



# *donorCentrics*™ Collaborative Benchmarking Trends in Nonprofit Individual Giving

*Trend Analysis 2020 - 2024*

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# Hello! I'm Meghann Batchelor

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*Senior Consultant, donorCentrics*

## CHARLOTTE, NC

Prior to my career with Blackbaud, I spent many years in Pledge HQ in a variety of direct marketing fundraising roles in Public Broadcasting.

I'm thrilled to share *donorCentrics* reports with a variety of nonprofit organizations, with a focus on public media.

# donorCentrics™ Sustainer Benchmarking

In addition to sector-specific Benchmarking meetings, donorCentrics™ benchmarks 3 separate groups of participants whose programs include significant donors/revenue from recurring gifts.

Each year, the **Sustainer Summit** is an opportunity for sustainer-focused organizations to meet and collaborate on the donorCentrics™ data while sharing with and learning from one another.

In 2024, the Sustainer Summit brought together **38 sustainer-focused organizations** of different sizes, strategies, and missions to review and discuss their recurring giving programs through a donor-centric lens.

This year's analysis includes giving from **over 19 million** donors and more than **\$3.4 billion** in revenue in FY24.

Selected medians from 2024 reports are shared within this presentation.



# donorCentrics™ Sustainer Summit Benchmarking

## BENCHMARKING PROCESS

- Reports are powered by Blackbaud's donorCentrics® service
- Data submitted directly by participating organizations and standardized by Blackbaud.
  - Actual donor transactions, not survey responses.
- **Seeking to identify trends for donors most likely to be renewed or retained each year.**
  - *How are recurring donor populations changing?*
  - *Are donors retaining well?*
  - *Which channel metrics should I monitor?*
- Data calculated based on **cash transactions** received from direct marketing sources, including:
  - Direct Mail
  - Digital Channels, including web site gifts, e-mail and digital advertisements
  - Telemarketing
  - DRTV
  - Face to Face/Door to Door
  - On-Air/Web Pledge
- Participants each receive individual, and collaborative reports of 5 years of data.
  - Bound by Confidentiality Agreement



# *donorCentrics*™ Sustainer Summit Benchmarking Methodology

## **FISCAL YEAR**

Timeframe: Fiscal Year 2024

July 1, 2023 to June 30, 2024

*Same timeframe as donorCentrics™  
Public Radio and Public Television  
Benchmarking*

## **GIFT CAP**

Individual payments of \$10,000 or more were excluded from all participating organizations

*A \$25,000 gift cap on donorCentrics™  
Public Radio and Public Television  
Benchmarking data*

## **EXCLUSIONS**

Does not include:

- Soft credits
- Matching gifts
- Vehicle Donations



# Overall Giving Trends in FY24



# Trend 1: Year-Over-Year Declines Continue

*donorCentrics™* Sustainer Summit Findings



-8%

Median 1-Year  
Change in  
Active **Donors**,  
2023 to 2024

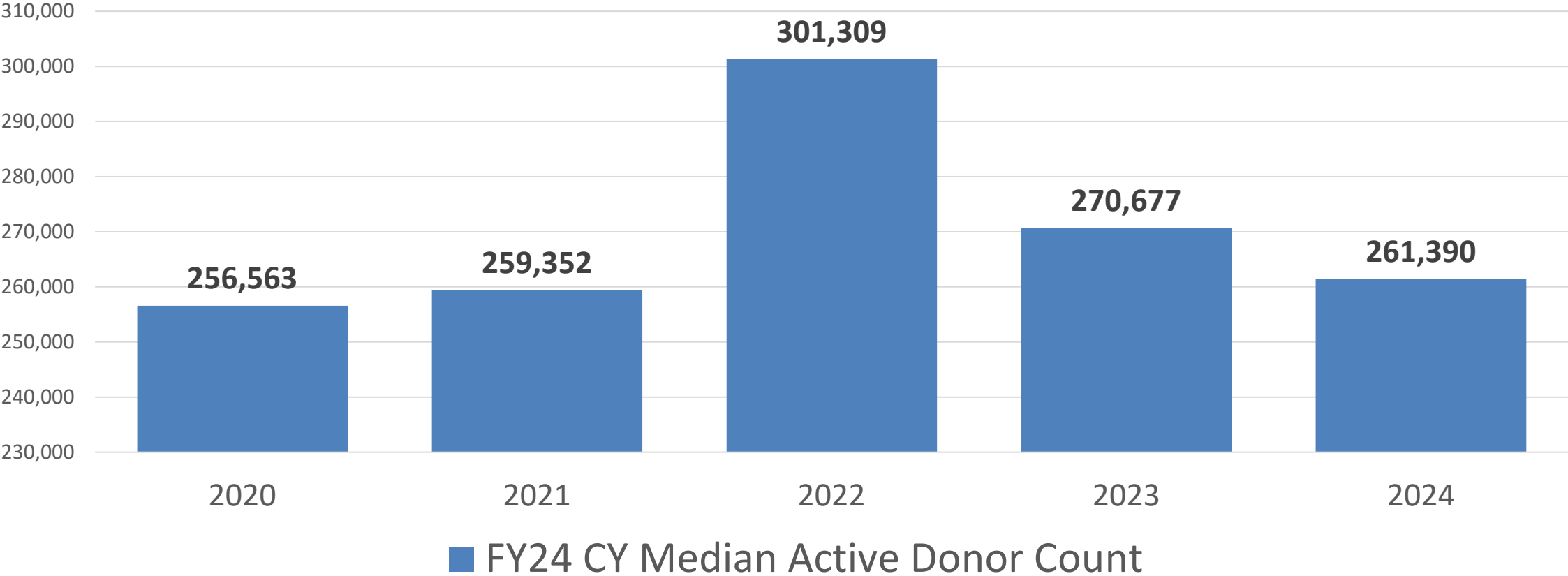


-2%

Median 1-Year  
Change in  
Donor **Revenue**,  
2023 to 2024

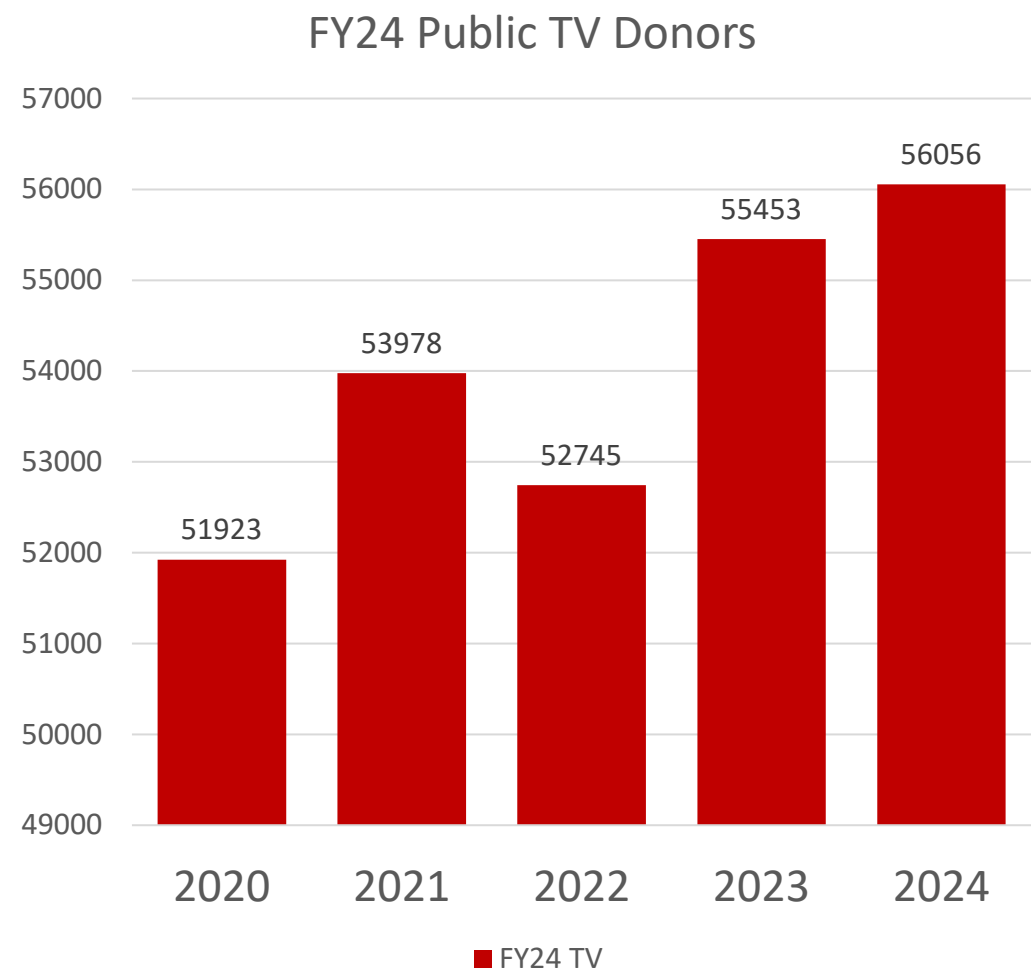
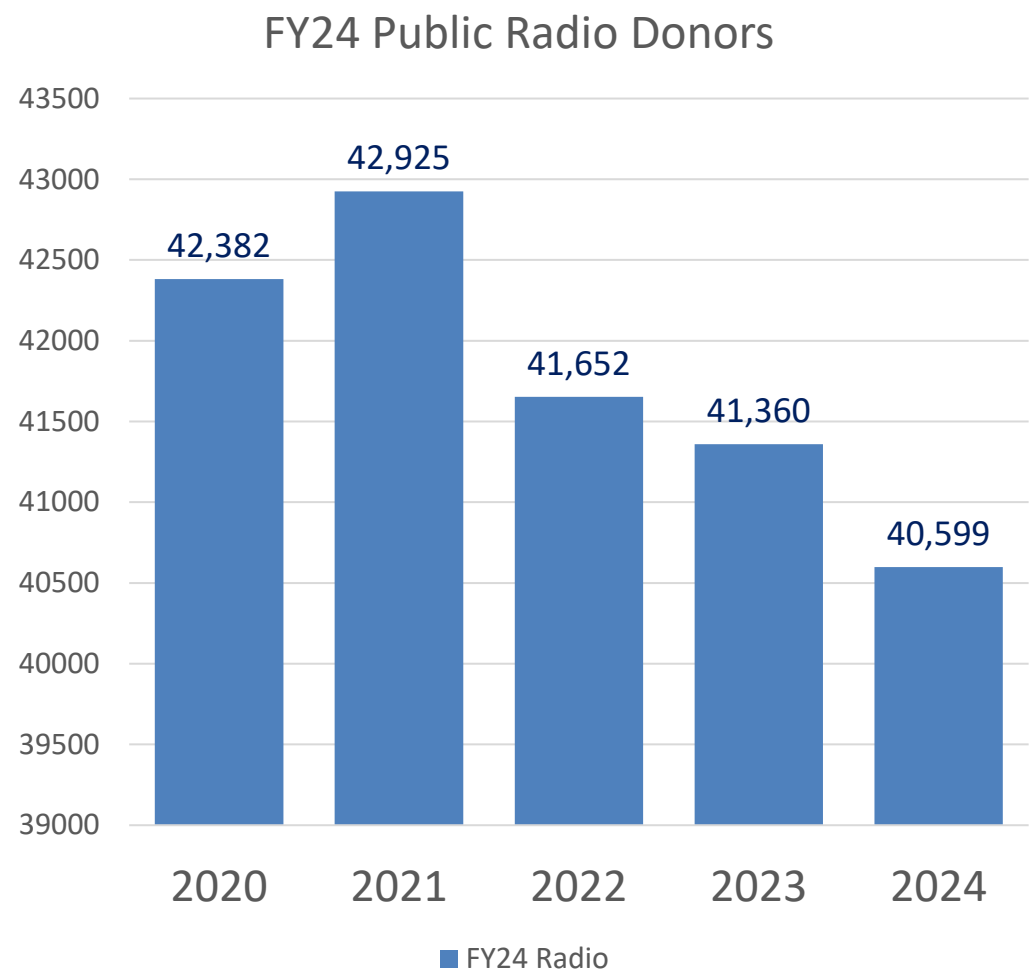
# Trend 1: Year-Over-Year Declines Continue

