



donorCentrics Sustainer Summit Benchmarking

FY2016 – FY2020 INSIGHTS, TRENDS, AND KEY TAKE-AWAYS

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Hello! I'm Deb Ashmore

HOMETOWN: PHILADELPHIA, PA
AT BLACKBAUD: 6 YEARS

I've worked for and with nonprofits for over 25 years.

Currently, I provide analysis and strategic program assessments for a wide variety of non-profits across many different sectors.

When not working, there's no telling where you'll find me and my family of curious travelers.

donorCentrics® Sustainer Summit

Sharing and Learning



Sharing and learning from 31 organizations of different sizes and missions.

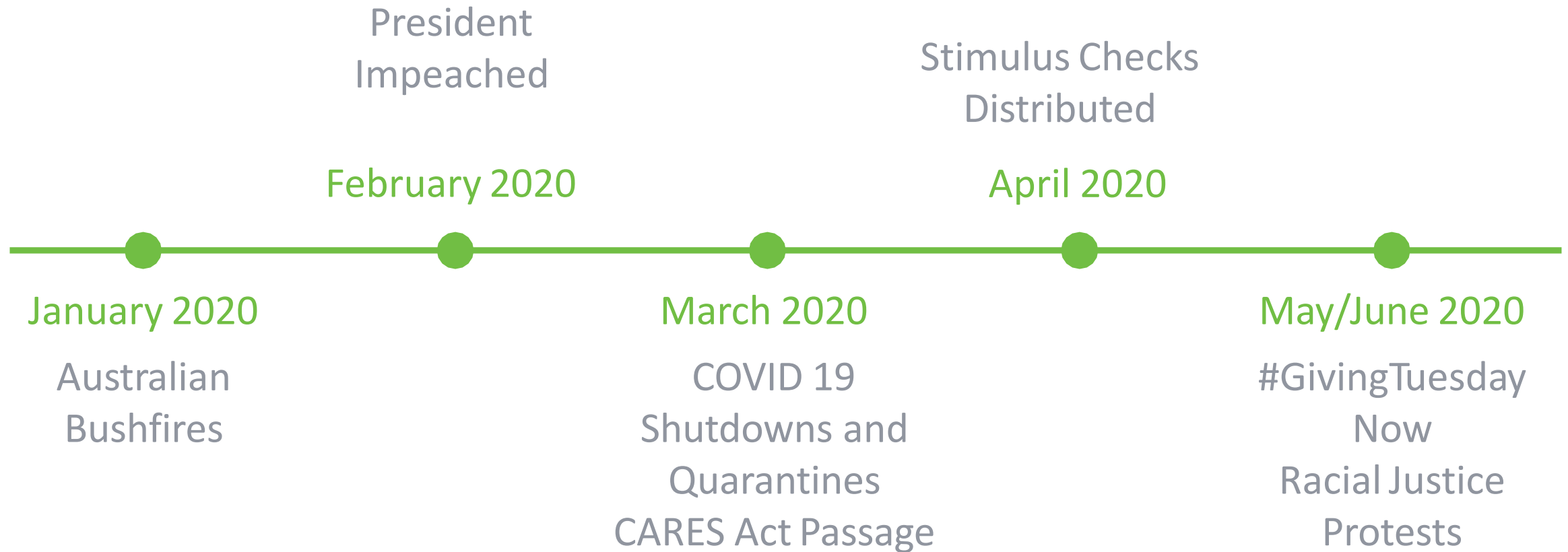


Data and Analysis

Analysis of giving from a total of 16+ million donors who gave 57 million gifts and for a total of \$2.4 billion in FY2020.

2020 Impacts on Giving

Q1/Q2 Events Impacting Giving 2020



Q3/Q4 Events Impacting Giving 2020



How have overall donors and revenue shifted in the last year?

Overall donors and revenue increased from FY2019 to FY2020

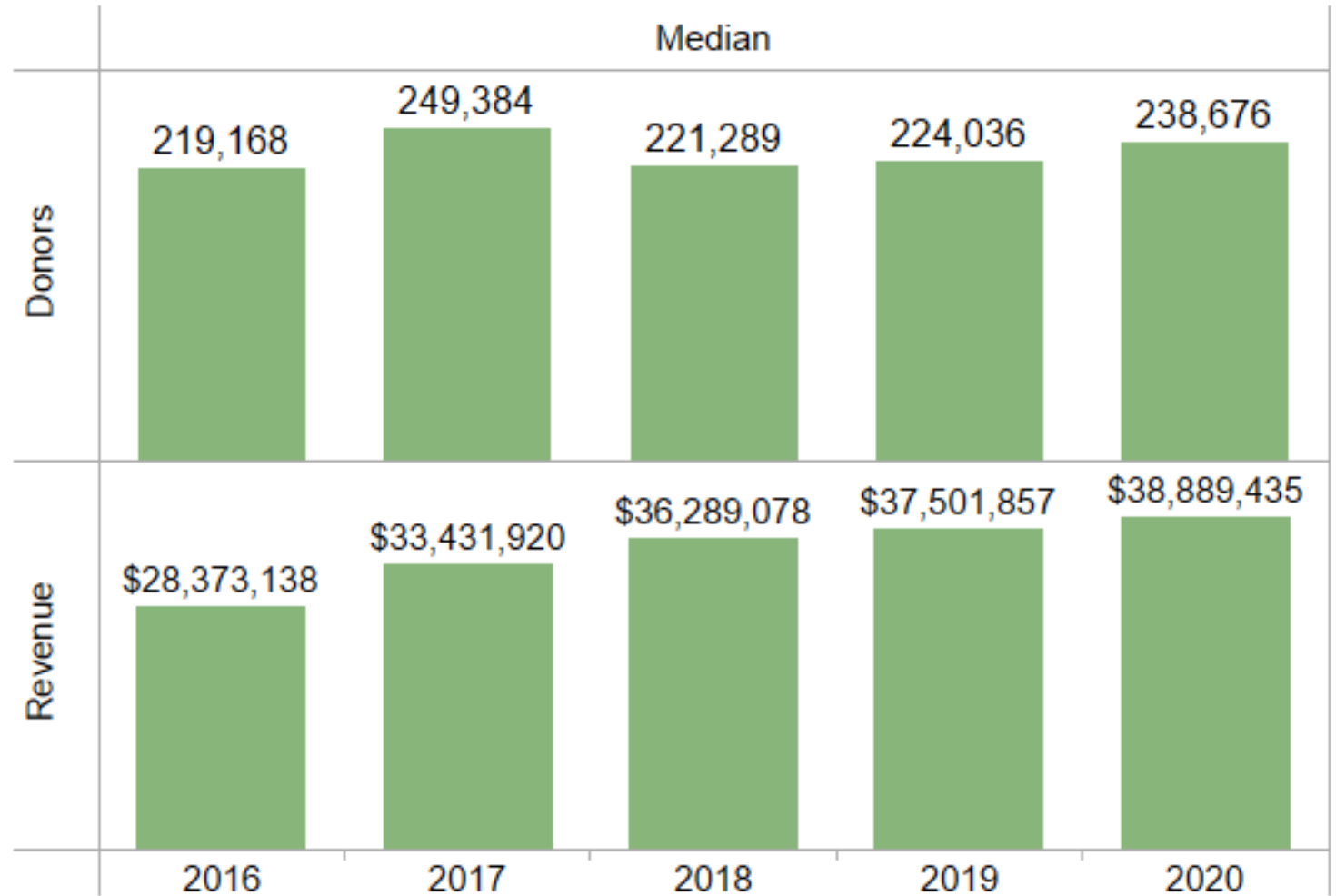
7%

7% increase in the median number of active donors in 2020.



4%

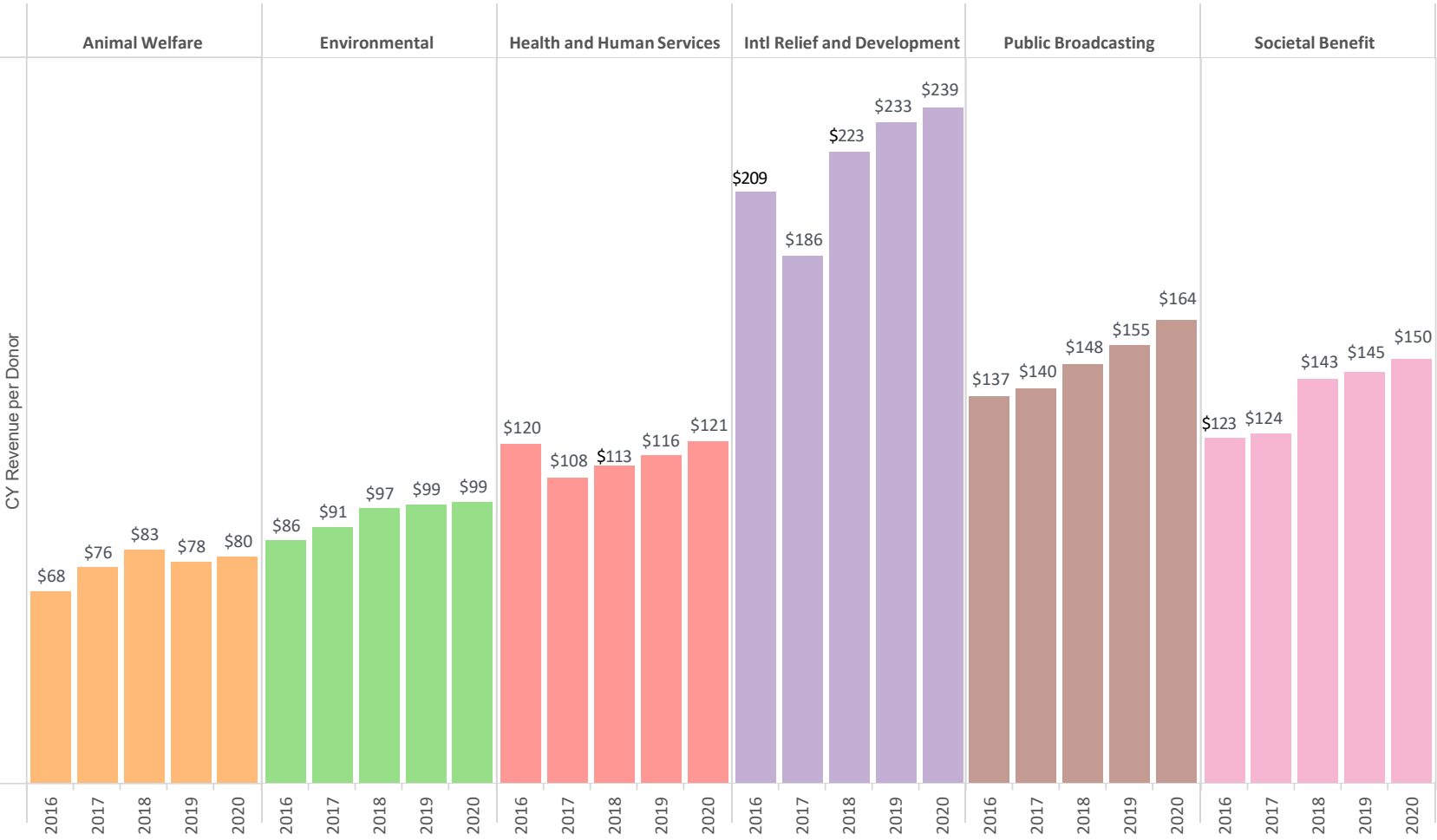
4% increase in median revenue in 2020.



