

2019 donorCentrics Collaborative Benchmarking Sustainer Summit

INSIGHTS AND HIGHLIGHTS



PROFESSIONAL FACE TO FACE
FUNDRAISING ASSOCIATION

PAIGE GRAINGER, ANALYTICS CONSULTANT, PRINCIPAL

blackbaud®

donorCentrics® Sustainer Summit

Sharing and Learning



Sharing and learning from 33 organizations of different sizes and missions.



Data and Analysis

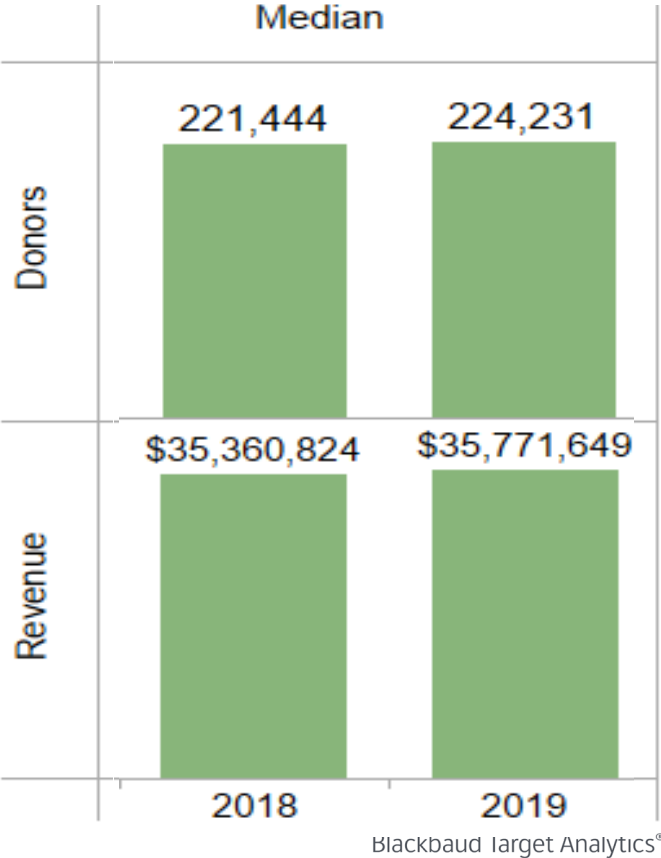
Analysis of giving from

- 16+ million donors
- who gave 56 million gifts
- for a total of \$2.3 billion in FY2019.

- All data was calculated directly from transactions from each organization's fundraising database
- Individual payments of \$10,000 or more were excluded
- All references to years within this analysis are based on a July to June year.

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

Total Active Donors and Revenue Increased Modestly at the Medians in FY2019



1%

1% increase in the median number of active donors.



1%

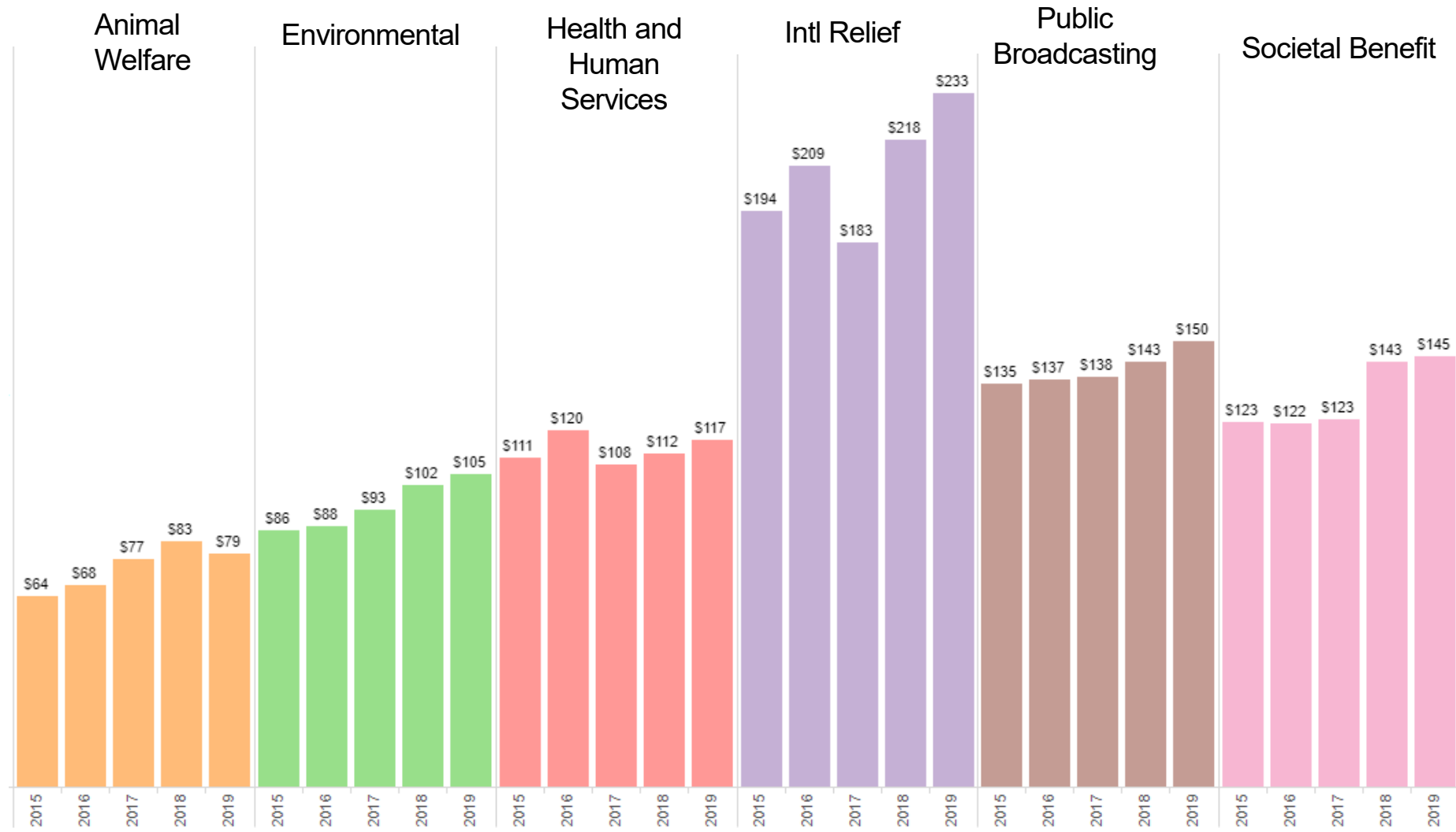
1% increase in median revenue.



Revenue per Donor Increased by 13% over 5-Year Period



Overall Revenue per Donor Increasing Across All Sectors



Blackbaud Target Analytics®

Recurring Donor Value Is Increasing

\$260

Median Revenue per Donor for Recurring Donors making at least 12 gifts in 2015



\$271

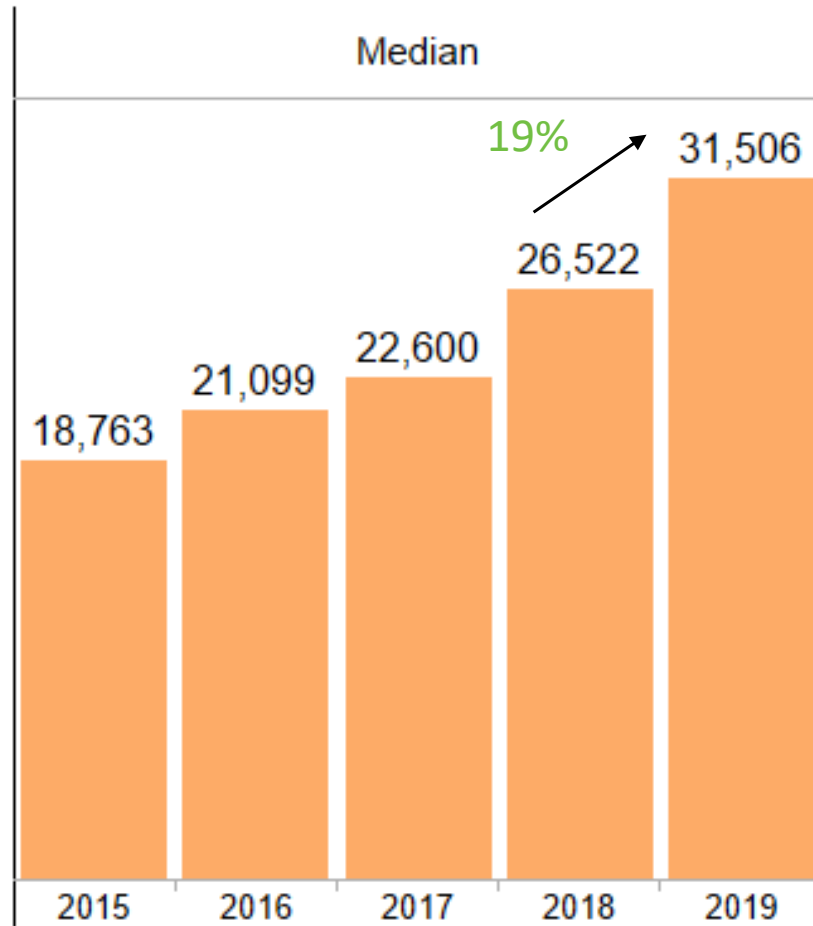
Median Revenue per Donor for Recurring Donors making at least 12 gifts in 2019



The average recurring gift for multi-year donors making 12+ gifts in 2019 was \$23, a one dollar increase since 2015.