*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024



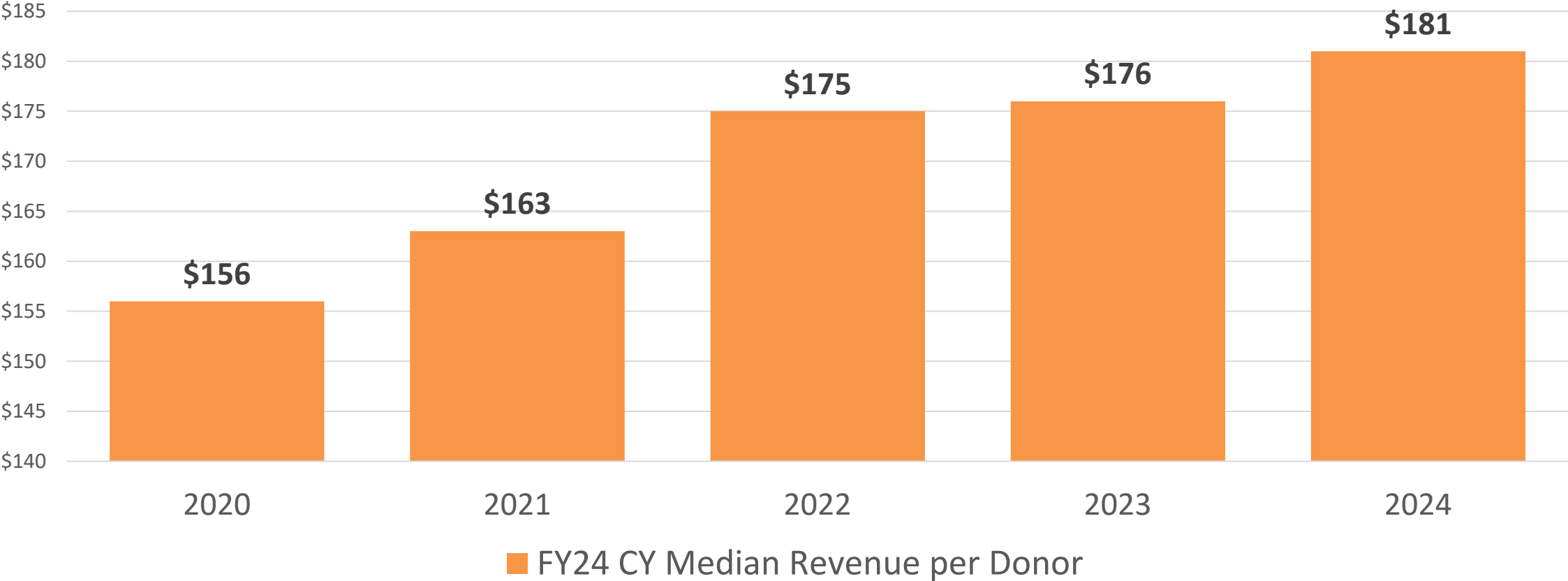


# Trend 1: Year-Over-Year Declines Continue **for Some**

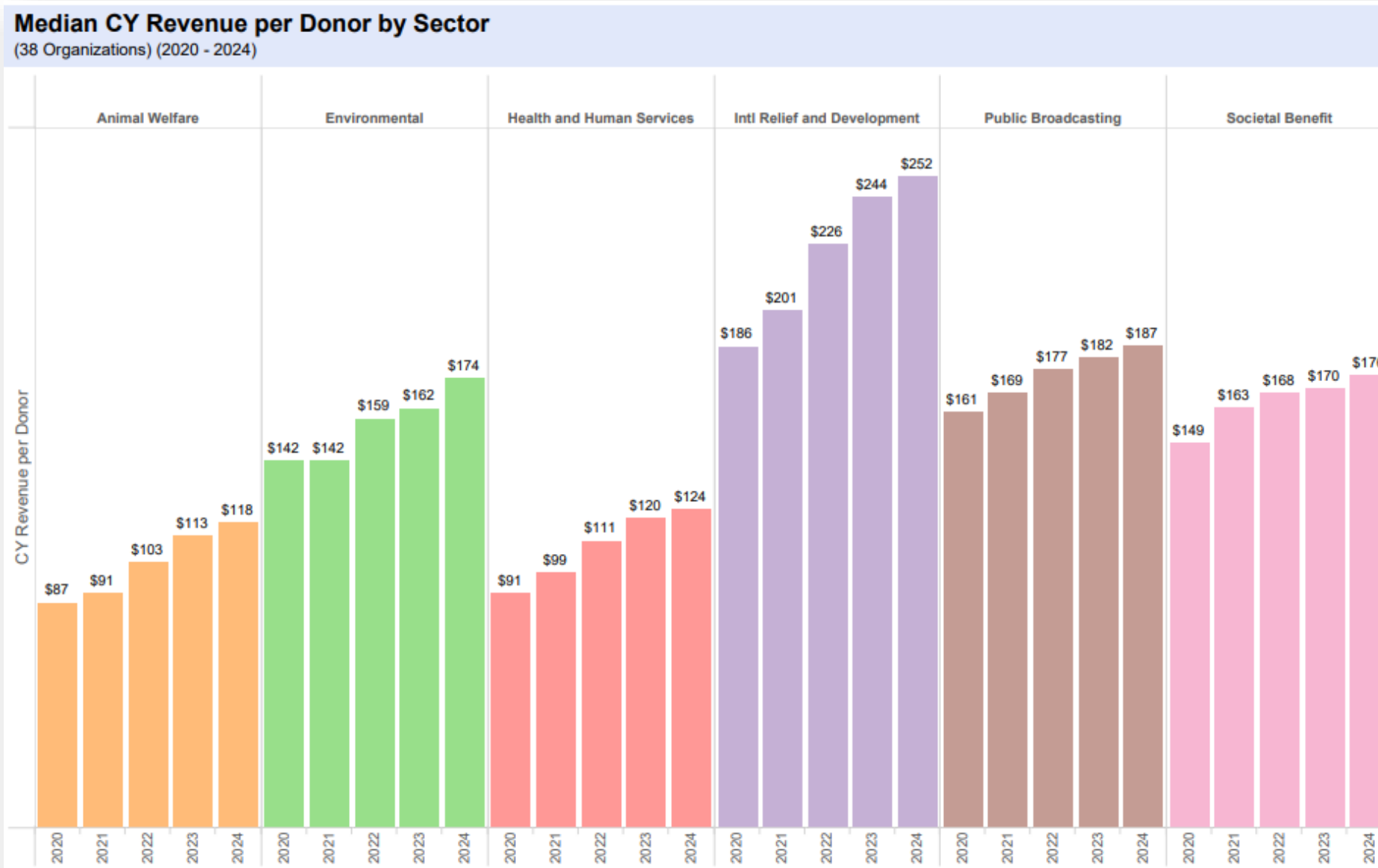


# Trend 2: Donor **Value** Continues to Rise

*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024



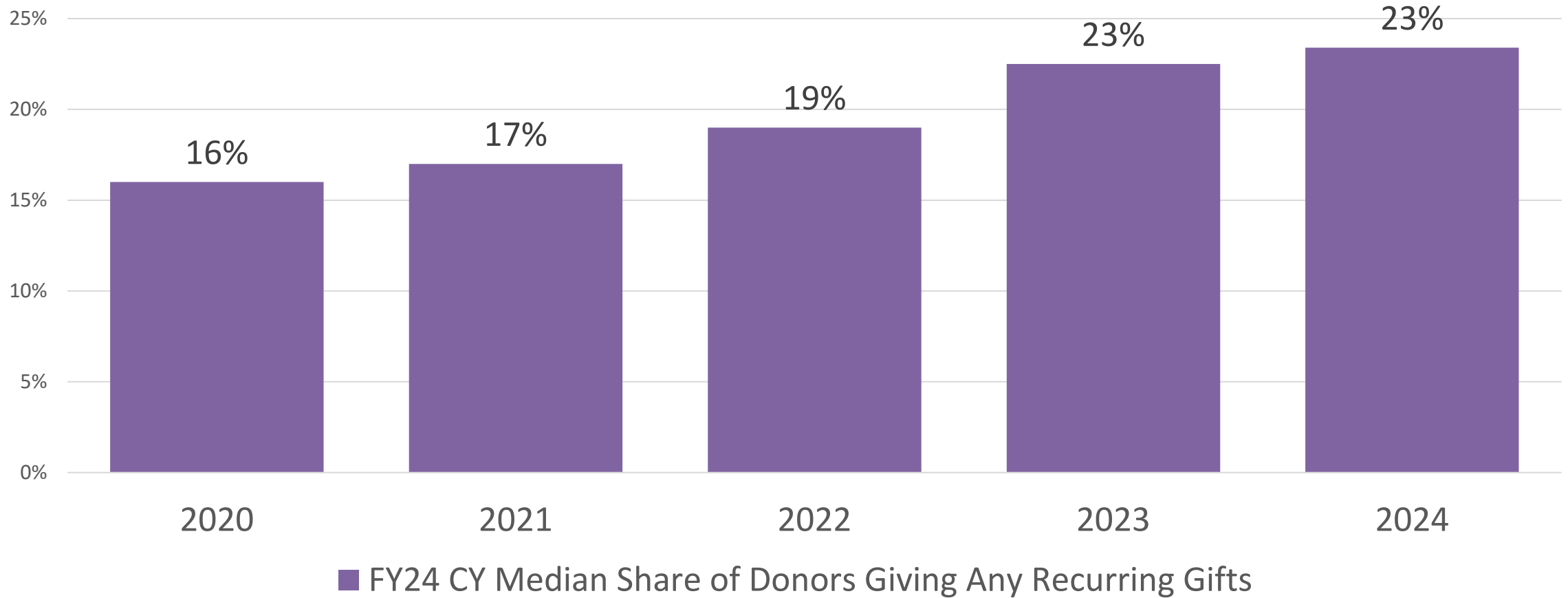
## Trend 2: Donor **Value** Continues to Rise *Across Sectors*



*donorCentrics™*  
**Sustainer  
Summit  
Findings 2020 -  
2024**

# Trend 3: Increased Recurring Gifts Giving

*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024



# Growth of Recurring Populations Over Time

*donorCentrics™* Sustainer Summit Findings

16%

Median % of total donors  
giving recurring gifts in FY20

26%

Median % of total revenue  
from recurring gifts in FY20



23%

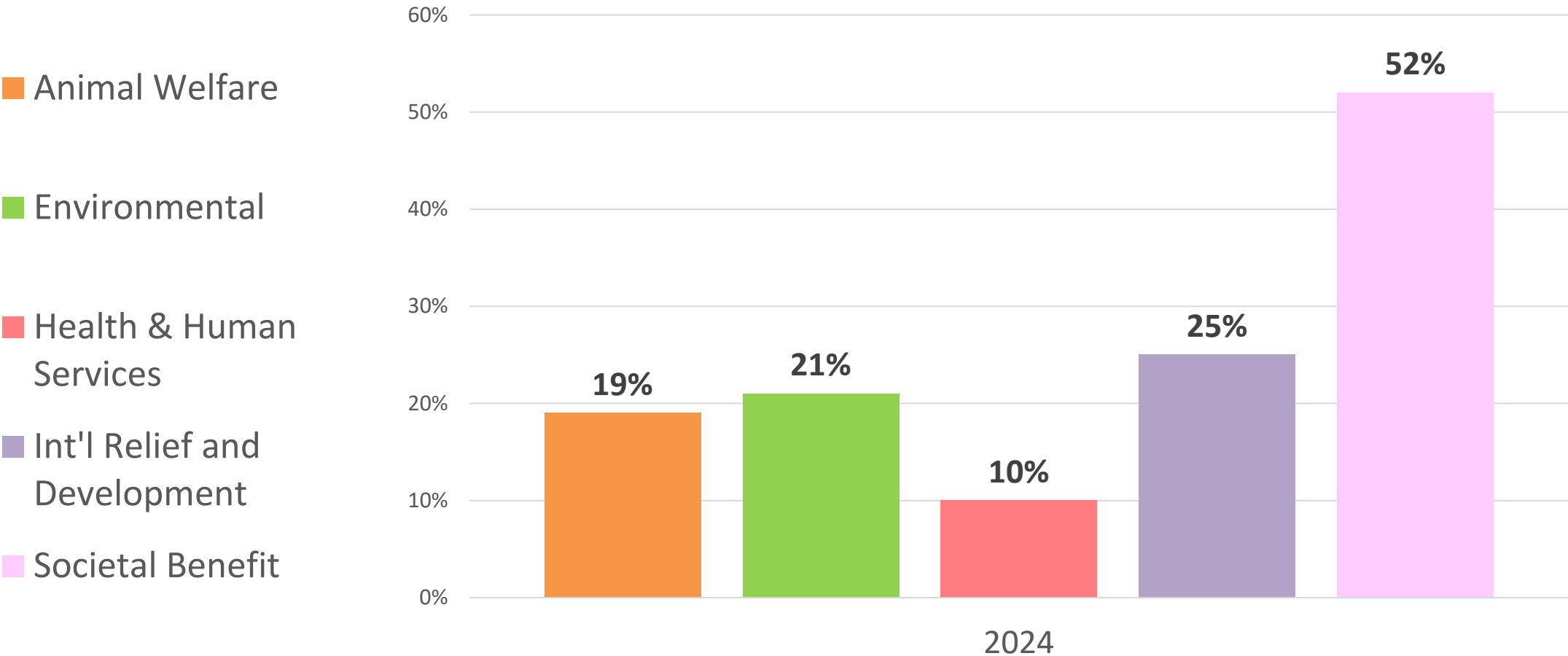
Median % of total donors  
giving recurring gifts in FY24

