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donorCentrics

# Sustainer Summit Benchmarking

*FY2018 – FY2022 Insights, Trends, and Key Take-Aways*

DEB ASHMORE, PRINCIPAL ANALYTICS CONSULTANT

# Welcome to the Sustainer Summit Combined Session!

## Sharing and Learning



Sharing and learning from 37 organizations of different sizes and missions.

## Data and Analysis



Analysis of giving from a total of 21 million donors and a total of \$4.4 billion in FY2022.

# Key themes



Over the last 2 years of a turbulent fundraising environment, sustainers did their job.

Sustainers provided stable, on-going and growing revenue across organizations



Sustainers CAN and SHOULD be acquired during high-profile giving moments



Digital acceleration in sustainer acquisition continues today

The background features several decorative geometric shapes. In the top-left corner, there is a large teal diamond with a white outline. Below it, a smaller purple diamond is positioned. In the bottom-left, there is a teal diamond and a purple diamond. In the bottom-right, there is a large teal diamond with a smaller cyan diamond overlapping its top-left corner. A white line forming a peak shape is located at the bottom center.

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

# Overall donors and revenue increased from FY2021 to FY2022

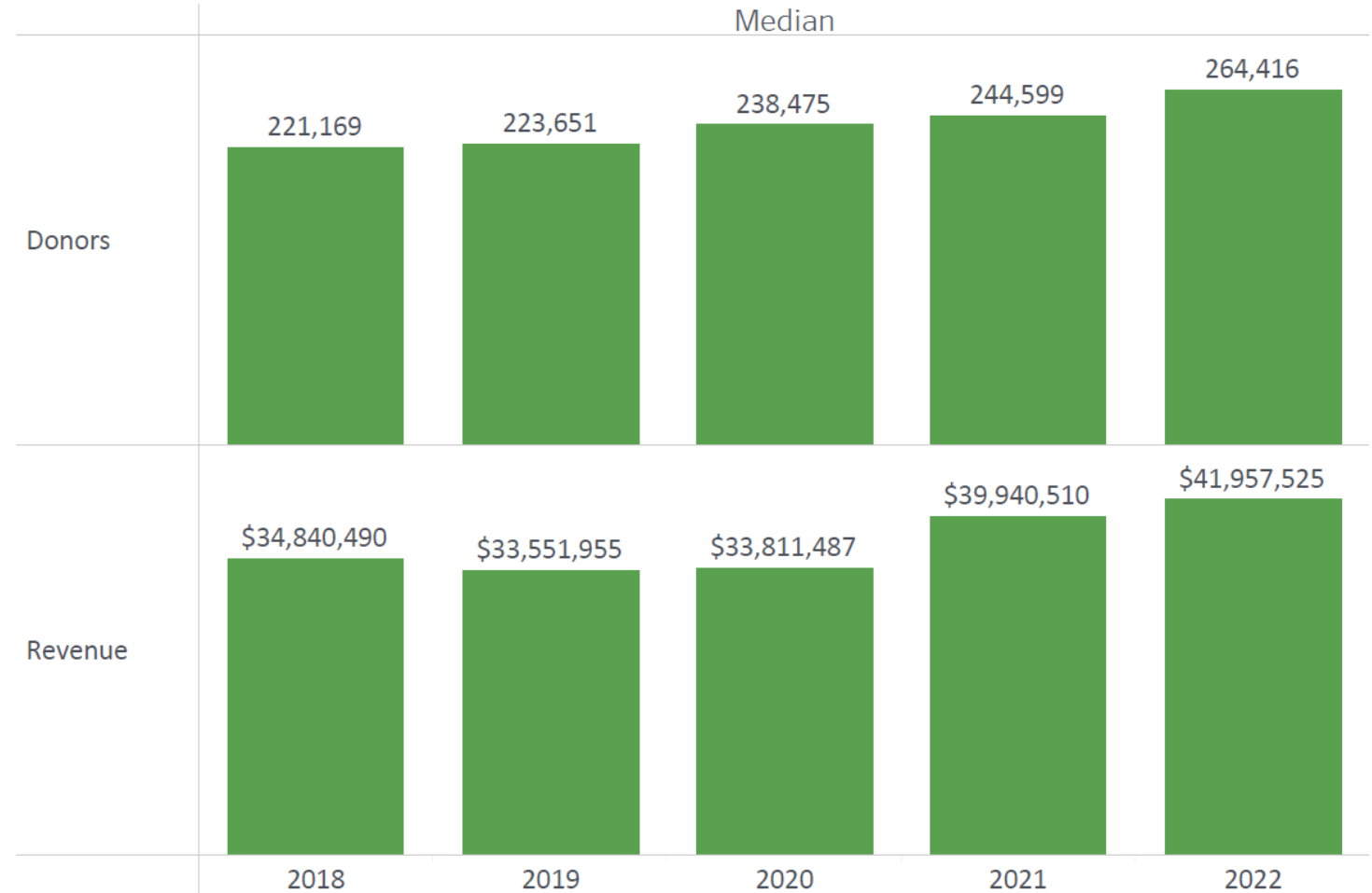
8%

8% increase in the median number of active donors in 2022.

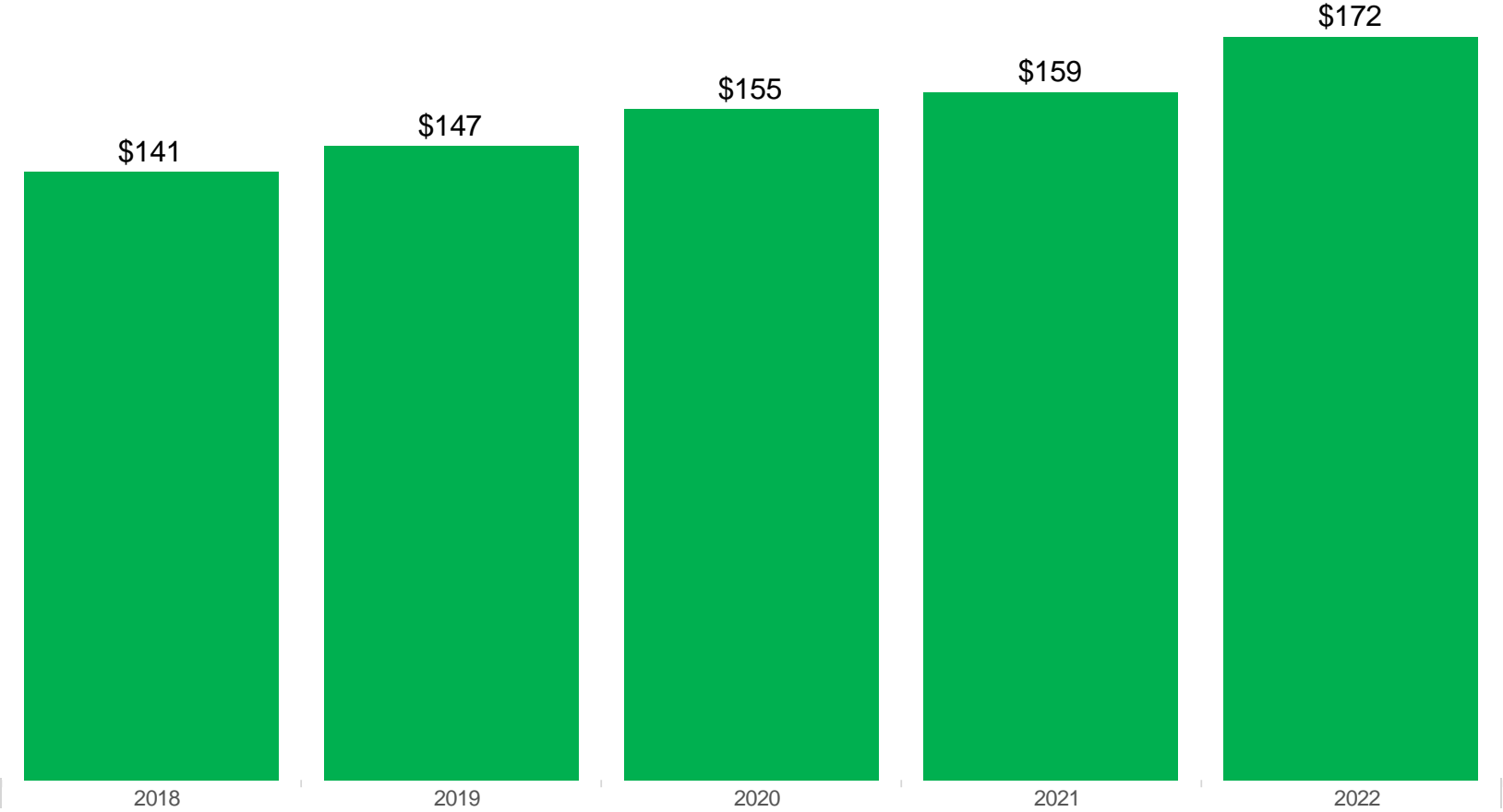


5%

5% increase in median revenue in 2022.



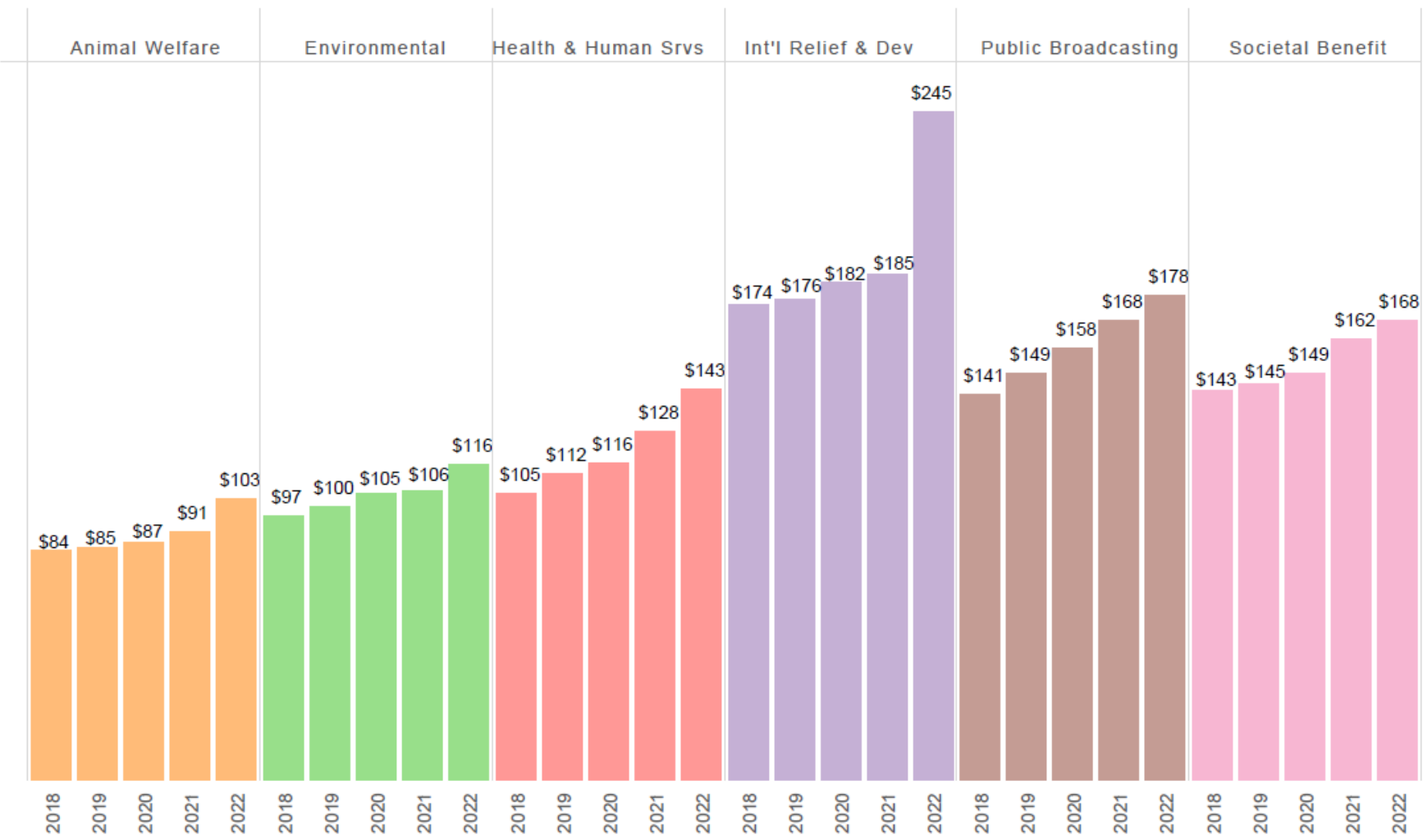
# Consistent increases in donor value helping to drive increases in revenue



