

donorCentrics™ Collaborative Benchmarking State of the System 2017 – 2021 Trends

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blackbaud®

Target Analytics Combined Benchmarking Groups

Data from 59 Stations representing a variety of:

- Market Sizes
- State Networks
- Licensee Types
- Geographic Locations
- Radio Formats

3.4 Million Donors



\$533 Million in Donor Revenue

*donor*Centrics Public Radio Benchmarking

Overall Active Donor Giving

Active Donors and Total Revenue Trends – 2020 to 2021

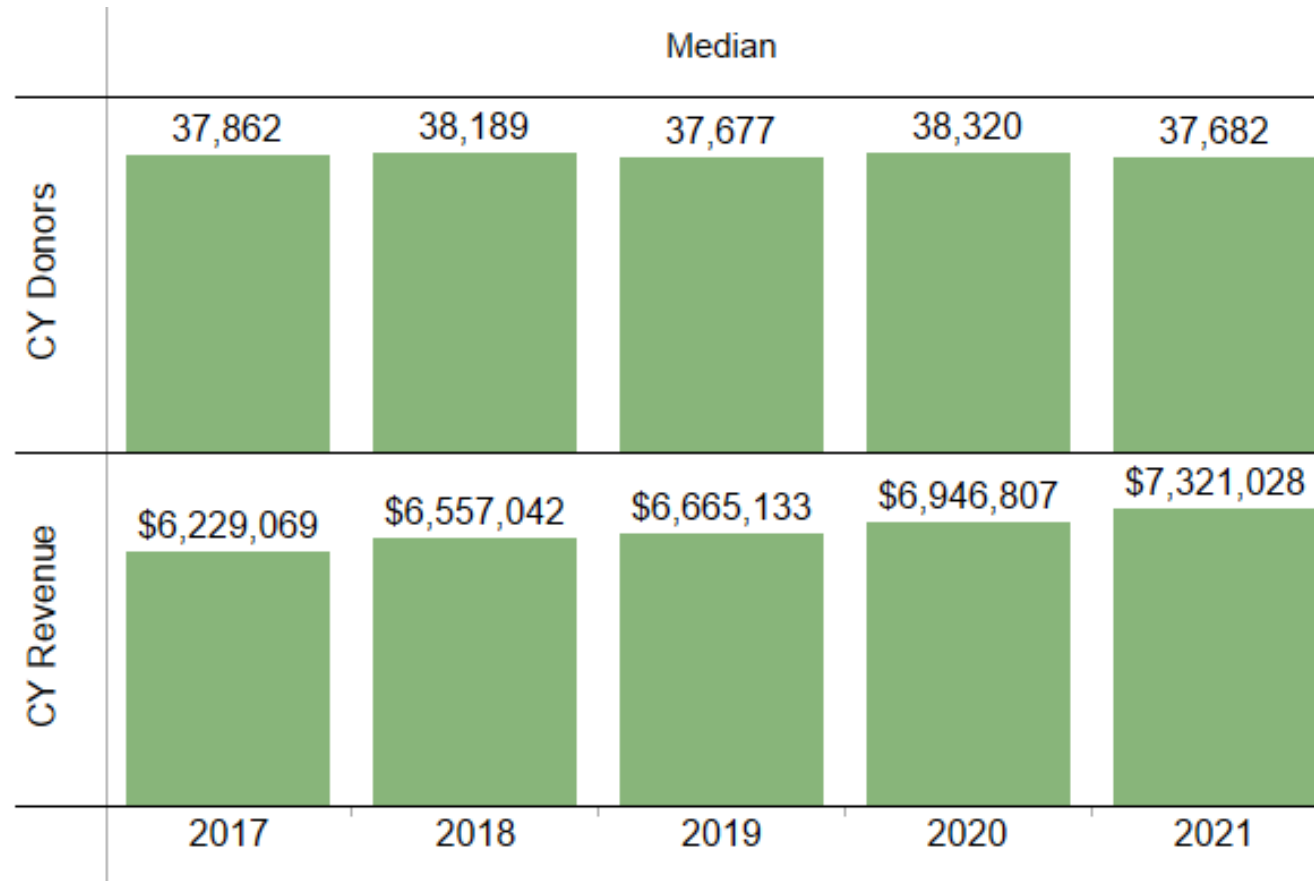
0% →

Median Change in
Donors in 2021

3% ↑

Median increase in
Revenue in 2021

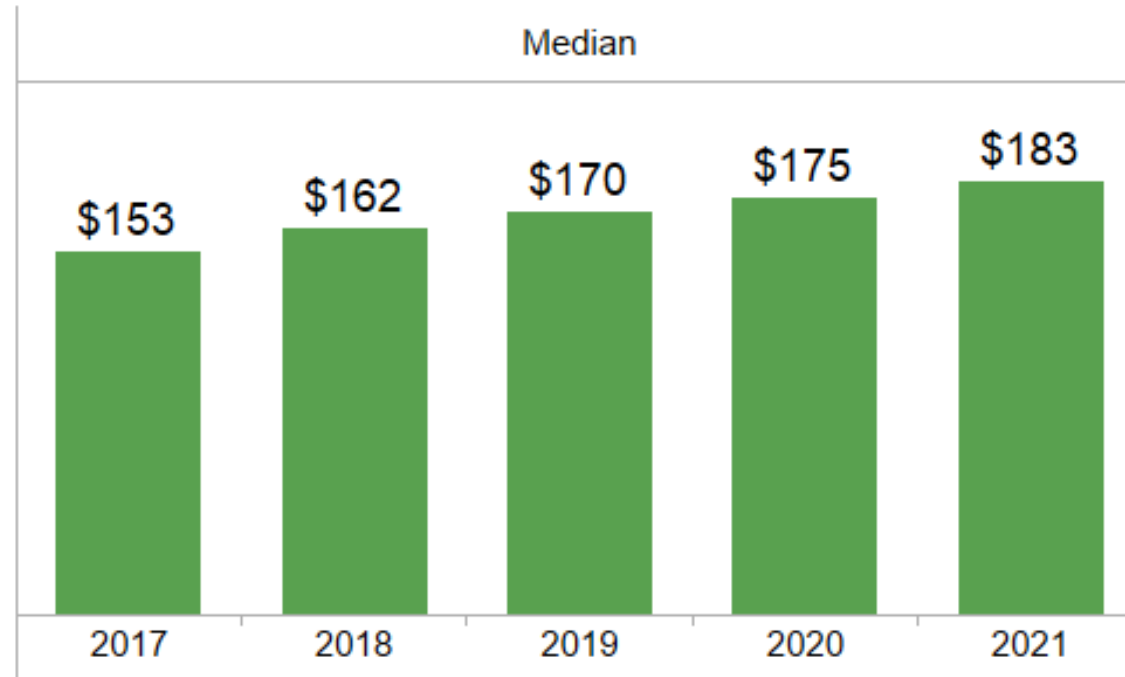
Active Donors and Total Revenue Trends



➤ Donors are essentially flat since 2017

➤ Median Revenue increased by \$1.1M since 2017

Revenue per Donor Trends

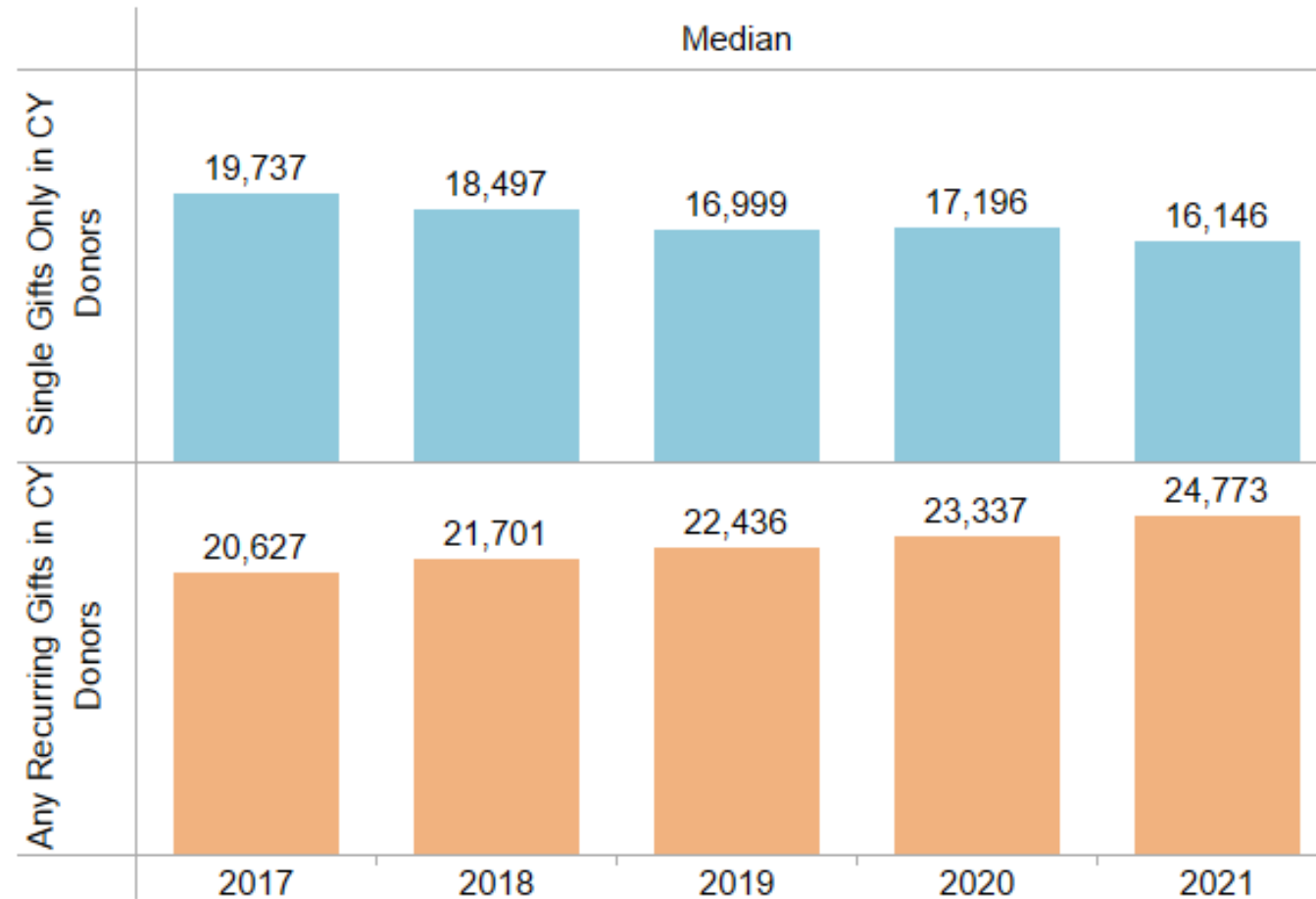


\$30 increase in revenue per donor since 2017.



- Over the five-year period, revenue per donor increased by 20%
- Revenue per Donor increased by 5% in 2021