32%

Median % of total revenue  
from recurring gifts in FY24

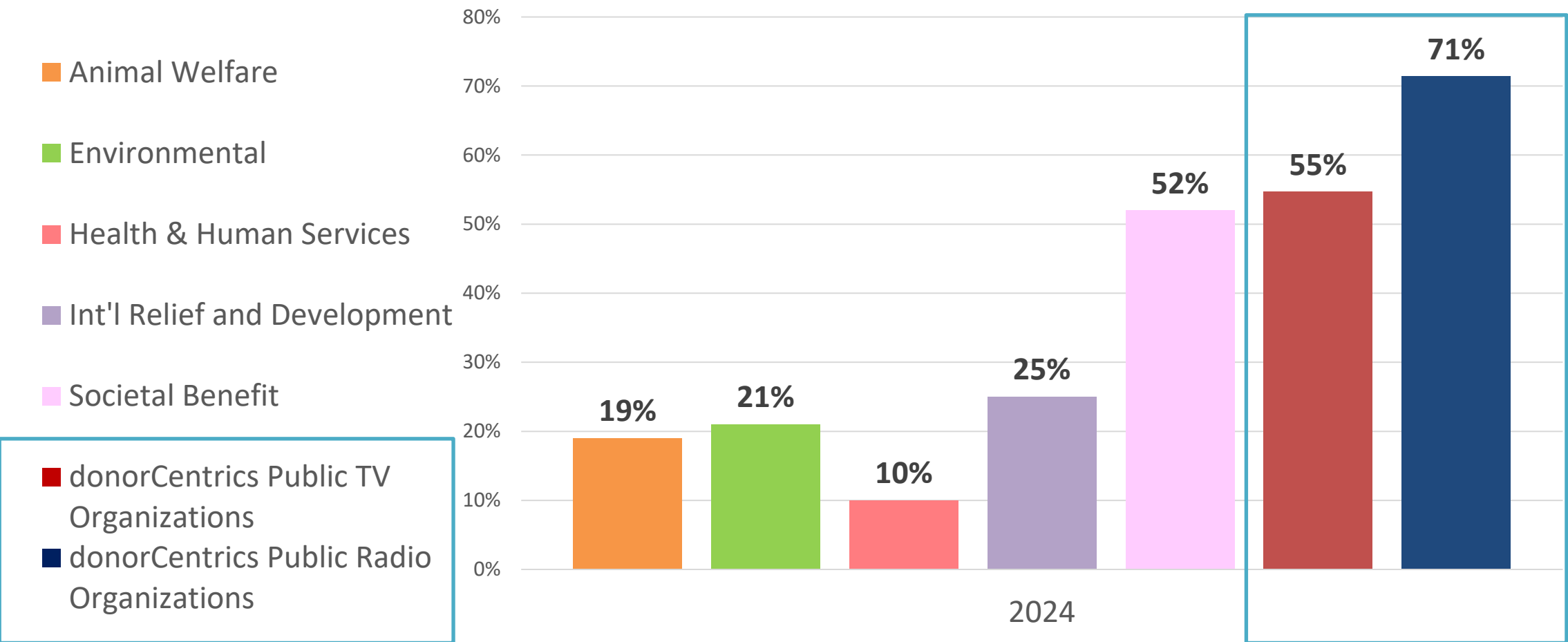
# Sustainer Shares Vary by Sector

FY24 Median % of Donors Giving Any Recurring Gifts: Sustainer Summit by Sector



# Public Broadcasting Continues to Pave the Sustainer Way

FY24 Median % of Donors Giving Any Recurring Gifts: Sustainer Summit by Sector



# Trend 4: Recurring Gifts Resiliency

*donorCentrics*™ Sustainer Summit Findings

↓ -11%

Median Change in Single Gifts  
Donors, 2023 to 2024

↓ -1%

Median Change in Recurring  
Gifts Donors, 2023 to 2024

↓ -1%

Median Change in Single Gifts  
Revenue, 2023 to 2024

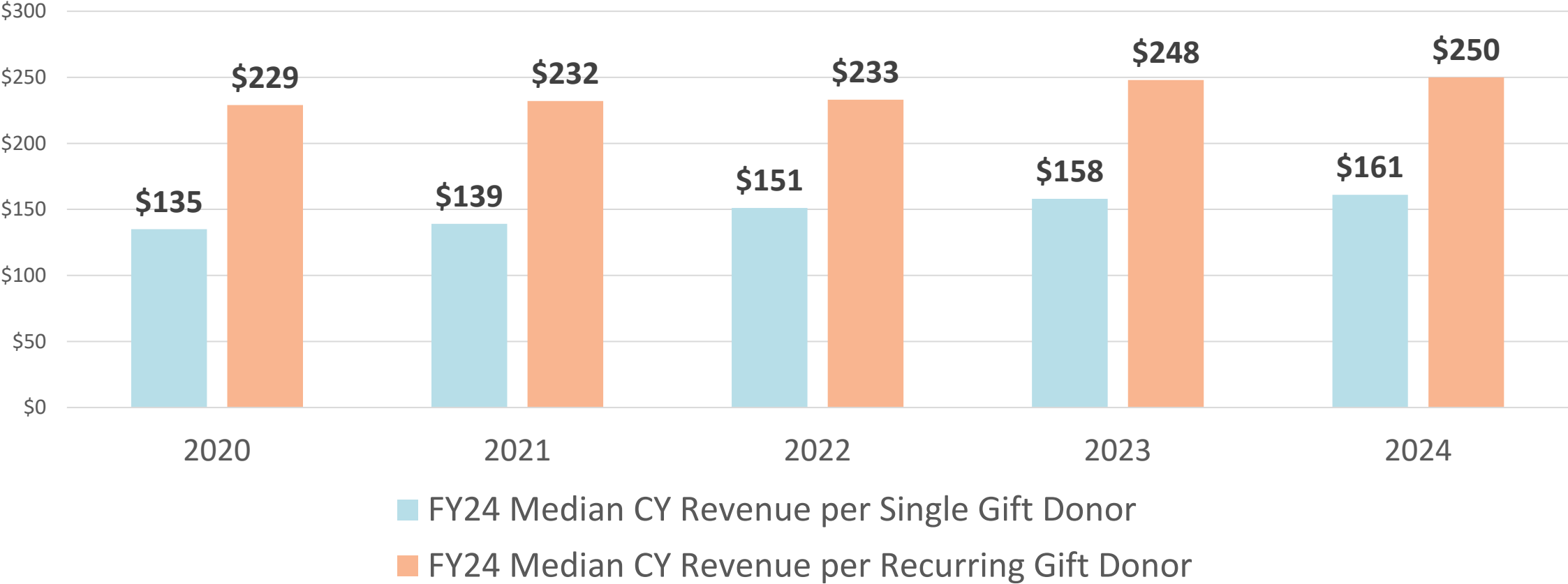
↑ +1%

Median Change in Recurring  
Gifts Revenue, 2023 to 2024



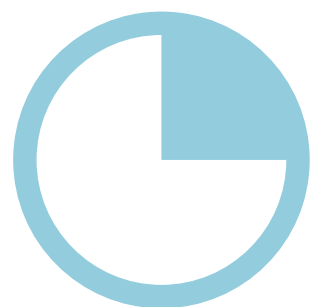
# Single v. Recurring Gifts Value

donorCentrics™ Sustainer Summit  
Findings 2020 - 2024



# Single v. Recurring Gifts Value

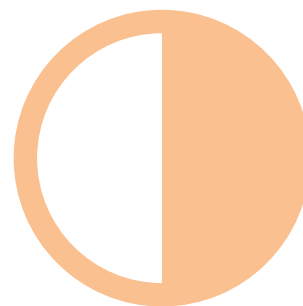
*donorCentrics™* Sustainer Summit Findings



24%

Share of CY Single-Gift Donors Giving \$100+


*Down from FY23*



46%

Share of CY Recurring Gift Donors Giving \$100+


*Up from FY23*

The background is a dark teal color. It features several decorative geometric elements: a large teal diamond in the top-left corner with a white outline; a small purple diamond in the top-center; a teal diamond in the bottom-left; a purple diamond in the bottom-left; a white line forming a peak in the bottom-center; and a large teal diamond in the bottom-right corner with a smaller teal diamond inside it.