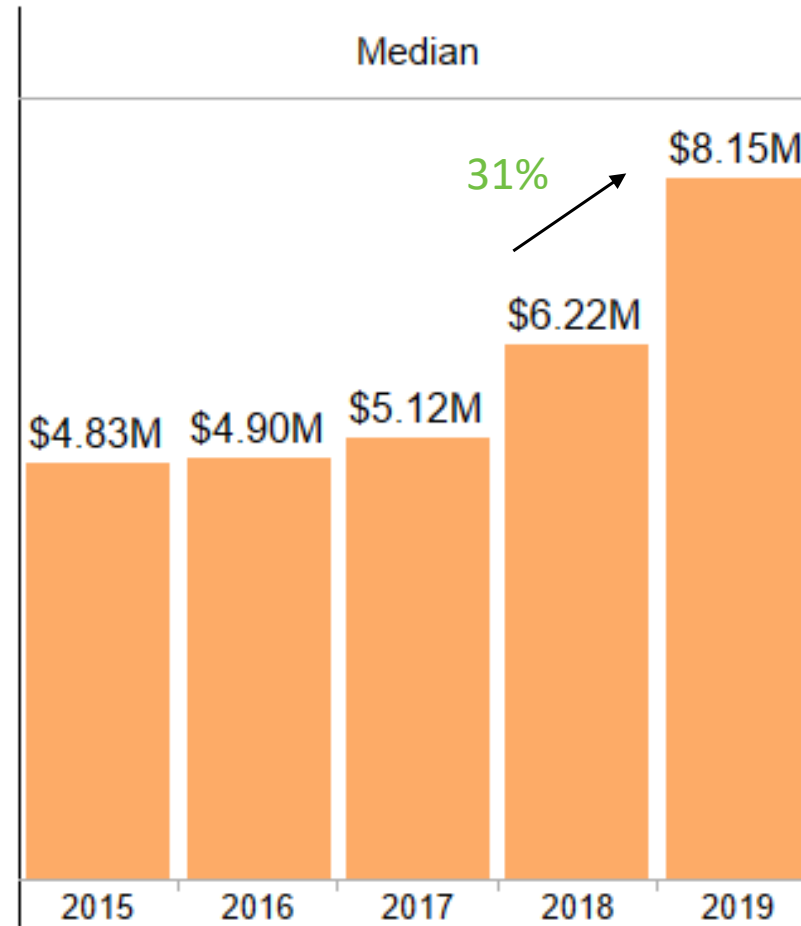
Significant Donor and Revenue Gains at the Median for Donors Giving Recurring Gifts for 3+ Years Consecutively – a primary factor for growth in donor value

Donors Giving Recurring Gifts for 3+ Years Consecutively



3+ Year Donors

Revenue from Donors Giving Recurring Gifts for 3+ Years Consecutively

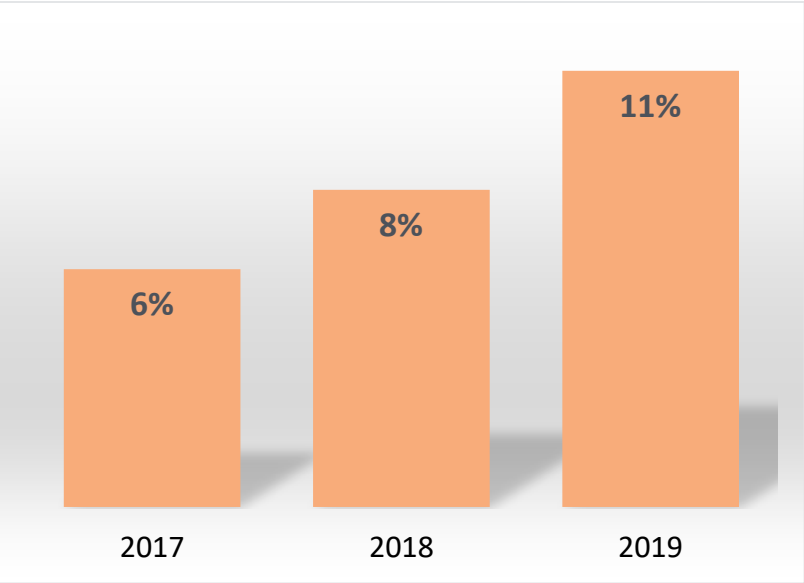


Revenue from 3+ Year Donors

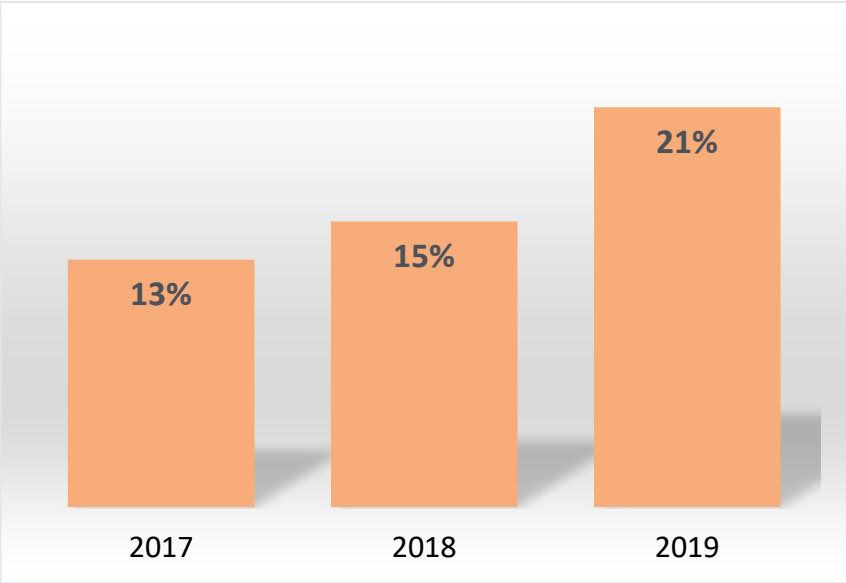
Blackbaud Target Analytics®

Significant Increases at the Median for Donors Giving Recurring Gifts for **3+ Years** Consecutively as a Share of Total Giving in 2019

3+ Year Recurring Gift Donors as a Share of All Donors



Revenue from 3+ Year Recurring Gift Donors as a Share of All Revenue



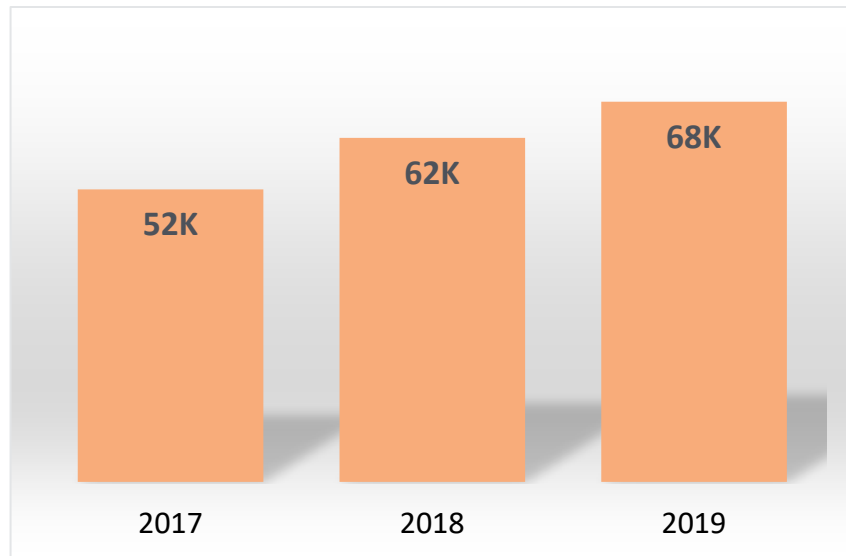
3+ Year Consecutive Recurring Gift Donors retain in the 95-98% range.

Are overall recurring donor
populations continuing to grow?

Recurring Donors and Revenue Increased at the Median

+31%

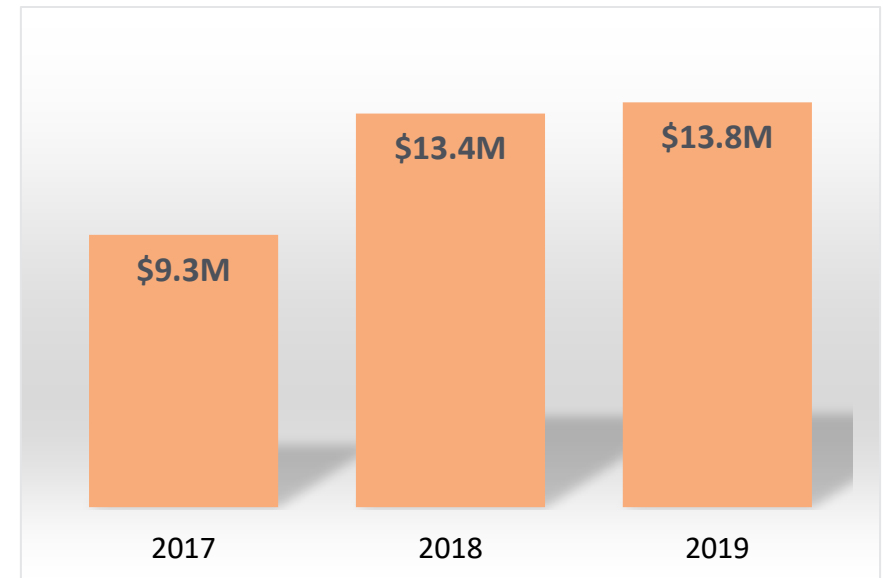
Change in median recurring donors over 3 years