**Median CY Revenue per Donor**  
(37 Organizations) (2018 - 2022)



# Overall Revenue per Donor Increasing Across All Sectors



**Median CY Revenue per Donor by Sector**  
 (37 Organizations) (2018 - 2022)



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

\$135

Median Revenue per Donor for **Single Gift** Donors in 2022



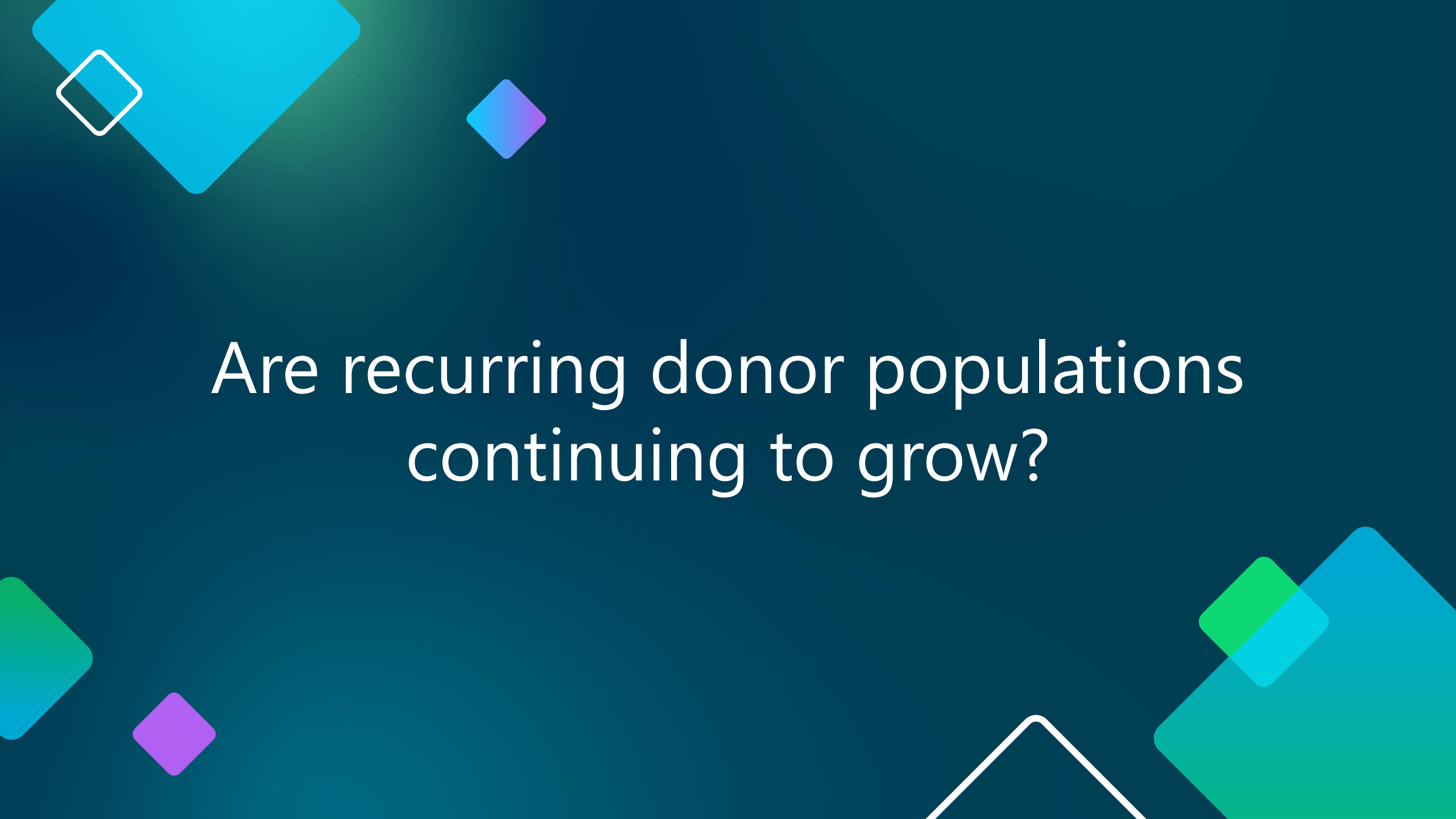
\$238

Median Revenue per Donor for **Recurring** Donors in 2022



The average recurring gift in 2022 was \$22.



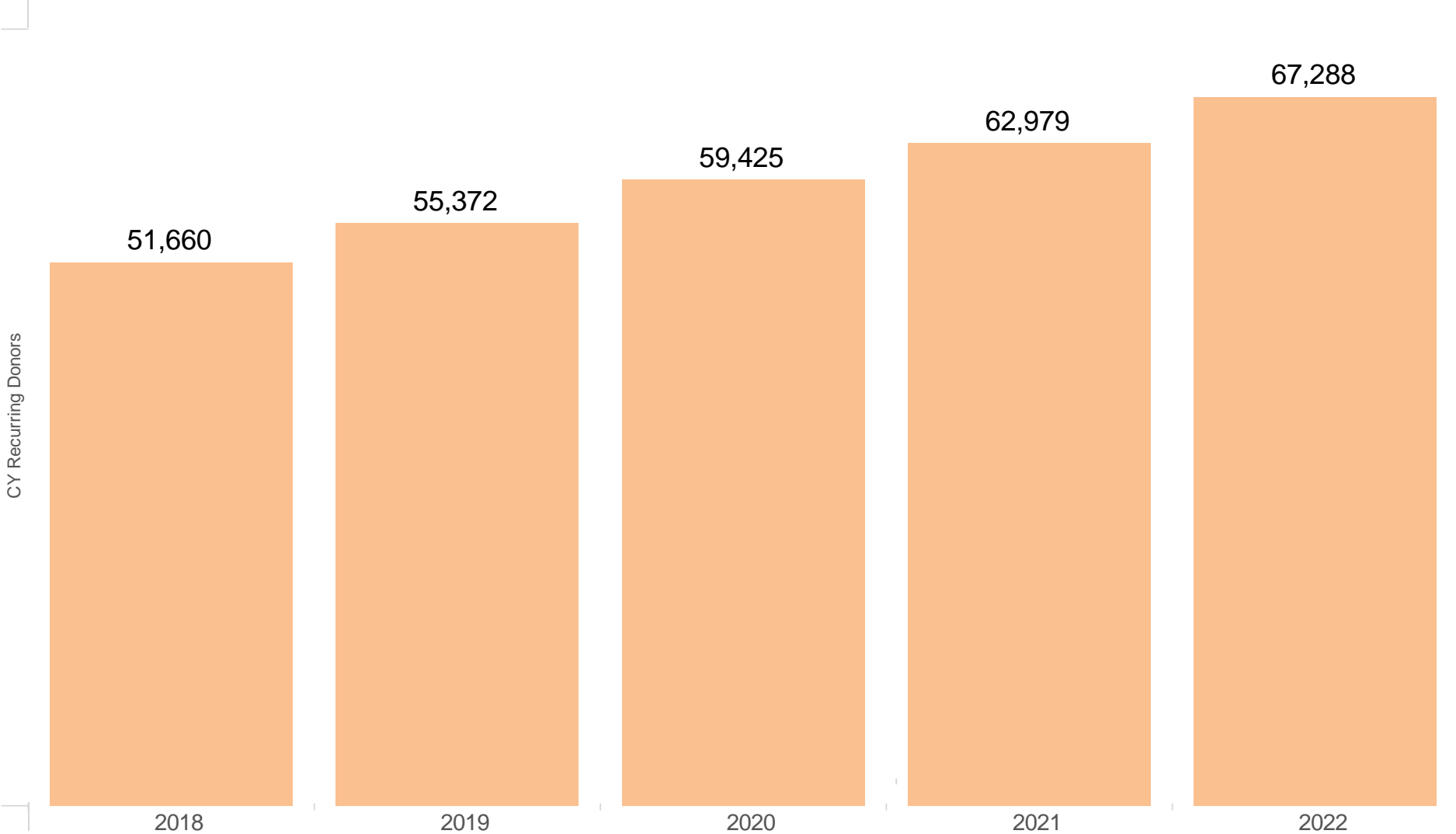


Are recurring donor populations  
continuing to grow?

At the median, the number of recurring gift donors has increased every year since 2018.

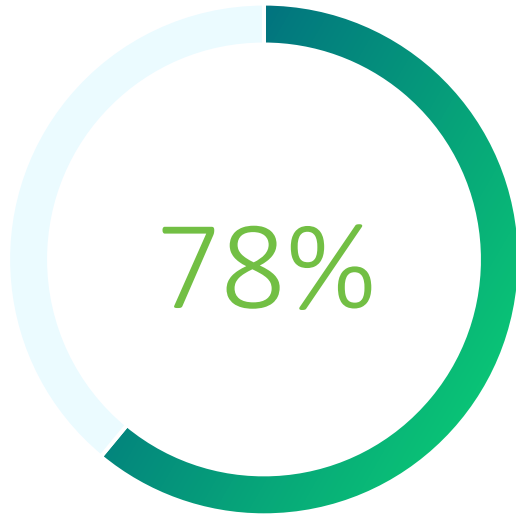
**+30%**

Change in median recurring **donors** over 5 years

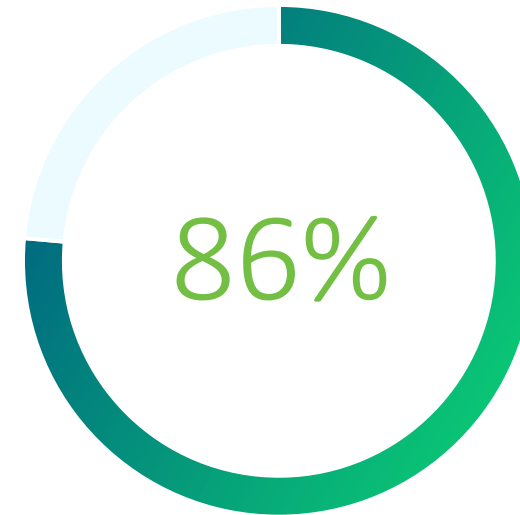


**Median CY Recurring Donors**  
(37 Organizations) (2018 - 2022)

# Recurring Donors and Revenue increased for the majority of organizations

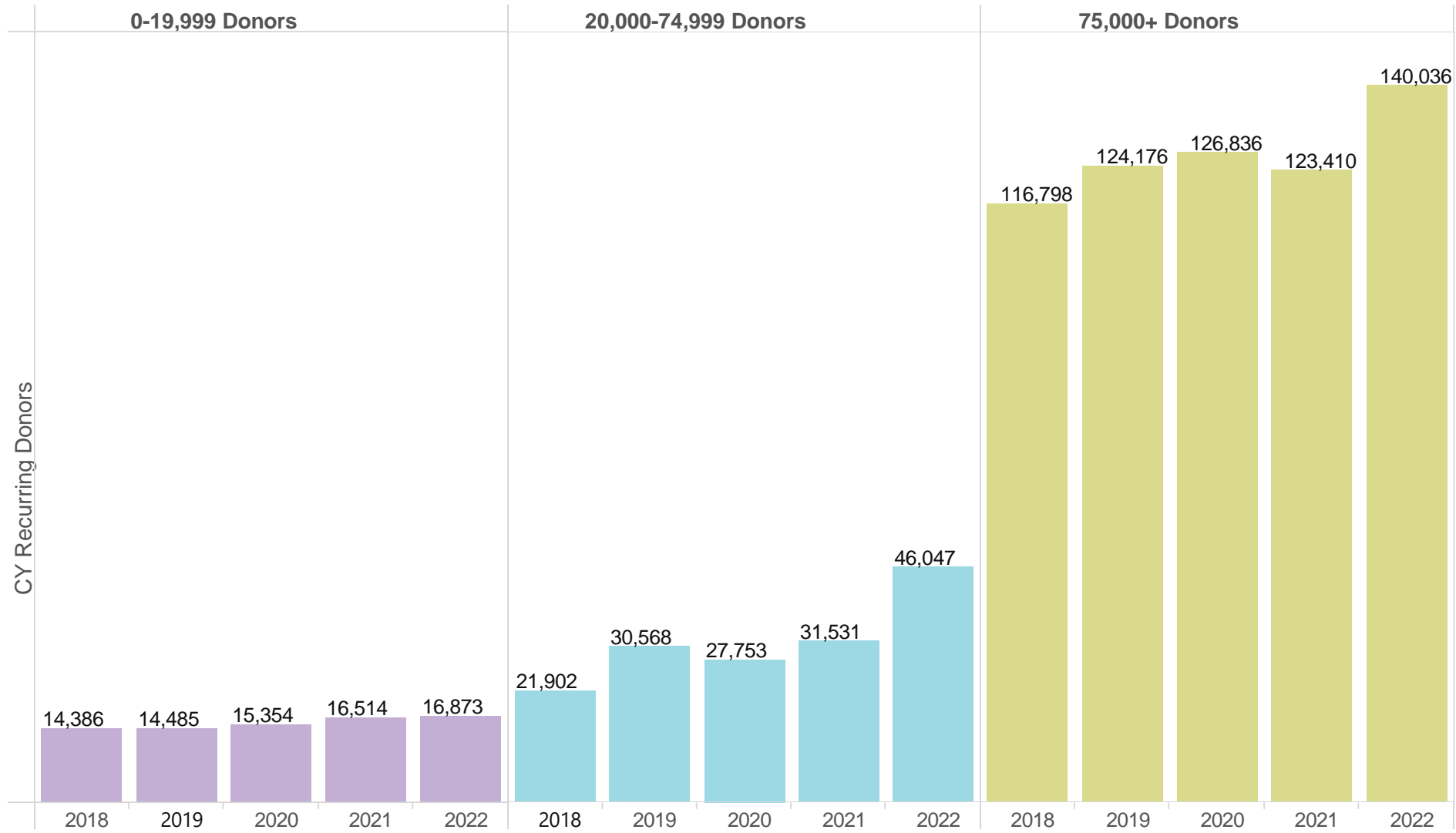


Share of Sustainer Summit Organizations that increased the number of recurring donors from FY2021 to FY2022