# Sustainer Summit New Donor Trends

# Trend 5: Year-Over-Year Acquisition Declines Continue

*donorCentrics™* Sustainer Summit Findings

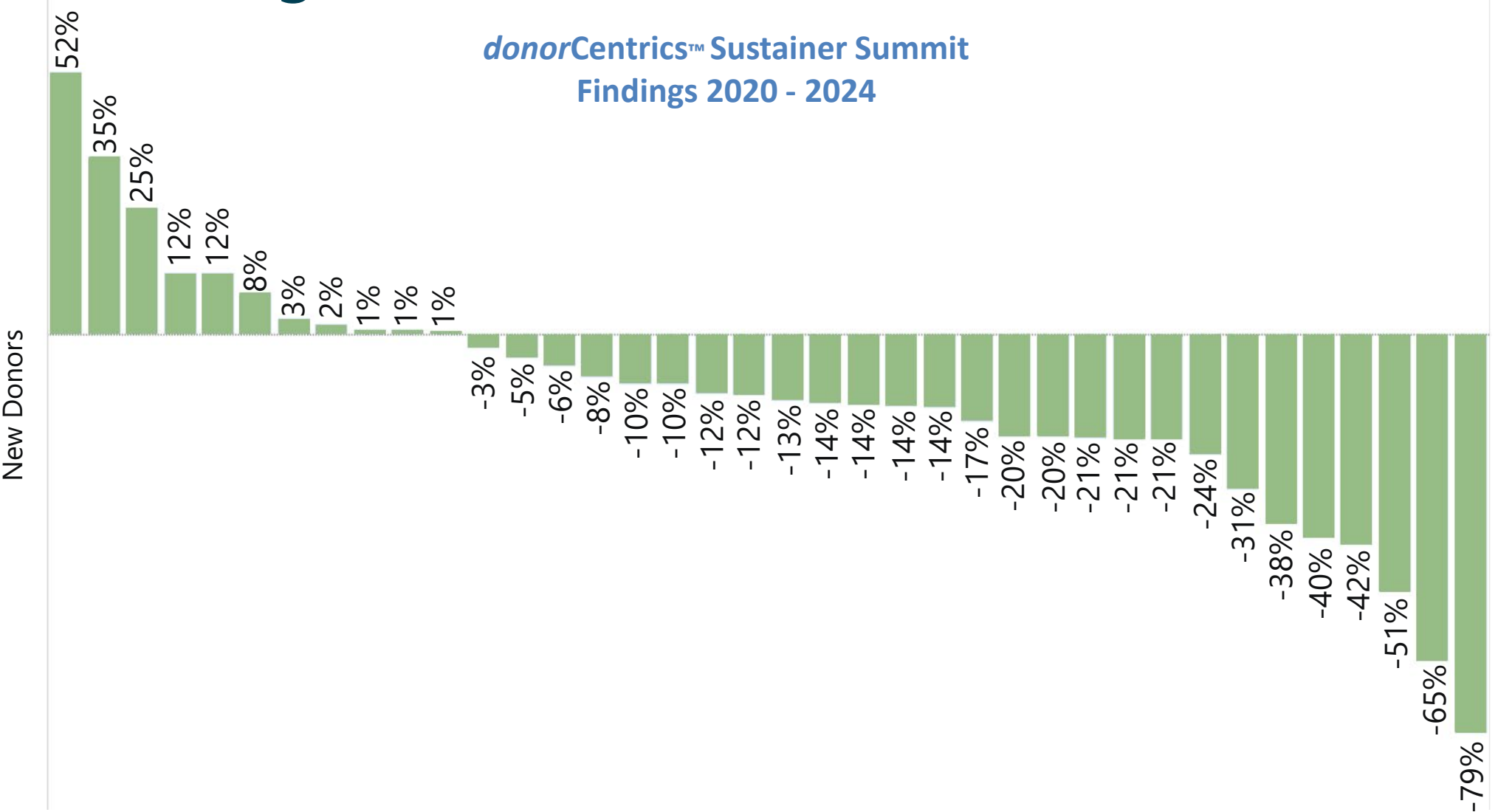
 **-12%**

Median 1-Year  
Change in  
New **Donors**,  
2023 to 2024

 **-10%**

Median 1-Year Change in  
**Revenue** from New  
Donors,  
2023 to 2024

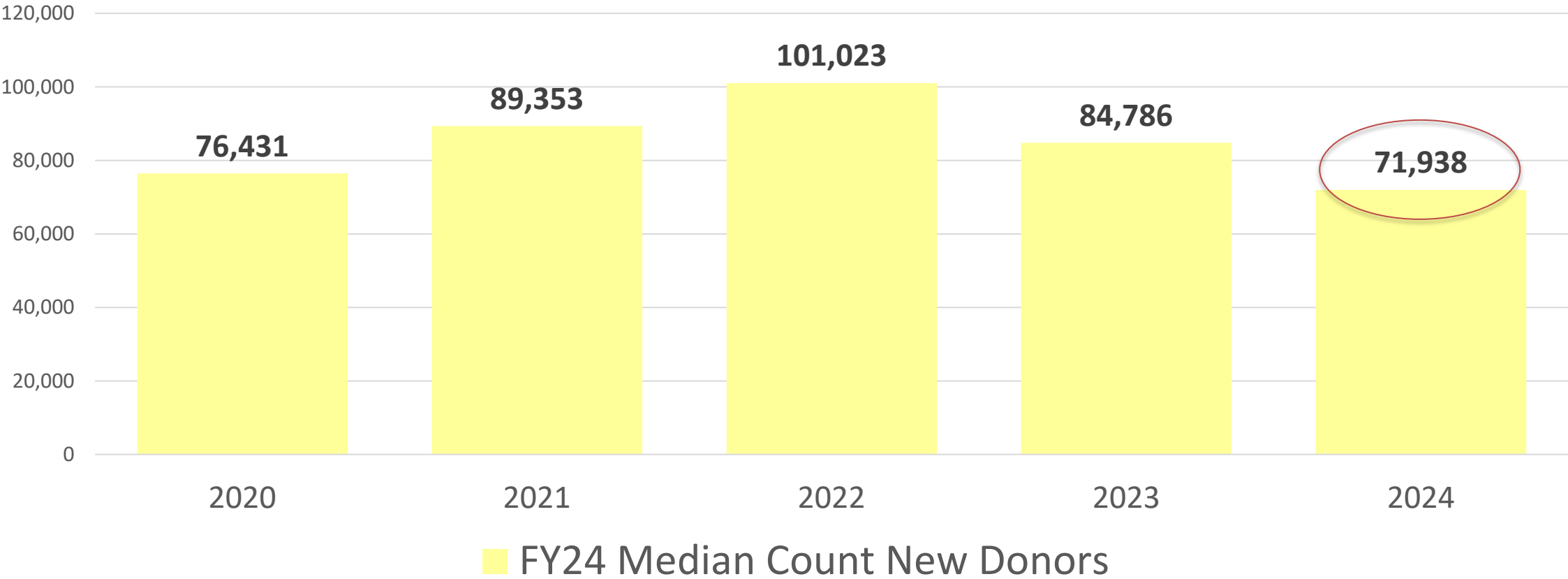