Revenue per Donor Increased by 22% over the 5-Year Period

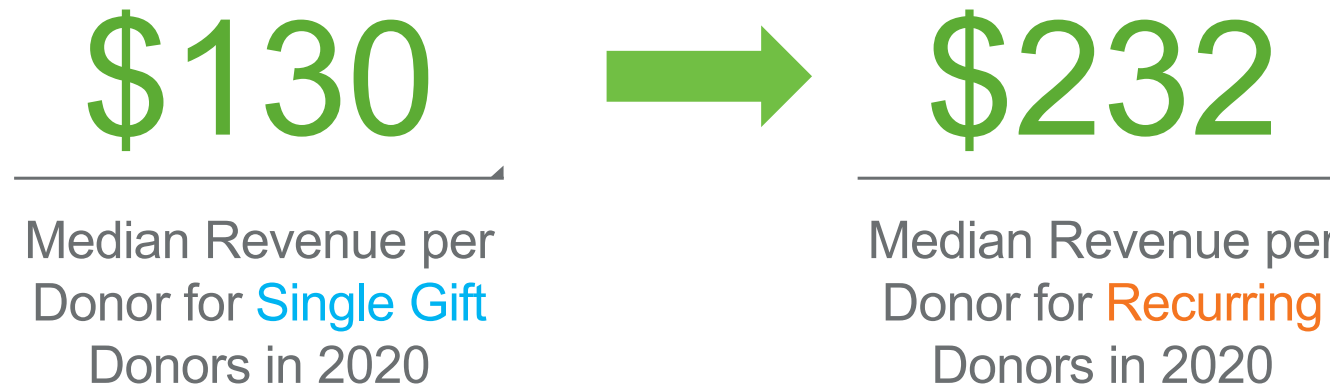


Overall Revenue per Donor Increasing Across All Sectors



Median CY Revenue per Donor by Sector
 (31 Organizations) (2016 - 2020)

Growth in Recurring Donors a Driver for Growth in Overall Donor Value

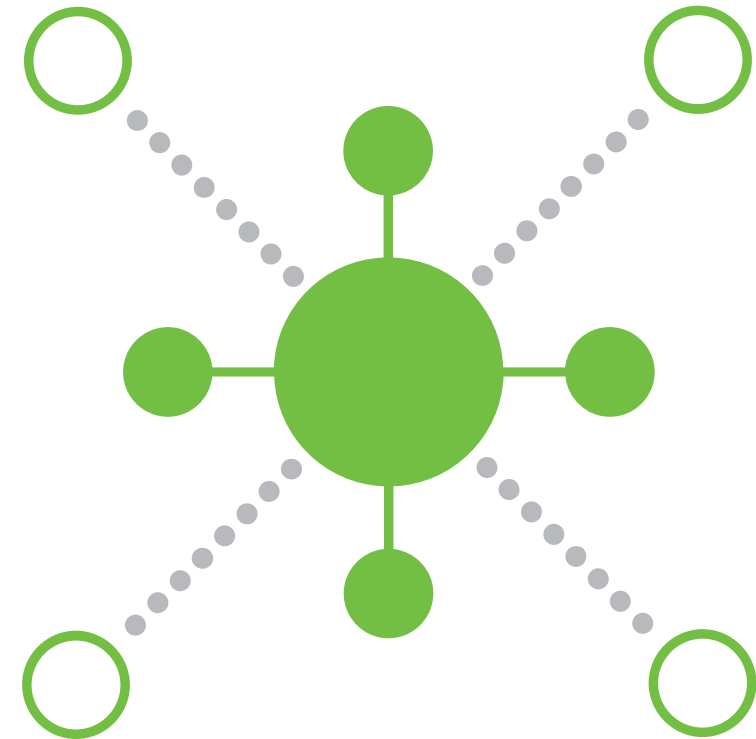


The average recurring gift in 2020 was \$23.

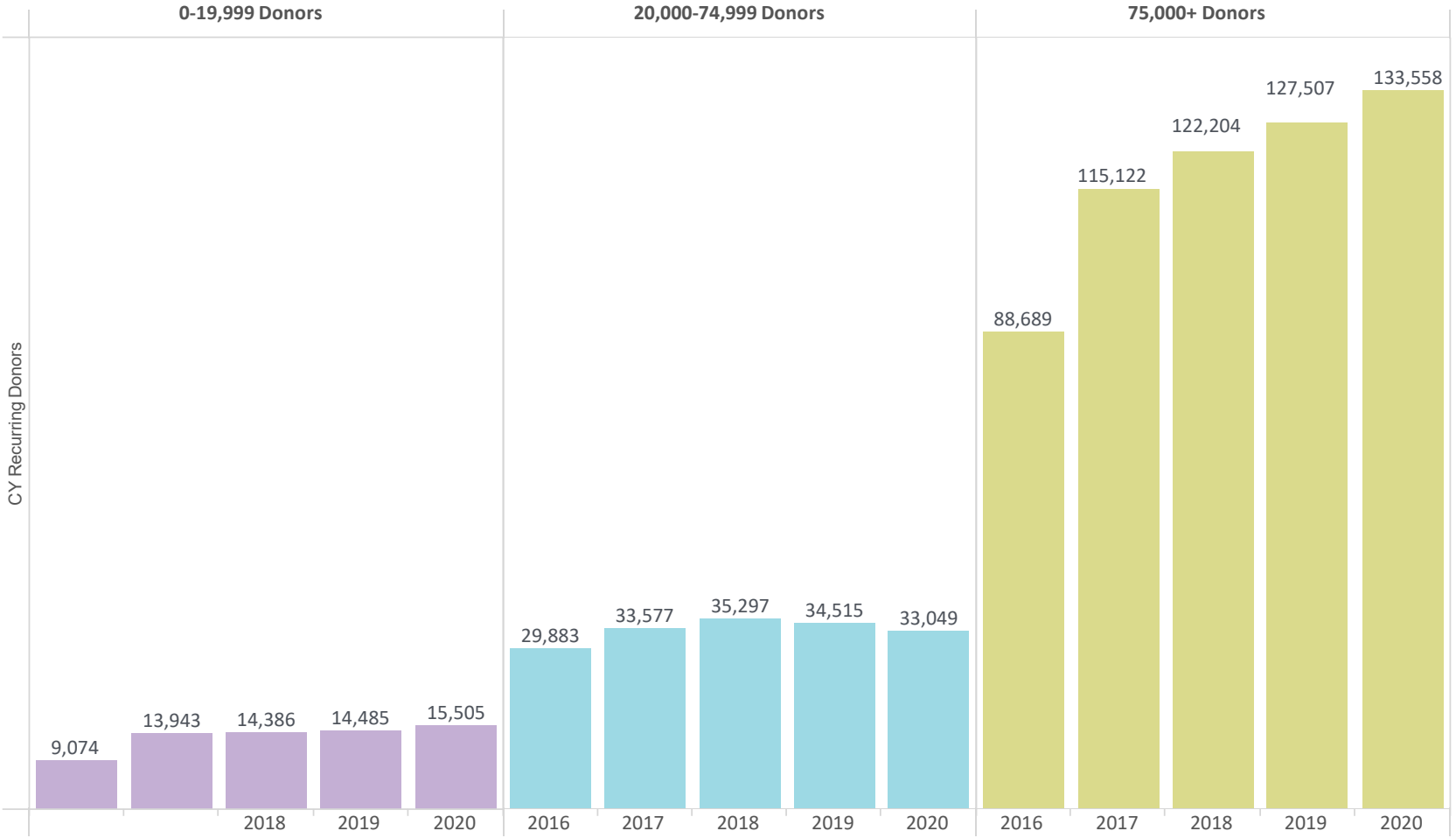
Are recurring donor populations
continuing to grow?

Recurring donor populations increased for some organizations, decreased for some organizations and there is no one reason why....

- Organizations were impacted by:
 - Response to needs created by COVID-19
 - Channel cancellations due to COVID
 - Channel investment due to COVID
 - Current Events – Presidential Election, Racial Justice Protests
 - Lockdown relief



Number of Recurring Donors Up Since FY16 and in the last year for the largest and the emerging sustainer programs.



Median CY Recurring Donors by Sustainer Program Size
(31 Organizations) (2016 - 2020)

Recurring Donors and Revenue are increasing as a share of totals

15%

Median % of total donors giving recurring gifts in FY16



17%

Median % of total donors giving recurring gifts in FY20

18%

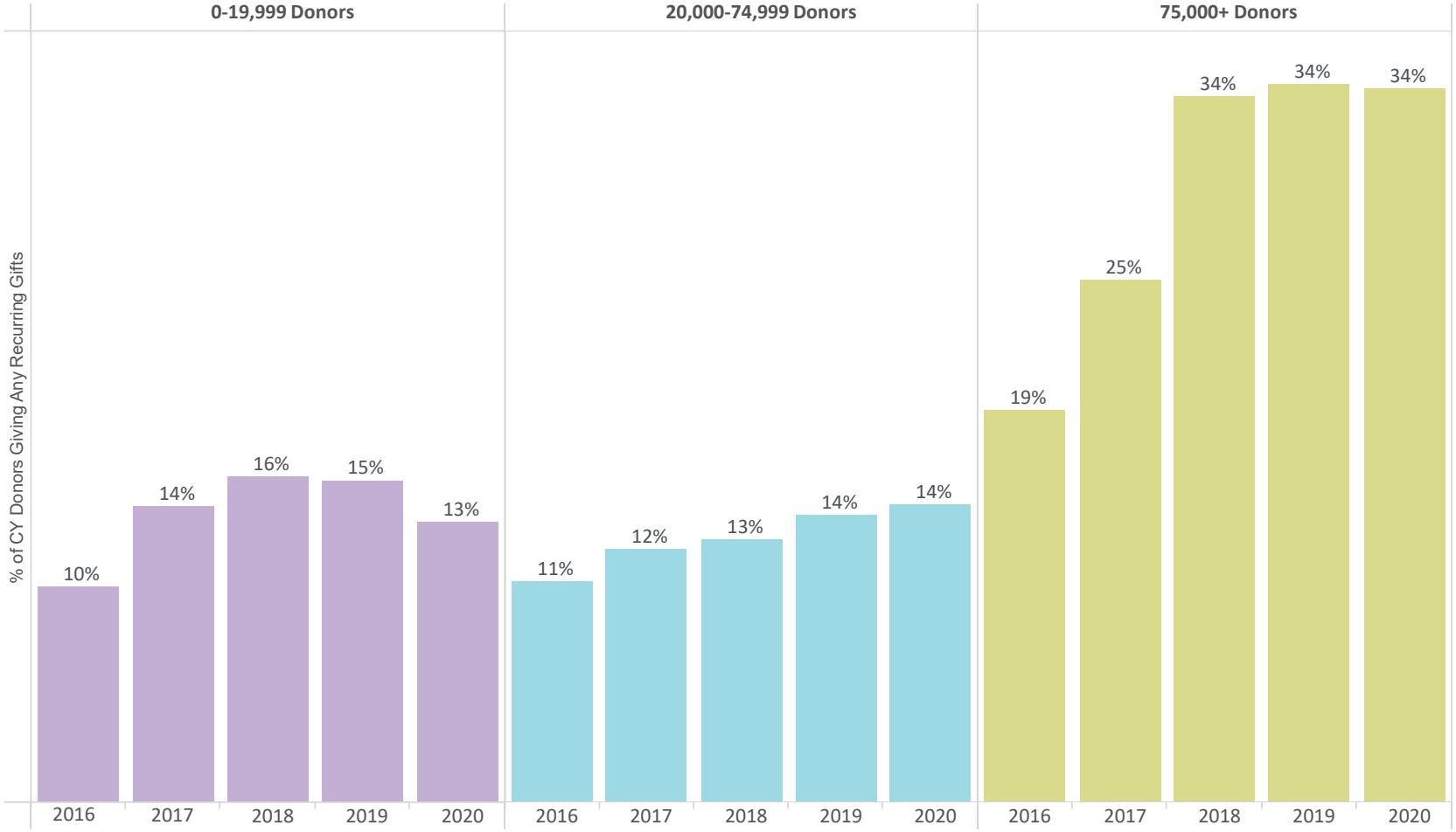
Median % of total revenue from recurring gifts in FY16



25%

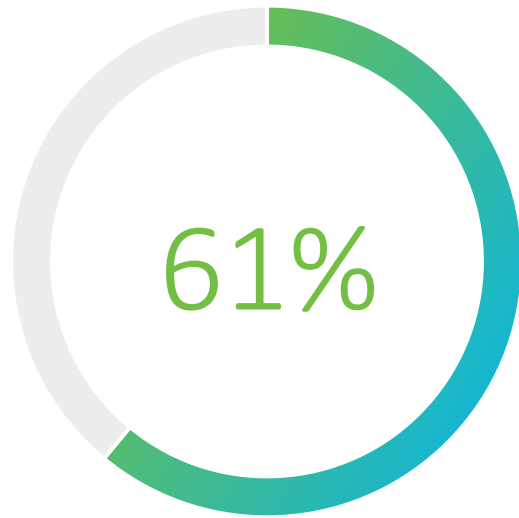
Median % of total revenue from recurring gifts in FY20

The Share of Sustainers is Growing Over Time, but Flat or Down in FY20.