Share of Sustainer Summit Organizations that increased the recurring revenue from FY2021 to FY2022

# Recurring Donor Growth Accelerated in FY22 for Mid and Large Sustainer Programs – likely impacted by channel transition



**Median CY Recurring Donors by Sustainer Program Size**  
(37 Organizations) (2018 - 2022)

# What are the top 4 gift sources for recurring gifts in FY22?

**33%**

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

**20%**

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

**8%**

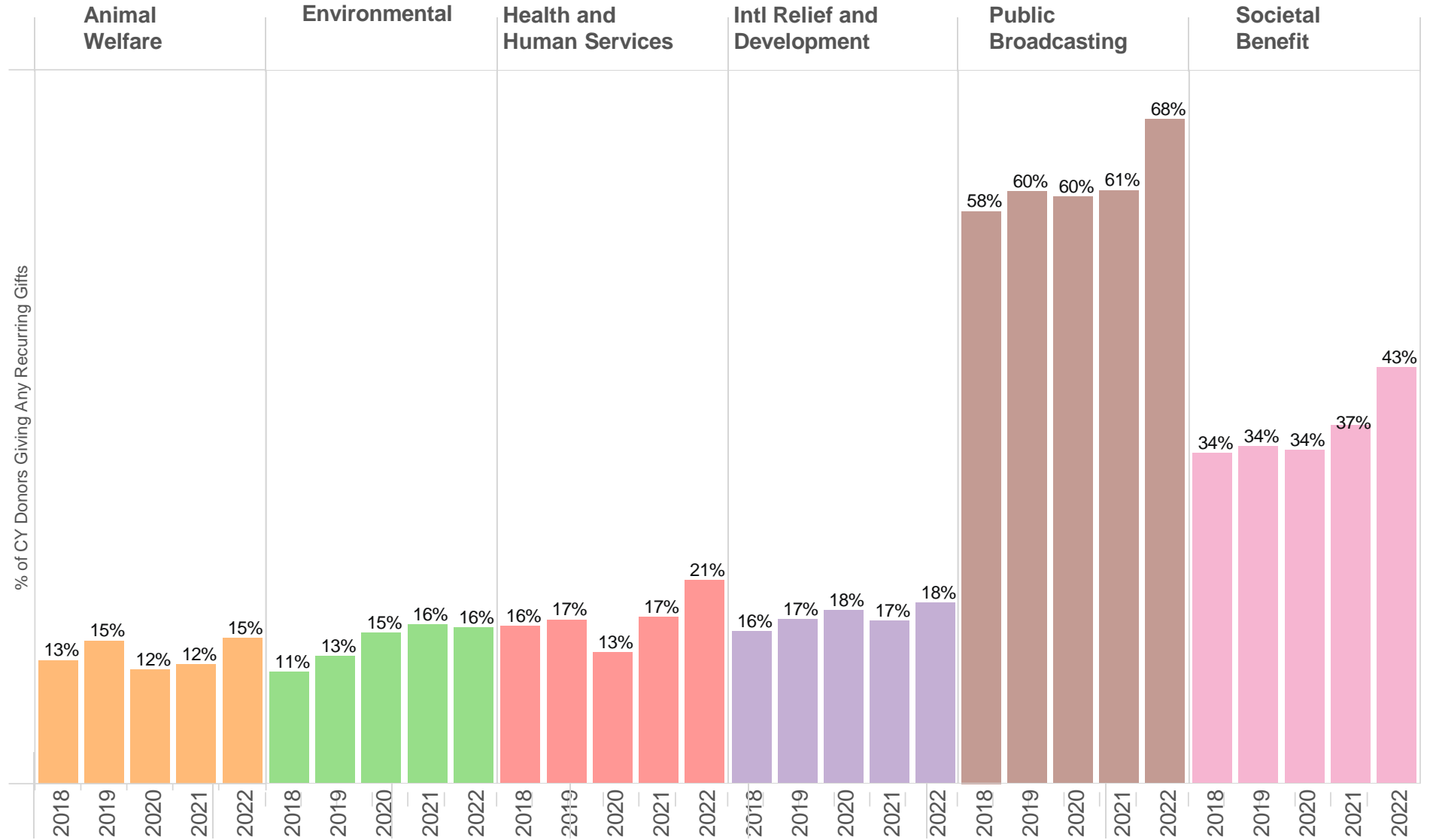
Median % of recurring revenue from **telemarketing**

**12%**

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

# The share of Active Donors that are Sustainers increased over time for all sectors.



**Median % of CY Donors Giving Any Recurring Gifts by Sector**

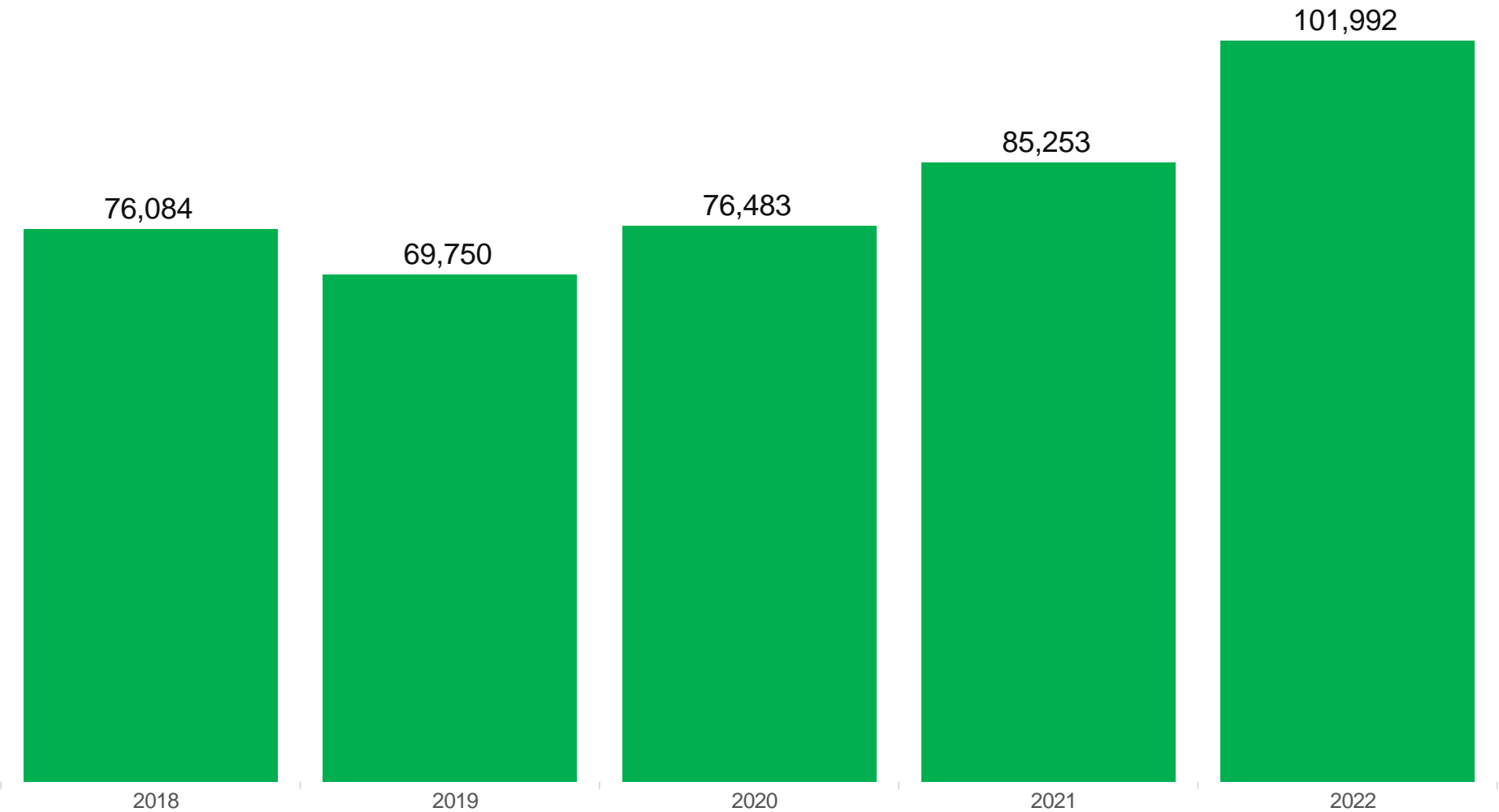
(37 Organizations) (2018 - 2022)