# 1-Year Change in NEW Donor Count



**1-Year Change in New Donors**  
(38 Organizations) (2024)

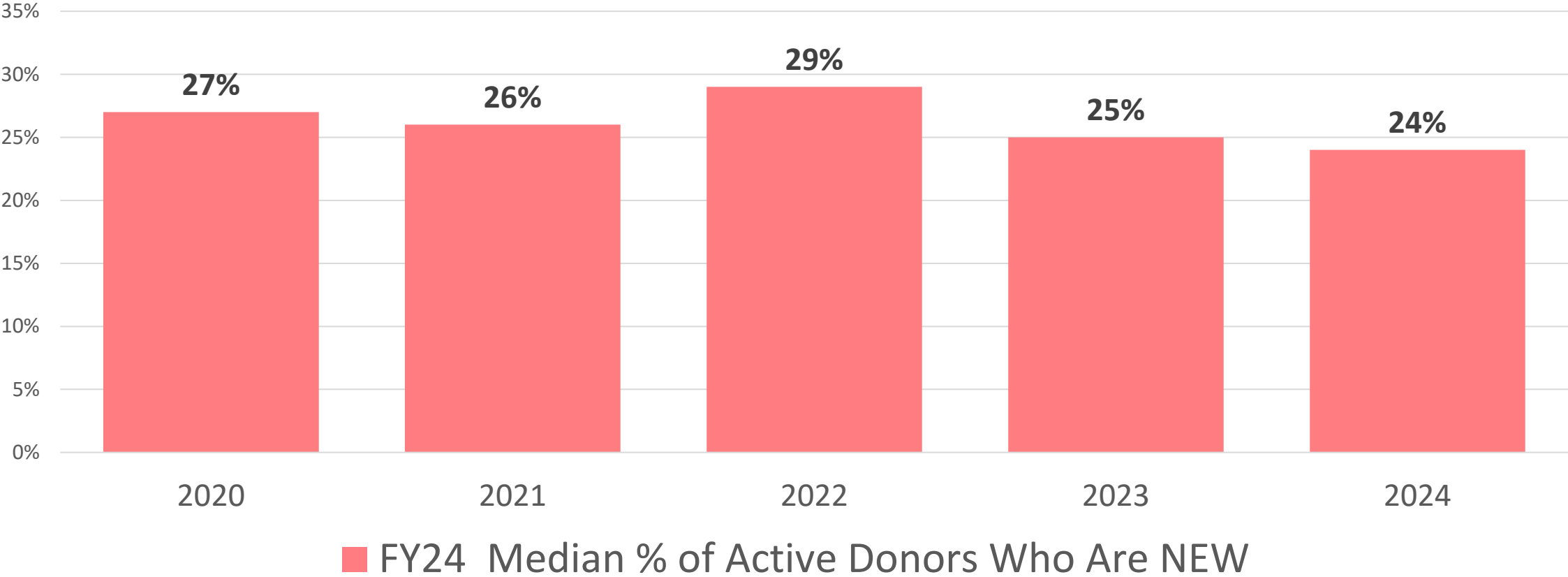
# New Donors Decline in Count in FY24

*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024



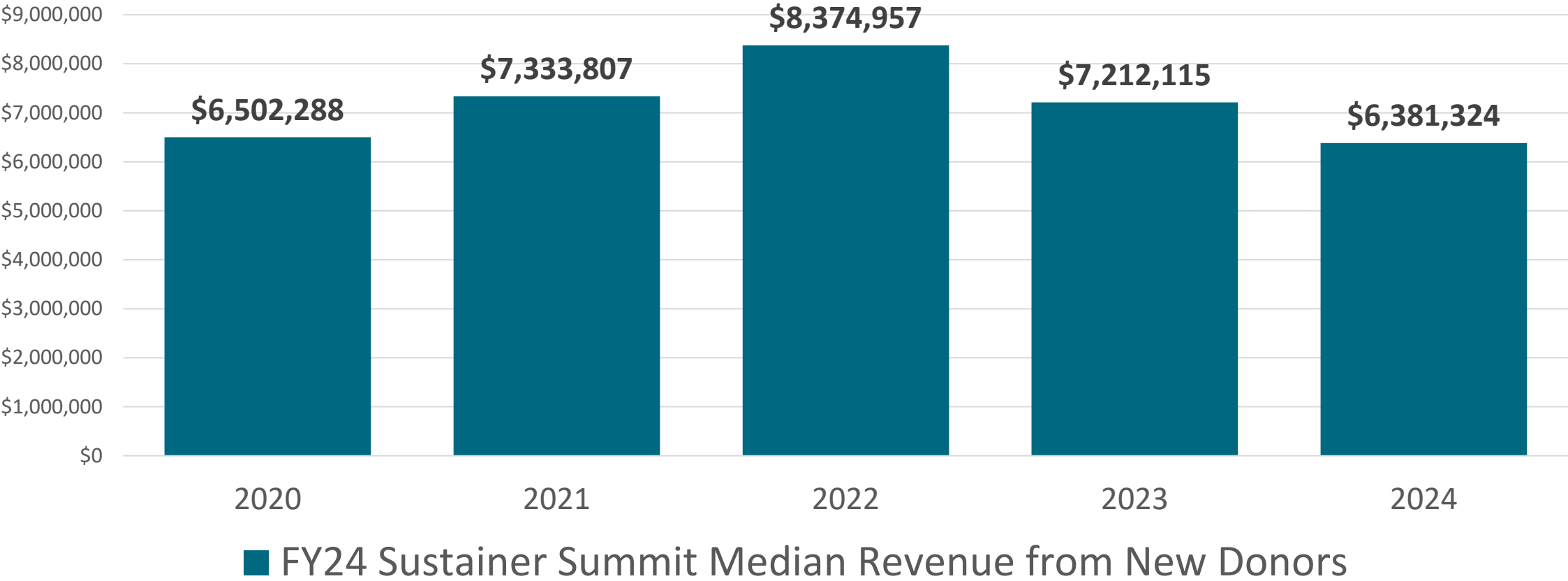
# New Donors Decline in Share in FY24

*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024



# New Donors Decline in Revenue in FY24

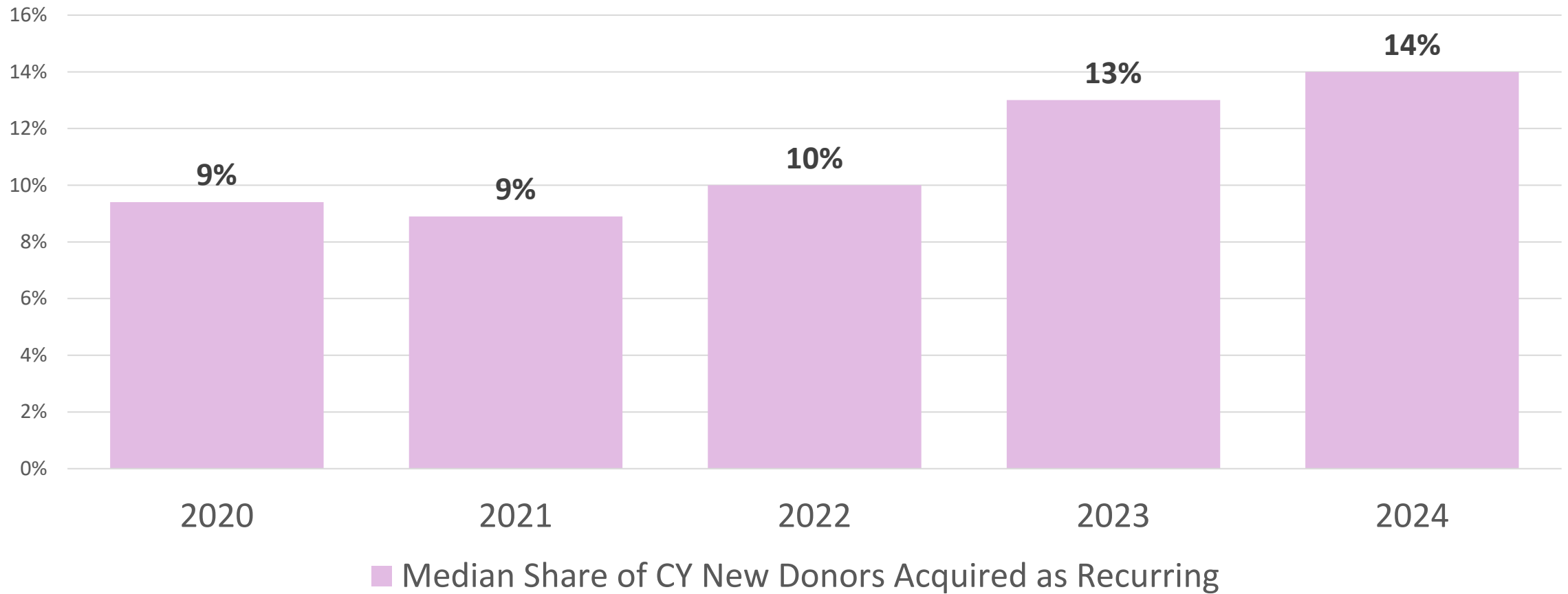