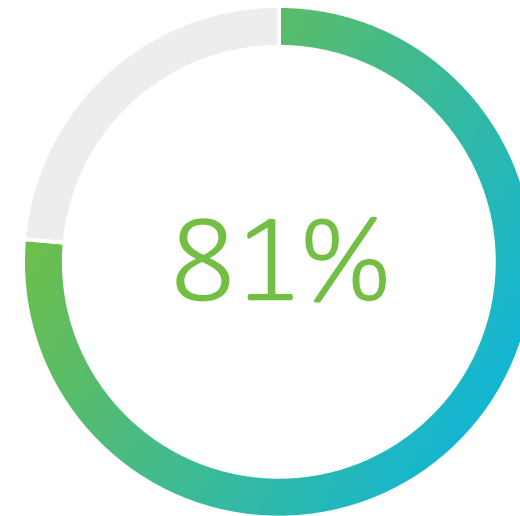


Median % of CY Donors Giving Any Recurring Gifts by Sustainer Program Size
(31 Organizations) (2016 - 2020)

Recurring Donors and Revenue increased for the majority of organizations



Number of Sustainer Summit Organizations that increased the number of recurring donors from FY2019 to FY2020



Number of Sustainer Summit Organizations that increased the recurring revenue from FY2019 to FY2020

What are the top gift sources for recurring gifts?

31%

Median % of recurring revenue from **web/digital** sources

26%

Median % of recurring revenue from **face to face/door to door**

9%

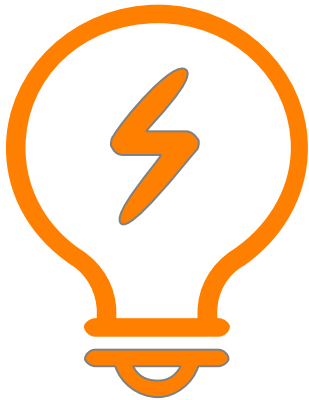
Median % of recurring revenue from **telemarketing**

5%

Median % of recurring revenue from **DRTV**

Web/Digital sources include e-mail and digital ads and are the channels shared across all organizations regardless of sustainer program size

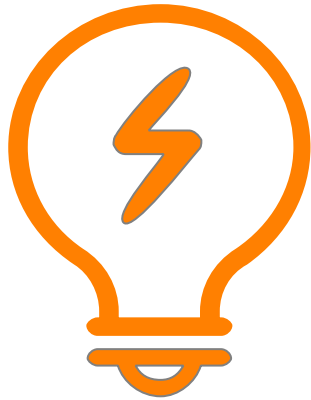
Key Evolving Strategies Take-Aways



Anecdotally, since July 2020, organizations that have since re-launched canvassing are reporting a strong restart. Some re-launching lessons include:

- Clear documentation on how to do it safely.
- Trying to open small teams in many locations rather than “putting all their eggs in one basket.”
- Canvassing is still entirely outdoors.
- Using Canvassers for telemarketing continues to be an area of pursuit for best practices in case some or all areas need to shut down again.

Key Evolving Strategies Take-Aways



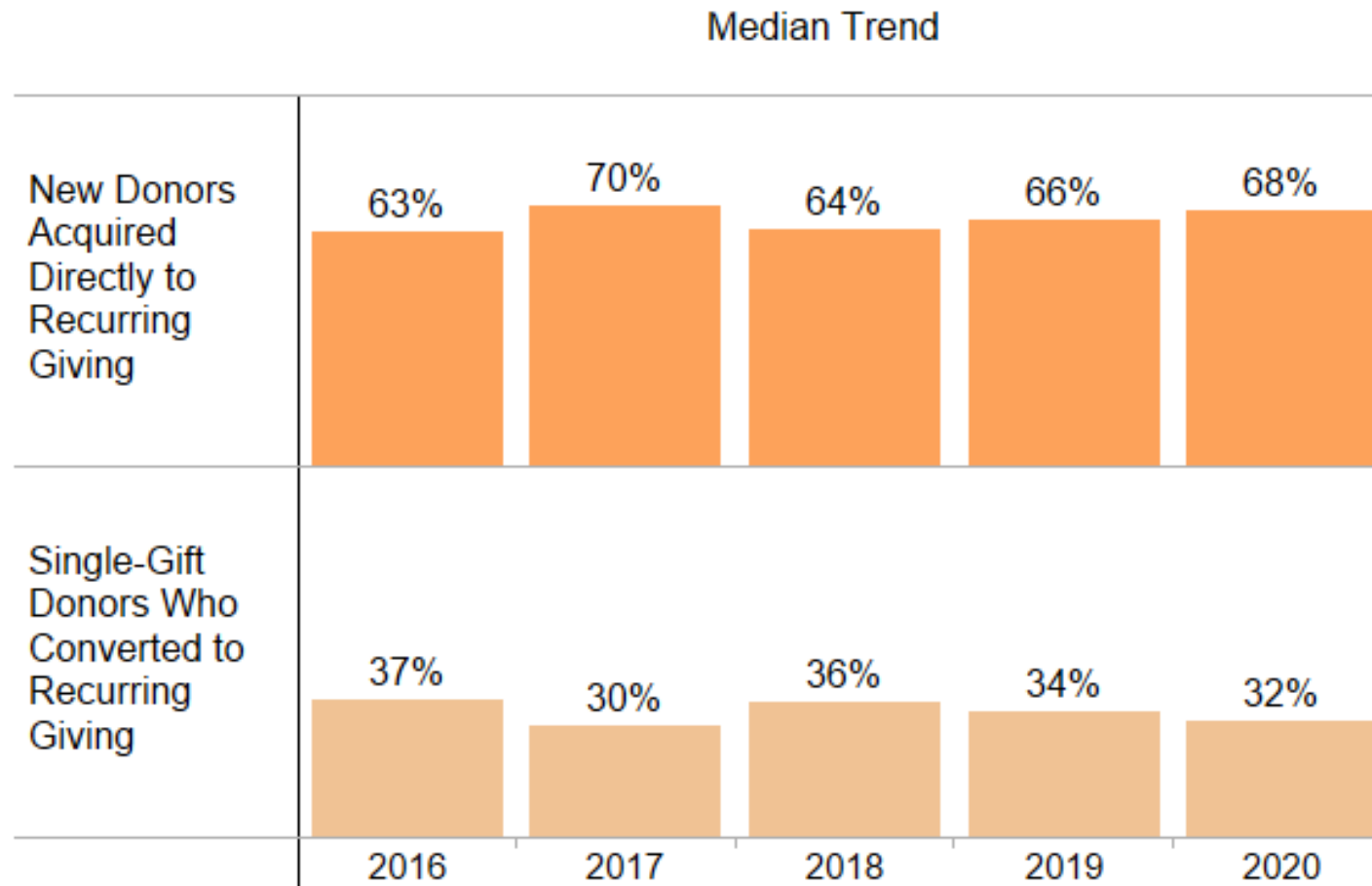
Annual (or Quarterly) Sustainer Offers

- Effective Credit Card updaters and expansion of EFT payment methods have made annual sustainers a more stable donor segment than in the past
- Used as a secondary ask to the monthly offer

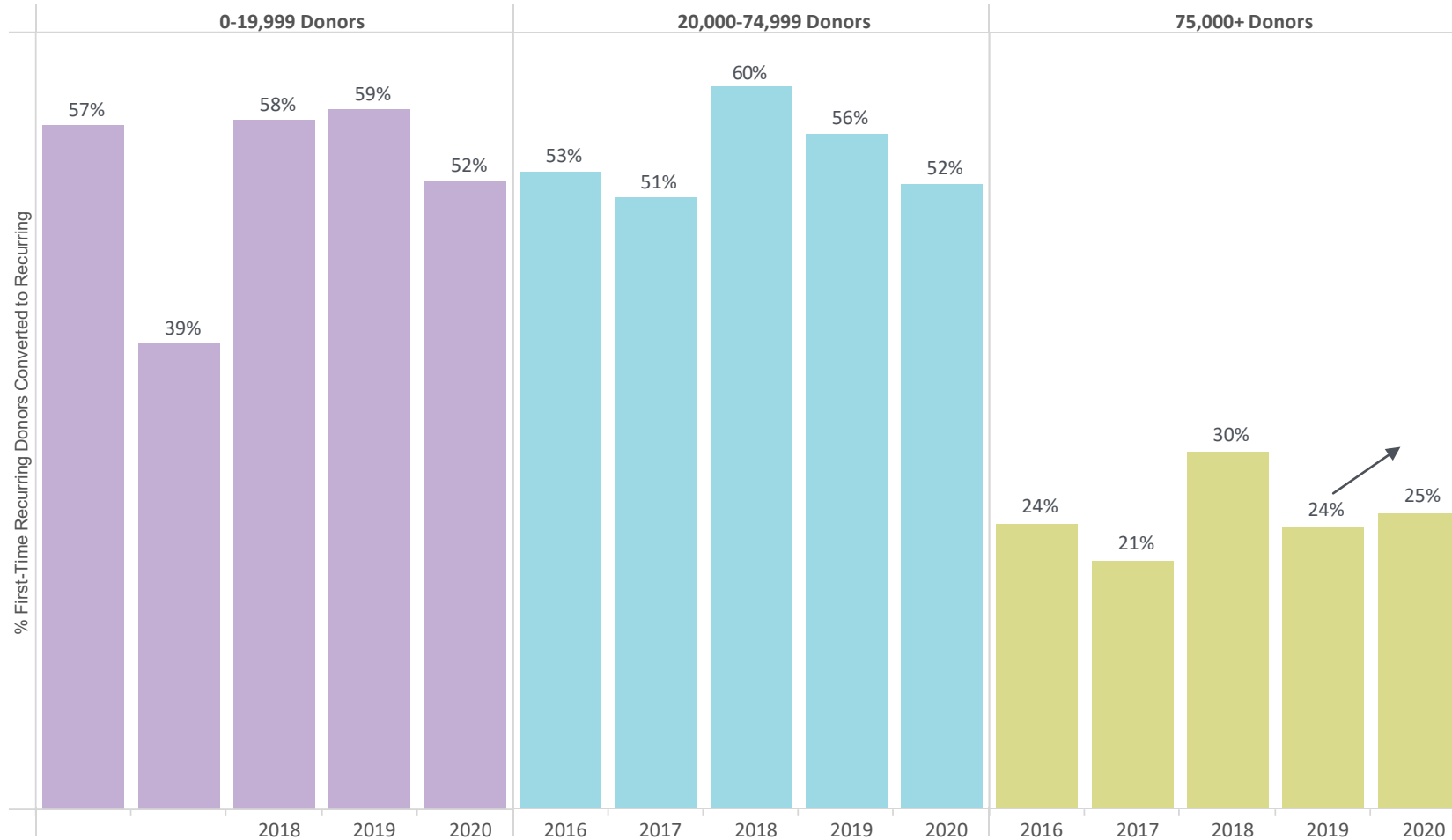
First-Time Recurring Donor Trends

Acquired Directly to Recurring and
Converted to Recurring

FY2016 was a turning point for acquiring donors direct to recurring.