# New Donor Trends

# Overall New Donors Increased in FY22

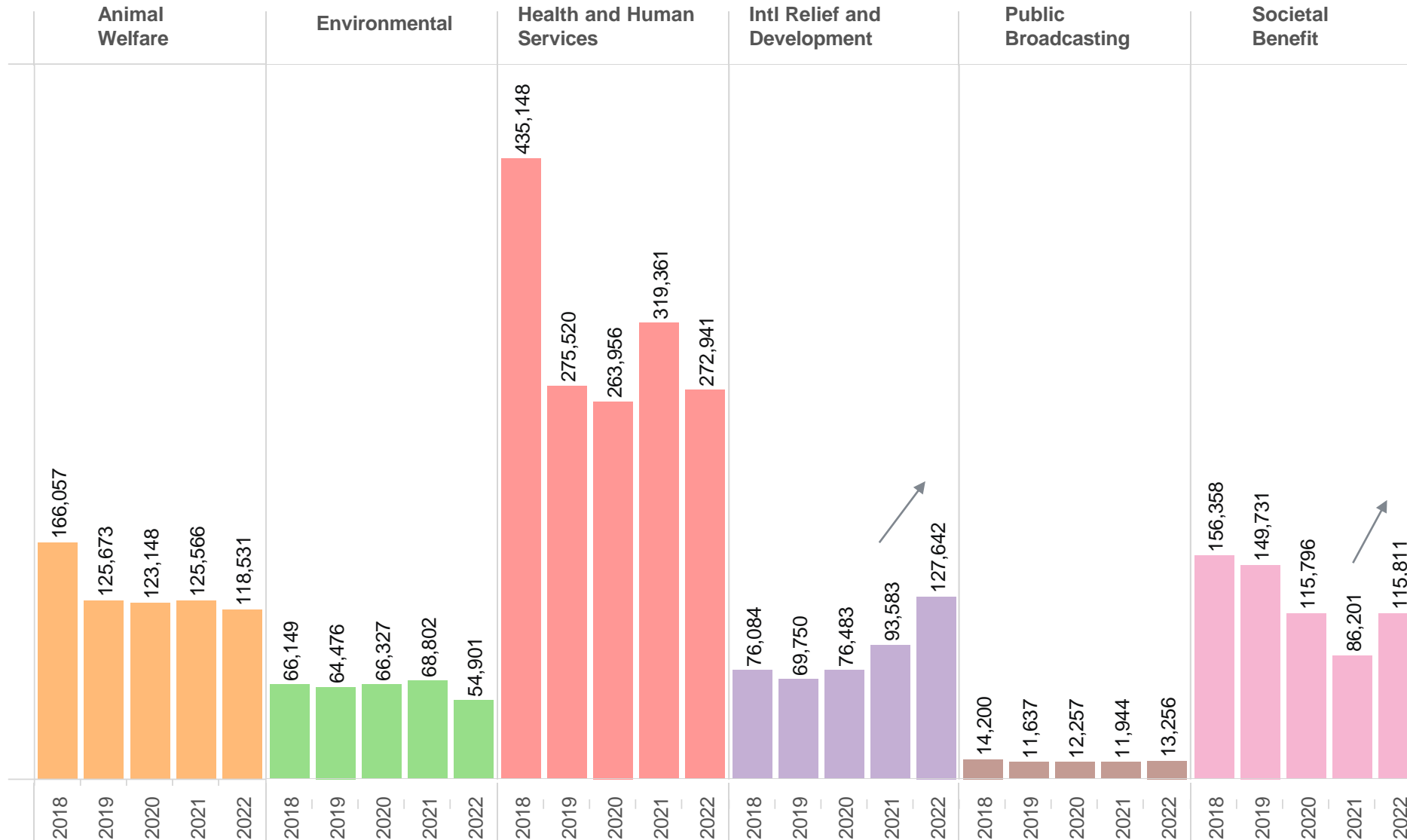


**Median New Donors**  
(37 Organizations) (2018 - 2022)





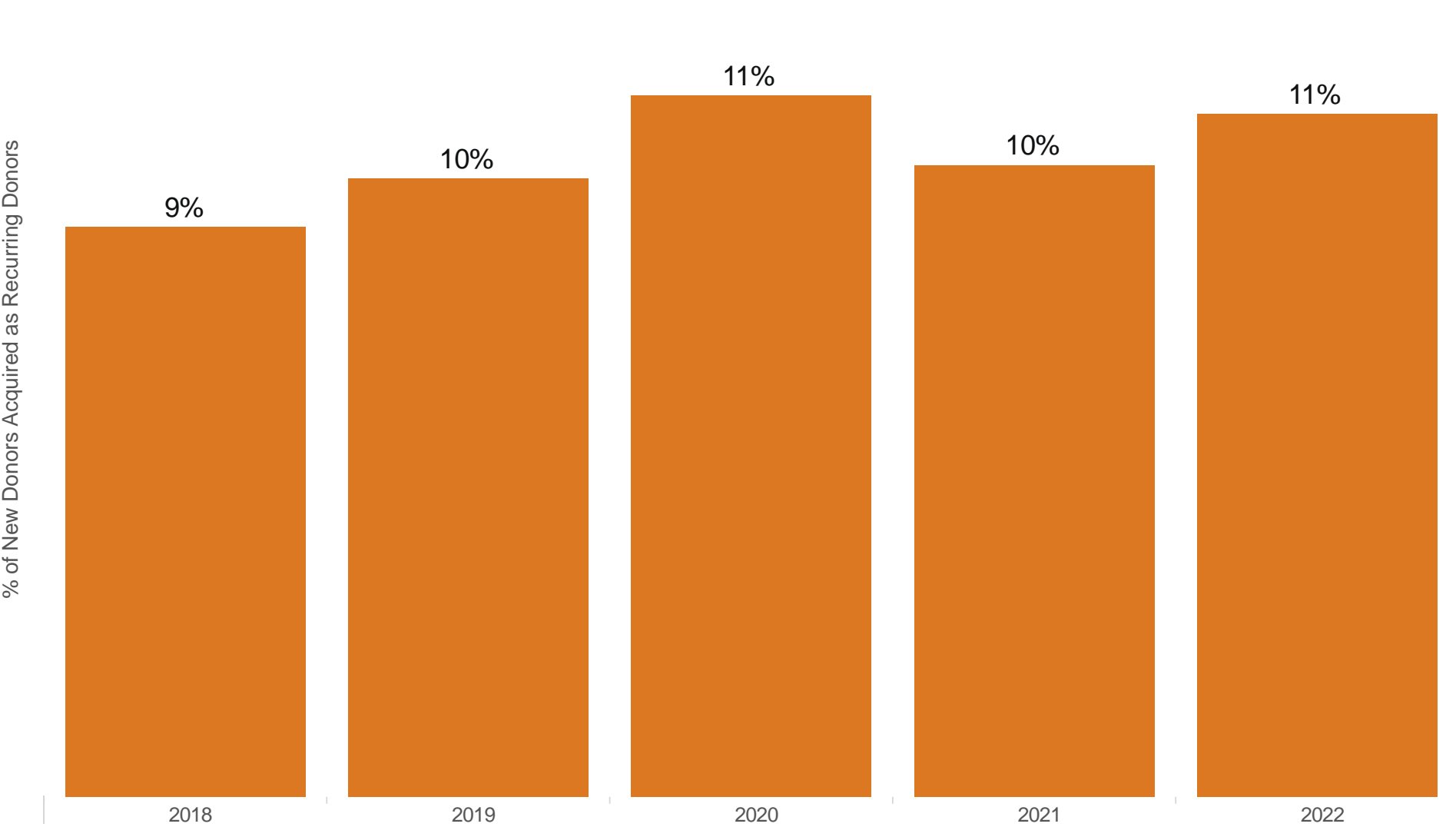
# However, Median New Donors Declined for Most Sectors in 2022



**Median New Donors by Sector**

(37 Organizations) (2018 - 2022)

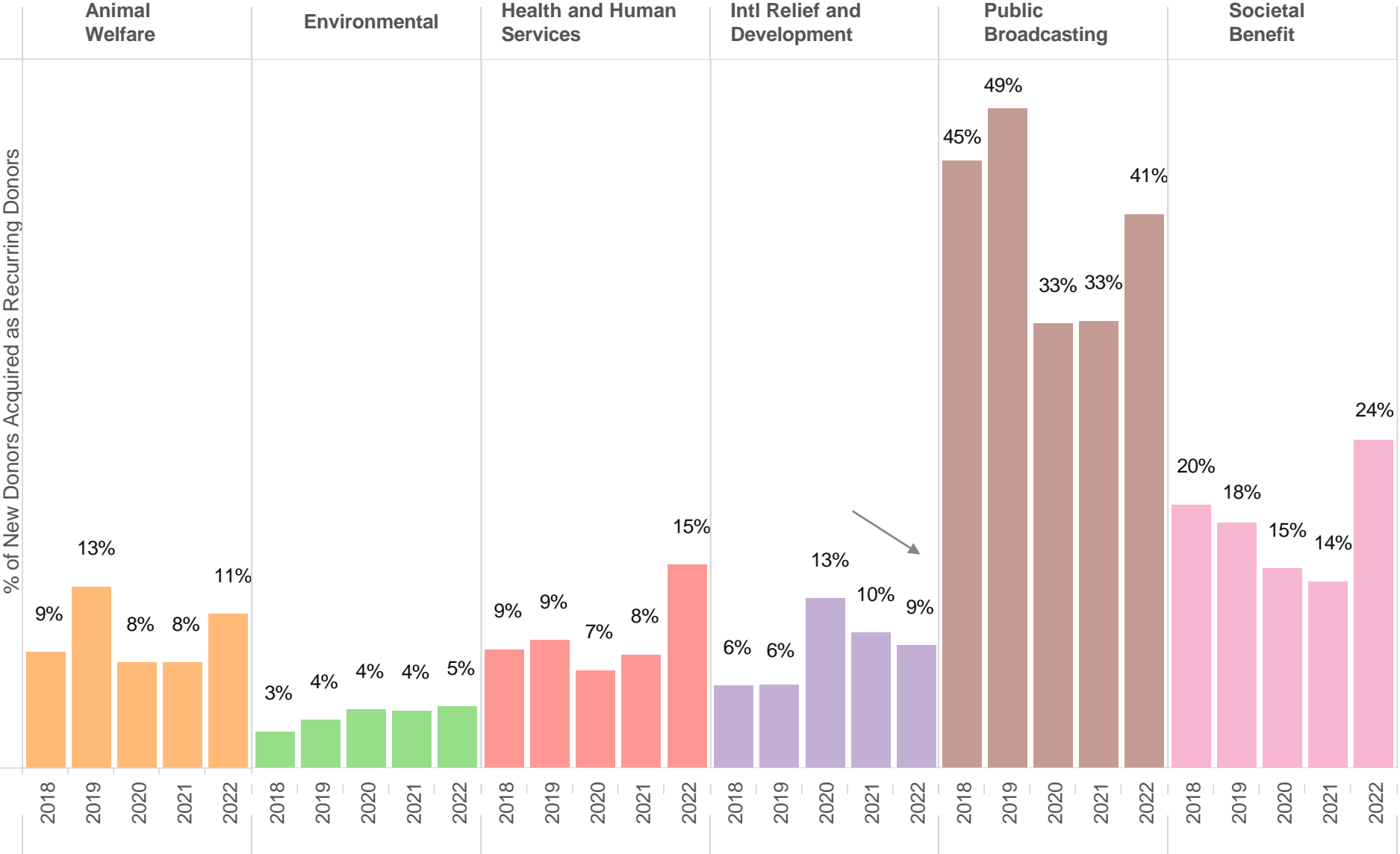
# Share of New Donors Acquired as Recurring Returned to Peak



**Median % of New Donors Acquired as Recurring Donors**  
(37 Organizations) (2018 - 2022)



# Share of New Donors Acquired as Recurring Increased in FY22 for Most Sectors

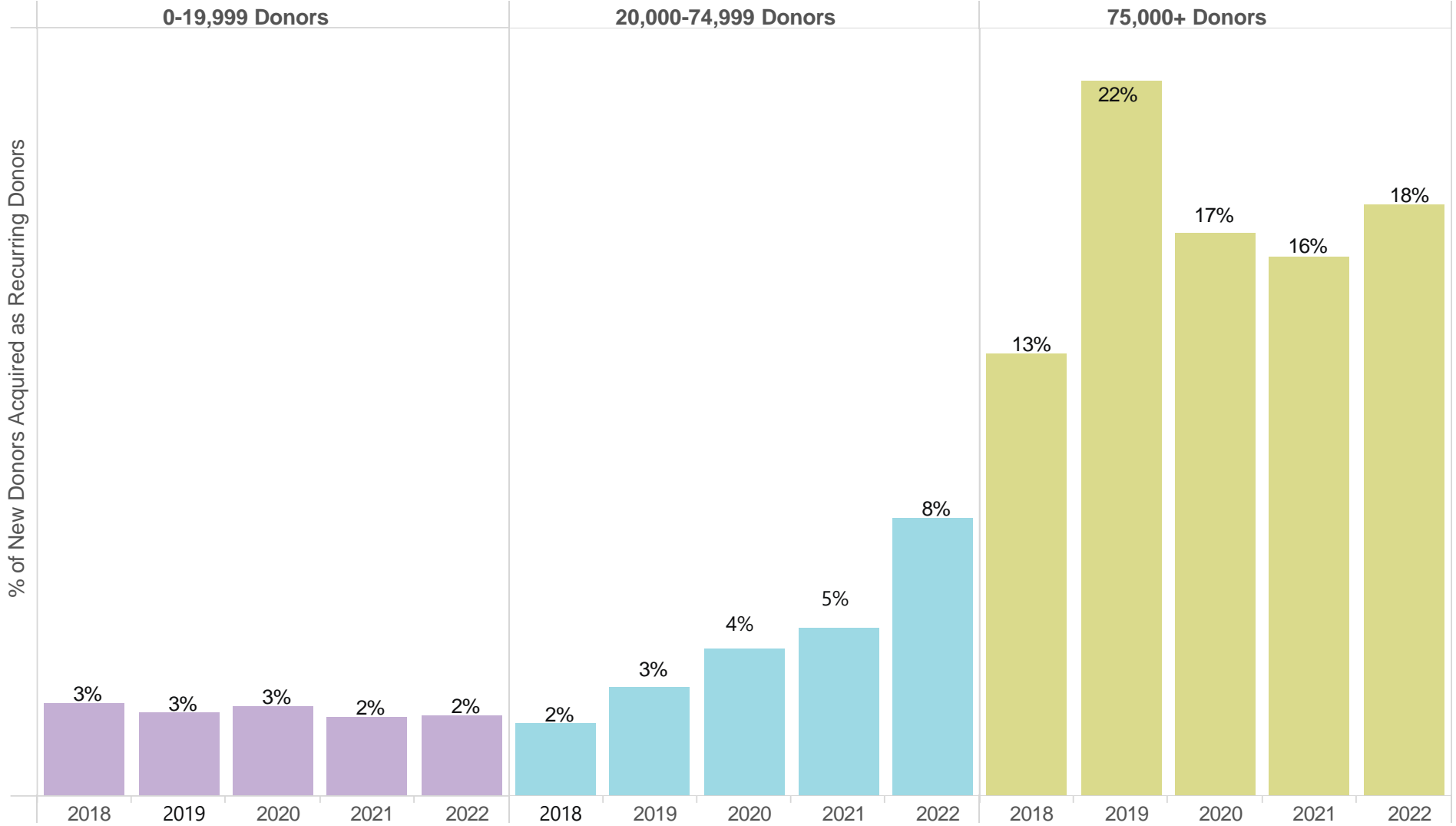


**Median % of New Donors Acquired as Recurring Donors by Sector**

(37 Organizations) (2018 - 2022)



# Mid-Sized Sustainer Programs with Greatest Growth at the Median in FY22



**Median % of New Donors Acquired as Recurring Donors by Sustainer Program Size**

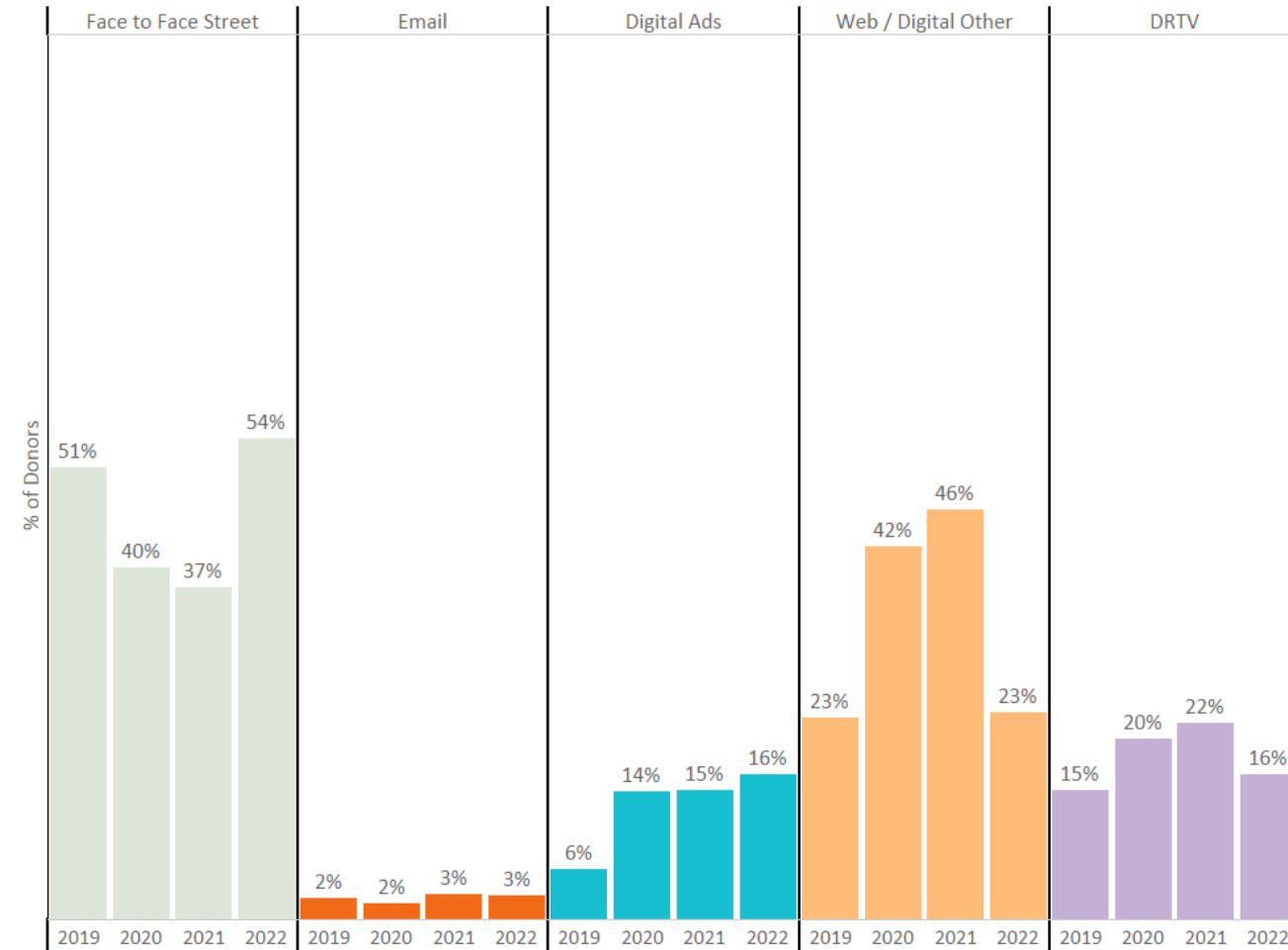
(37 Organizations) (2018 - 2022)