Blackbaud Target Analytics®

+48%

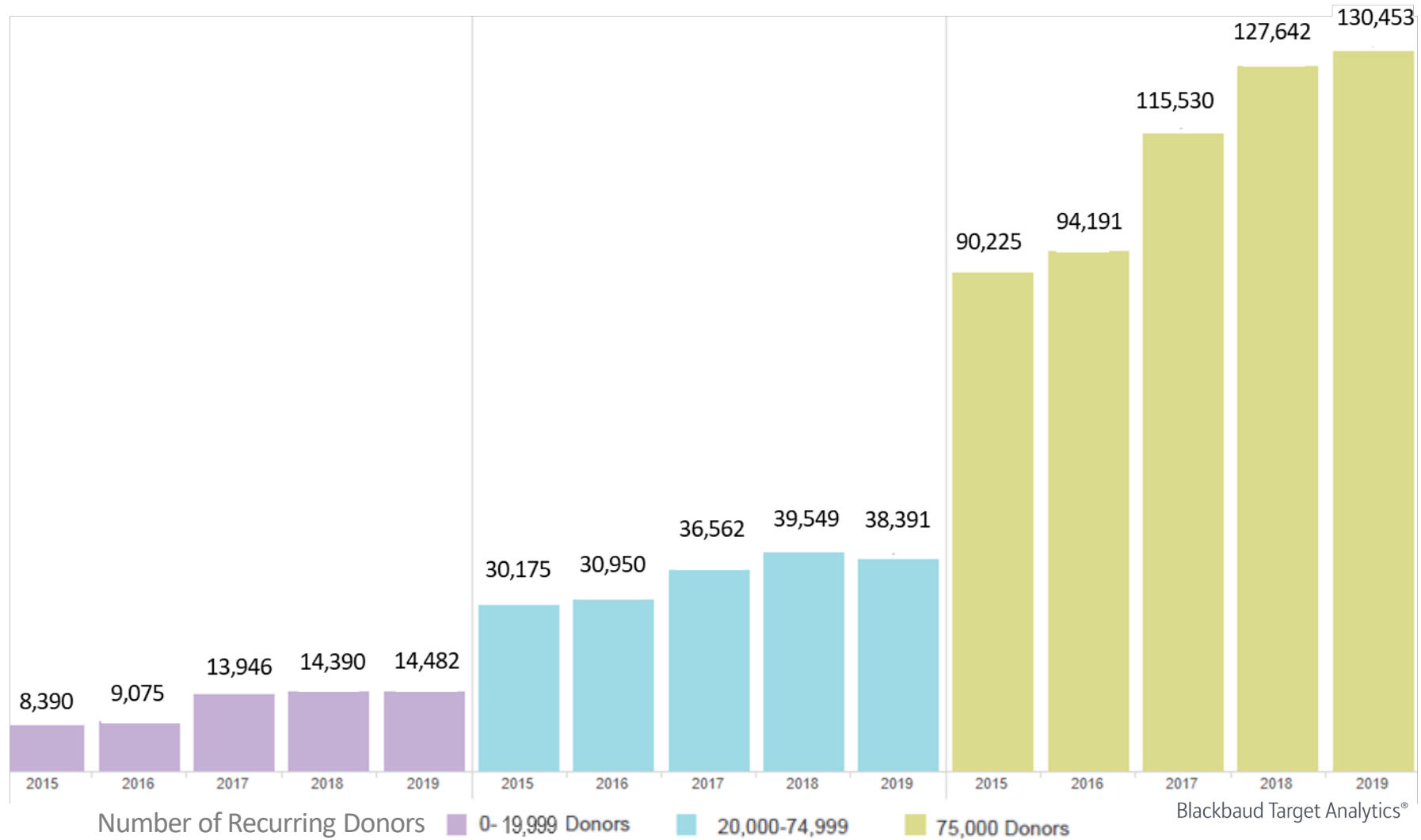
Change in median recurring revenue over 3 years



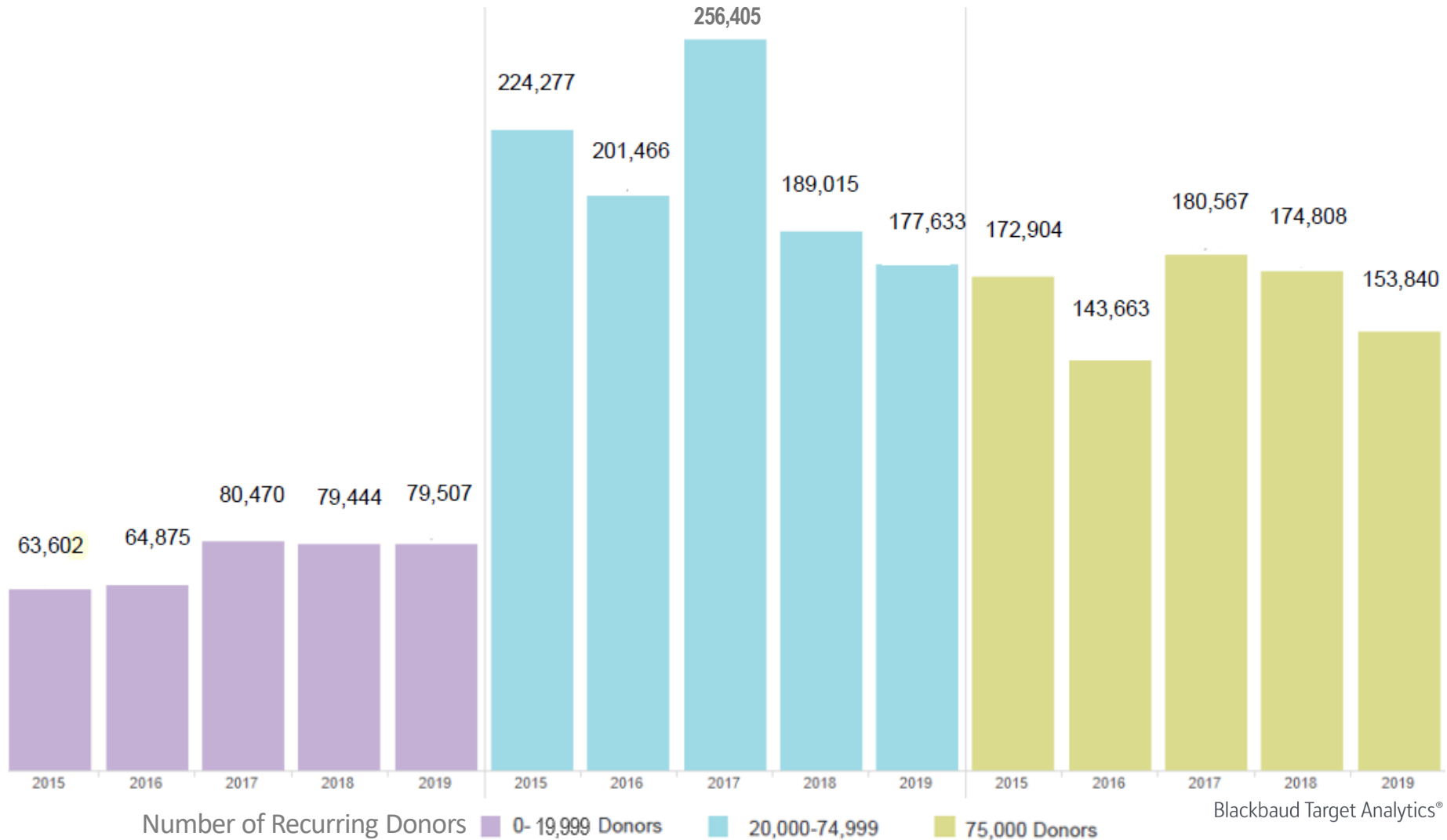
Blackbaud Target Analytics®

Any Recurring Gifts in CY

Number of Recurring Donors Up Since FY2015 for All Program Sizes



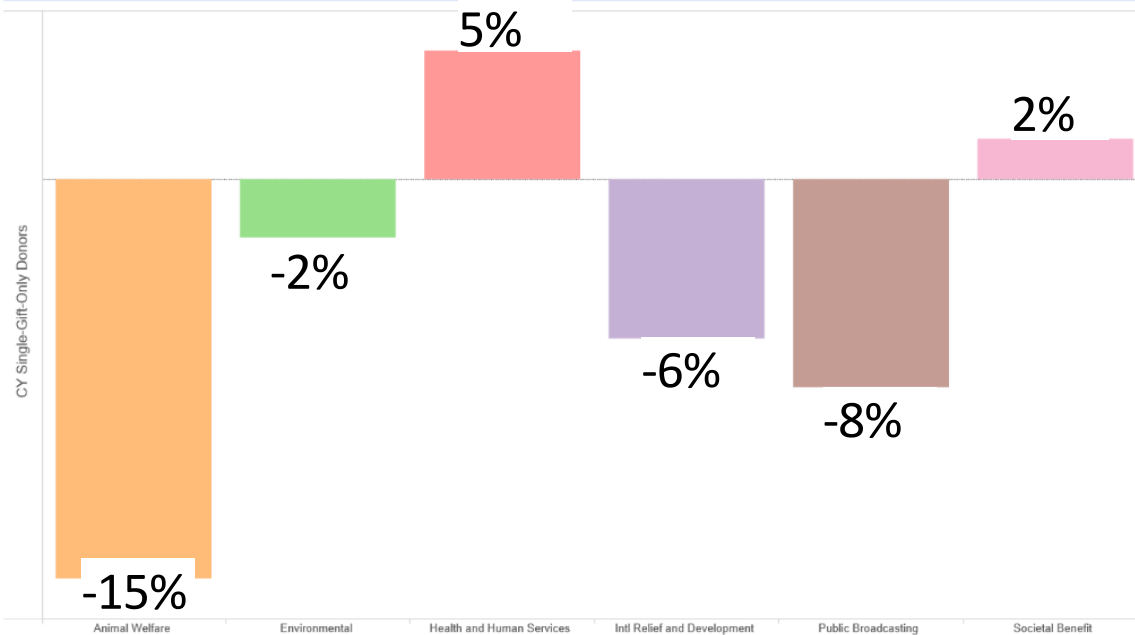
Single Gift Donors Declining for Larger Programs