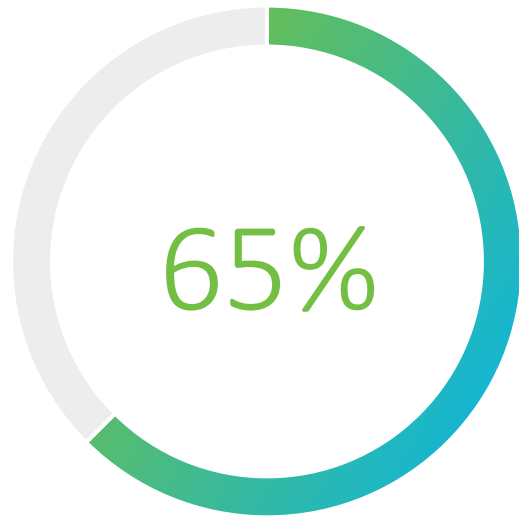
Half of All First-Time Recurring Donors are Acquired Via Conversion of Single Gift Donors for Emerging and Mid-Size Sustainer Programs.



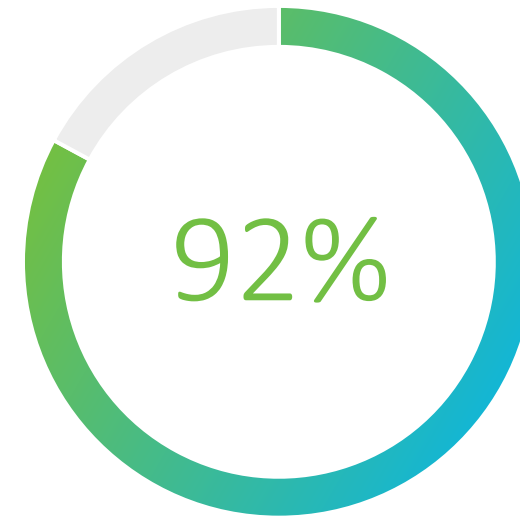
Median % First-Time Recurring Donors Converted to Recurring by Sustainer Program Size

(31 Organizations) (2016 - 2020)

Following declines in FY2019, the number of single gift donors who converted to recurring increased in FY2020

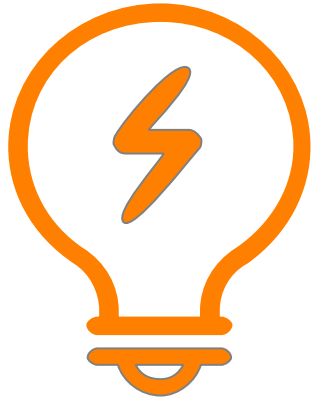


Sustainer Summit Organizations that increased the number of donors that converted to recurring from FY2019 to FY2020



Sustainer Summit Organizations that increased the number of donors that converted to recurring from FY2019 to FY2020 via **Digital Ads**

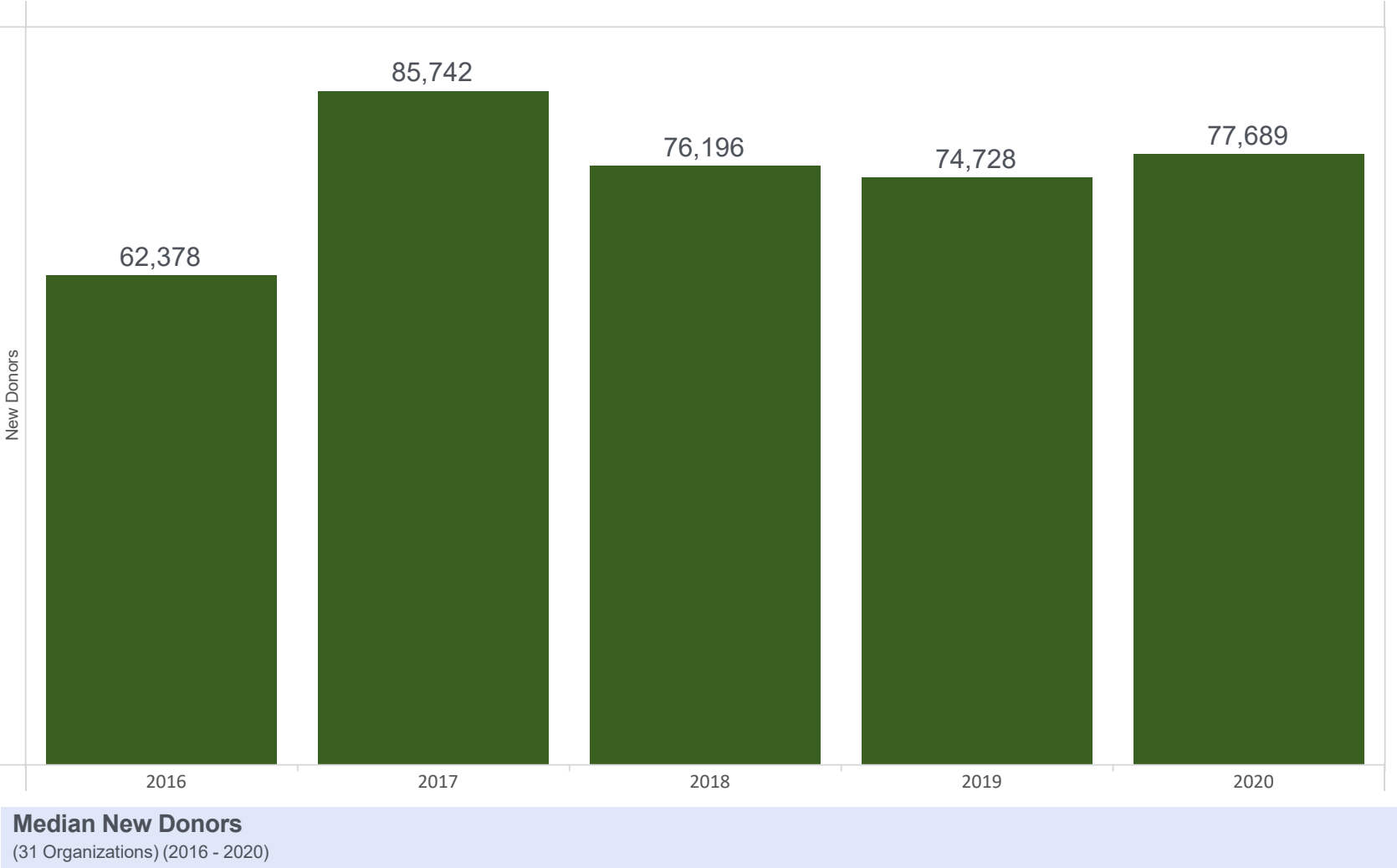
Key Sustainer Conversion Take-Aways



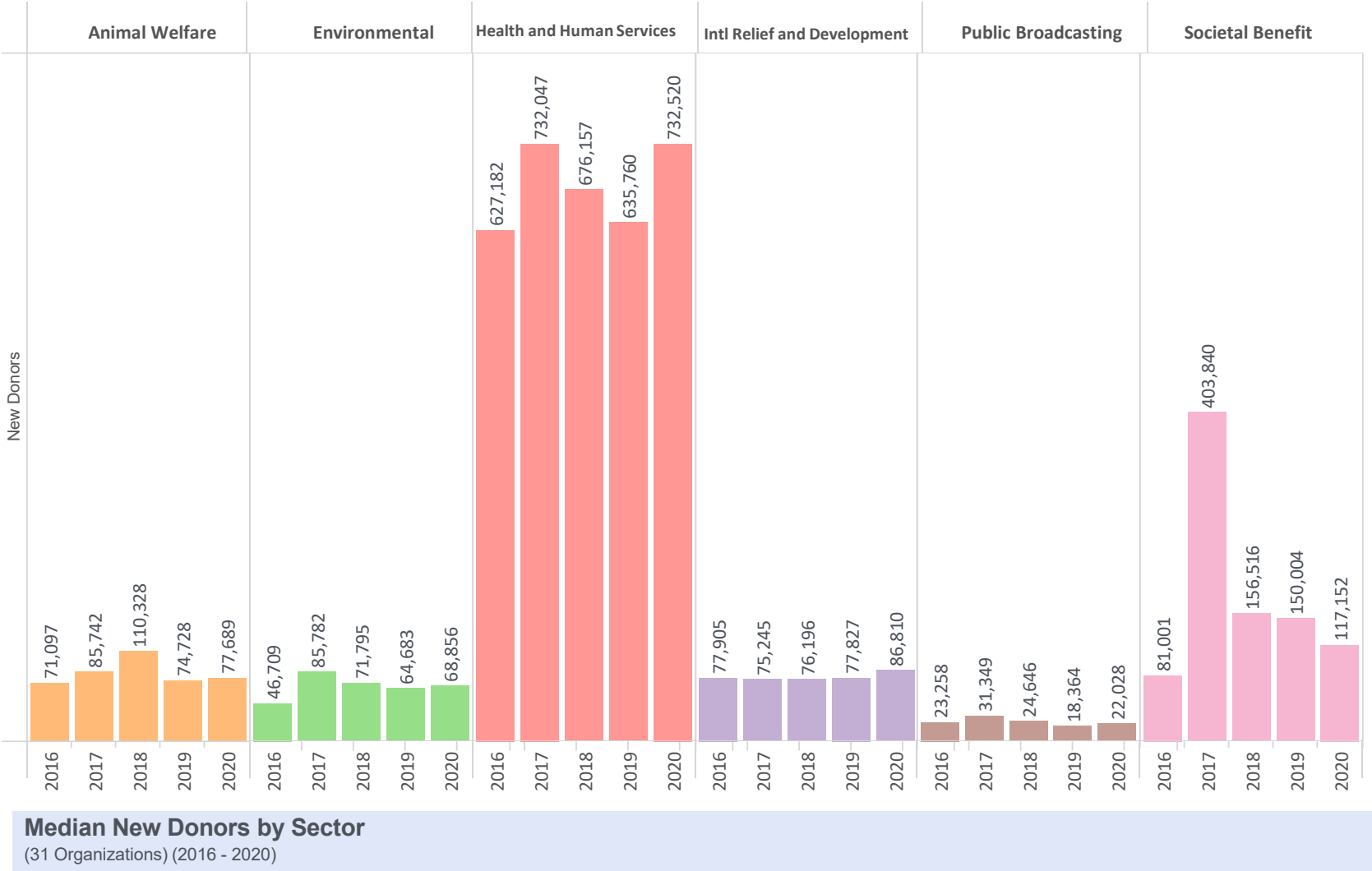
- New donor conversion efforts occurred within 30 days, if not sooner.
- Automated e-mail donor welcome series included a conversion ask.
- The strategy was more often a blanketing technique, wherein all single gift donors receive frequent messages to convert.
- In direct mail, the conversion ask is included in most solicitations and as soon as within the gift acknowledgment letters.
- A lower ask amount may be necessary to convert more donors.
- Offering a premium can work for conversion, though careful monitoring of retention should be a part of the measured results.