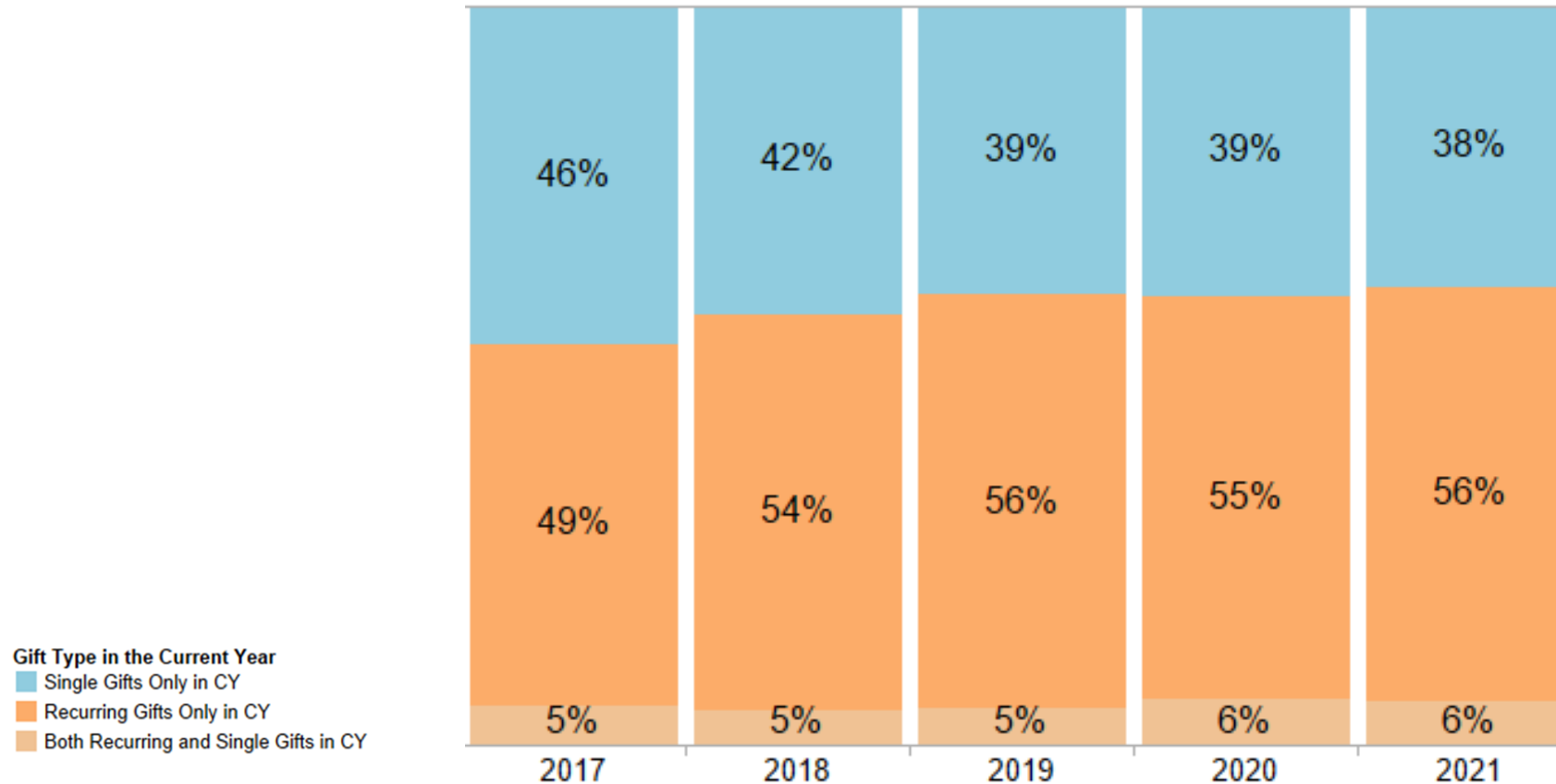
Active Donor Trends by Gift Type



- After a modest increase in single gift donors in 2020, a return to pre-Pandemic declining trends.
- Sustaining donors increased by 6% in 2021 from 2020.

Sustainers as a Share of All Donors Trend

Composite



62% ↑

An increase in the share of donors making recurring gifts after flat performance in 2020.

- The range in the share of recurring donors for all stations was 40% - **85%**.
- 19% of participating stations with greater than 70% share of recurring among all donors.

File Building Trends:

Acquiring New Donors

Converting Donors to Sustainers

New Donor Trends – 2020 to 2021

-9%



Median Decline in
Overall New Donors
in 2021

-7%



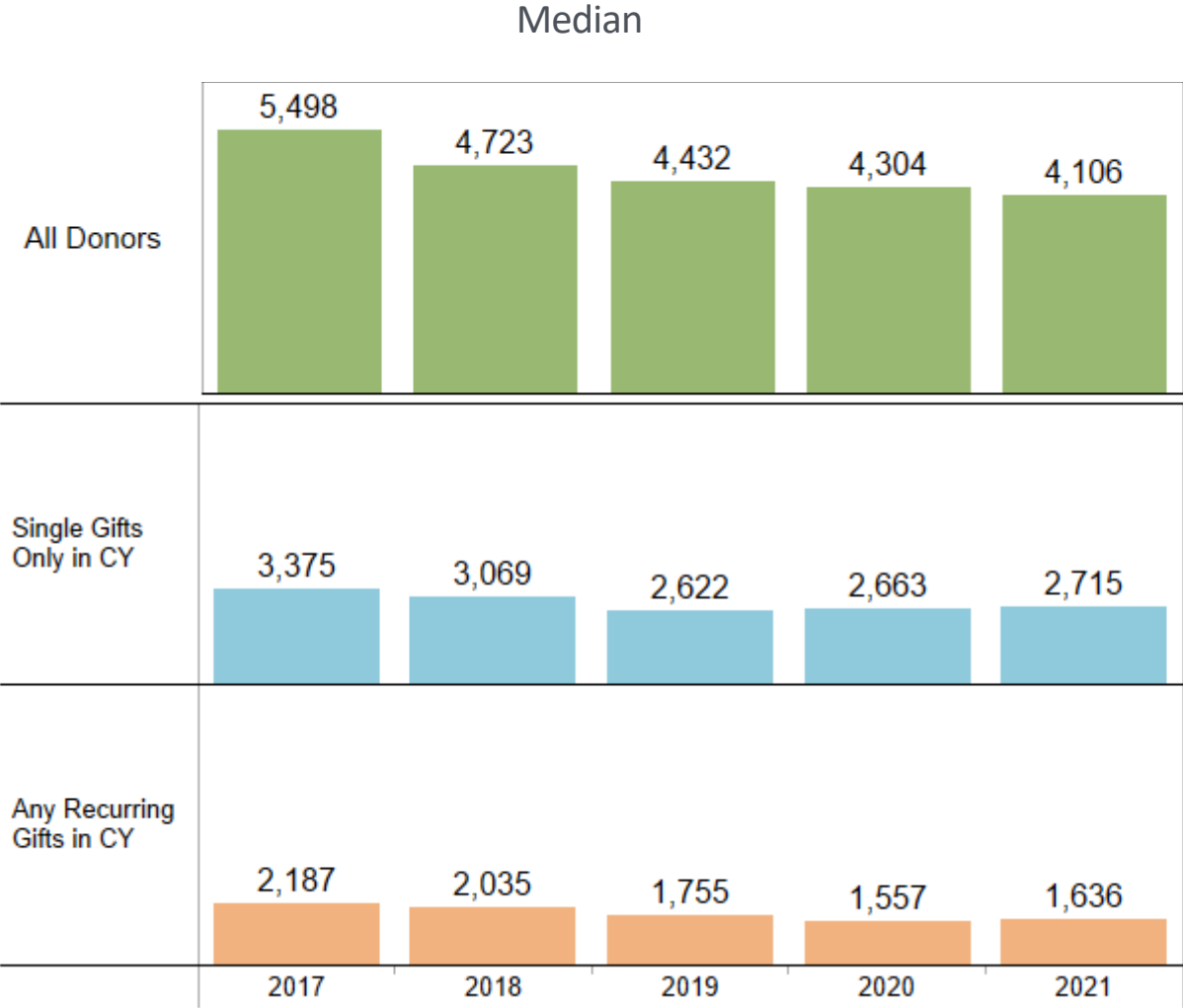
Median Decline in New
Single Gift Donors
in 2021

-14%

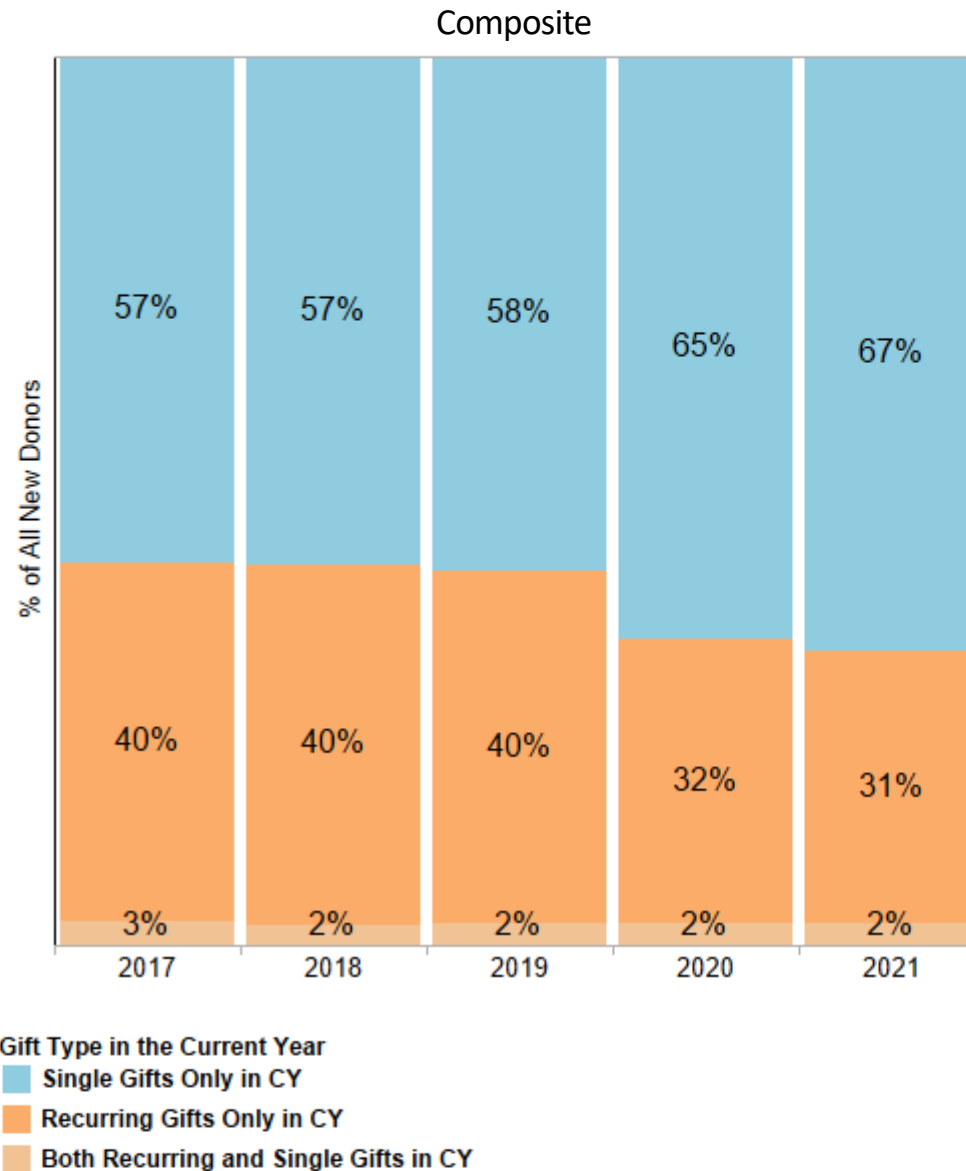


Median Decline in New
Recurring Gift Donors
in 2021

New Donor Trends by Gift Type



New Donor Trends by Gift Type

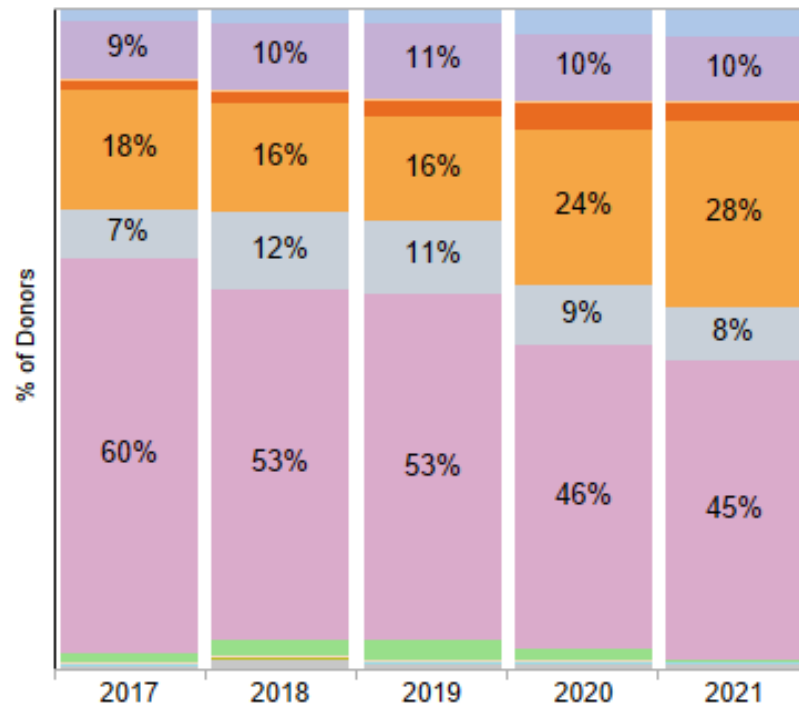


- 2021 saw a further decline in the percentage of new donors making recurring gifts moving from 34% to 33%.
- From 2017 - 2019, the share of new donors making single gifts had been in the same range: 57% - 58%.
- In 2020, direct-acquired sustainers as a share of all new donors ranged from 14% to 62%.
- 23% of radio stations had 45% or more new donors make sustainer gifts.