Median 1-Year % change in Single and Recurring Donors from FY2018 to FY2019

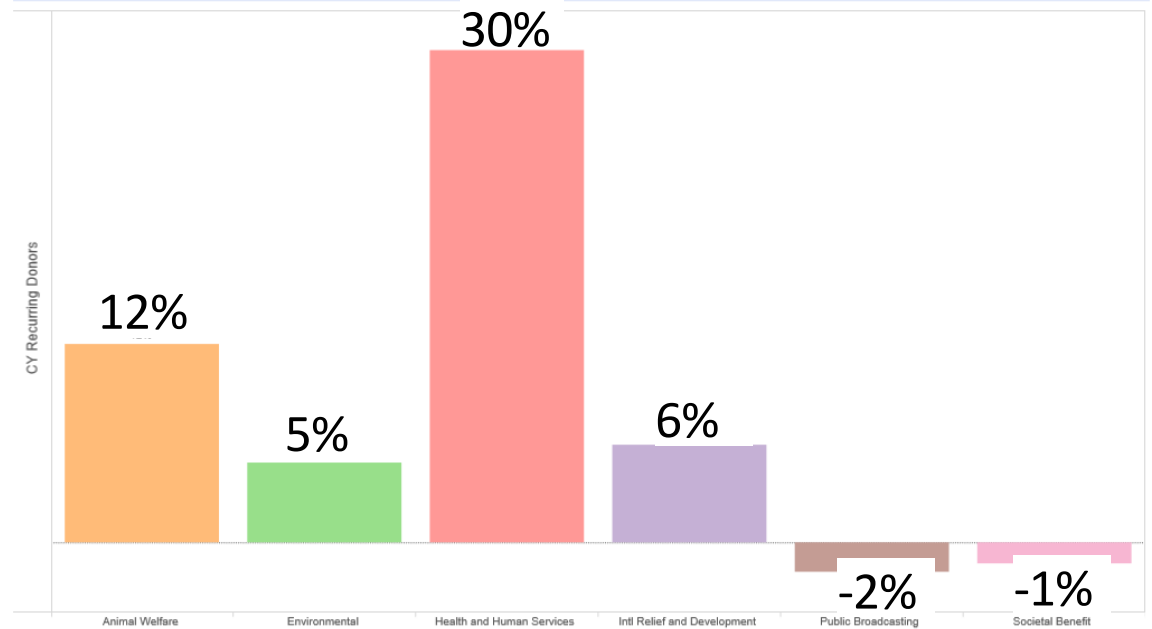
Median 1-Year Change in CY Single-Gift-Only Donors by Sector

(33 Organizations) (2019)



Median 1-Year Change in CY Recurring Donors by Sector

(33 Organizations) (2019)



■ Animal Welfare
 ■ Environmental
 ■ Health and Human Services
 ■ Intl Relief and Development
 ■ Public Broadcasting
 ■ Societal Benefit

Recurring Donors are increasing as a share of total donors

13%

Median % of total donors giving recurring gifts in FY15

18%

Median % of total donors giving recurring gifts in FY19

Recurring Revenue is increasing as a share of total revenue

21%

Median % of total revenue from recurring gifts in FY15

32%

Median % of total revenue from recurring gifts in FY19

What are the top 3 gift sources for recurring revenue?