New Donor Trends

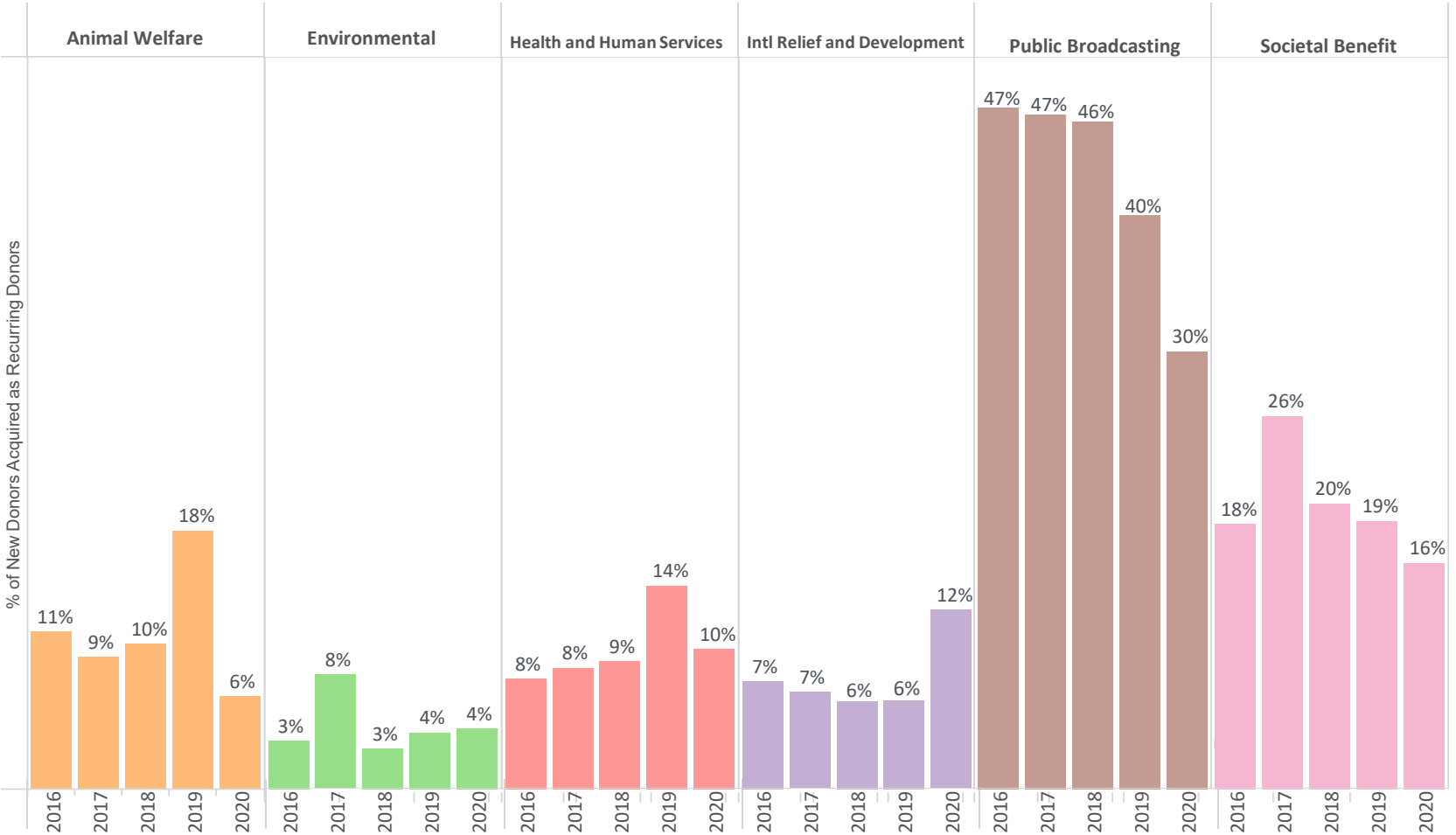
Overall New Donors Increased in FY20



Overall New Donors Increased in FY20 for Most Sectors

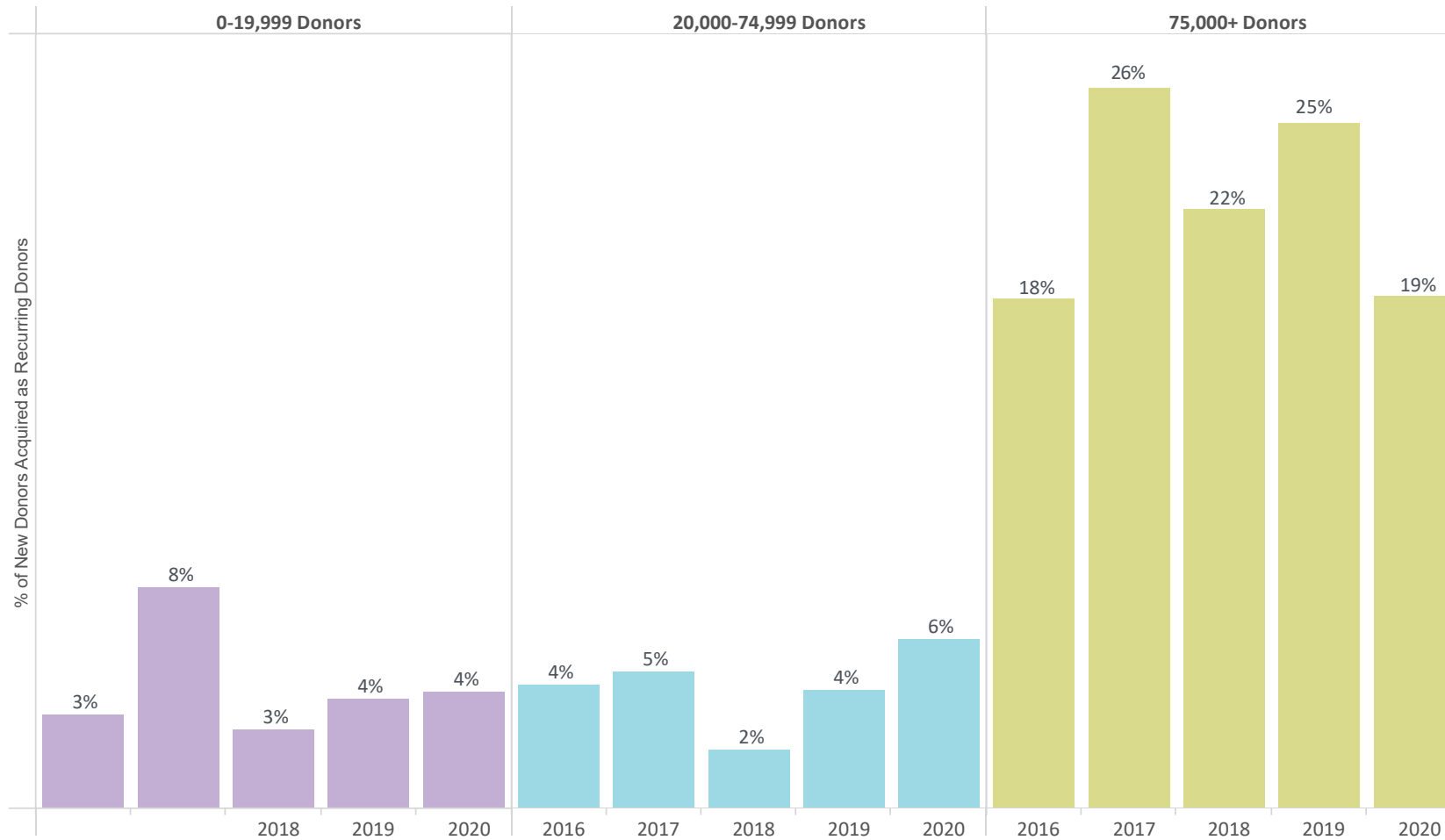


However, Share of New Donors Acquired as Recurring Declined in FY20 for Most Sectors



Median % of New Donors Acquired as Recurring Donors by Sector
 (31 Organizations) (2016 - 2020)

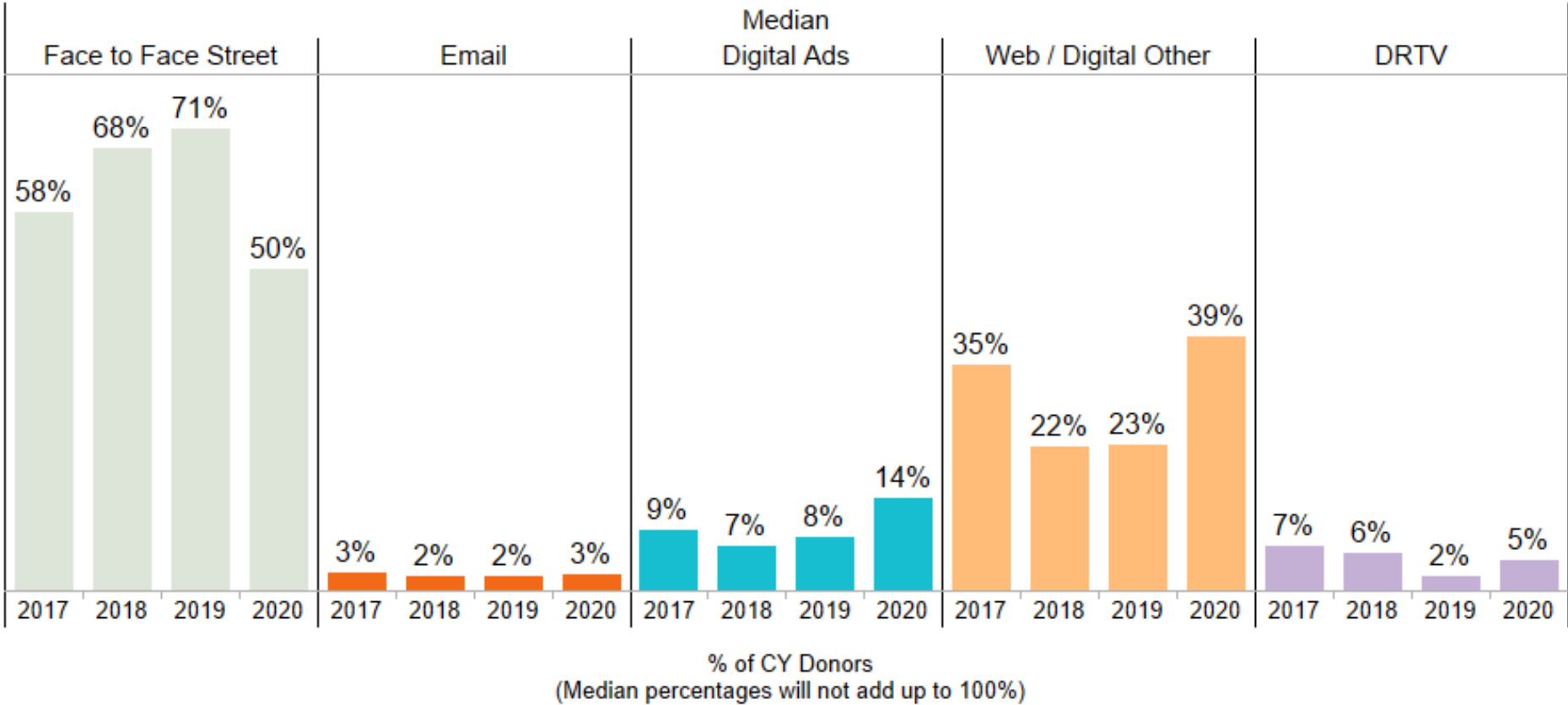
By Recurring Program Size, the Largest Sustainer Programs Saw a Decline in Share of New Donors Acquired as Recurring in FY20