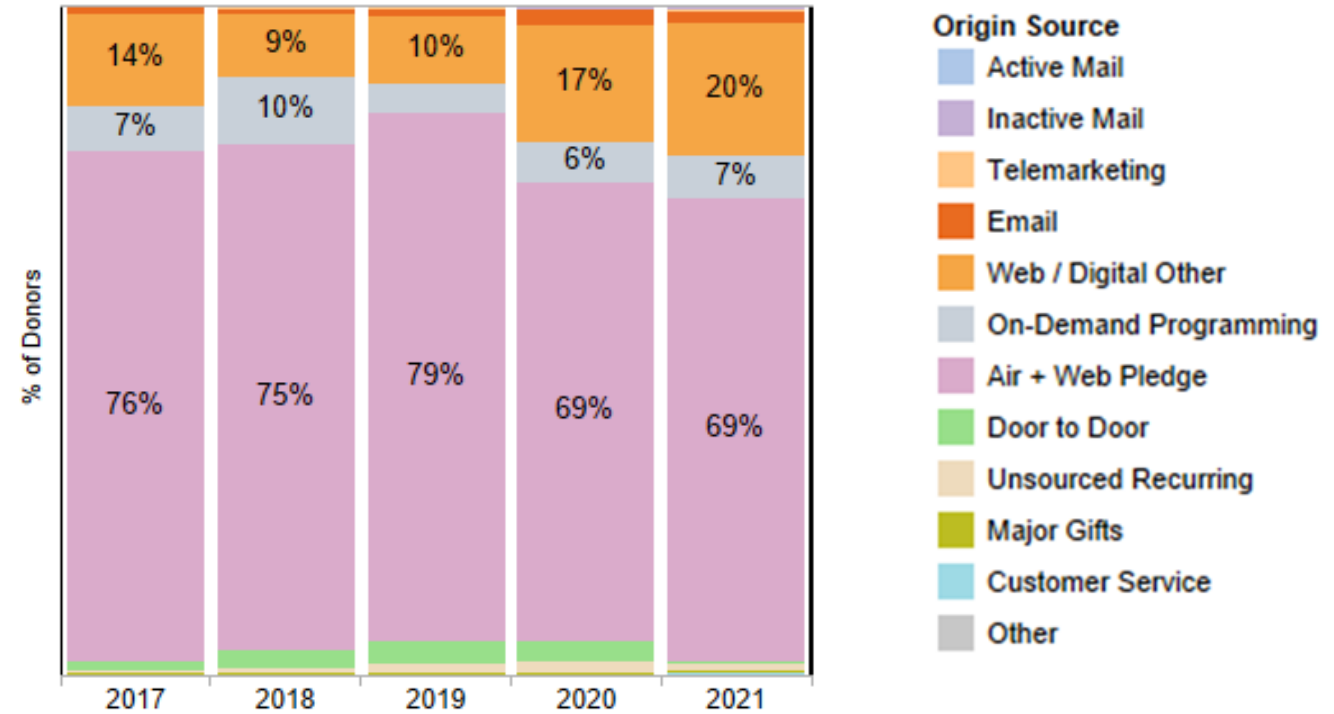
What Channels Are Driving Acquisition and How Is That Changing over Time?

Composite Data

Donors Acquired with a Single Gift

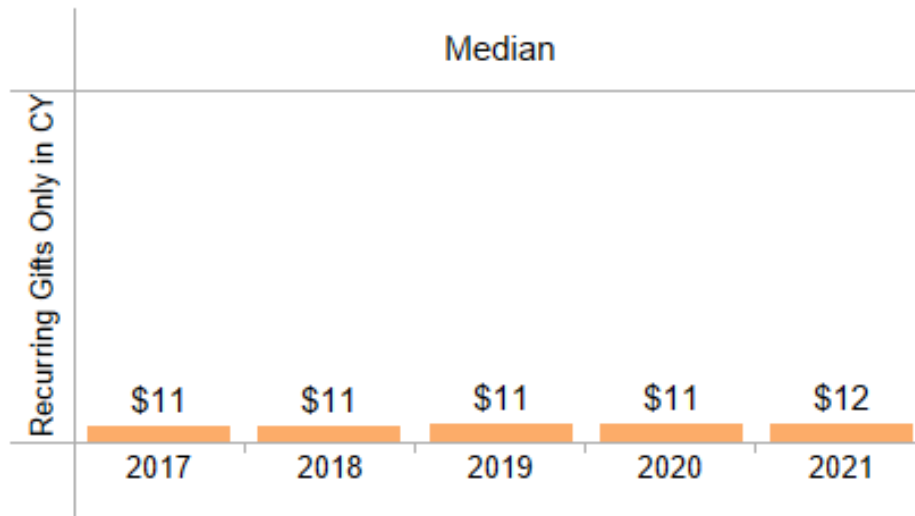


Donors Acquired with a Recurring Gift



➤ Shifts from Pledge to Digital in 2020 and 2021.

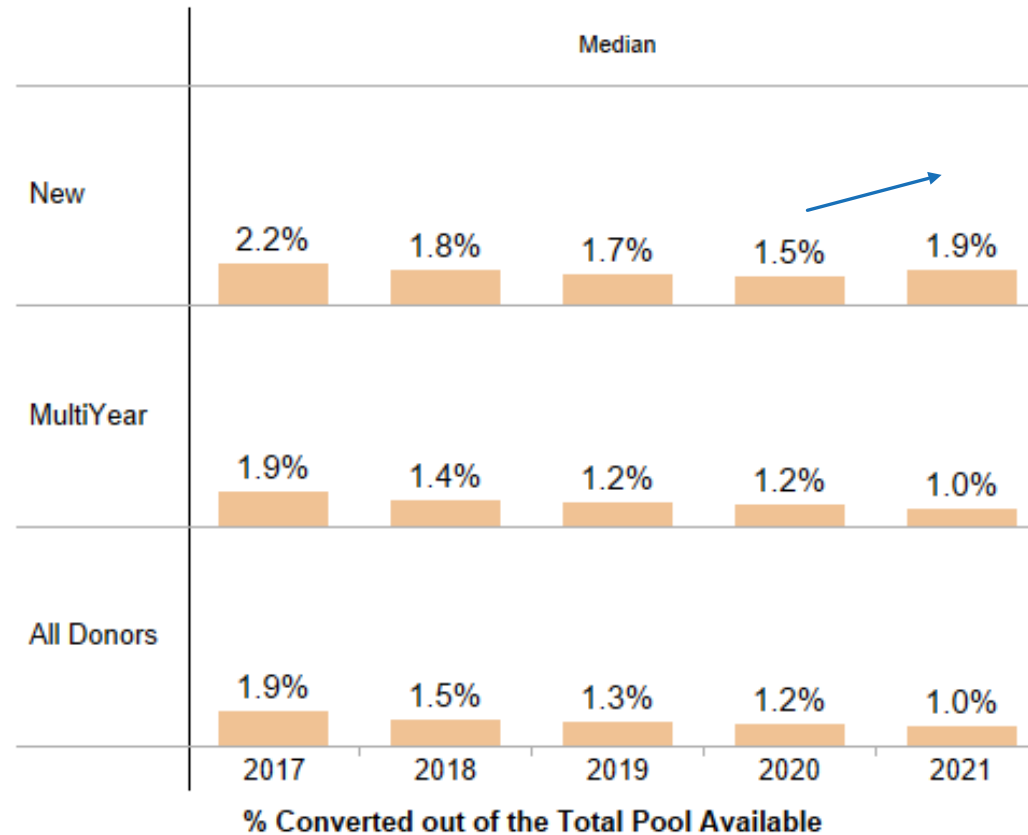
New Donor Average Gift: Recurring-Gift Donors



- New Recurring Donor average gift increased in 2021 for the first time since the invention of radio.

		Median		
		2019	2020	2021
Origin Recurring	Inactive Mail	\$10	\$12	\$13
	Email	\$11	\$12	\$12
	Web / Digital Other	\$11	\$12	\$13
	On-Demand Programming	\$8	\$9	\$9
	Air + Web Pledge	\$12	\$12	\$12

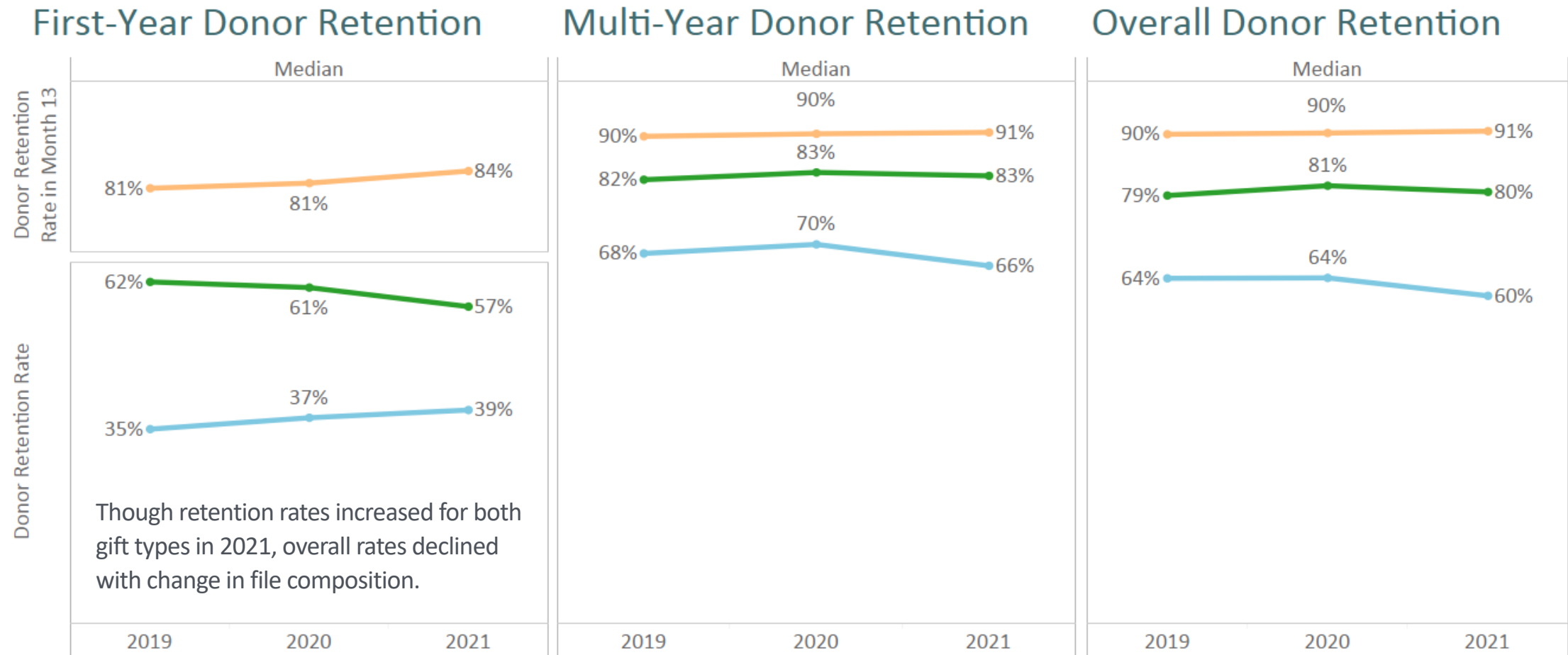
Conversion: As a Percentage of Population Available



- Conversion will be a key component for 2022 to continue to offset increase in donors acquired as single gift donors in 2020 and 2021.
- The rate for conversion of new donors increased for the first time in report period in 2021.
- A median 12% of new donors convert in year two, up from 10% in 2020.

Retention

Median Retention Trends (First-Year, Multi-Year, and Overall)



First-Year Retention Rate for Any Recurring Gifts is 13th Month. Multi-Year and Overall Retention rates are annual.