31%

Median % of
recurring
revenue from
web/digital
sources

27%

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

10%

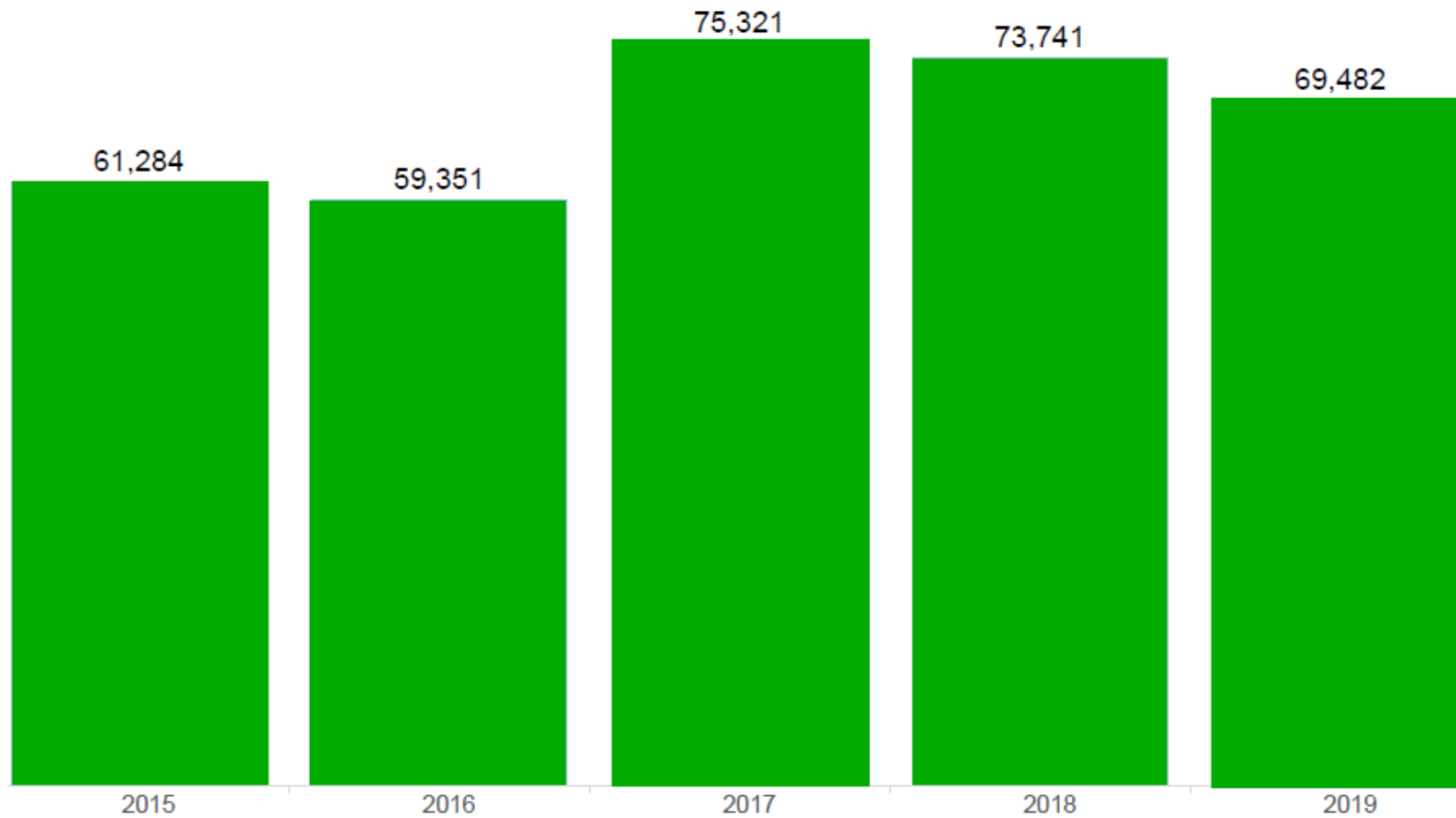
Median % of
recurring
revenue from
DRTV

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

First-Time Recurring Donor Trends

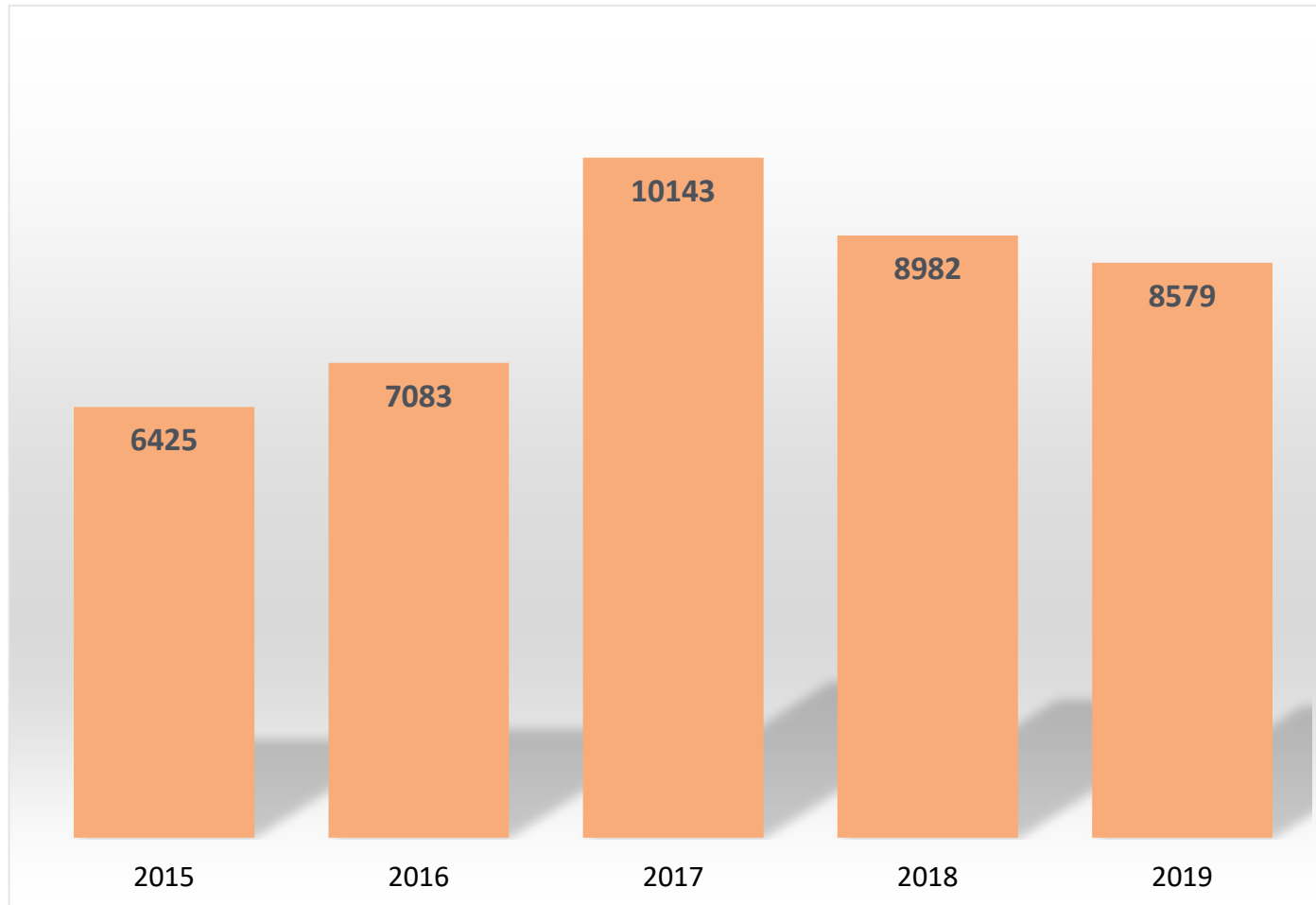
Acquired Directly to Recurring and
Converted to Recurring

Total New Donors declined at the median in 2019, but they remain well above 2015 and 2016 medians



Blackbaud Target Analytics®

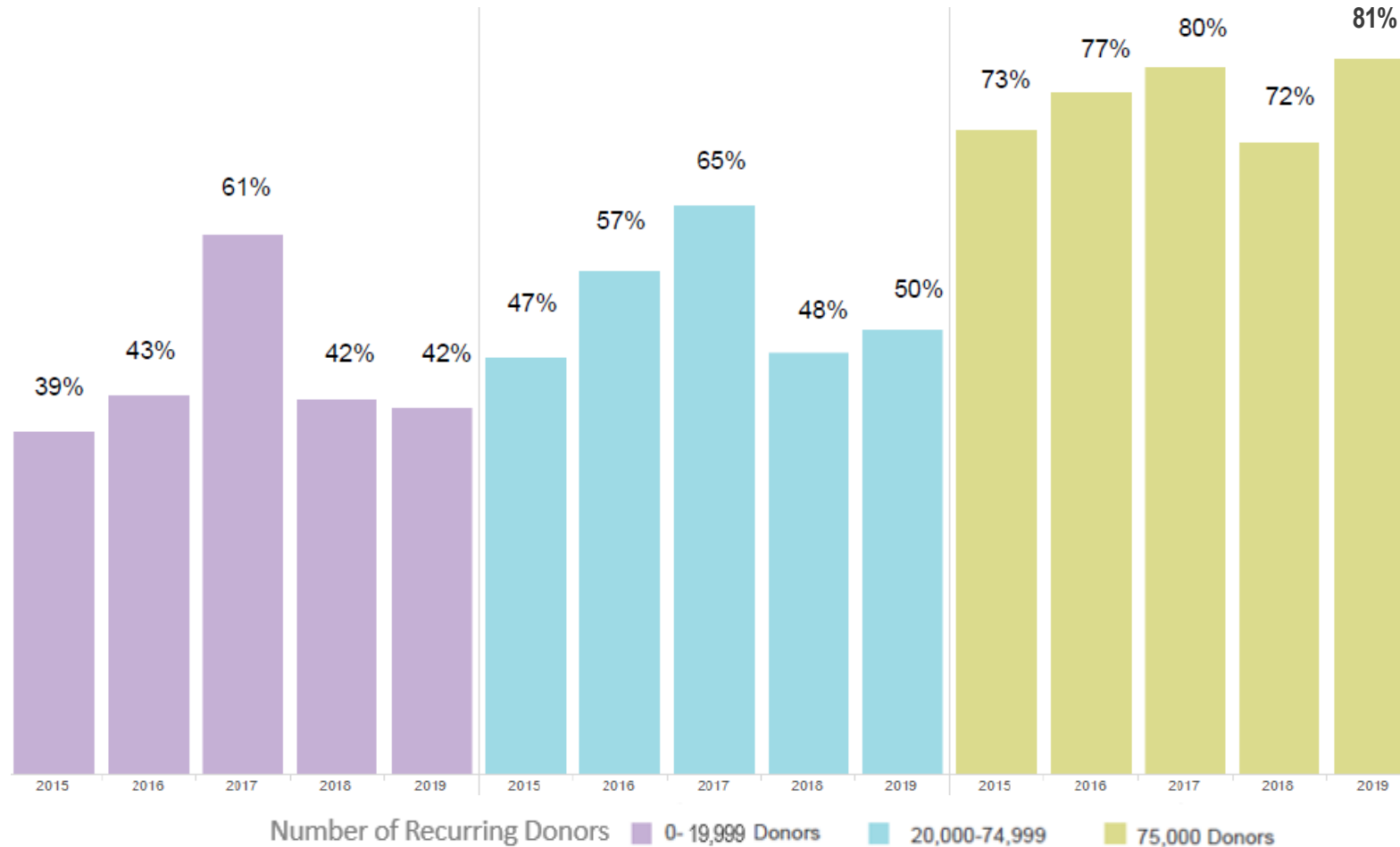
New Donors making recurring gifts declined at the median in 2019, but they remain well above 2015 and 2016 medians



- New recurring donors declined by 4% from 2018 to 2019
- Since 2015, new recurring gift donors increased by 34%
- 25 out of 33 organizations have had an increase in new recurring gift donors since 2015
- 13 out of 33 organizations had a decline in new recurring gift donors from 2018 to 2019

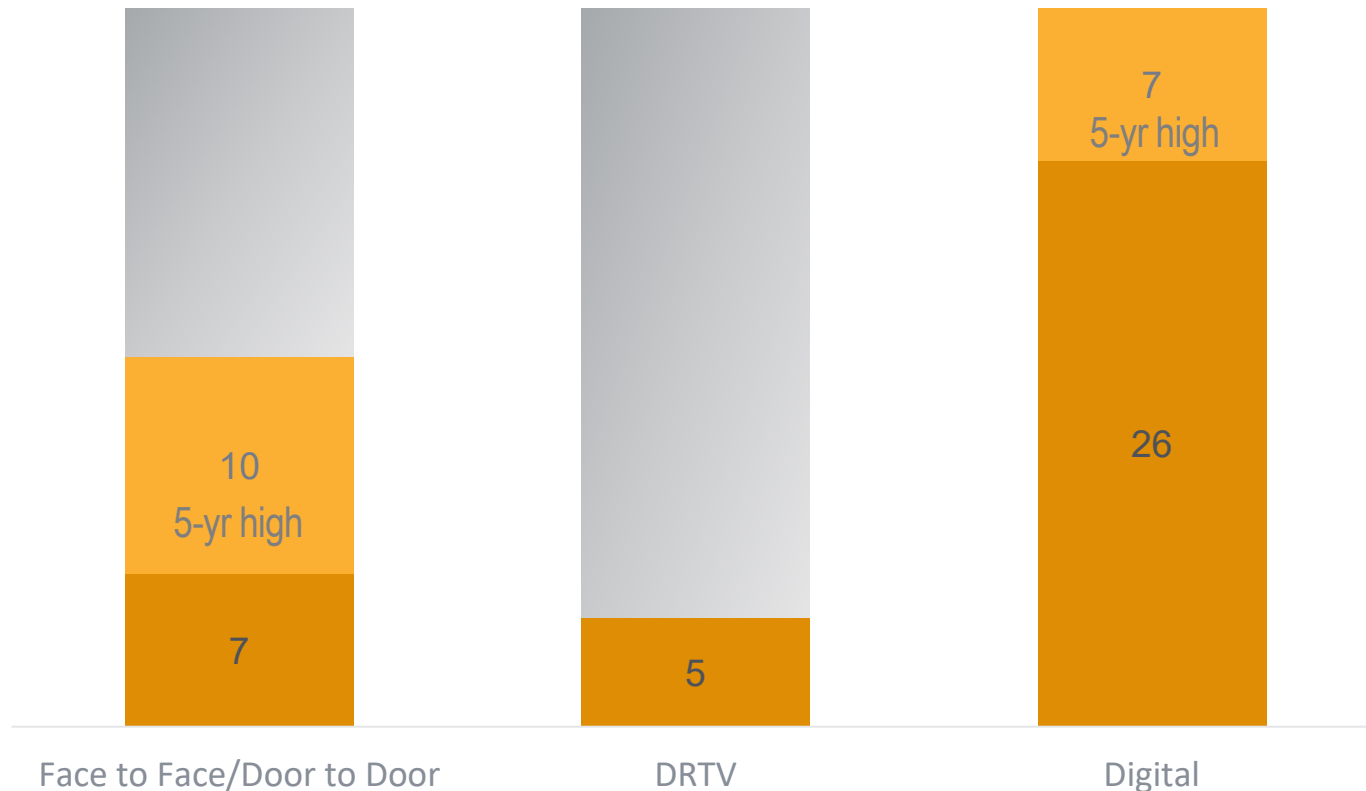
Larger sustainer programs acquire most of their first-time recurring donors directly to recurring

Percentage of first-time recurring gift donors that were acquired directly as recurring gift donors.