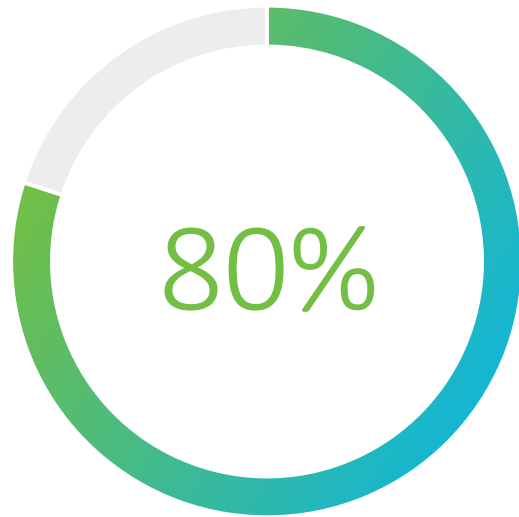
Median % of New Donors Acquired as Recurring Donors by Sustainer Program Size
(31 Organizations) (2016 - 2020)

Shifts in Recurring Donor Acquisition by Source Likely Related to Pandemic and Driving Shifts in Share of New Donors Making Recurring Gifts

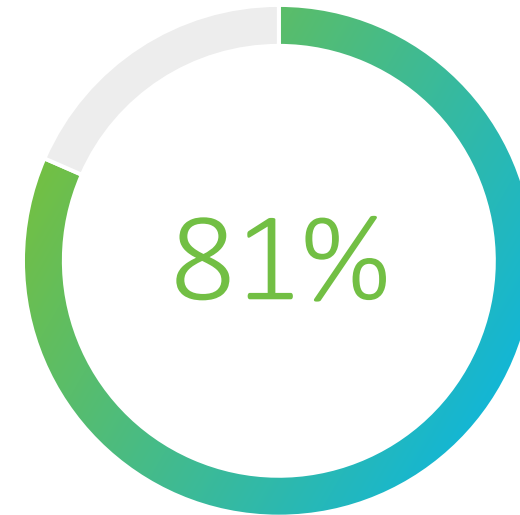
Trends in Distribution of New Donors by Origin Source
(Donors Acquired as Recurring Donors)



Summit Organizations experienced declines in canvassing and increases in digital acquisition.

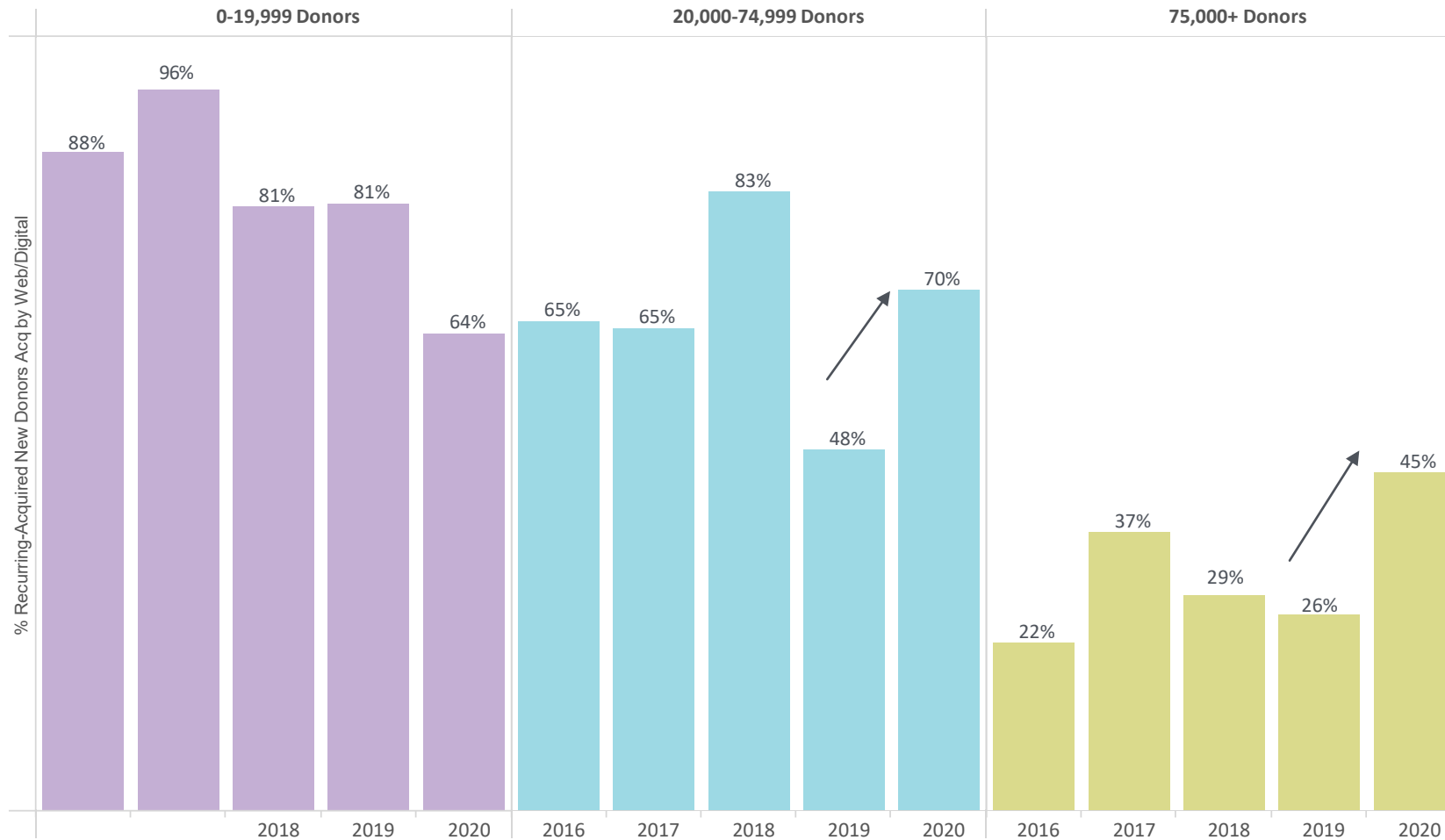


Sustainer Summit Organizations that used canvassing had declines in donor acquisition via Canvassing



Sustainer Summit Organizations that had increases in donor acquisition via digital channels

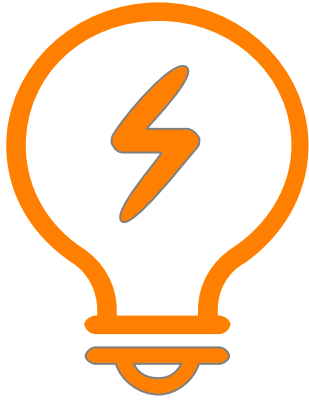
Larger Sustainer Programs Pivot to Digital for Recurring Acquisition in FY20



Median % Recurring-Acquired New Donors Acq by Web/Digital by Sustainer Program Size
(31 Organizations) (2016 - 2020)

Key Acquisition Take-Aways

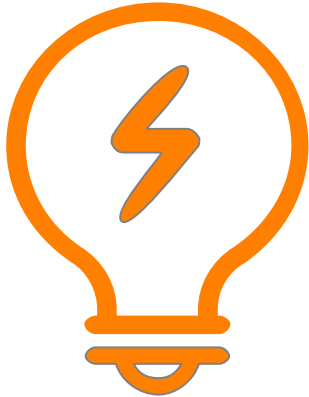
What digital strategies continue to perform well?



- The sustainer ask is the primary ask in digital ads and email solicitations
- The sustainer option is the preselected choice on all digital forms
- Lightboxes or Pop-ups on online forms that ask donors making single gifts to consider a recurring gift during the donation process continue to work well.
- Facebook
- Bolstering search marketing efforts and display

Key Acquisition Take-Aways

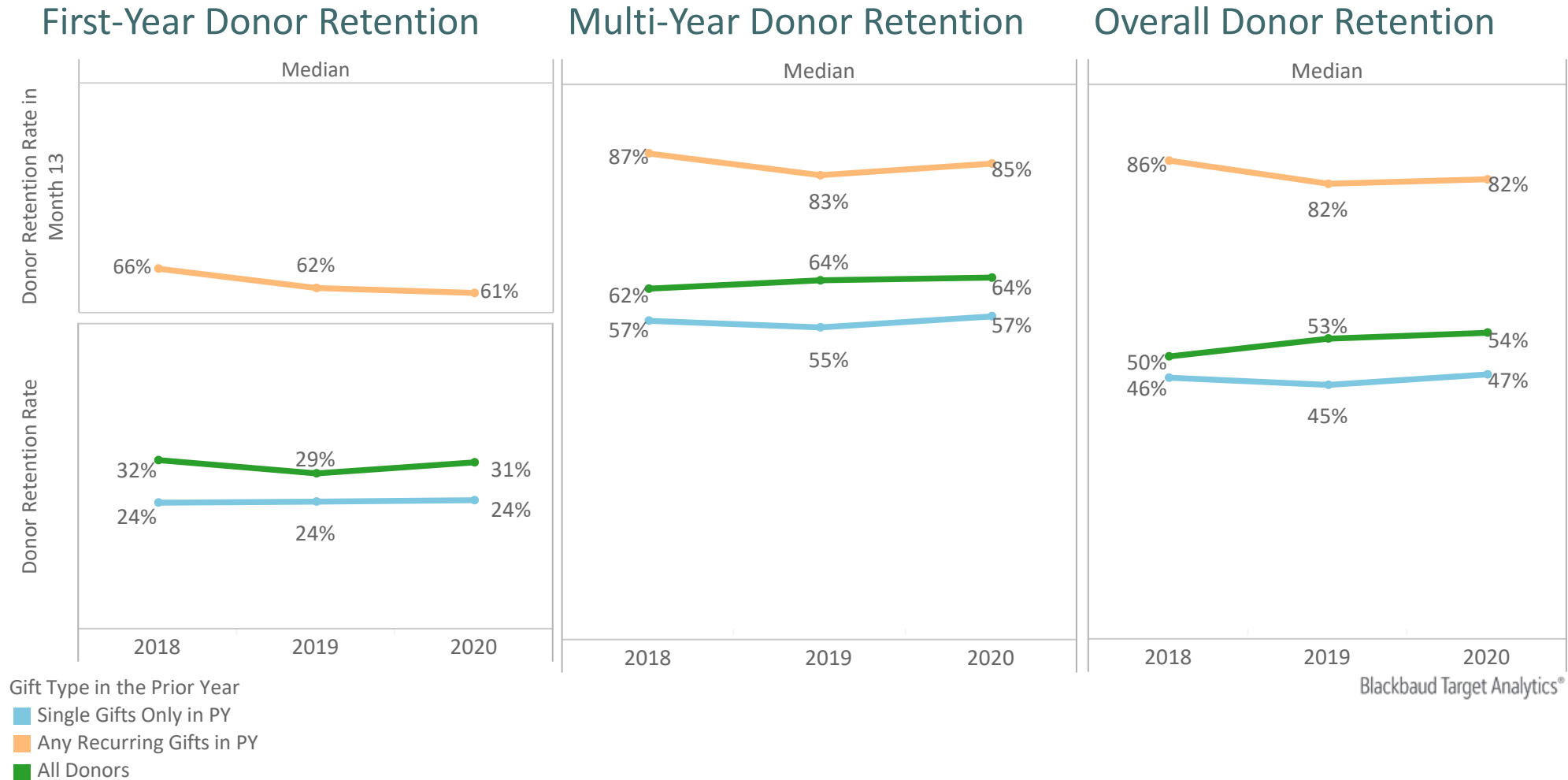
What new digital ad strategies or channels are organizations testing or considering for overall and sustainer acquisition?