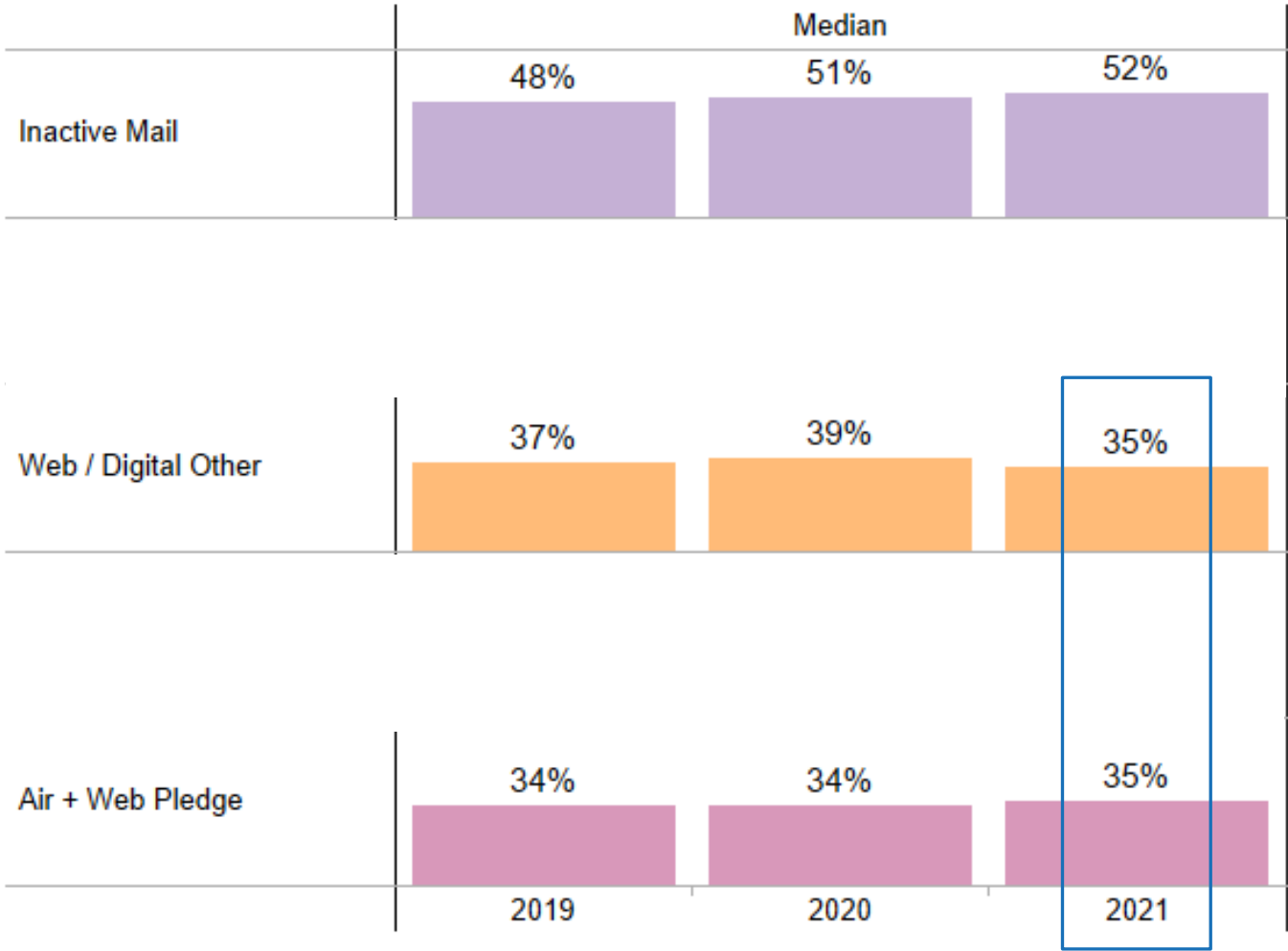
Blackbaud Target Analytics®

Gift Type Recurring PY

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

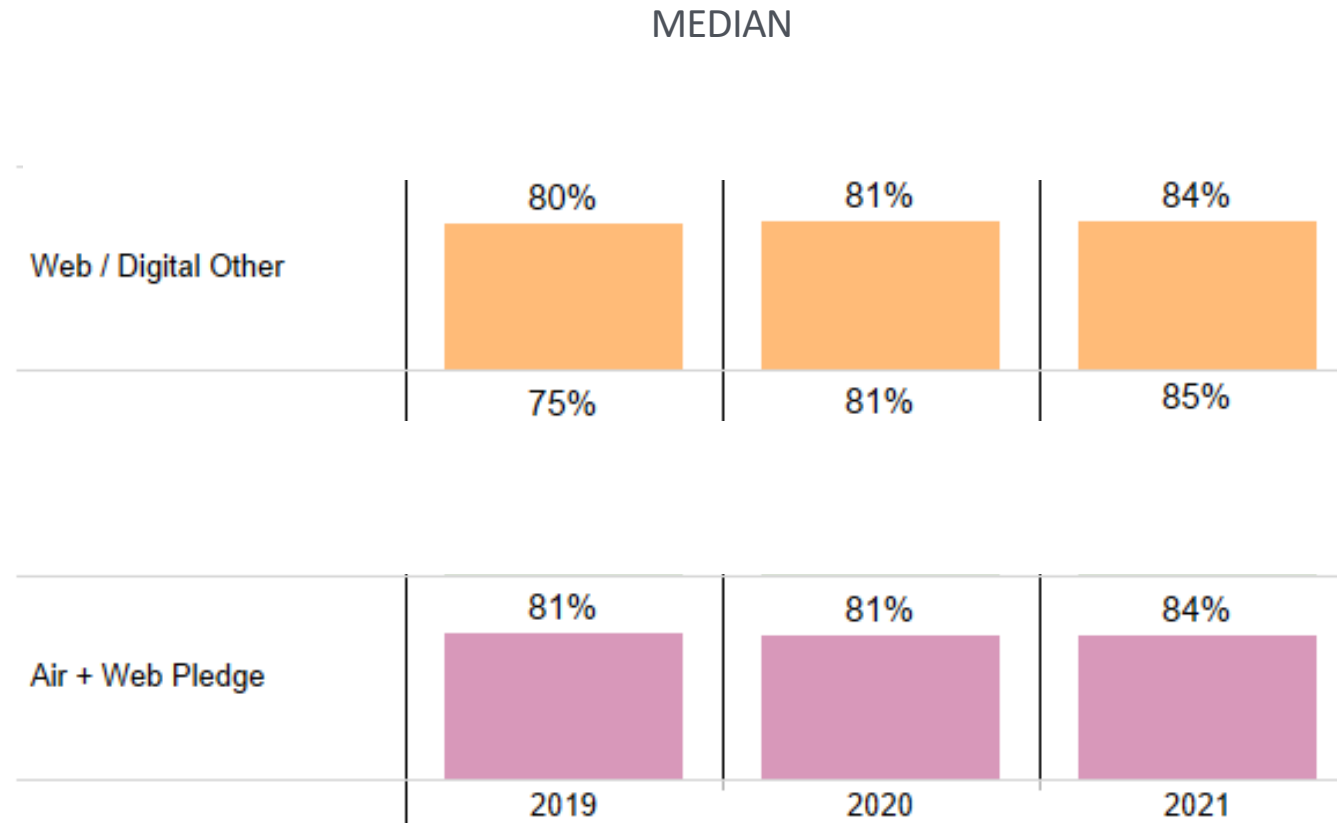
donorCentrics Public Radio Benchmarking

First-Year Retention by Origin Source – Acquired as Single Gift Donors



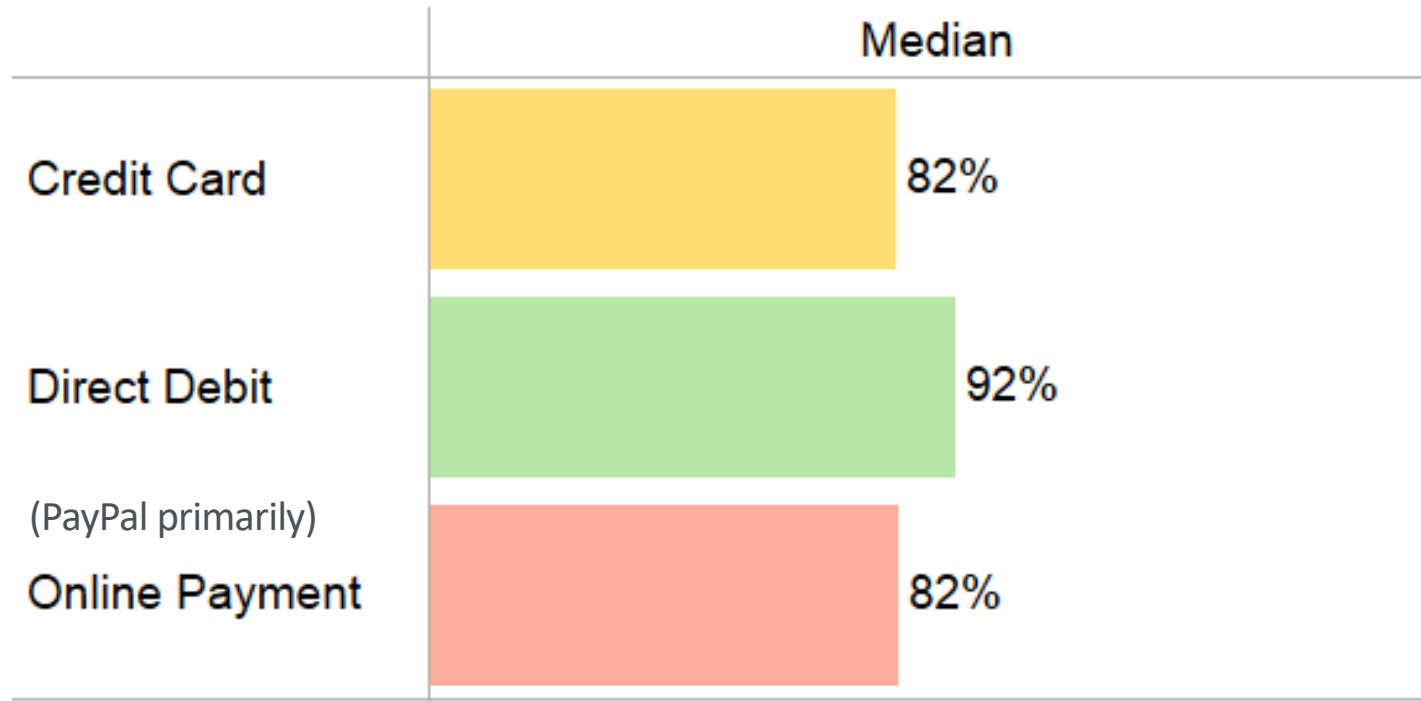
Single gift donors acquired via digital sources, outside of pledge, retained at the same rates as pledge acquired donors in 2021.

First-Year 13-Month Retention by Origin Source – Recurring Acquired



Recurring gift donors retain at the same rate regardless of acquisition source.

First-Year 13-Month Retention by Origin Payment Method: Recurring Acquired Donors



First-Year 13-Month Retention by Origin Month – Recurring Acquired

83%

13th Month Retention Rate for
Recurring Donors Acquired July
– February of FY 2020 (Pre-
Pandemic Quarantines)

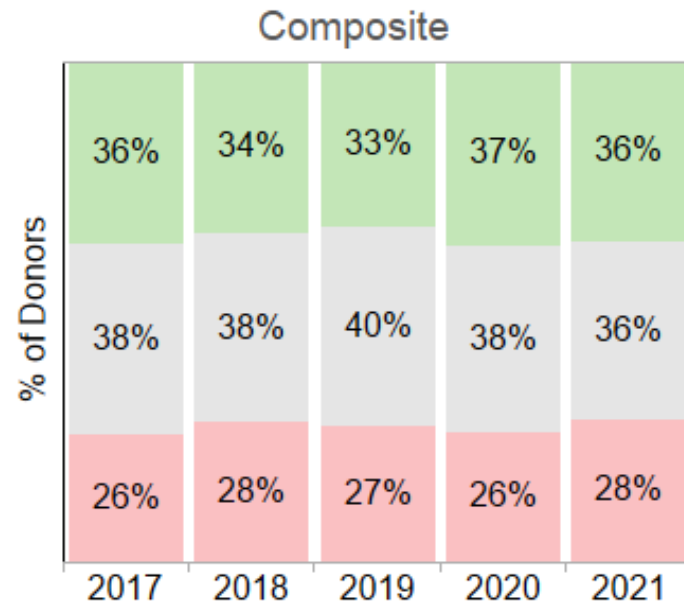
87%

13th Month Retention Rate for
Recurring Donors Acquired
March – June of FY 2020
(Pandemic Quarantines)

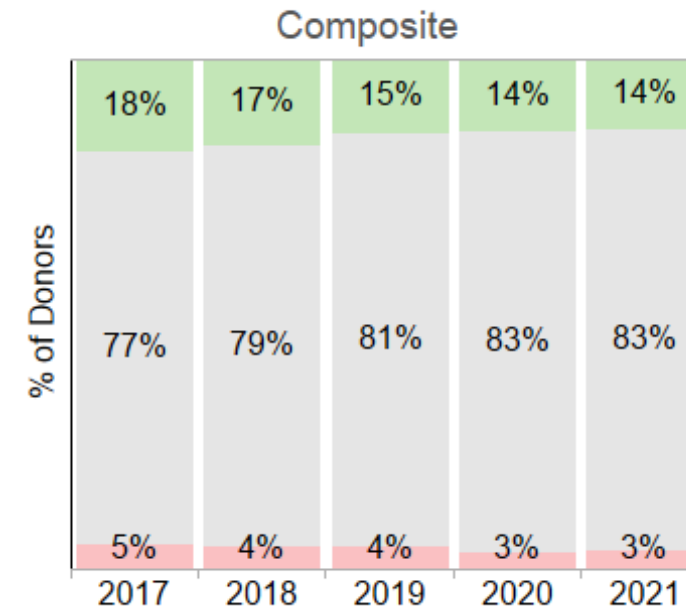
Increasing Donor Value Trends: Upgrading and Long-Term Value

Multi-Year Donor Upgrading

Single Gifts Only in Prior and Current Years

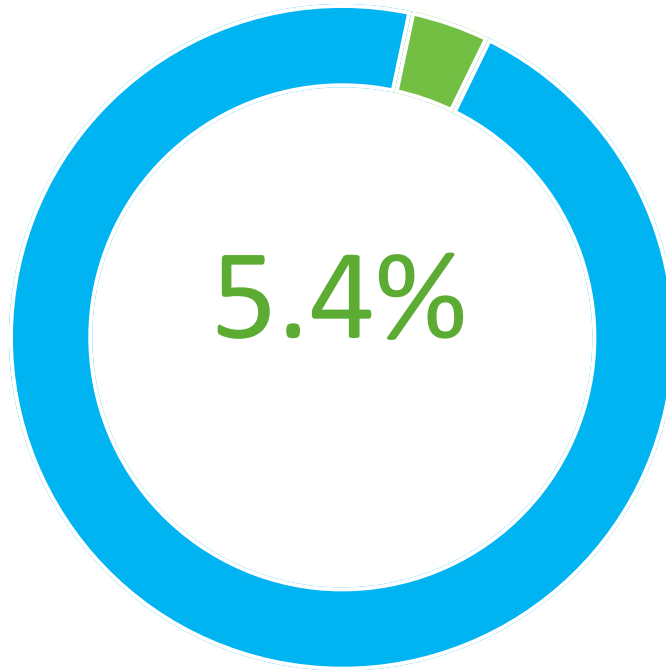


Recurring Gifts Only in Prior and Current Years



- A significant increase in upgrading for single gifts in 2020, followed by lift in downgrading in 2021. How will you mitigate downgrading in 2022?
- Average gift upgrading for recurring donors on a downward trend. The shift has been toward remaining at same levels, rather than downgrading.