*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024





# Trend 6: Recurring Acquisition Grows

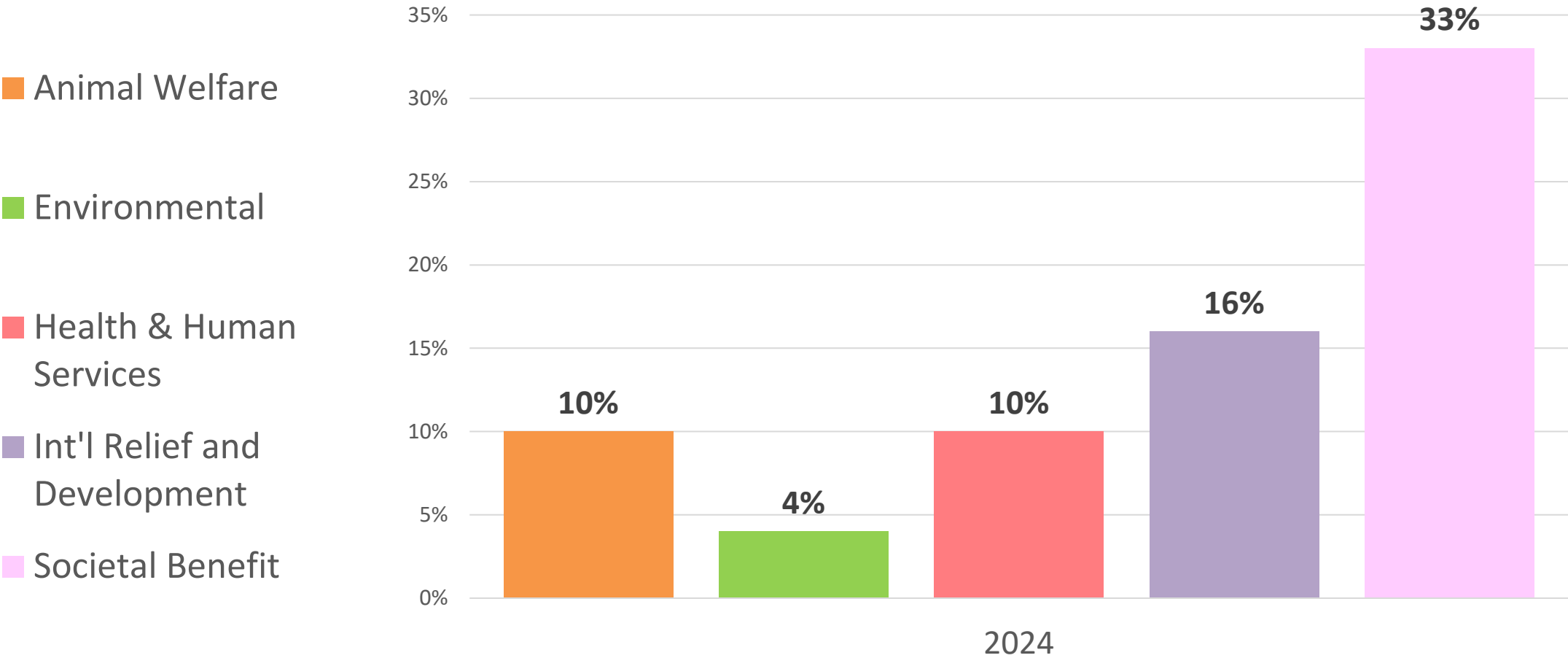
*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024



■ Median Share of CY New Donors Acquired as Recurring

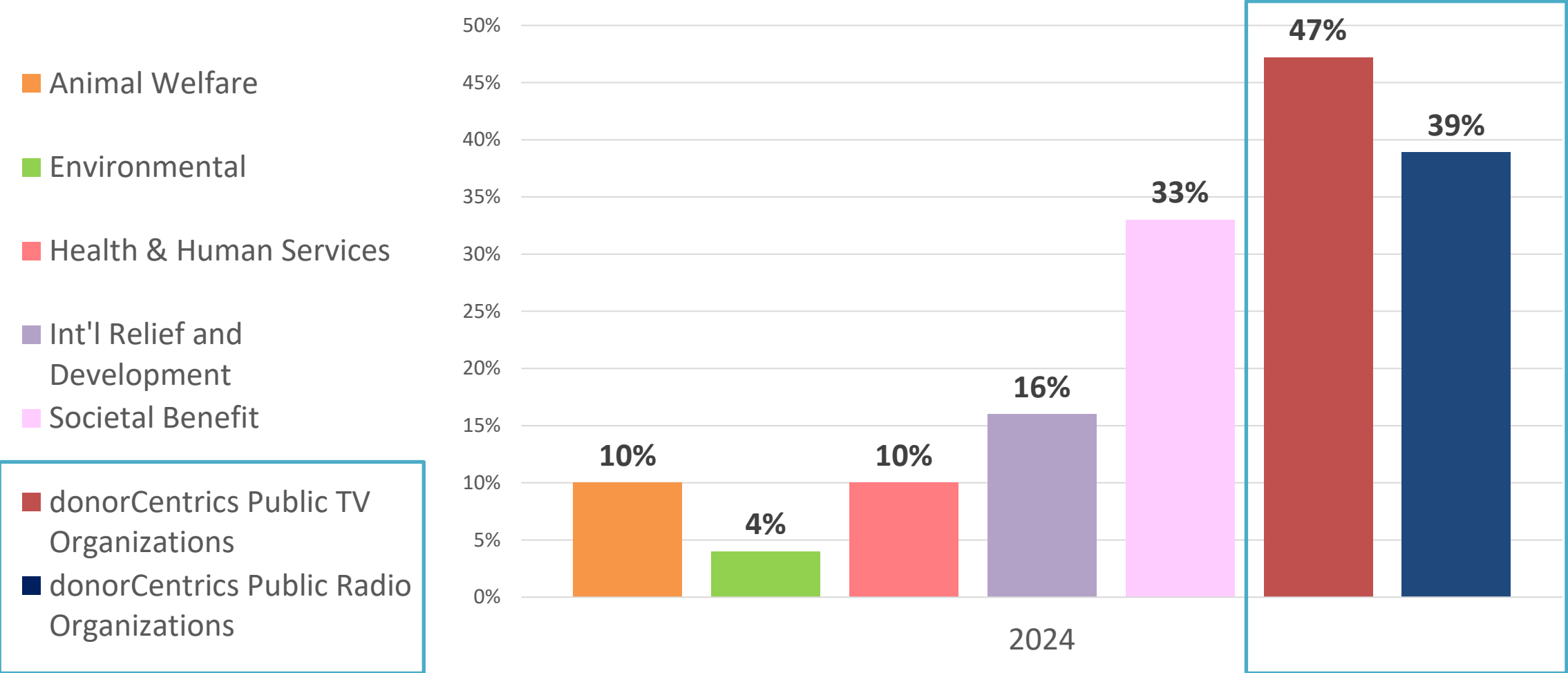
# Recurring Acquisition by Sector

FY24 Median % of NEW Donors Giving Any Recurring Gifts: Sustainer Summit by Sector