# What sources are used to acquire donors directly to recurring giving?

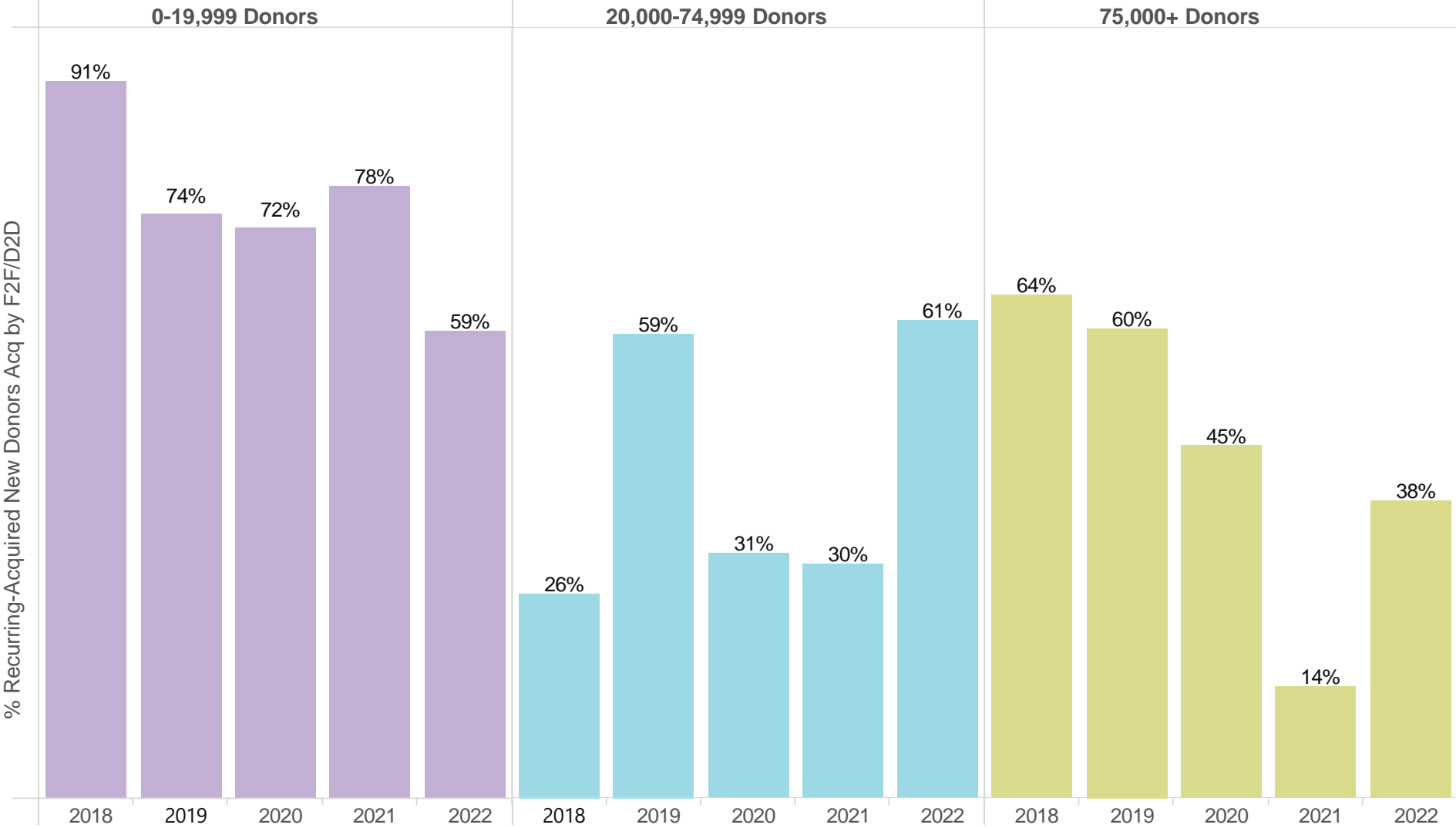
- The share of donors acquired via Face to Face declined during the pandemic and has rebounded to pre-pandemic levels.
- Digital channel acquisition increased during the pandemic and has returned to pre-pandemic levels
  - Digital ads continued to grow

Trends in Distribution of New Recurring Donors by Origin Source



% CY Donors  
Medians may not add up to 100%

# Canvassing a Contributing Factor in Increase of Recurring

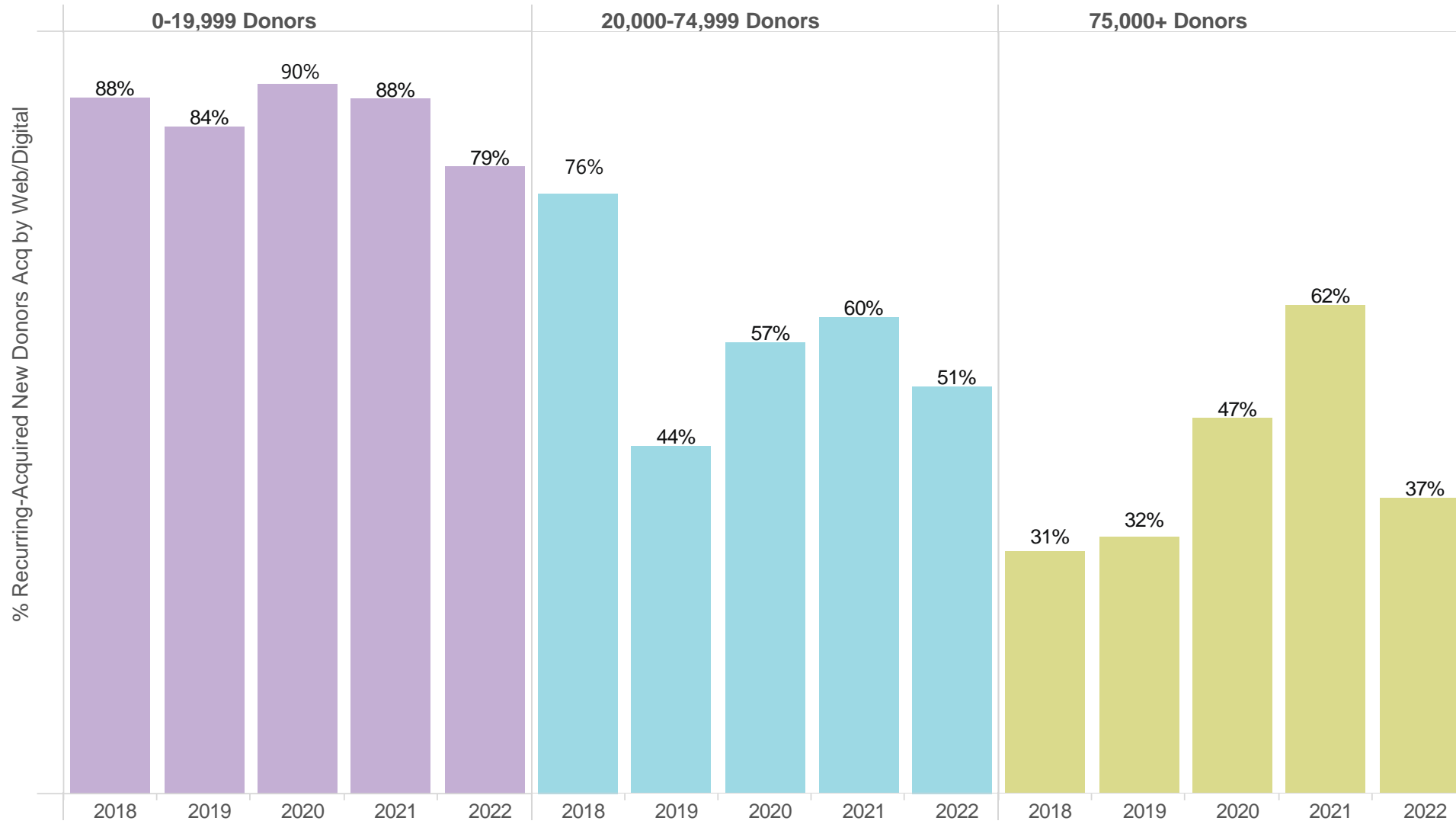


**Median % Recurring-Acquired New Donors Acq by F2F/D2D by Sustainer Program Size**

(37 Organizations) (2018 - 2022)



# Larger Sustainer Programs with Steepest Declines in Recurring Acquisition via Digital

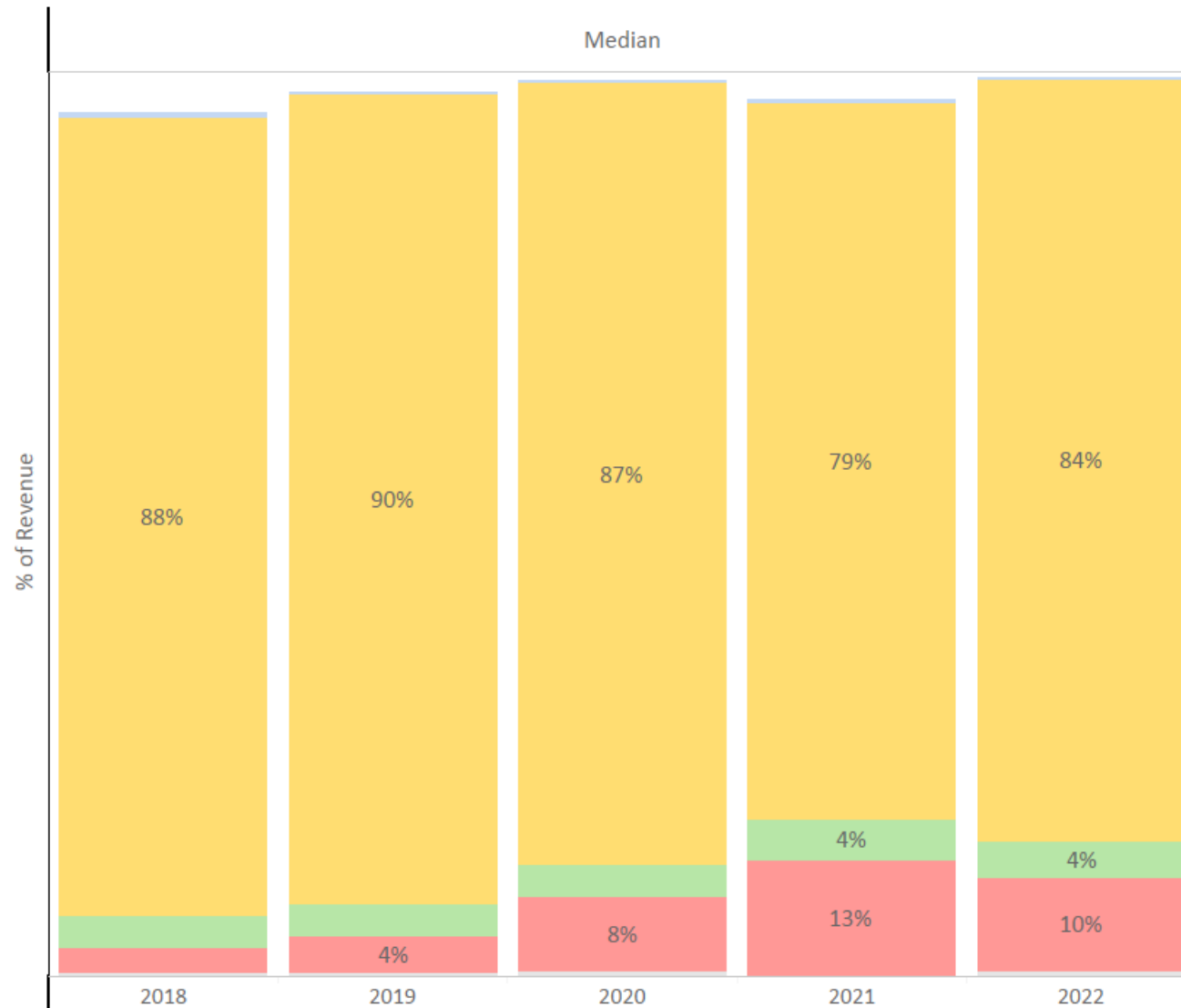


**Median % Recurring-Acquired New Donors Acq by Web/Digital by Sustainer Program Size**  
(37 Organizations) (2018 - 2022)

# Digital Acceleration in Payment Methods

Trends in Distribution of Recurring Revenue by Payment Method  
(NEW Donors ONLY)

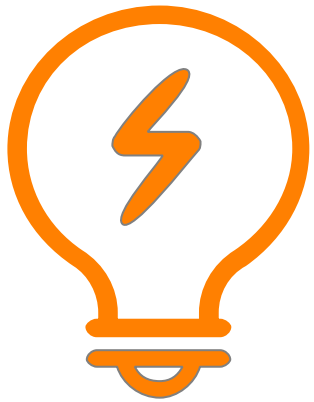
- Cash/Check
- Credit Card
- Direct Debit
- Online / Digital
- Everything Else



Medians may not add up to 100%



# Key New Donor Acquisition Take-Aways



- Direct Acquisition of Recurring Donors via Digital Channels has emerged as a best practice
- As quarantines have lifted, organizations have returned to canvassing. While street Face to Face canvassing remains by far the most common technique, organizations are starting to experiment more with Door-to-Door canvassing.
- As with last year, Connected TV is a rising space for testing and experimentation, with the more traditional DRTV fundraising channel also experiencing growth for many. How shrinking and more fragmented audience will impact DRTV and Connected TV should be considered.