Share of Recurring Gift Donors Making Additional Gifts in 2021

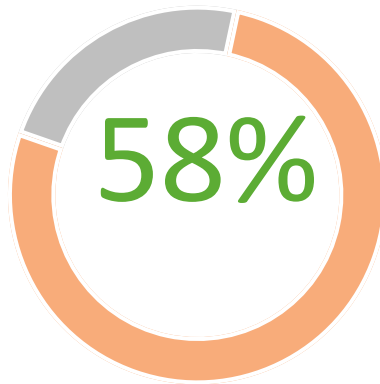


- Over 5% of all multi-year recurring gift donors made an additional gift in 2021, essentially flat with last year.
- The average single gift from recurring gift donors was \$90 in 2021, an increase from prior years.
- The median revenue received was \$54K, up from \$36K in just two years.

Does not include donors that converted from single to recurring.

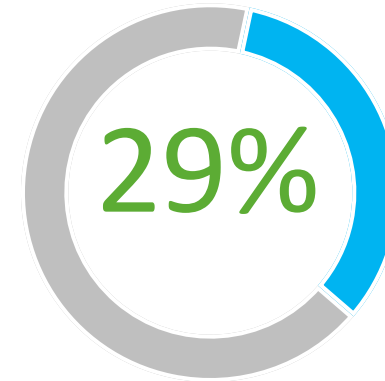
Long Term Value for Donors Acquired in 2017

Acquired As Recurring



Percent of Original Donors
Still Giving in 2021

Acquired As Single



Lifetime Revenue Per
Donor in 2021



*donor*Centrics Public Television Benchmarking Overall Active Donor Giving

Active Donors and Total Revenue Trends from 2020 to 2021

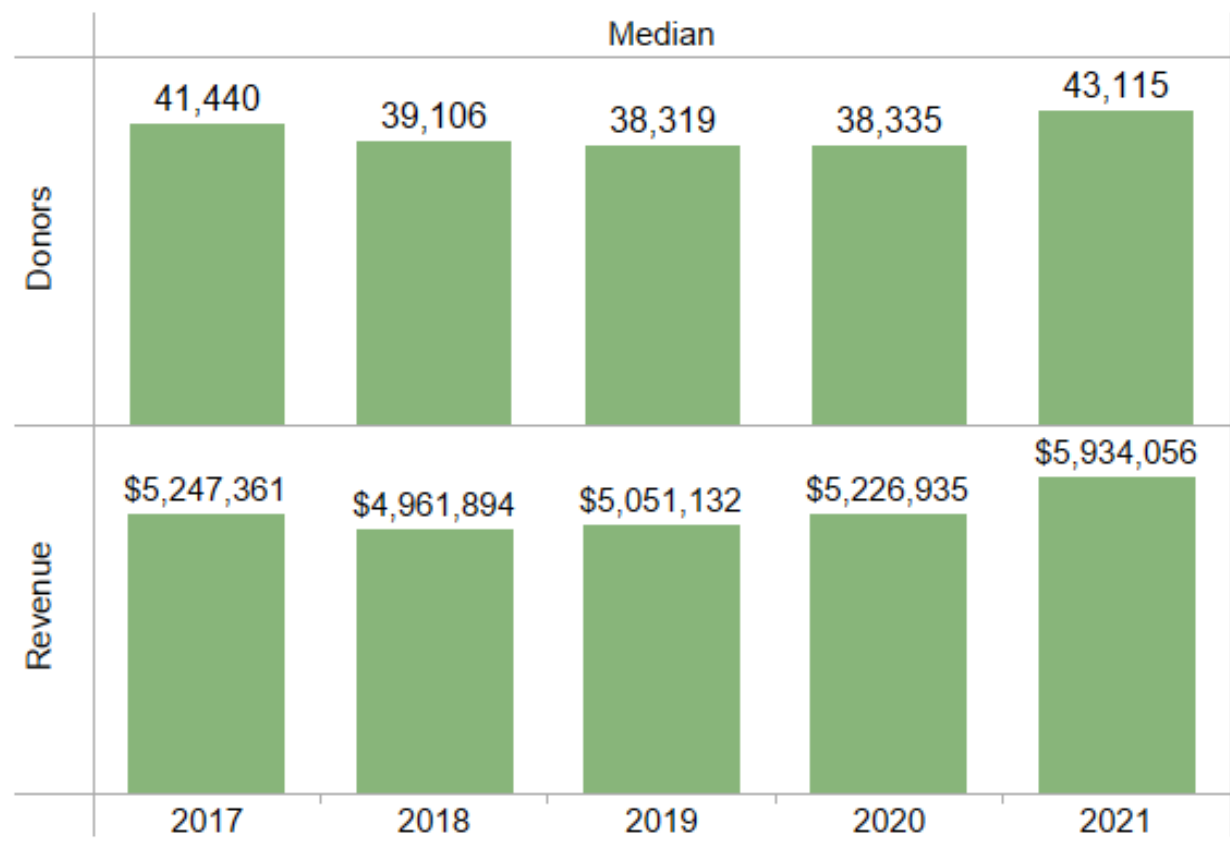
6% ↑

Median increase in
Donors in 2021

9% ↑

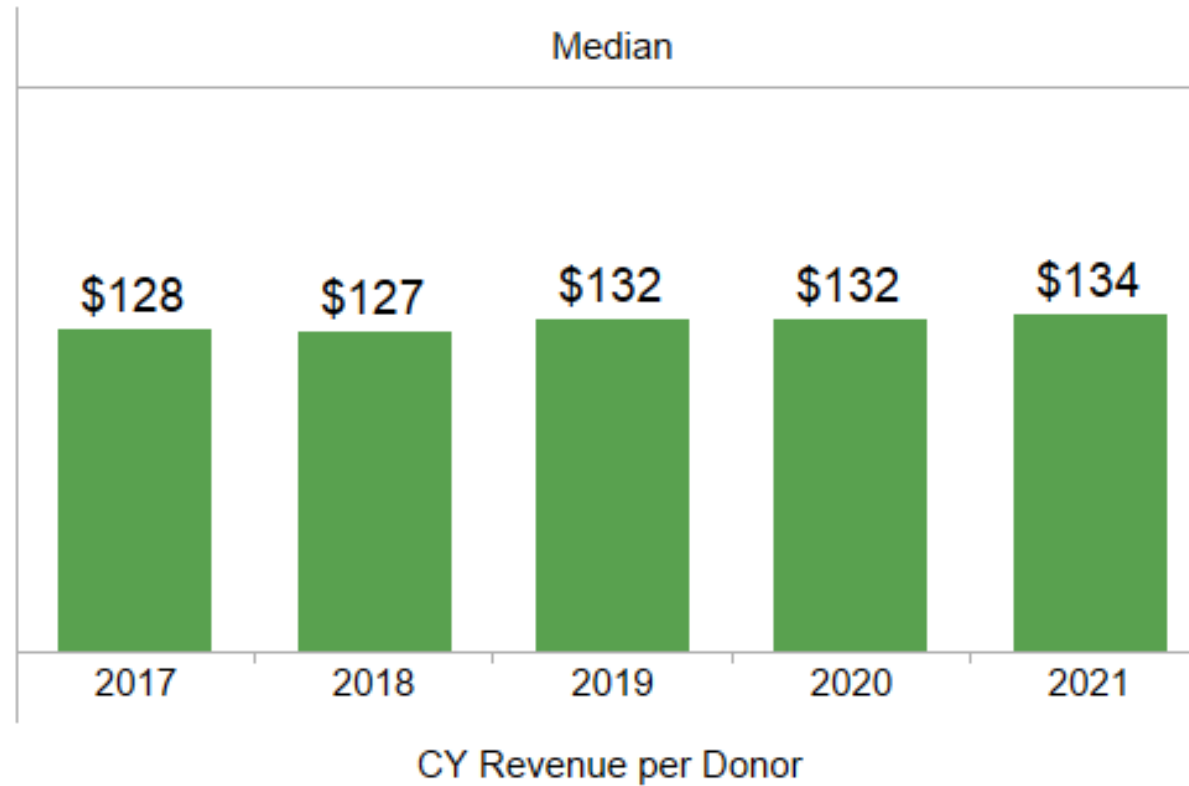
Median increase in
Revenue in 2021

Active Donors and Total Revenue Trends



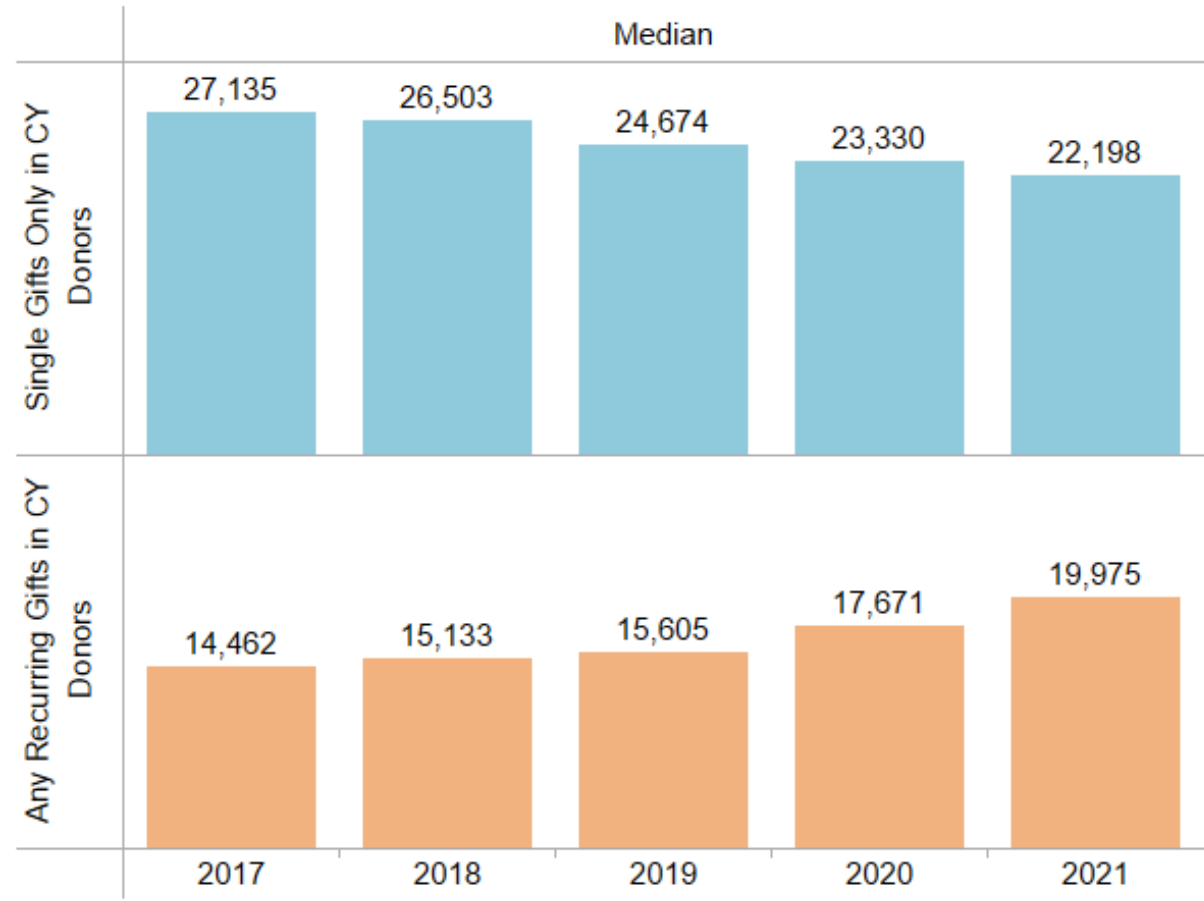
- Median Donors surpassed former peak year of 2017 in 2021.
- Median Revenue increased by \$700K since 2020.

