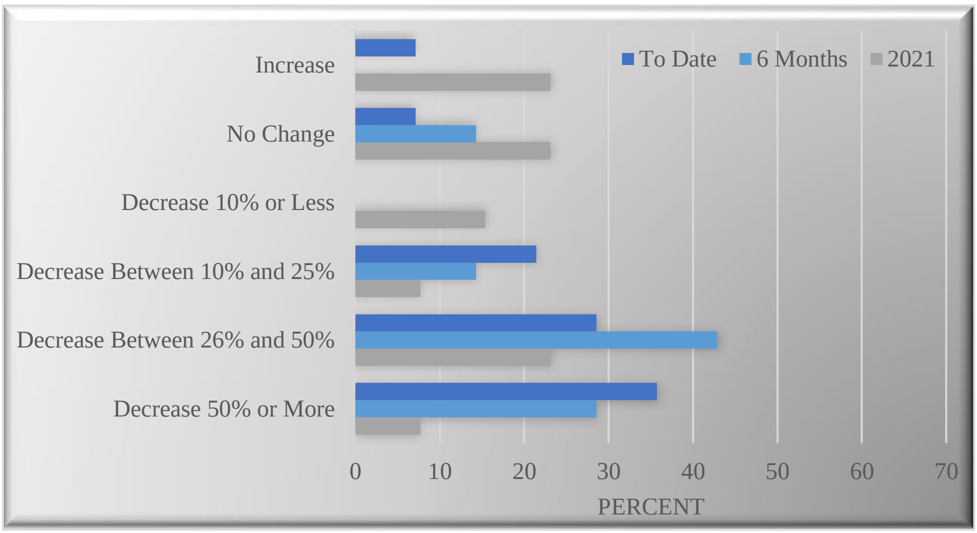
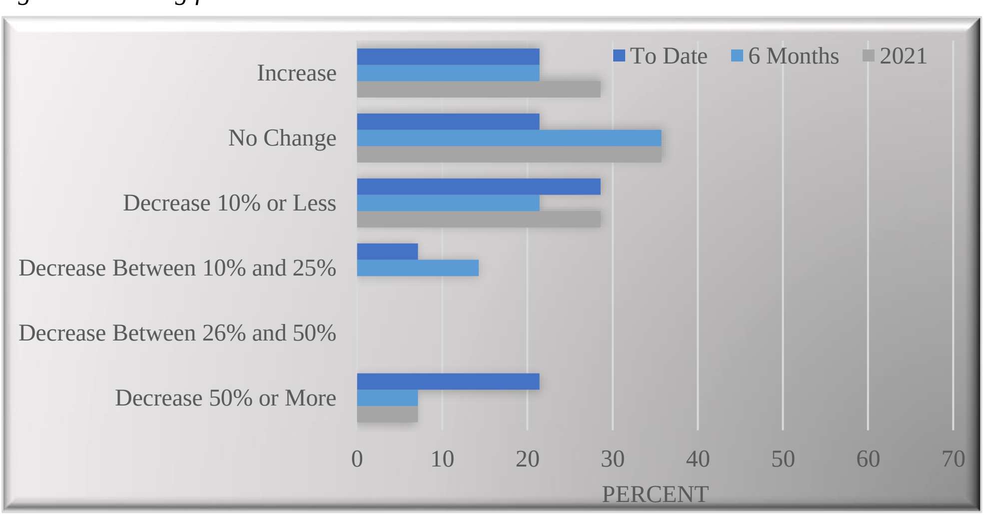


Figure 22 shows how the pandemic has and is expected to affect giving to small White churches. Considerably fewer of the churches have experienced a decrease of over 50 percent relative to small African American churches (22 vs 36 percent, respectively). They become considerably more optimistic, however, with only 8 percent anticipating the same level of decrease in 6 months and in 2021. Twenty-two percent experienced increases in giving to date and anticipate that there will be an increase in 6 months. For 2021, they are even more optimistic with 28 percent anticipating an increase in giving.

Figure 22: Giving for Small White Churches



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