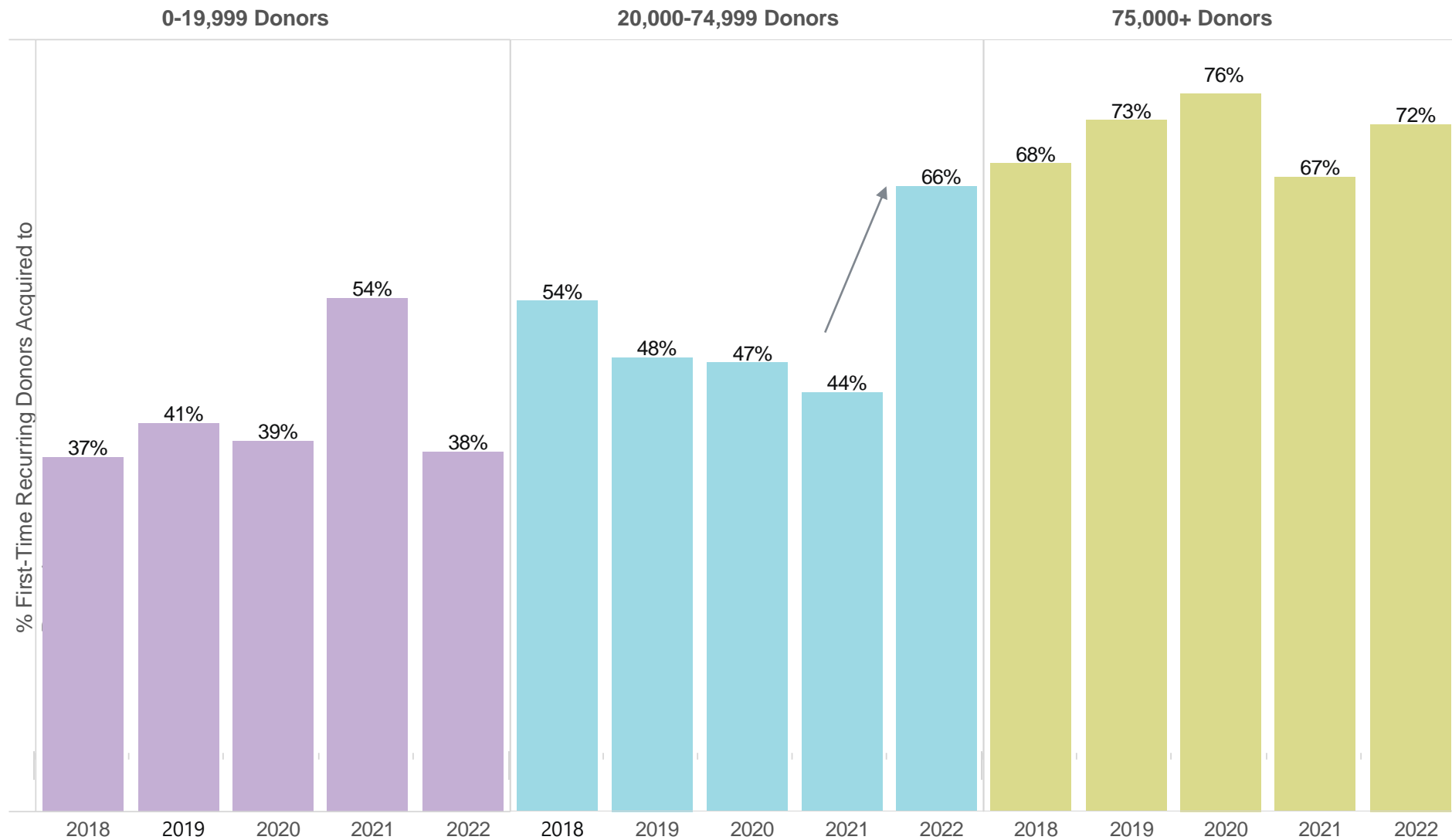


# First-Time Recurring Donor Trends

Acquired Directly to Recurring and  
Converted to Recurring



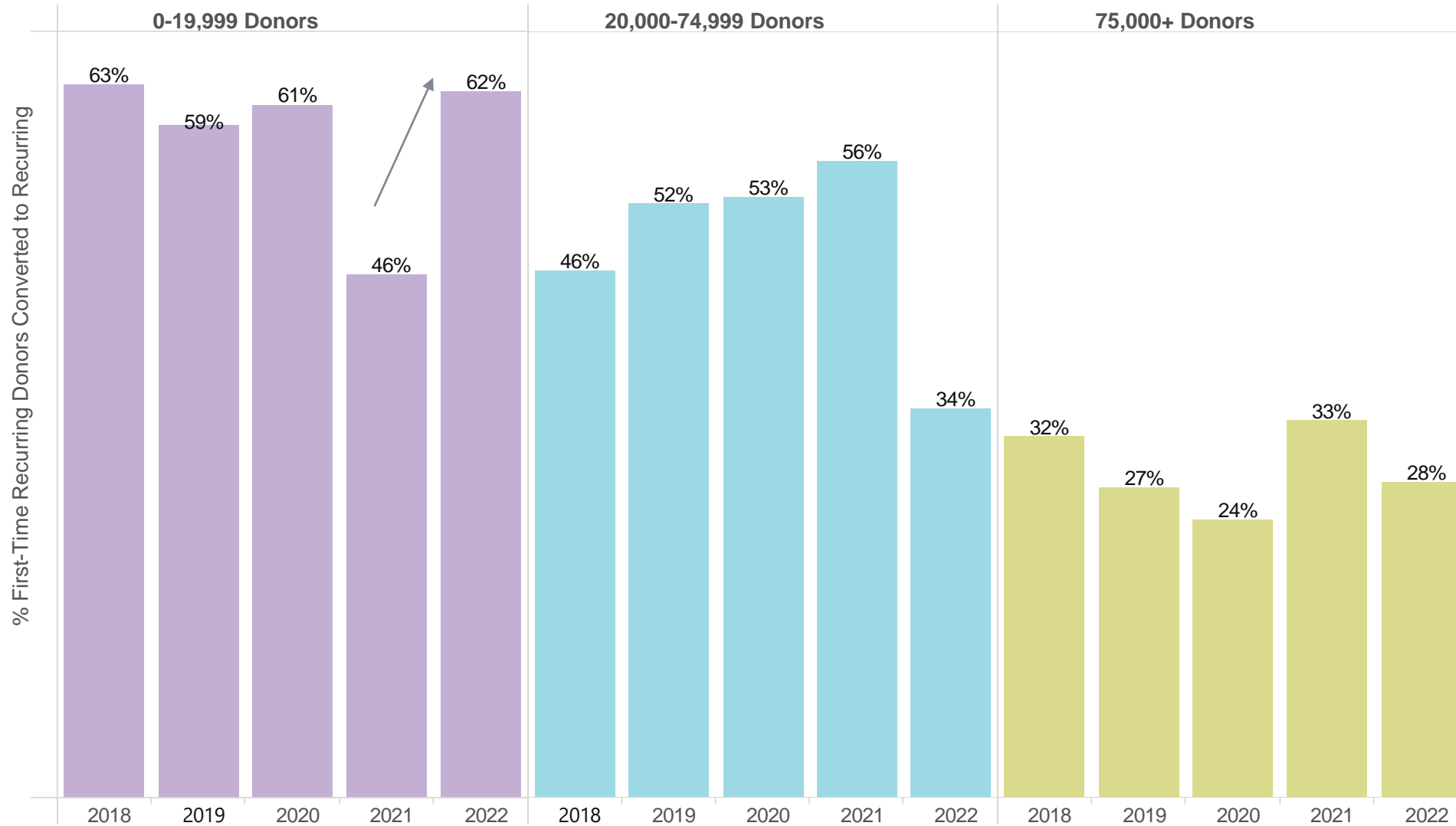
# The Largest Sustainer Programs Continue to Acquire Majority of New Sustainers Directly to Recurring. A Growing Share Acquired Directly for Mid-Size Programs.



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

(37 Organizations) (2018 - 2022)

# Emerging Sustainer Programs Return to Conversion as the Primary Strategy for Recurring Donor Growth



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

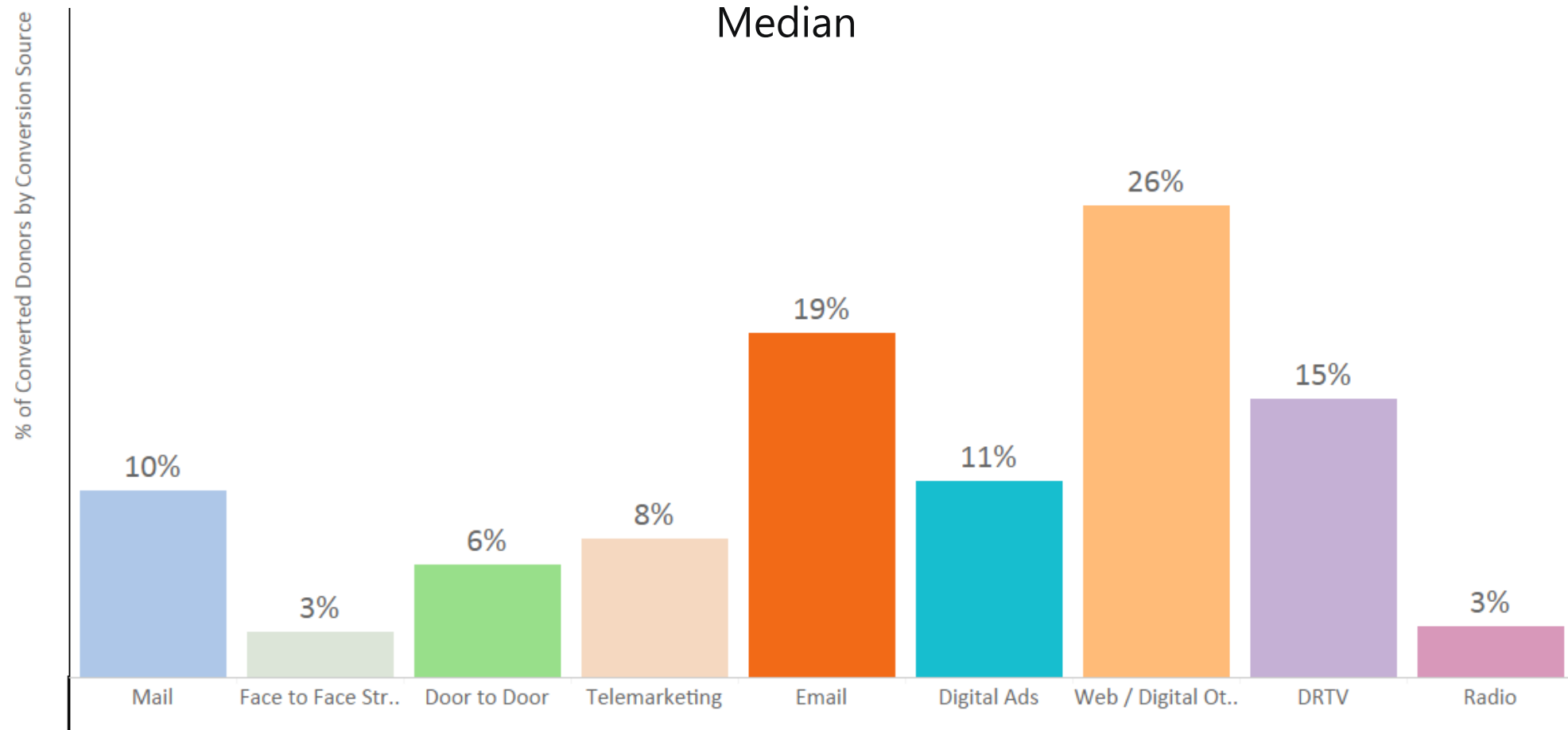
(37 Organizations) (2018 - 2022)