Revenue per Donor Trends



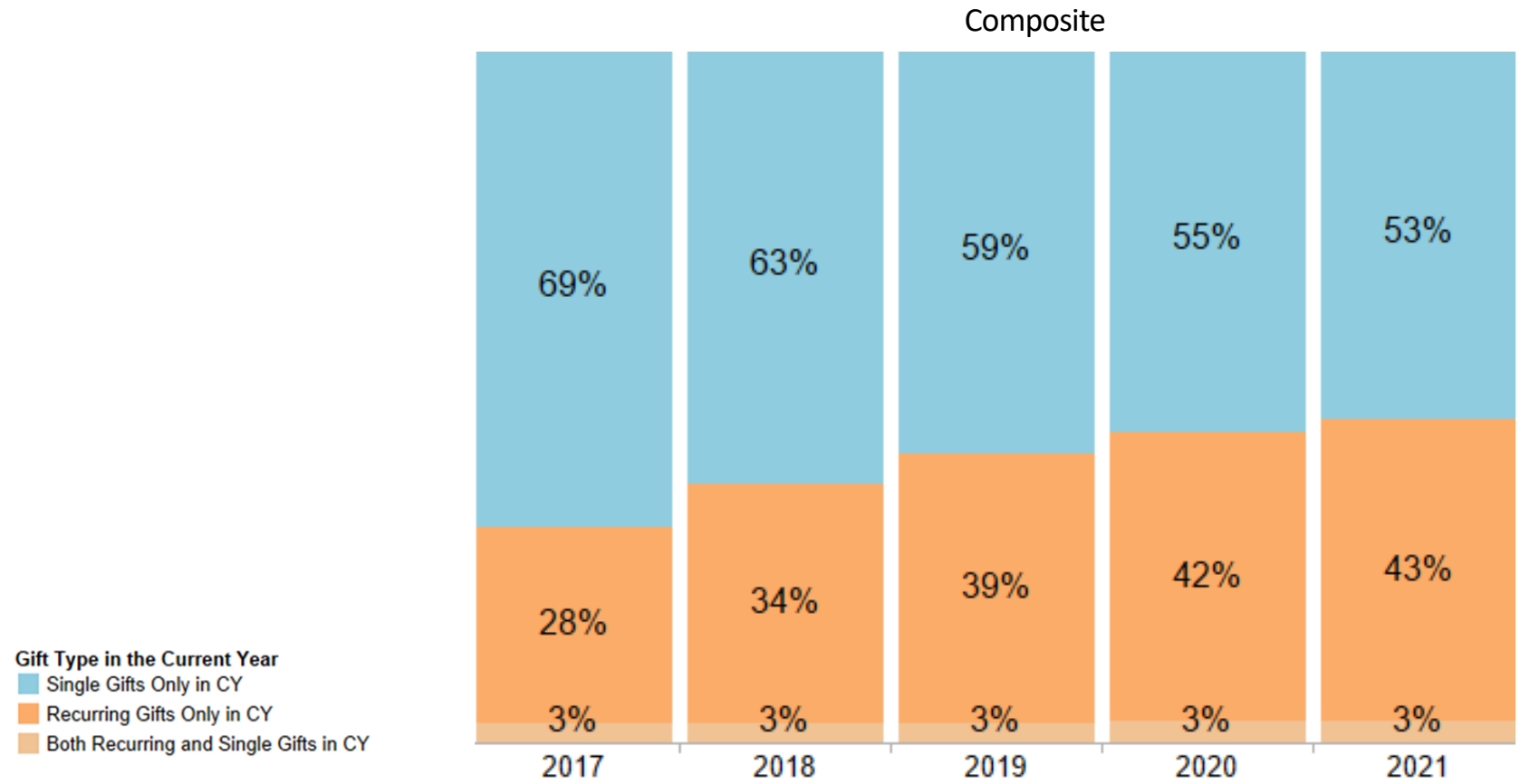
\$6 increase in revenue per donor since 2017.

Active Donor Trends by Gift Type



➤ Median recurring gift donor counts have increased each year while single gift donors have declined.

Sustainers as a Share of All Donors Trend



46% ↑

An increase in the share of donors making recurring gifts.

- The range in the share of recurring donors for all stations was 33% - **64%**.
- 27% of participating stations with greater than 50% share of recurring among all donors.

File Building Trends:

Acquiring New Donors

Converting Donors to Sustainers

New Donor Trends – 2020 to 2021

11% ↑

Median Increase in
Overall New Donors
in 2021

12% ↑

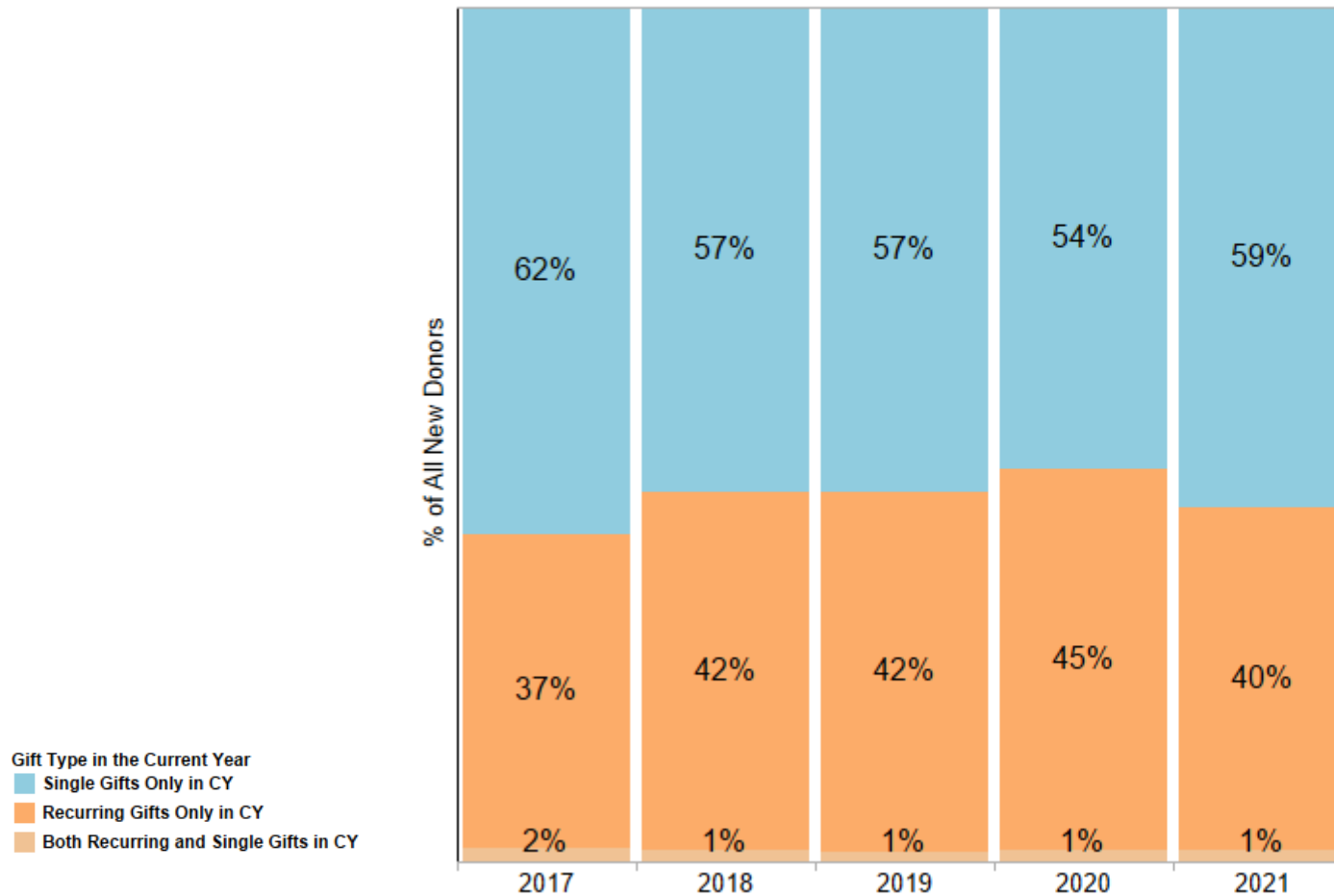
Median Increase in
New Single Gift Donors
in 2021

3% ↑

Median Increase in New
Recurring Gift Donors
in 2021

New Donor Trends by Gift Type

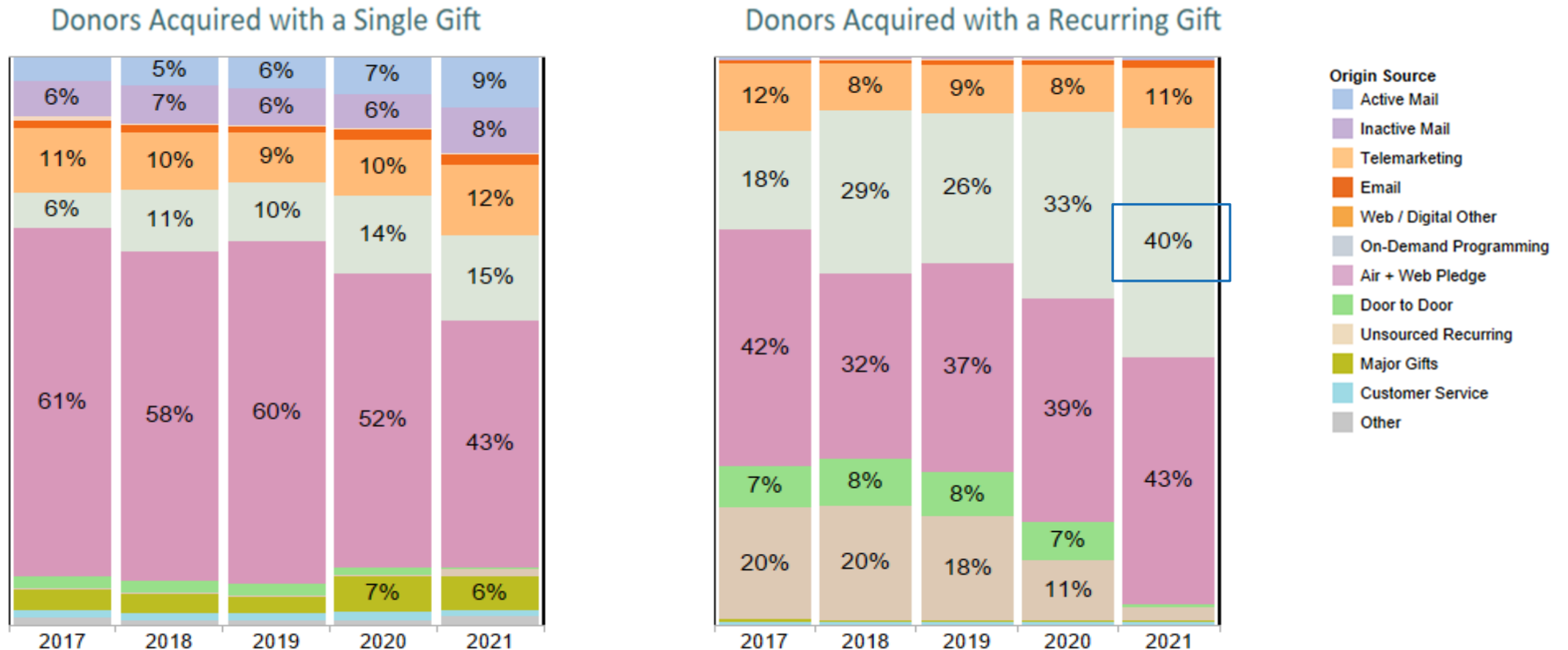
Composite



- 41% of all new donors made a recurring gift in 2021, a decline from 2020's peak.
- In 2021, sustainers as a share of all new donors ranged from 13% to **69%**.
- 4 stations had 50% or more new recurring gift donors in 2021