Blackbaud Target Analytics®

2019 New Recurring Donor Acquisition Channels



17 organizations acquired new recurring donors via Face to Face/Door to Door
Up from 13 organizations in 2015
10 hit a 5-year high in FY2019

5 organizations acquired new recurring donors via DRTV
4 had DRTV programs in the past,
but not this year

7 organizations hit a 5-year high in the number of recurring donors acquired via Web/Digital channels in FY2019
16 of 33 organizations hit their high in FY2017

Composite new recurring donor counts increased for two key acquisition channels from FY2018 to FY2019

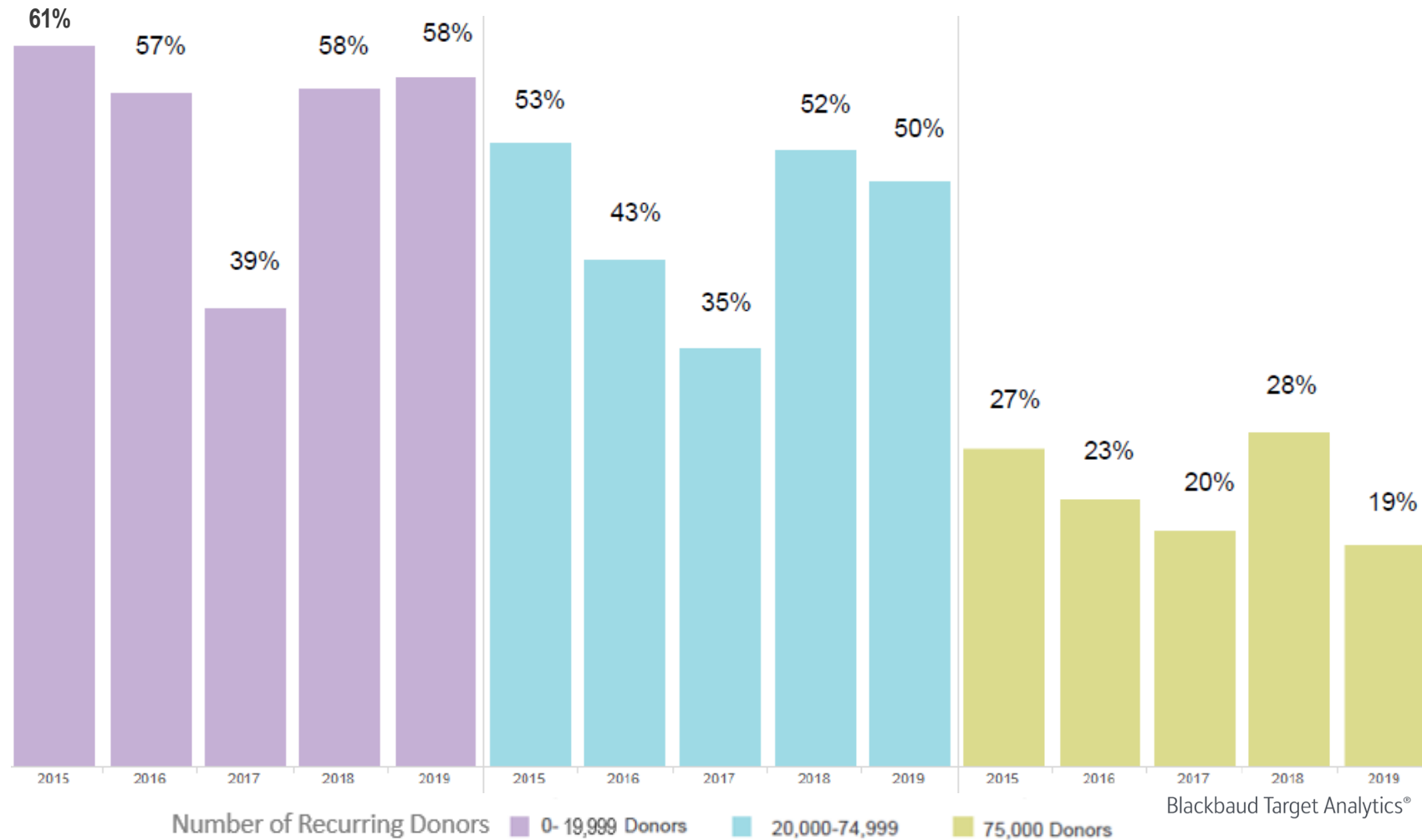
- **12%** increase in the composite count of new recurring donors from FY2018 to FY2019.
 - **7%** increase in the composite count new online acquired recurring donors
 - **-4%** decline in the composite count of new DRTV acquired recurring donors
 - **35%** increase in the composite count of new Face to Face/Door to Door acquired recurring donors

Over 5-years, the composite count of new recurring donors increased for same key channels

- +62% increase in the composite count of new recurring donors from FY2015 to FY2019.
 - +130% increase in the composite count new online acquired recurring donors
 - -9% decline in the composite count of new DRTV acquired recurring donors
 - +74% increase in the composite count of new Face to Face/Door to Door acquired recurring donors

Smaller sustainer programs rely heavily on conversion to increase recurring donor populations

Percentage of first-time recurring gift donors that were converted to recurring gift donors from single.



What were the top 3 sources for converting single gift donors to recurring donors in 2019?

49%

Of all donors that converted from single to recurring did so via **web/digital** sources

20%

Of all donors that converted from single to recurring did so via **telemarketing**

9%

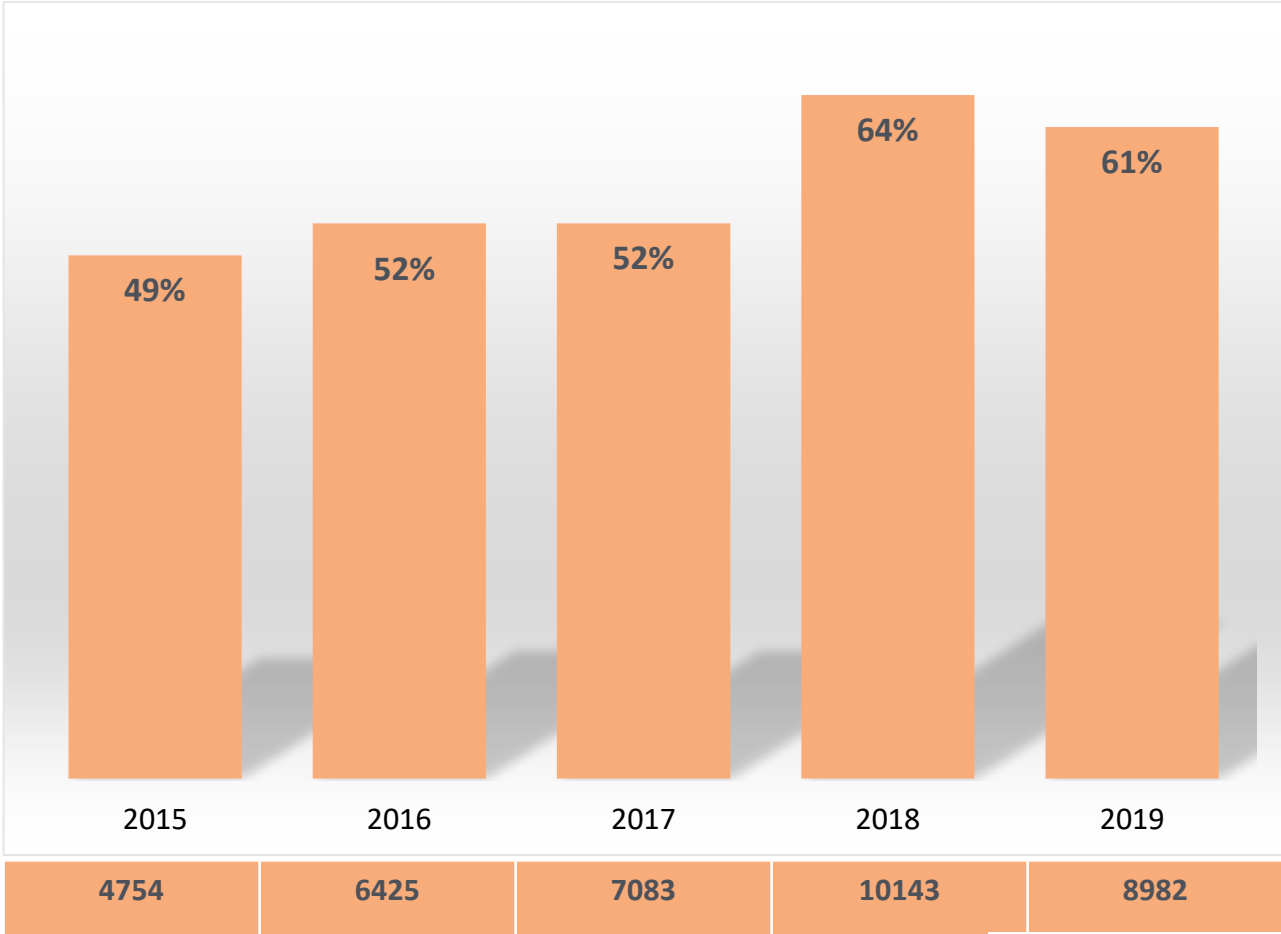
Of all donors that converted from single to recurring did so via **mail**



Conversions declined via all channels in 2019.