# Recurring Acquisition by Sector

FY24 Median % of NEW Donors Giving Any Recurring Gifts: Sustainer Summit by Sector



# Recurring Acquisition by Gift Type

*donorCentrics*™ Sustainer Summit Findings

↓ -12%

Median Change in New,  
Single Gifts Donors

↓ -2%

Median Change in New,  
Recurring Gifts Donors

↓ -14%

Median Change in New,  
Single Gifts Revenue

↓ -3%

Median Change in New,  
Recurring Gifts Revenue

# Recurring Acquisition by Gift Type

*donorCentrics*<sup>™</sup> Sustainer Summit Findings

\$92

Median  
Revenue per  
New, Single  
Donor

\$129

Median  
Revenue per  
New, Recurring  
Donor

# Sustainer Conversion

While acquisition of recurring gifts donors continues to grow for this cohort, especially across Digital channels, the Sustainer Summit experienced **declines in conversion in 2024**.

10

Only 10 of 38 organizations **increased** in the number of Single Gifts Donors who converted to recurring for the first time from 2023 to 2024

25%

25% of converted donors converted through Web/Digital methods

11%



The number of Single Gifts Donors who converted to recurring declined a median 11% from 2023 to 2024.

2%

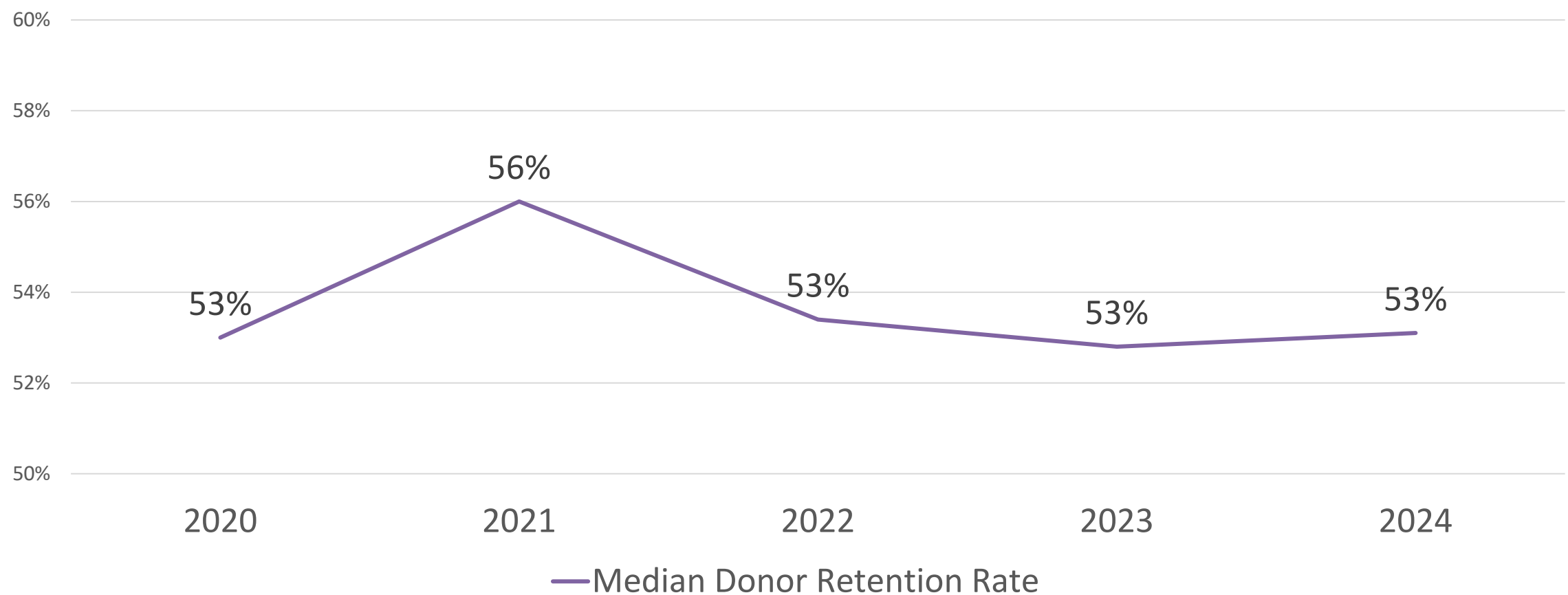
2% of converted donors converted through SMS Marketing, as Sustainer Summit programs expand their SMS presence.

The background is a dark teal color. It features several decorative geometric elements: a large teal diamond in the top-left corner with a white outline; a small purple diamond in the top-center; a teal diamond in the bottom-left; a small purple diamond in the bottom-left; a white line forming a peak in the bottom-center; and a large teal diamond in the bottom-right corner with a smaller teal diamond inside it.

# Sustainer Summit Donor Retention Trends

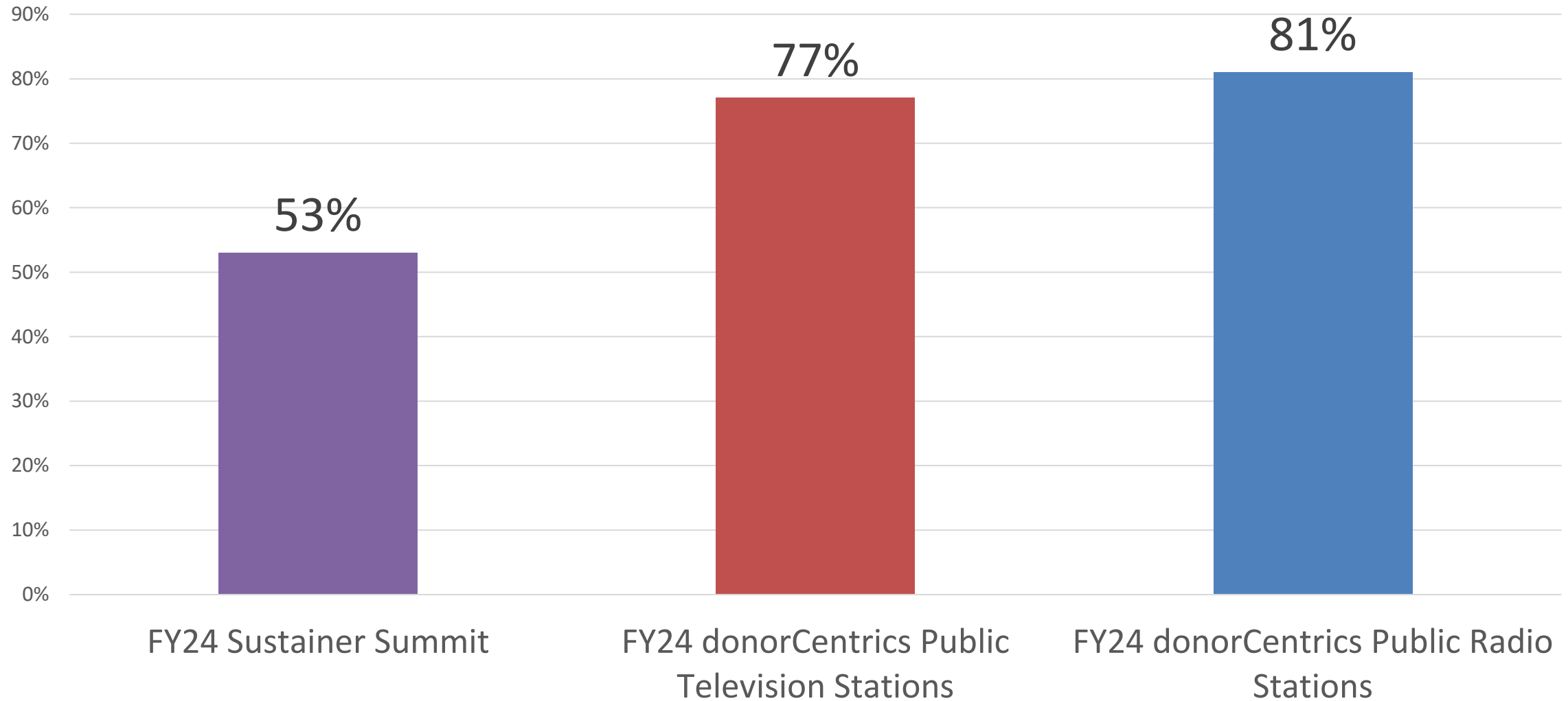
# Trend 6: Annual Donor Retention Flattens