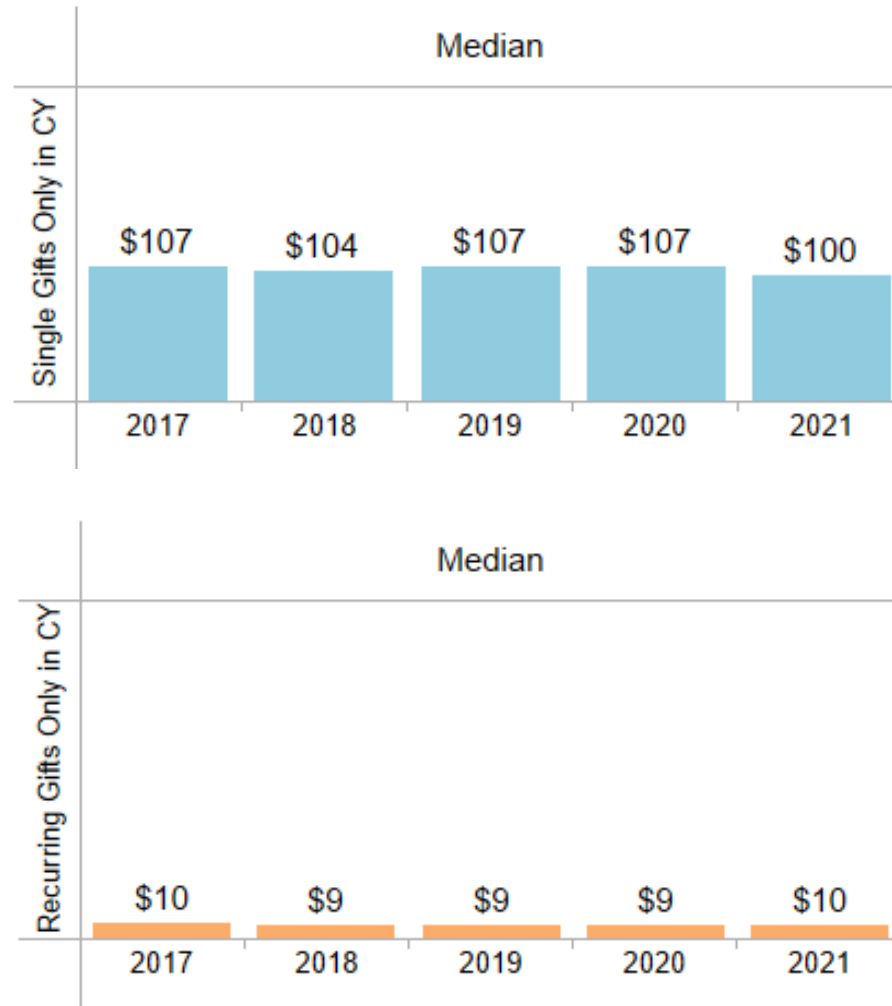
What Channels Are Driving Acquisition and How Is That Changing over Time?

Composite Data



- Growth over time in the share of new donors acquired via digital and passport for both single and recurring gift donors.
- Disruptions in canvassing impacting share of recurring and first-year retention trends.

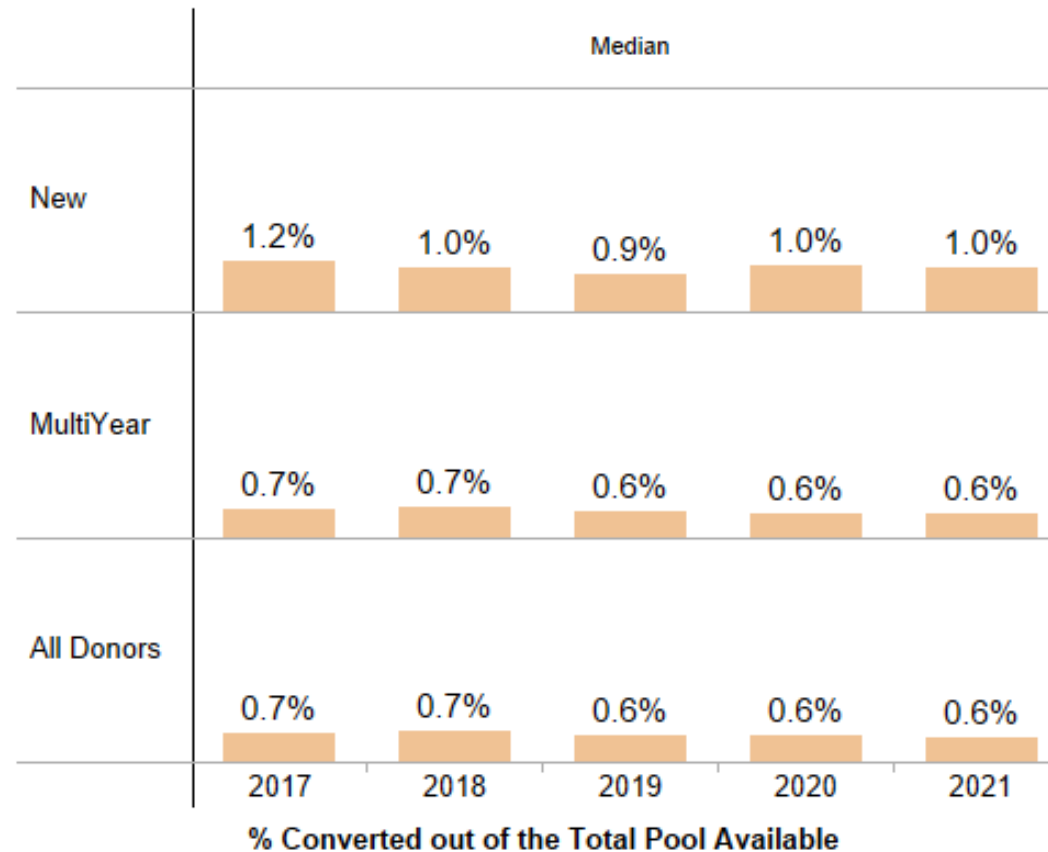
New Donor Average Gift



- The median single gift average gift was at its lowest in 2021 in the last five years.

- Recurring gift average gift increased in 2021, the first time since the expansion of Passport.

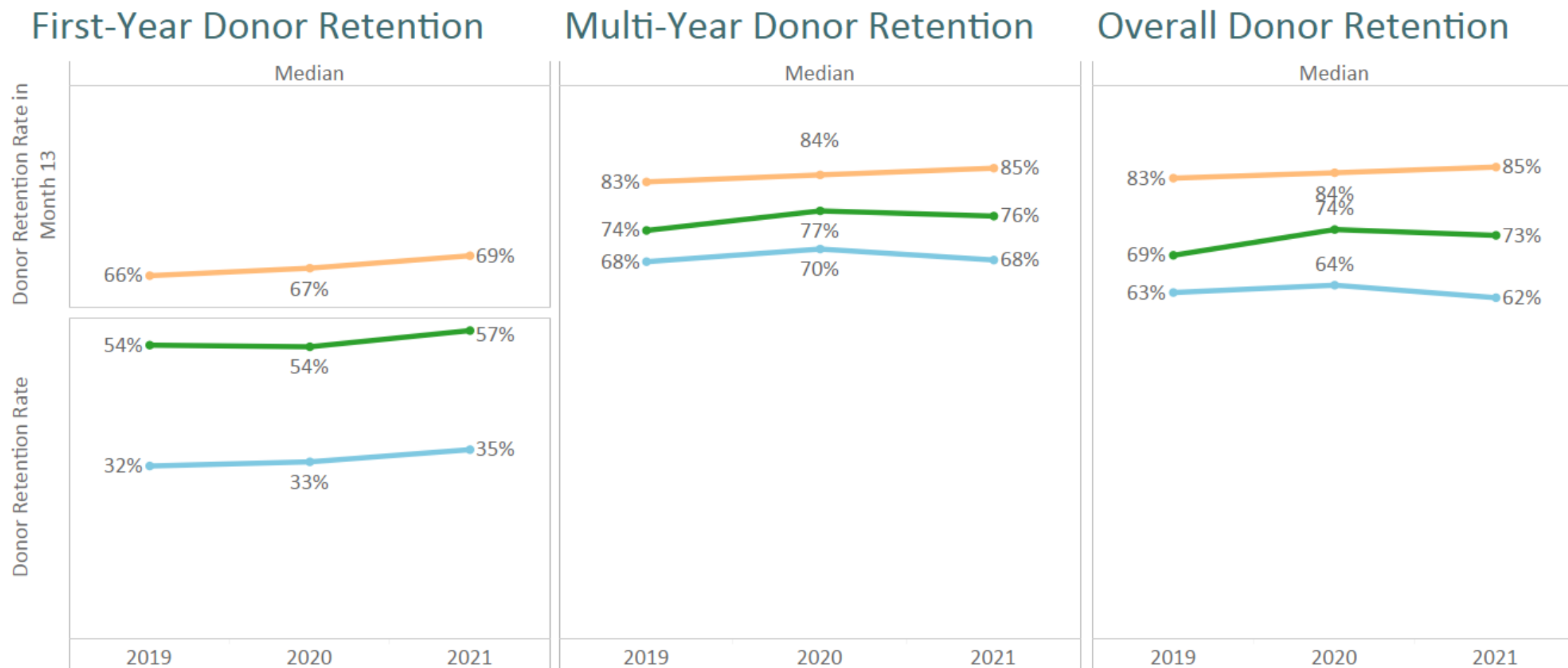
Conversion: As a Percentage of Population Available



- Conversion will be a key component for 2022 to continue to offset increase in donors acquired as single gift donors in 2021.
- The rate for conversion of new donors was consistent from 2020 to 2021.
- A median 7% of new donors convert in year two.

Retention

Median Retention Trends (First-Year, Multi-Year, and Overall)



First-Year Retention Rate for Any Recurring Gifts is 13th Month.
Multi-Year and Overall Retention rates are annual.