New Donor Retention Trends

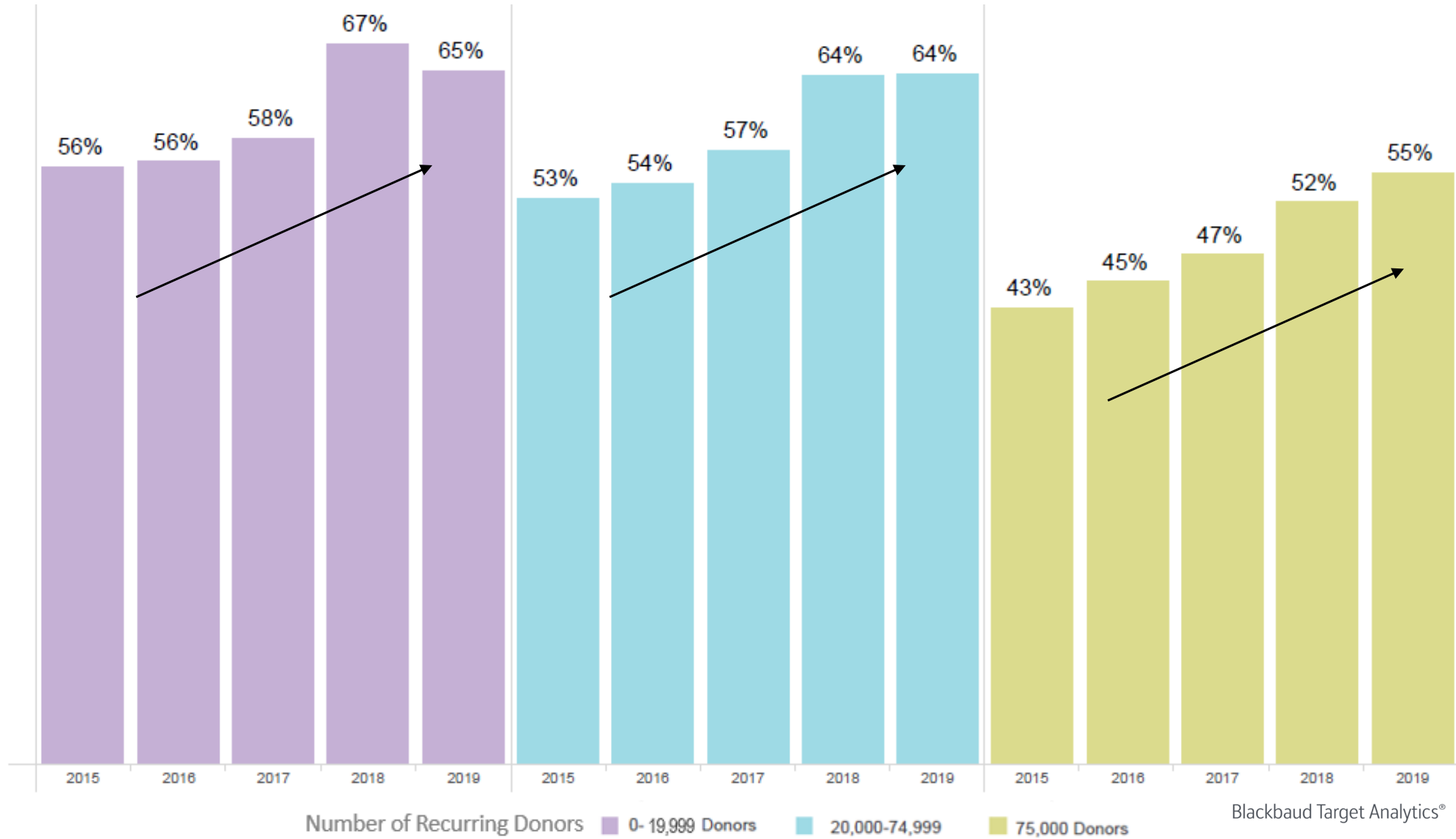
Median Month 13 Donor Retention Rate for Recurring Acquired Donors Declined Slightly in 2019 from 2018 Peak, Increased Over Time



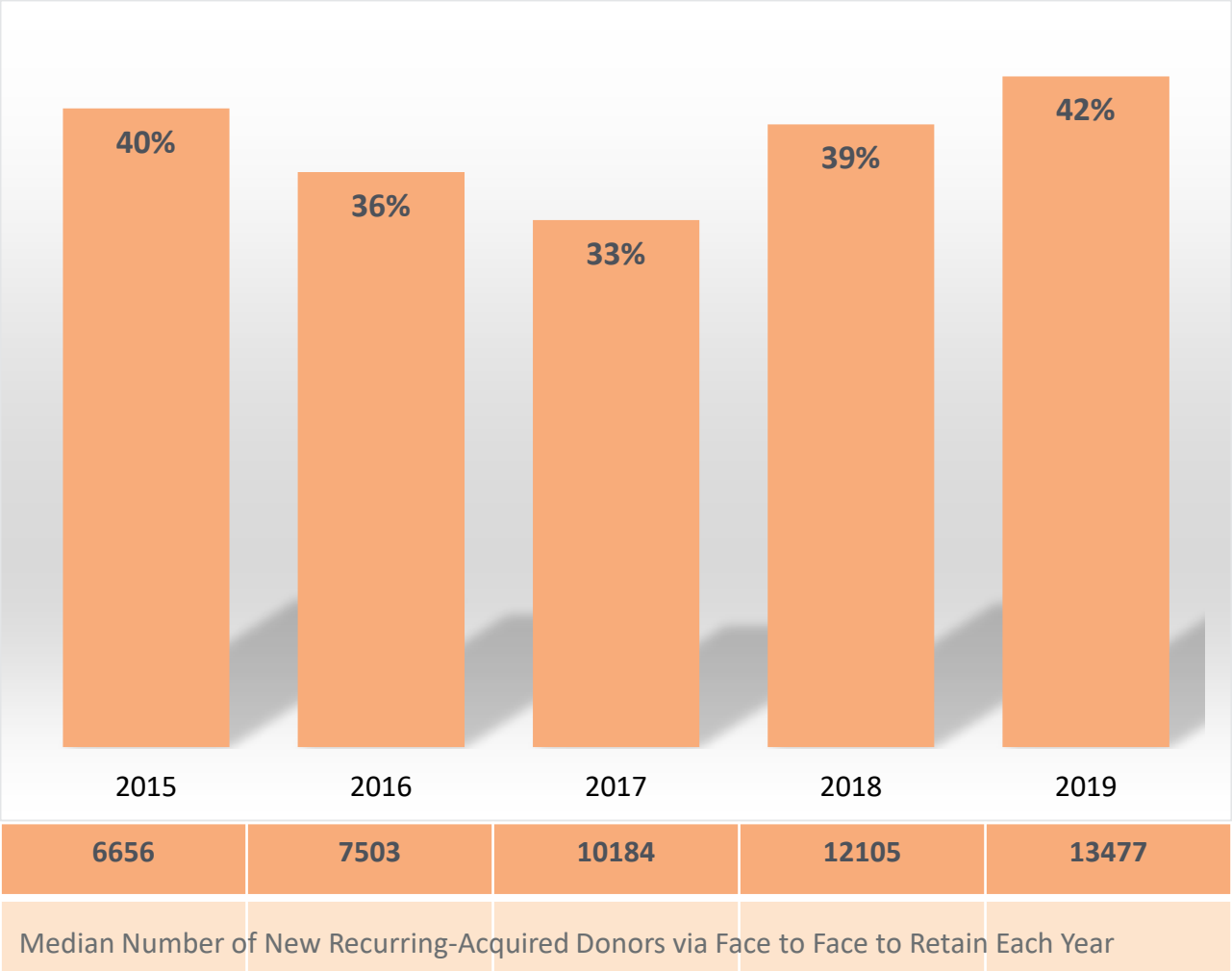
Blackbaud Target Analytics®

Median Number of New Recurring-Acquired Donors to Retain Each Year

Median Month 13 Donor Retention Rate Trends for Recurring Acquired Donors Were Mixed in 2019 by Program Sizes, However All Increased over Time