# Volumes of single donors converting to recurring slowed across many orgs following jumps in FY21

54%

Or more than half of organizations experienced a decrease in the number of first-time recurring donors via conversion in FY2022

# What Channels Convert Single Donors to Recurring Donors?



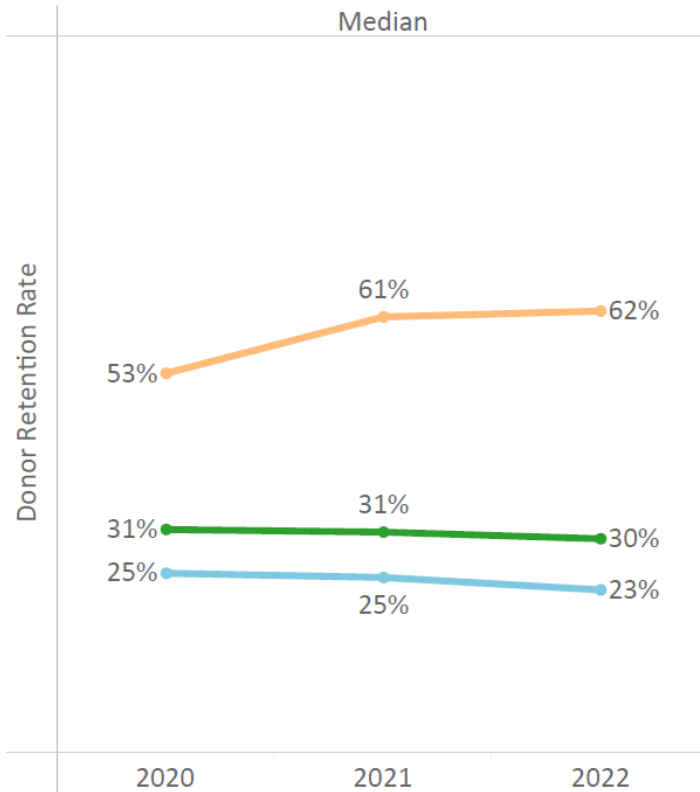
Source: FY22 donorCentrics Sustainer Summit



The background features several decorative geometric shapes. In the top-left corner, there is a large cyan diamond with a white outline. Below it is a smaller purple diamond. In the bottom-left, there is a cyan diamond and a purple diamond. In the bottom-right, there is a large cyan diamond with a green diamond on top of it, and a white line forming a peak shape below. The text "New Donor Retention Trends" is centered in white.

# New Donor Retention Trends

## First-Year Donor Retention



**Shifts in share of recurring among new donor populations drove a modest decline in the retention of all new donors in 2022**

**Lifts in retention rates for recurring donors driven primarily by pauses in canvassing.**

Retention rates are annual, except for first-year recurring donors, which are 13th month retention rates.

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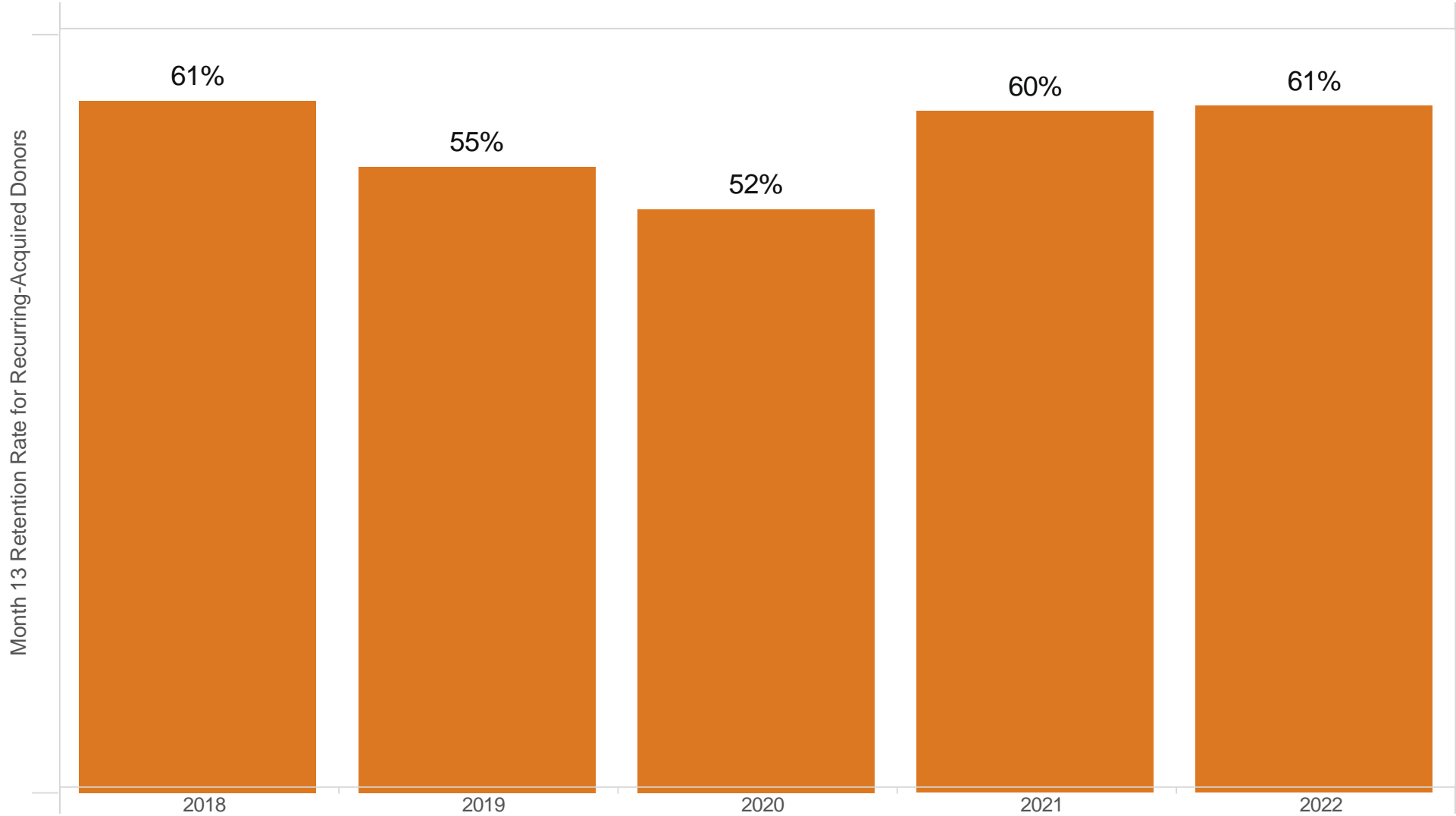
Gift Type in the Prior Year

■ Single Gifts Only in PY   ■ Any Recurring Gifts in PY   ■ All Donors





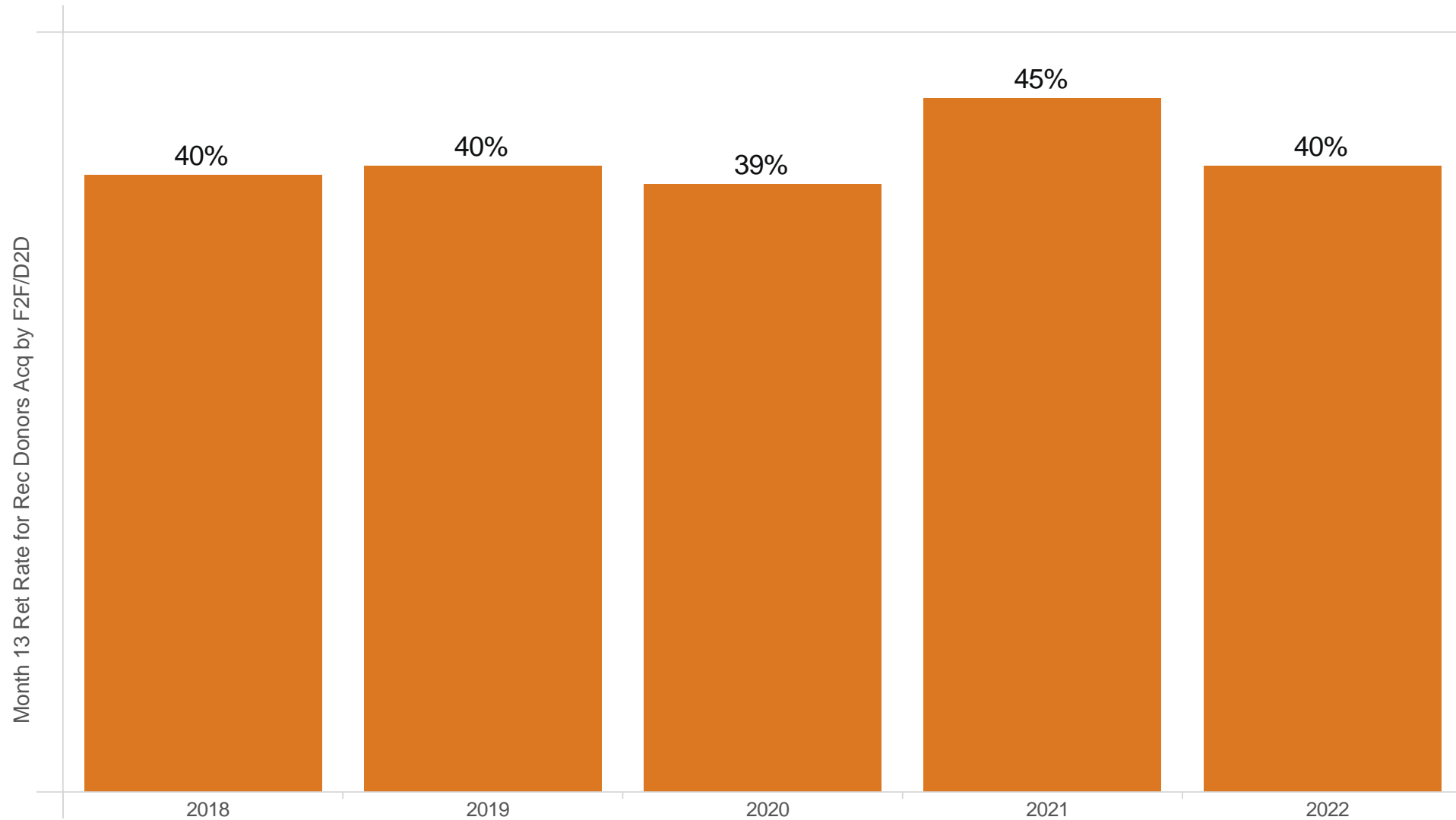
# Median Month 13 Donor Retention Rate for Recurring Acquired Donors Were Stable from 2021 to 2022



**Median Month 13 Retention Rate for Recurring-Acquired Donors**  
(37 Organizations) (2018 - 2022)

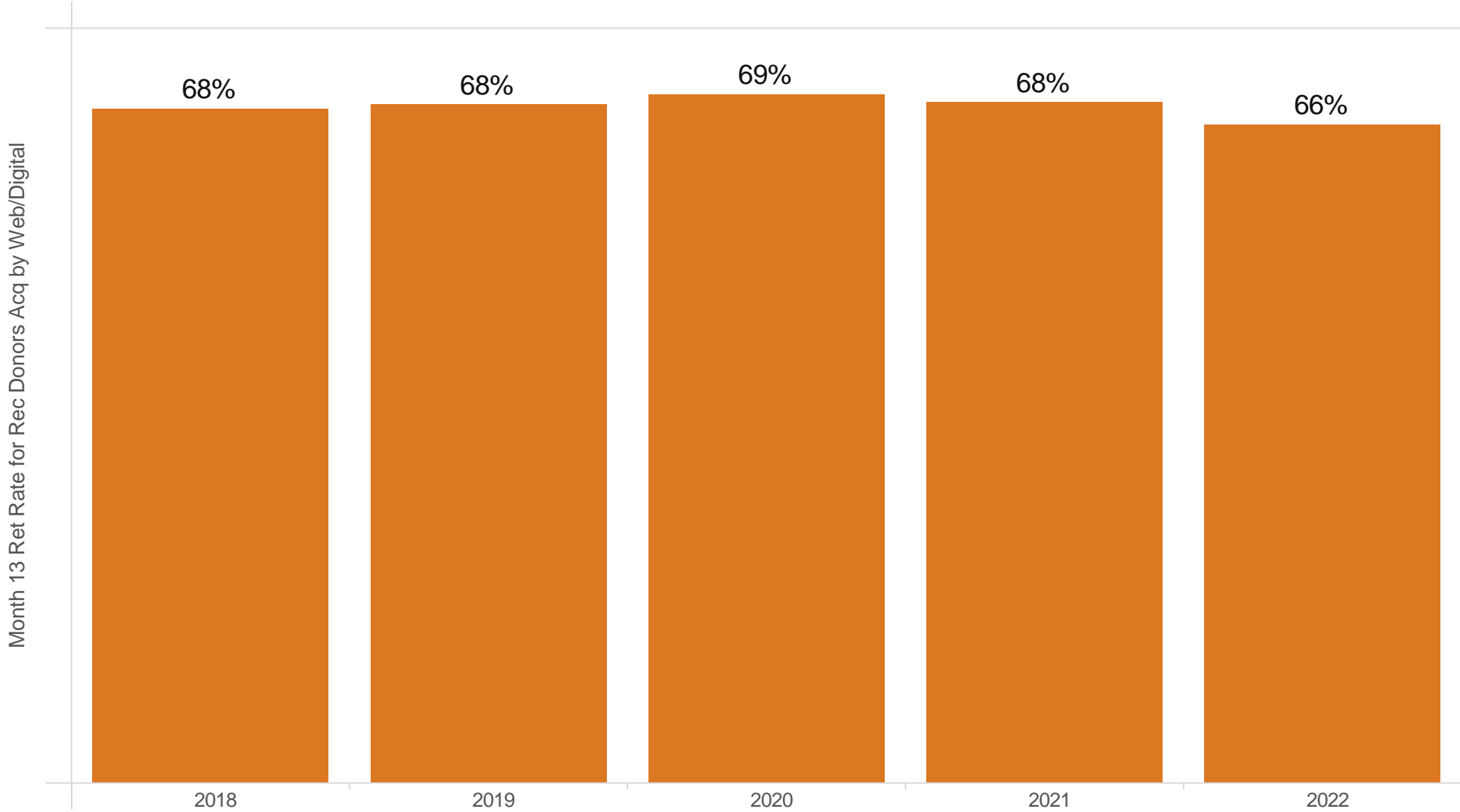


## Median Month 13 Retention of New Recurring Donors Face to Face/Door to Door Acquired Returned to More Typical Rates for this Source with Return to Greater Volumes of Donors