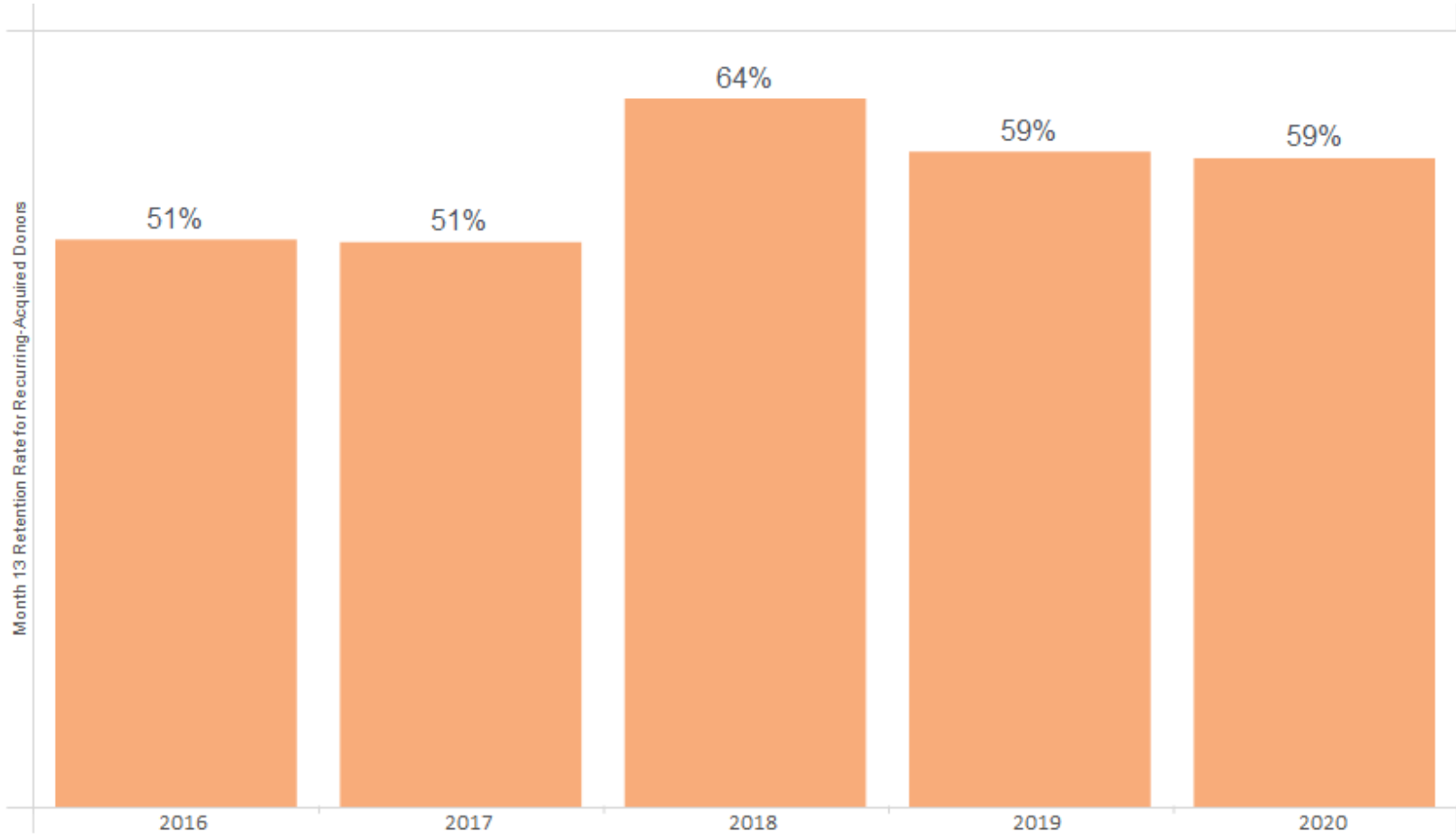
- Connected TV
- Tik Tok and other social media sites beyond Facebook
- Retargeting video viewers with pre-roll ads and display banners
- QR Codes
- Airport video ads

Donor Retention Trends

Median Retention Trends

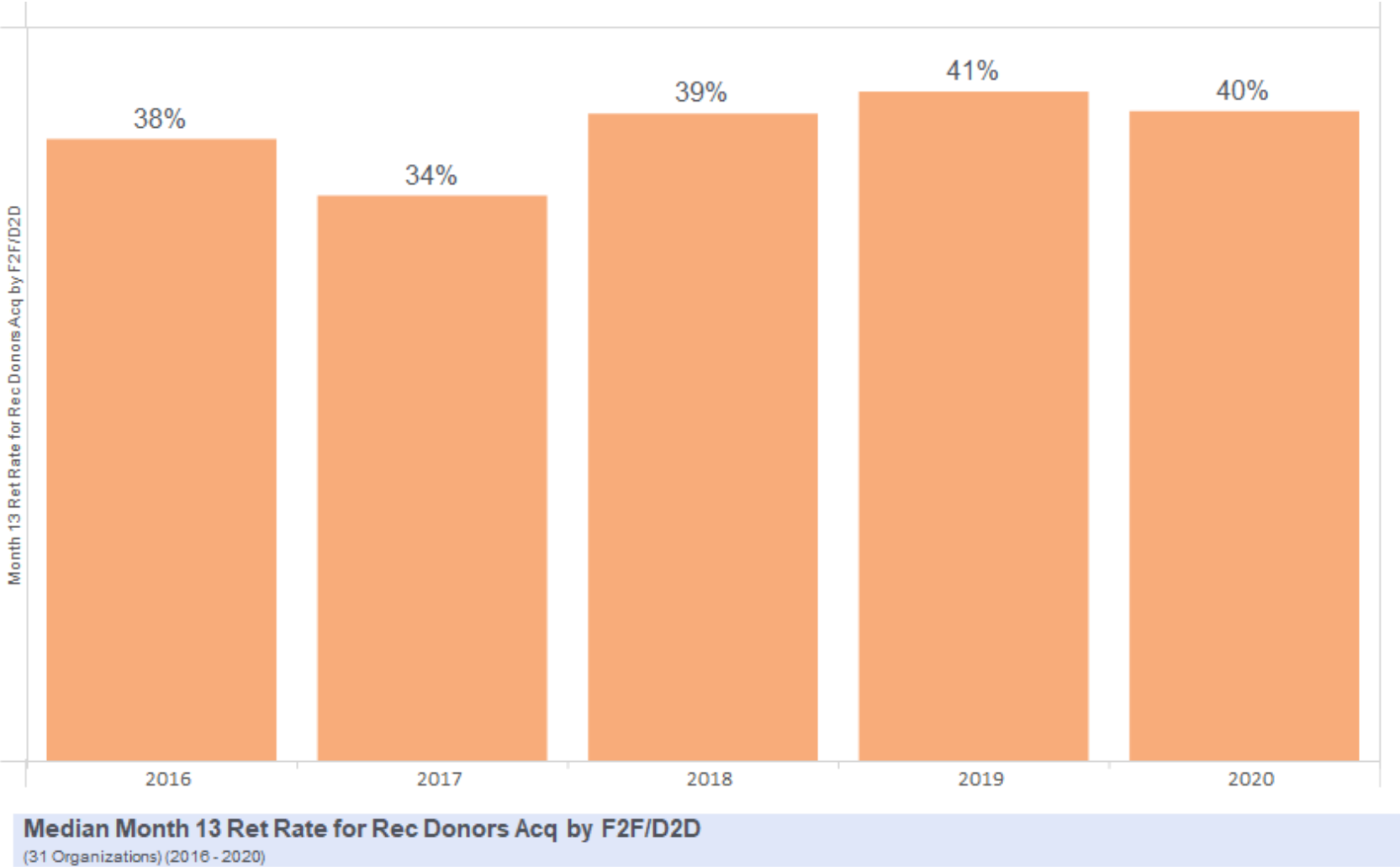


Median Month 13 Donor Retention Rate for Recurring Acquired Donors Were Stable from 2019 to 2020, Despite Fears of Increased Cancellations Due to Pandemic

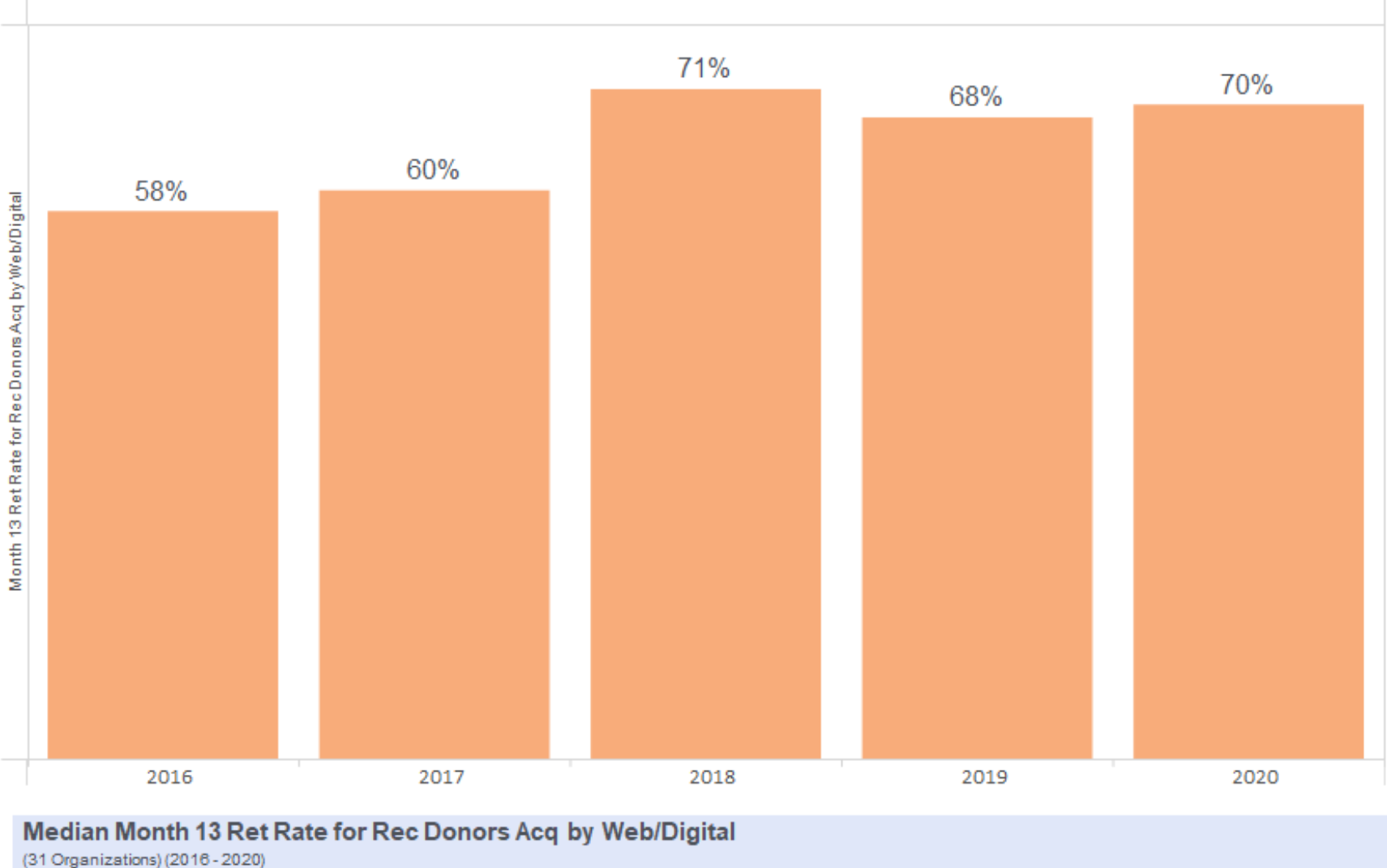


Median Month 13 Retention Rate for Recurring-Acquired Donors
(31 Organizations) (2016 - 2020)

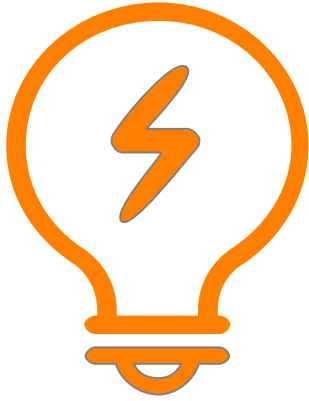
Median Month 13 Retention of New Recurring Donors Face to Face/Door to Door Acquired Is Nearly 20 Points Below Overall 13th Mo Retention Rates



Median Month 13 Retention of New Recurring Donors Acquired via Digital Channels Is More than 10 Points Above Overall 13th Mo Retention Rates in 2020



Key Retention Take-Aways



What new stewardship and cultivation activities were introduced during the pandemic that organizations are planning to expand and/or continue into the new normal?