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Gift Type Recurring PY

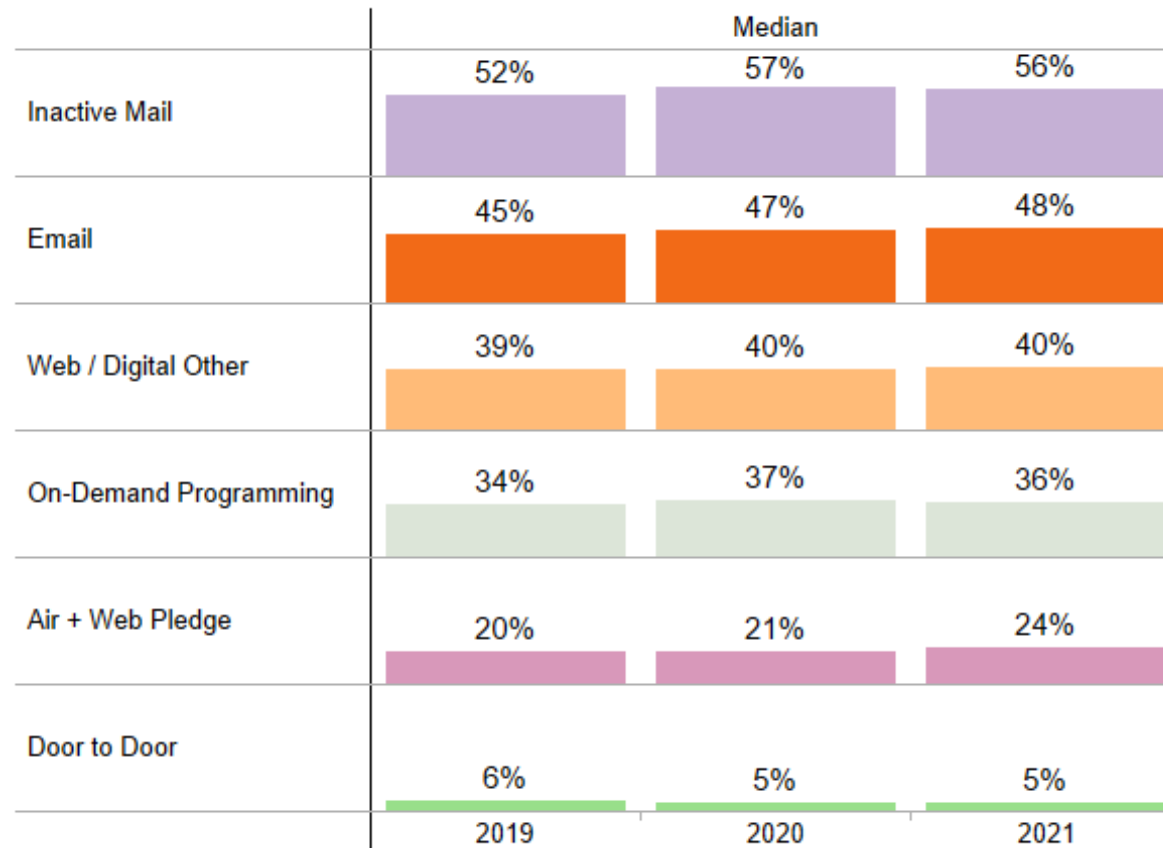
Single Gifts Only in PY

Any Recurring Gifts in PY

All Donors

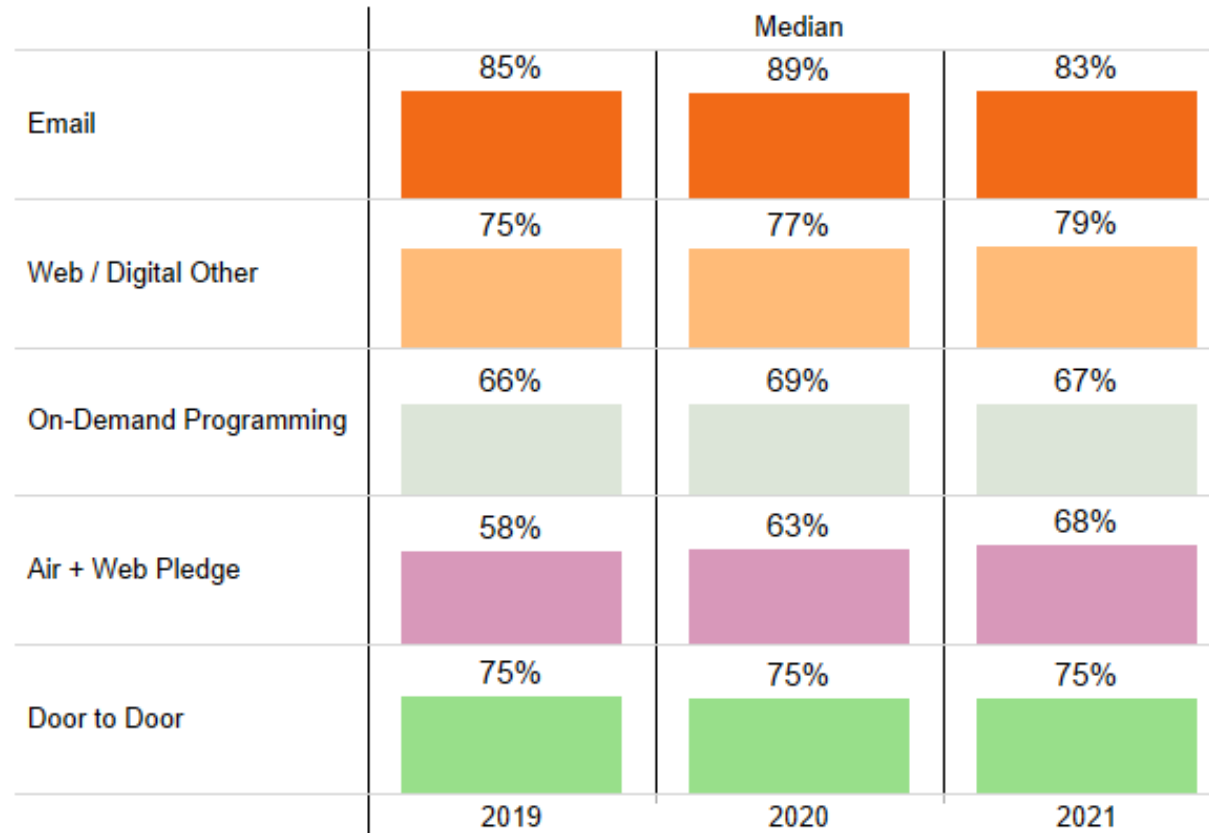
donorCentrics Public Television Benchmarking

First-Year Retention by Origin Source – Single Gift Acquired



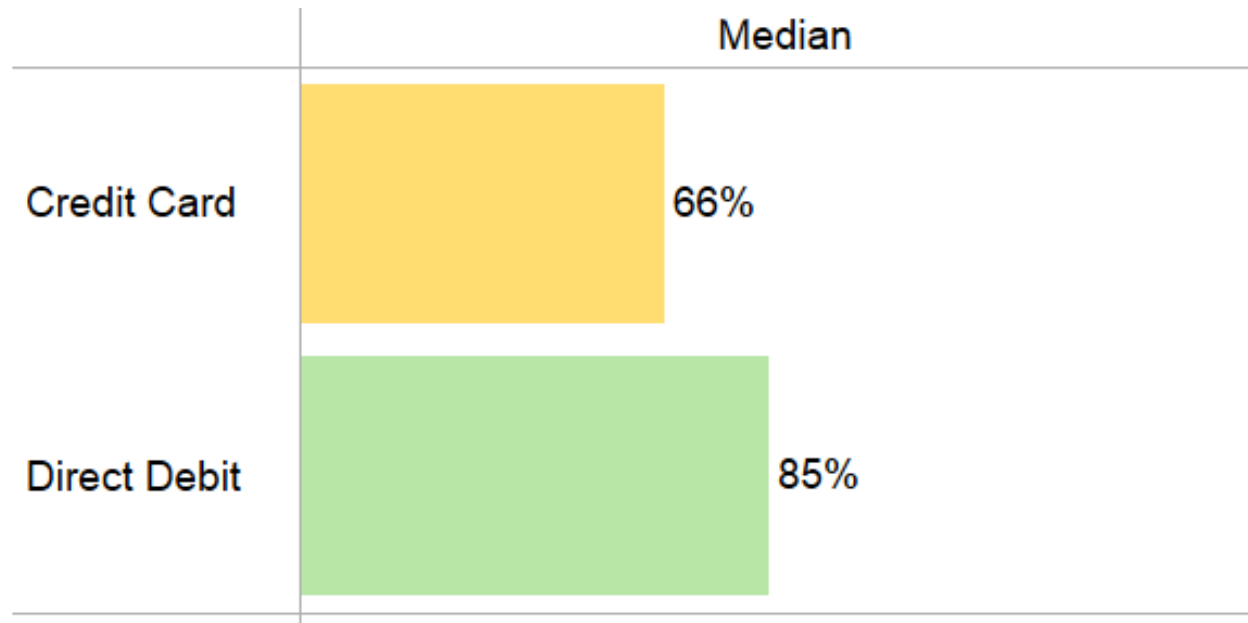
Donors acquired via digital sources, outside of pledge, have greater first year retention rates than pledge acquired.

First-Year 13-Month Retention by Origin Source – Recurring Acquired



13th Month retention rates for donors acquired as sustainers via Passport are in line with pledge-acquired donors.

First-Year 13-Month Retention by Origin Payment Method: Recurring Acquired Donors



First-Year 13-Month Retention by Origin Month – Recurring Acquired

69%

13th Month Retention Rate for
Recurring Donors Acquired July
– February of FY 2020 (Pre-
Pandemic Quarantines)

69%

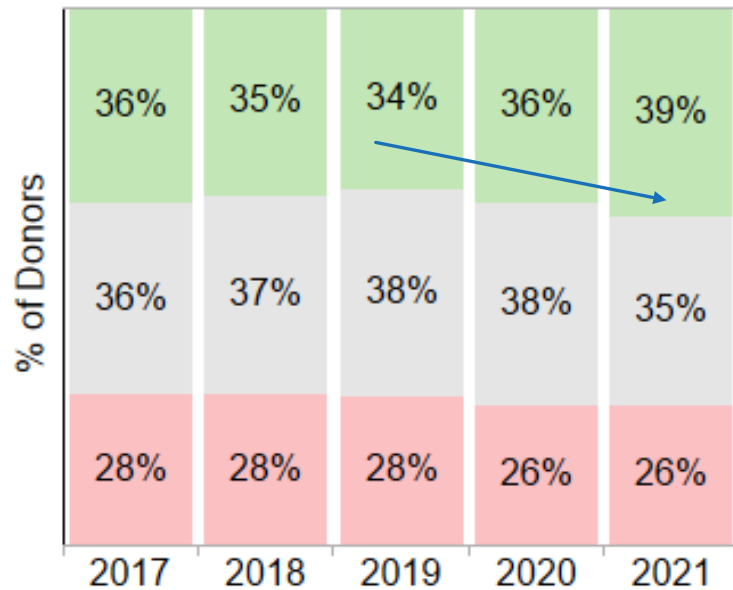
13th Month Retention Rate for
Recurring Donors Acquired
March – June of FY 2020
(Pandemic Quarantines)

Increasing Donor Value Trends: Upgrading and Long-Term Value

Multi-Year Donor Upgrading

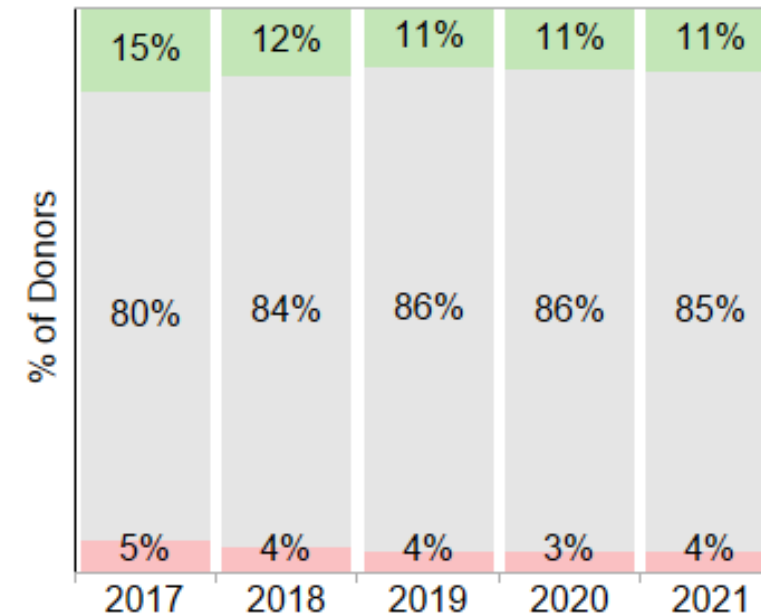
Single Gifts Only in Prior and Current Years

Composite



Recurring Gifts Only in Prior and Current Years

Composite



- Single gift donors have seen an increase in upgrading through the pandemic
- Recurring gift donors have been steady at 11%

Passport: Impact on Upgrading

9%

Share of recurring-gift only donors that gave **less than \$10/Month** that upgraded in 2021

5%

Share of recurring-gift only donors that gave **less than \$10/Month** AND who had a prior year source of **Passport** that upgraded in 2021

13%

Share of recurring-gift only donors that **gave at least \$10/Month** AND who had a prior year source of **Passport** that upgraded in 2021

Impact of Passport on Additional Gifts from Recurring Gift Donors

Excludes donors who were acquired with a single gift and converted to recurring, so we can count only additional single gifts given by recurring donors.

All recurring acquired donors

	Median	
2019	<div><div></div><div>2.4%</div></div>	<div><div></div><div>\$79</div></div>
2020	<div><div></div><div>2.4%</div></div>	<div><div></div><div>\$82</div></div>
2021	<div><div></div><div>2.9%</div></div>	<div><div></div><div>\$85</div></div>
	% of Donors Giving an Additional One-Off Single Gift	Average Gift Amount of Single Gifts

Passport acquired donors

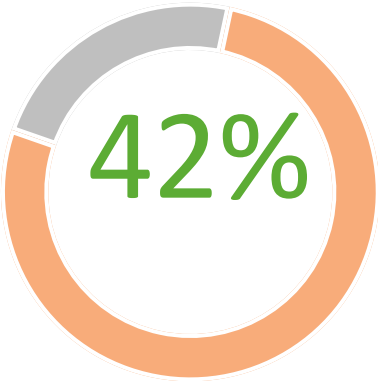
	Median	
2019	<div><div></div><div>1.4%</div></div>	<div><div></div><div>\$50</div></div>
2020	<div><div></div><div>1.5%</div></div>	<div><div></div><div>\$59</div></div>
2021	<div><div></div><div>1.6%</div></div>	<div><div></div><div>\$60</div></div>
	% of Donors Giving an Additional One-Off Single Gift	Average Gift Amount of Single Gifts

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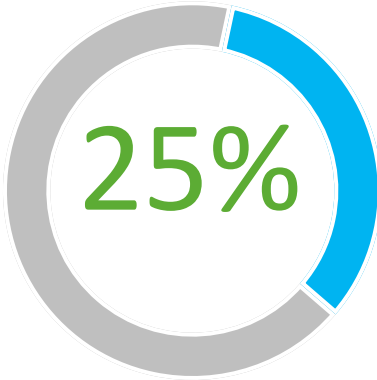
- Passport donors are less likely to make an additional gift and those gifts are smaller than those for all recurring gift donors.

Long Term Value for Donors Acquired in 2017

Acquired As Recurring



Acquired As Single



Percent of Original Donors
Still Giving in 2021



Lifetime Revenue Per
Donor in 2021

The Big Take-Aways

Stay the Course

- Resist the urge to cut acquisition or reduce pledge events
- Continue to build your sustainer file with direct acquisition
- Increase efforts to convert new and reactivated single gift donors to monthly sustainers or annual sustainers

And Innovate

- Increase efforts to acquire and convert donors to EFT Payment Method
- Consider Online payment methods, especially in mobile giving
- Increase efforts to engage new audiences and donors in digital spaces

Thank you to our participating stations!

AETN	KPCC	MPT	TPT	WHYY	WTTW
CAPR	KQED	Neb Pub TV	WAMU	WLIW	WUNC
DPTV	KUAT	Nine Network	WBEZ	WMFE	WXEL
GBH	KUSC	NJPBS	WBUR	WMHT	WXPB
GPB	KUT	NYPR	WEDU	WNED	WXXI
KCPBS	KVIE	OPB	WESA	WNET	
KDFC	KWMU	PBSNC	WETA	WPBT	
KERA	MPR	PBS Utah	WFAE	WPR	
KPBS	MPBS	PMGSC	WGVU	WPTV	

Thank You!

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