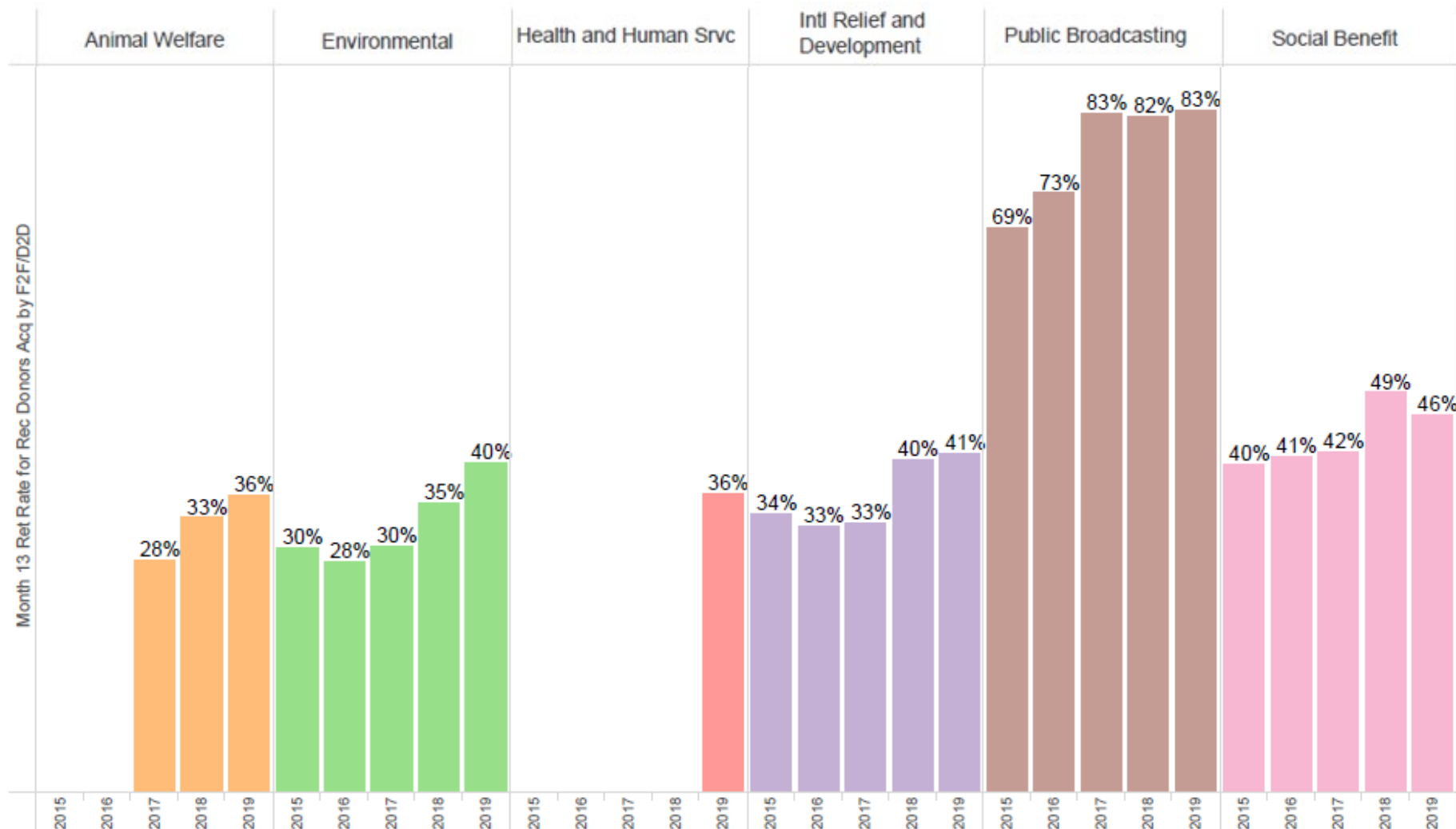


Median Month 13 Retention of New Recurring Donors Face to Face/Door to Door Acquired

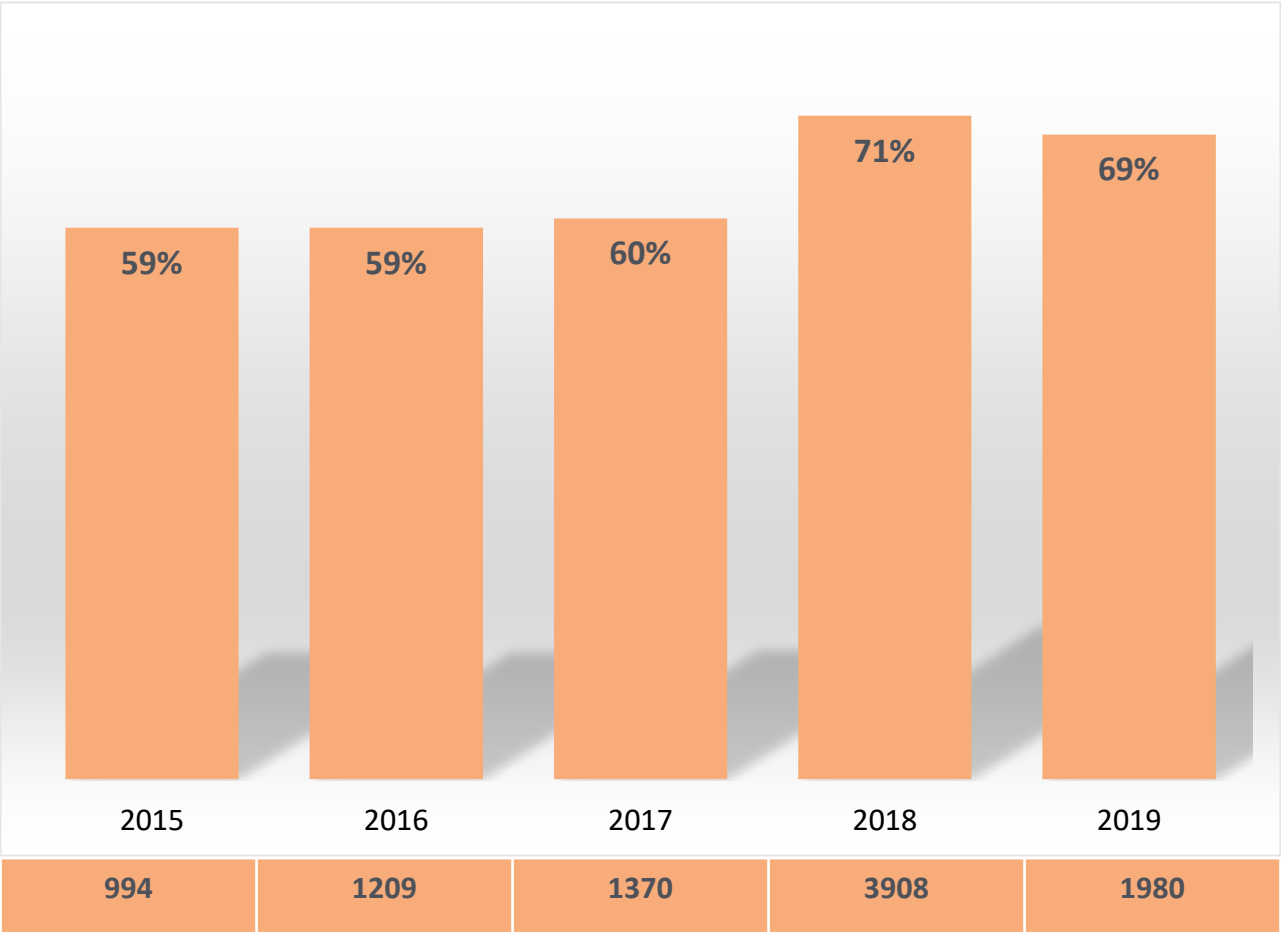


Blackbaud Target Analytics®

The Median Month 13 Donor Retention Rate for Face to Face/Door to Door Acquired donors increased for most sectors in 2019



Median Month 13 Retention of New Recurring Donors Acquired via Digital Channels



Blackbaud Target Analytics®

Median Number of New Recurring-Acquired Donors via Web/Digital to Retain Each Year

Long Term Value for Canvass- Acquired Donors

The long-term value of canvass-acquired (F2F/D2D) donors is accelerating. Third year value of a 2017-acquired recurring donor was 20% higher than the 3rd year value of a 2015-acquired donor.



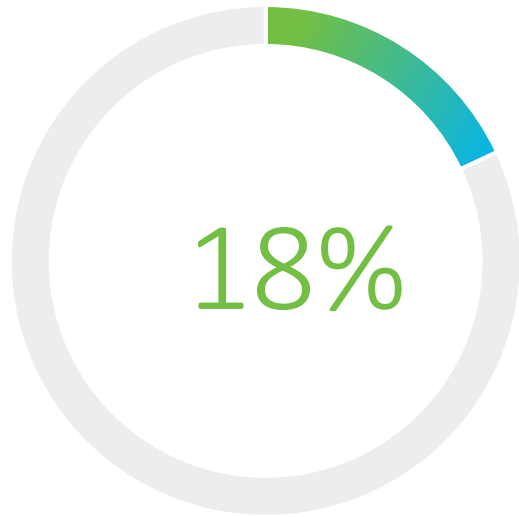
The composite long-term value per donor **acquired via canvassing in 2015** was \$144 in 2017

Compare to:



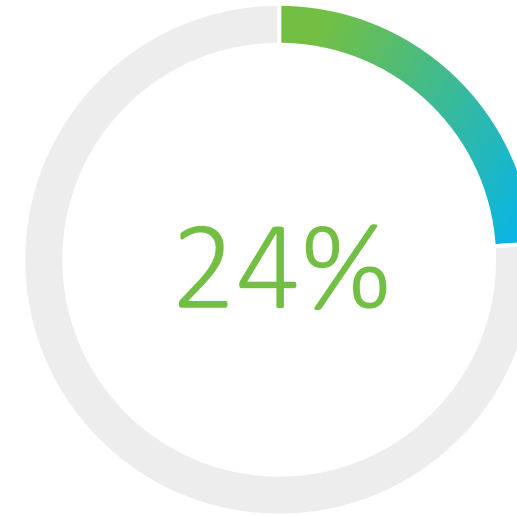
The composite long-term value per donor **acquired via canvassing (F2F/D2D) in 2017** was \$173 in 2019

The long-term retention of canvass-acquired (F2F/D2D) donors is increasing.



18% percent of donors **acquired via canvassing (F2F/D2D) in 2015** were still giving in 2017.

Compare to:



24% percent of donors **acquired via canvassing (F2F/D2D) in 2017** were still giving in 2019.

Thank You!

Keep In Touch!

Paige.Grainger@Blackbaud.com



PROFESSIONAL FACE TO FACE
FUNDRAISING ASSOCIATION

blackbaud®