- Virtual events that can be easily expanded to include sustainers and other donor groups or prospects
- Expanded use of Vlogs
- Expanded use of texting, including thank-you's and surveys
- Creating digital and offline Impact Reports for sustainers
- Using virtual tools to create a sense of community for sustainers
- Concierge call centers for sustainers
- Pre-recorded calls from co-founders

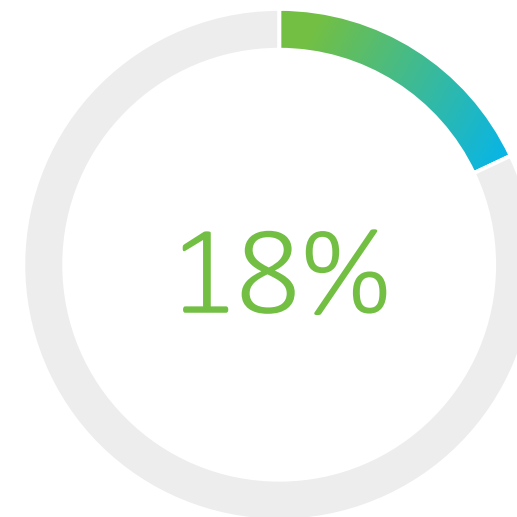
Shifts in Recurring Donor Long Term Value

Compare Long Term Retention for Donors Acquired as Recurring or Single Gifts in 2017



A median 50% percent of donors **acquired to recurring giving in 2017** were still giving in 2020.

Compare to:



A median 18% percent of donors **acquired with a single gift in 2017** were still giving in 2020.

Compare Long Term Values for Donors Acquired as Recurring or Single Gifts in 2017



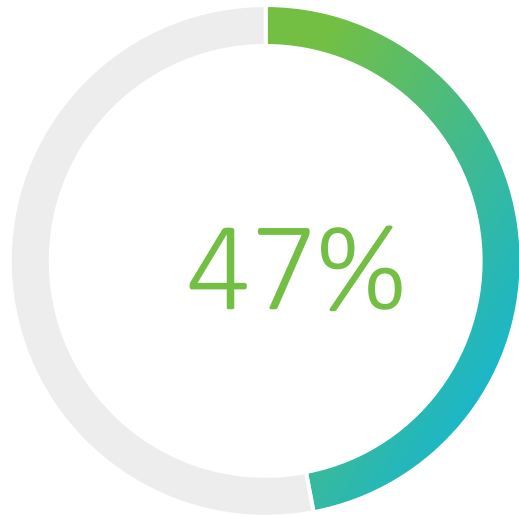
The median long-term value per donor **acquired as recurring in 2017** is \$550 in 2020

Compare to:



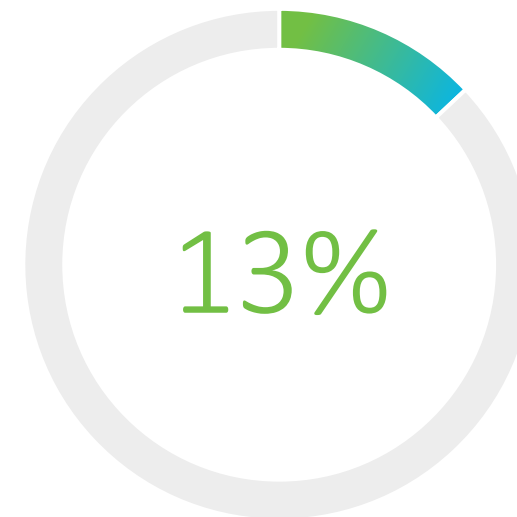
The median long-term value per donor **acquired as single gift in 2017** was \$179 in 2020

Long-Term Trends for 2017 Web-Acquired Donors



A median 47% percent of donors **acquired to recurring giving via Web/Other** in 2017 were still giving in 2020.

Compare to:



A median 50% percent of donors acquired to **single gift giving via Web/Other** in 2017 were still giving in 2020.

Long-Term Trends for 2017 Acquired Donors



The median long-term value of donors **acquired to recurring giving via Web/Other** in 2017 is \$492

Compare to:

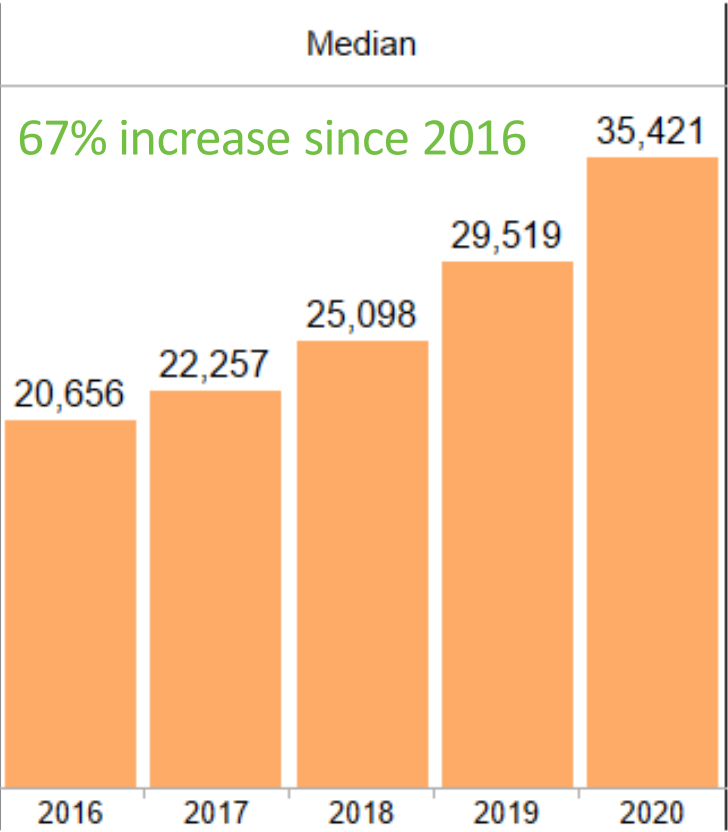


The median long-term value of donors **acquired to single giving via Web/Other** in 2017 is \$182

Significant Donor and Revenue Gains at the Median for Donors Giving Recurring Gifts for 3+ Years Consecutively in FY2020 and Over Time.

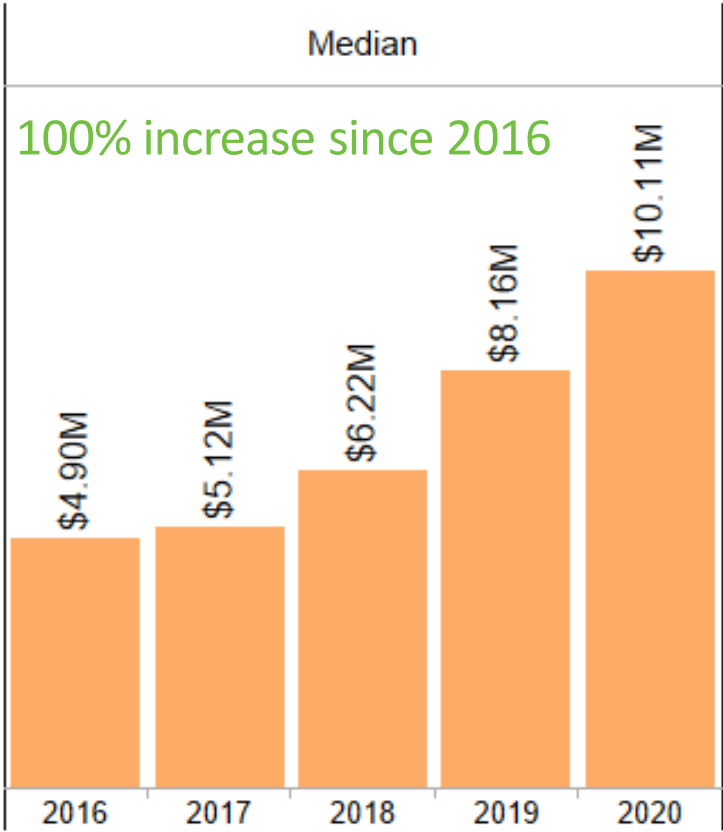
Active Donors Giving Recurring Gifts for 3+ Years Consecutively

Donors Giving Recurring Gifts for 3+ Years Consecutively



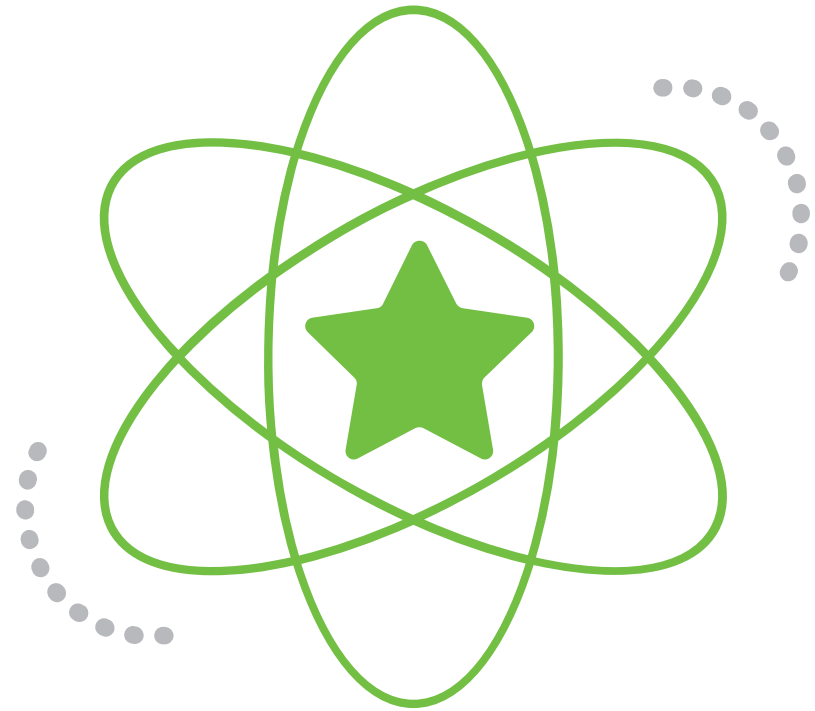
3+ Year Donors

Revenue from Donors Giving Recurring Gifts for 3+ Years Consecutively



Revenue from 3+ Year Donors

Early investments and determination in building a solid core of extremely loyal recurring donors helped weather the challenges and embrace the opportunities of 2020.



Resources

[Encourage Recurring Giving: 3 Simple Digital Strategies](#)

[8 Key Aspects for a Successful Monthly Sustainer Donor Program](#)

[How Benchmarking and Analytics Can Inform Fundraising Strategies](#)



Thank You!



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