**Median Month 13 Ret Rate for Rec Donors Acq by F2F/D2D**  
(37 Organizations) (2018 - 2022)

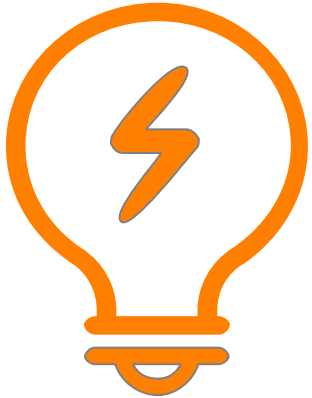
# Median Month 13 Retention of New Recurring Donors Acquired via Digital Channels Declined Modestly with Growth in Donor Volume



**Median Month 13 Ret Rate for Rec Donors Acq by Web/Digital**  
(37 Organizations) (2018 - 2022)



# Key Retention Take-Aways

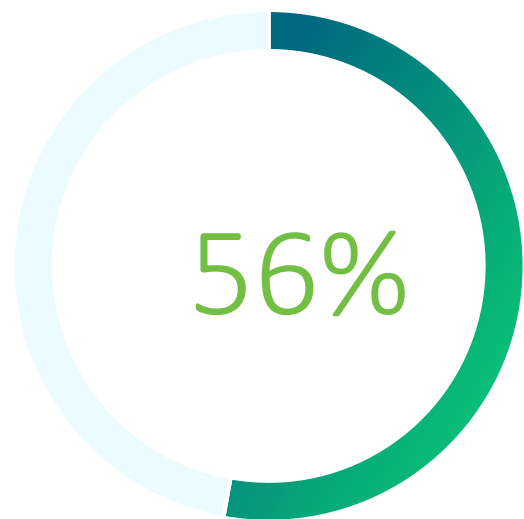


- Improved practices for credit card expiration management, including automatic updaters, have driven rapid increases in retention rates for many organizations.
- Close tracking of retention rates by payment methods exposes some softness with some online wallets that do not require a credit card
- EFT remains the king of retention rates and many organizations are increasing efforts to acquire sustainers directly to EFT and convert credit card donors
- Annual recurring donors or “auto-renewals” have re-emerged as a solid method for increasing the retention of donors that do not wish to make monthly sustainer gifts but do wish to commit to on-going support



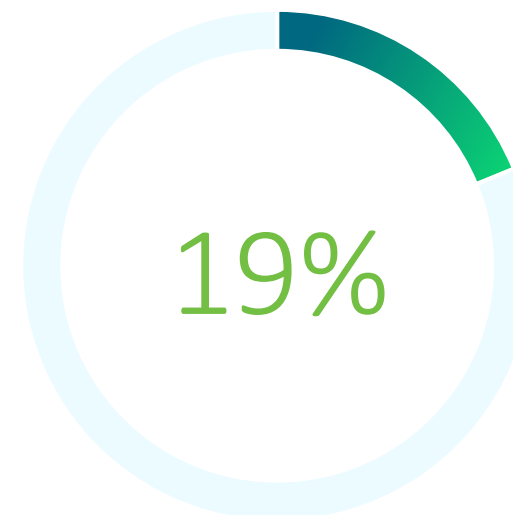
# Shifts in Recurring Donor Long Term Value

# Compare Long Term Retention for Donors Acquired as Recurring or Single Gifts in 2020



A median 56% percent of donors **acquired to recurring giving in 2020** were still giving in 2022.

Compare to:



A median 19% percent of donors **acquired with a single gift in 2020** were still giving in 2022

# Compare Long Term Values for Donors Acquired as Recurring or Single Gifts in 2020



The median long-term value per donor **acquired as recurring in 2020** is \$394 in 2022

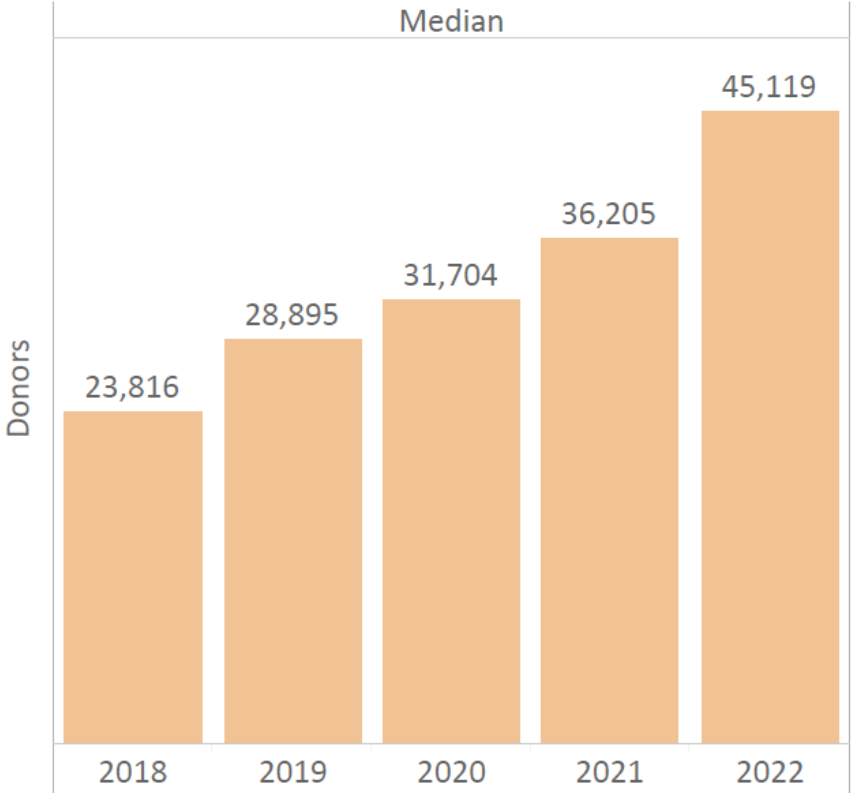
Compare to:



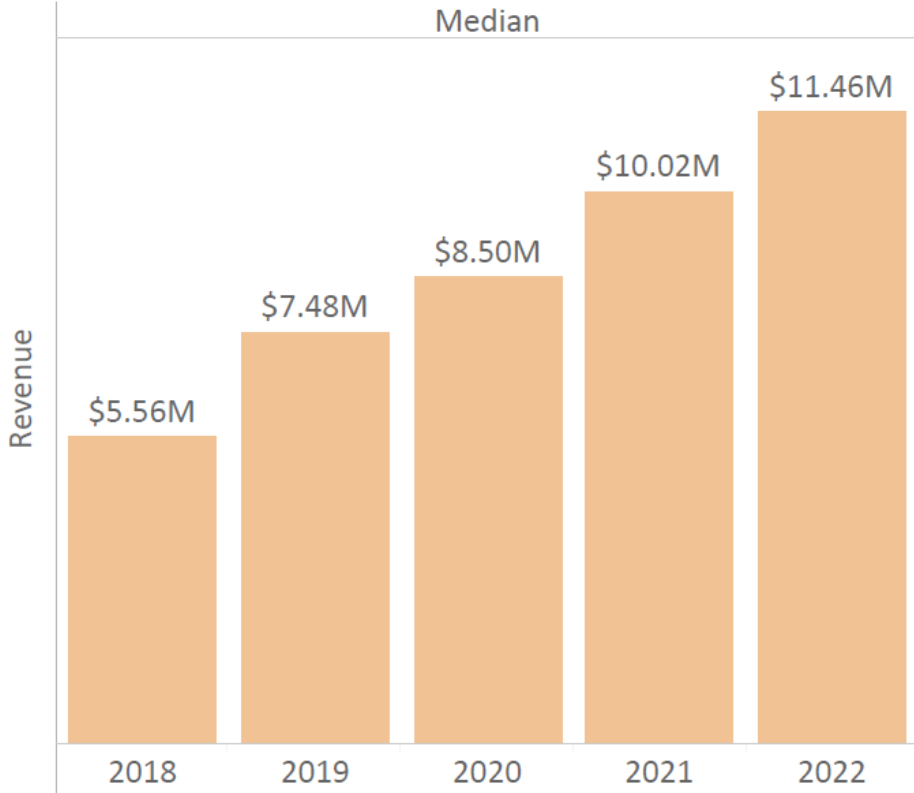
The median long-term value per donor **acquired as single gift in 2020** was \$144 in 2022

# Significant Donor and Revenue Gains at the Median for Donors Giving Recurring Gifts for 3+ Years Consecutively in FY2022 and Over Time.

**Donors** Giving Recurring Gifts for 3+ Years Consecutively



**Revenue** from Donors Giving Recurring Gifts for 3+ Years Consecutively

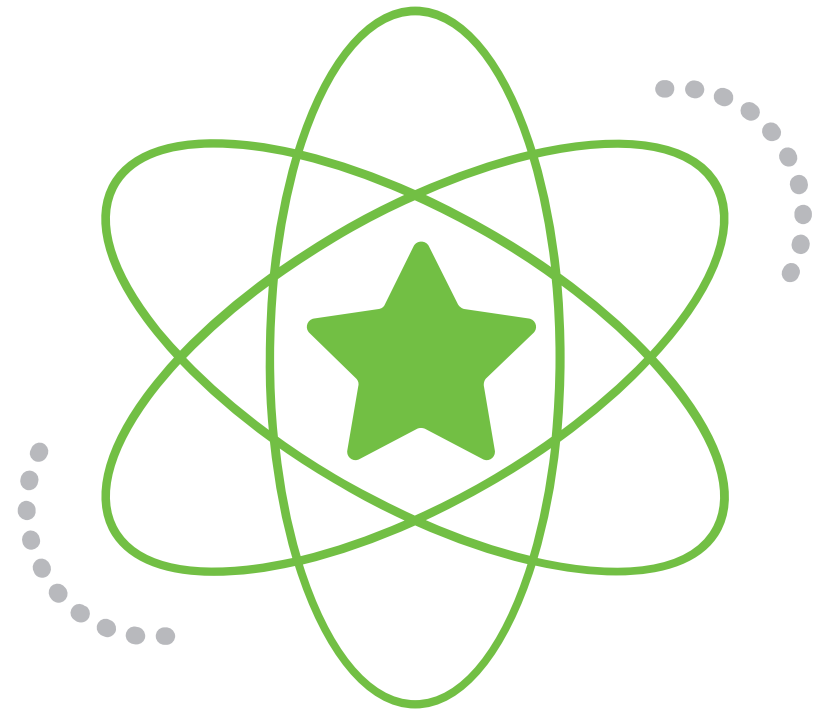


Donors making recurring gifts for 3+ years in a row have nearly doubled over the five-year period.





**A sustainer forward approach during high-profile giving moments can and does drive long-term donor and revenue growth and leads to file stability beyond extreme conditions.**



# Thank You to Our Participating Organizations

- **ACLU**  
American Civil Liberties Union
- **ALSAC**  
St. Jude Children's Research Hospital
- **Amnesty International**
- **Audubon**
- **Best Friends Animal Society**
- **CARE**
- **ChildFund**
- **CRS**  
Catholic Relief Services
- **Earthjustice**
- **EDF**  
Environmental Defense Fund
- **Friends of the Earth**
- **Greenpeace**
- **Habitat for Humanity International**
- **HRC**  
Human Rights Campaign
- **HSUS**  
Humane Society of the United States
- **IFAW**  
International Fund for Animal Welfare
- **International Fellowship of Christians and Jews**
- **IRC**  
International Rescue Committee
- **Mercy Corps**
- **Mercy Ships**
- **MPR**  
Minnesota Public Radio
- **MSF**  
Doctors Without Borders
- **NWF**  
National Wildlife Federation
- **NYPR**  
New York Public Radio
- **Operation Smile**
- **Oxfam**
- **No Kid Hungry Share our Strength**
- **PPFA**  
Planned Parenthood Federation of America
- **Project Hope**
- **PVA**  
Paralyzed Veterans of America
- **Save the Children – Recurring**
- **Save the Children - Sponsorship**
- **Sierra Club**
- **Twin Cities PBS**
- **UCS**  
Union of Concerned Scientists
- **UNICEF**
- **WWF**  
World Wildlife Fund

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**Thank you**