*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024

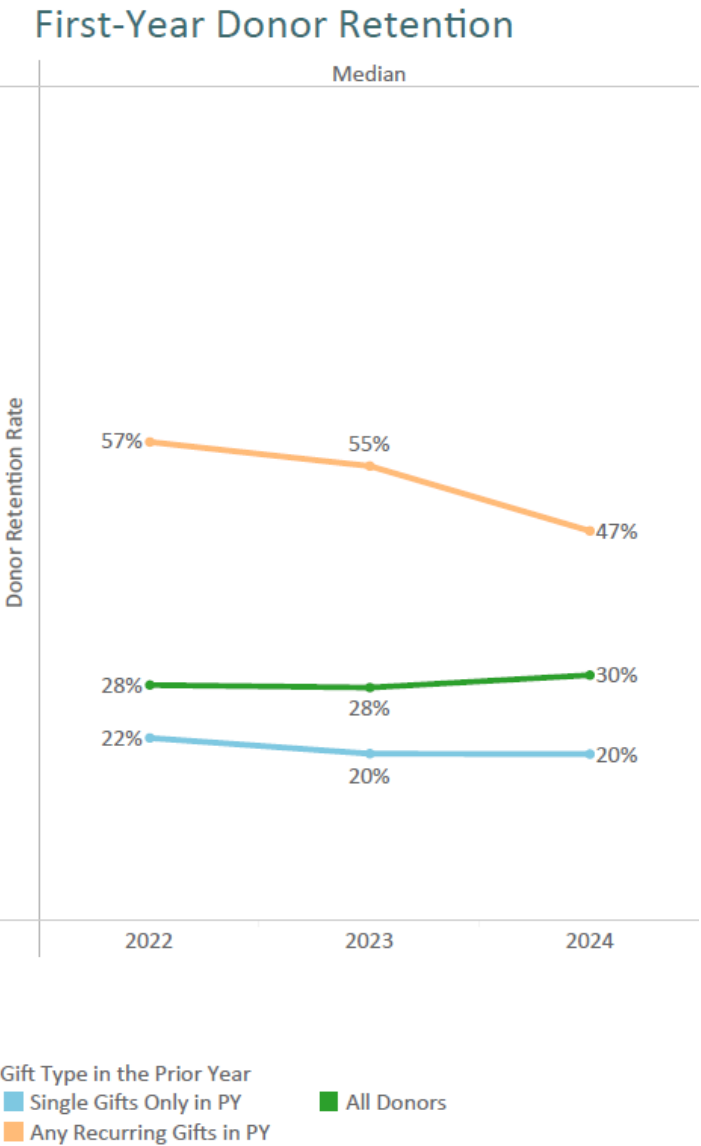




# Annual Donor Retention Rate



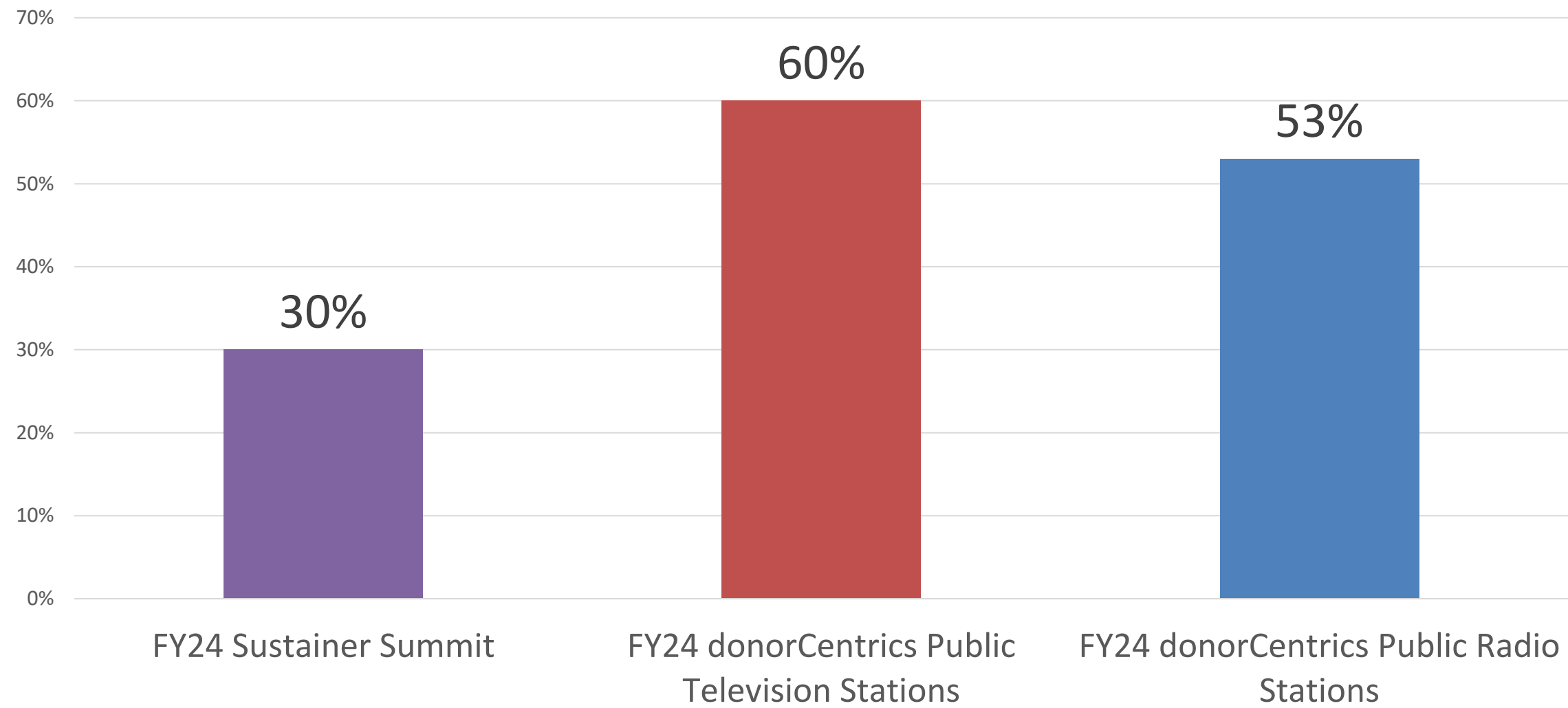
# Donor Retention by Loyalty and Gift Type



donorCentrics™ Sustainer Summit  
Findings 2020 - 2024

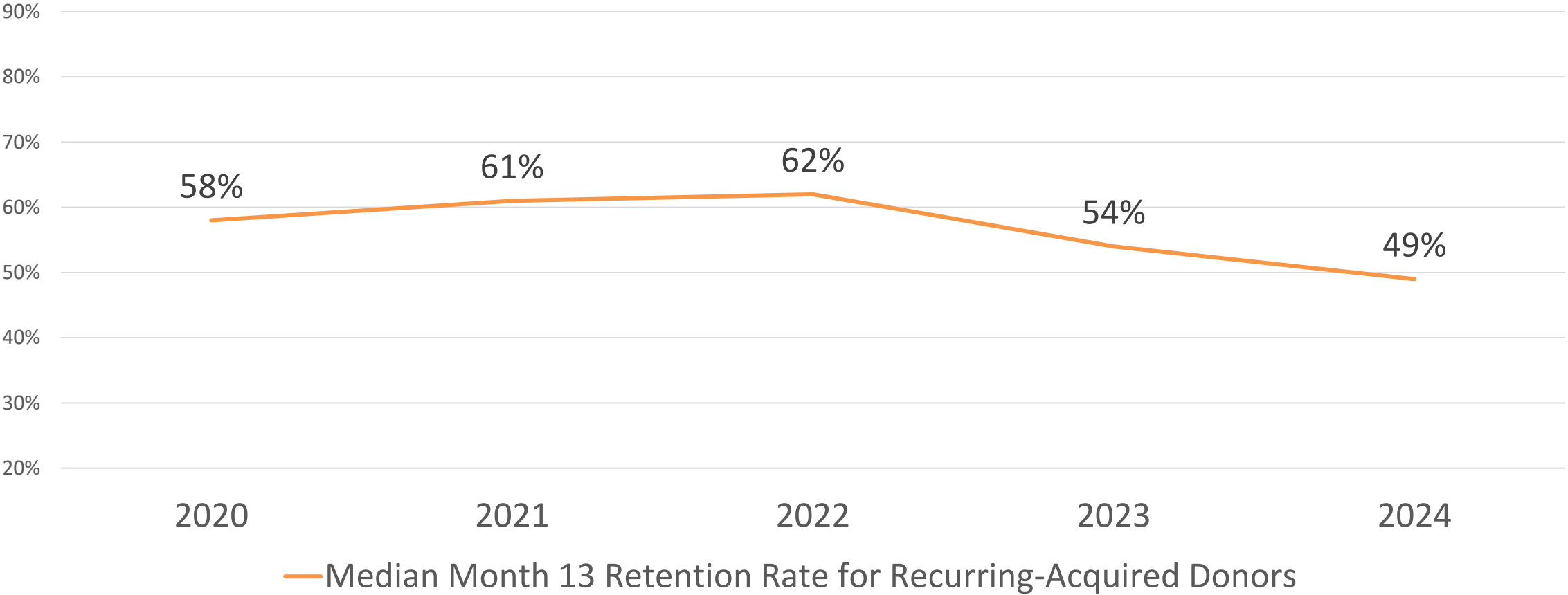
- New Donor retention **lifted** for this cohort at the median.
- New, Single flat from 2023
- New, Recurring takes a steep decline from 2023

# Overall **New** Donor Retention

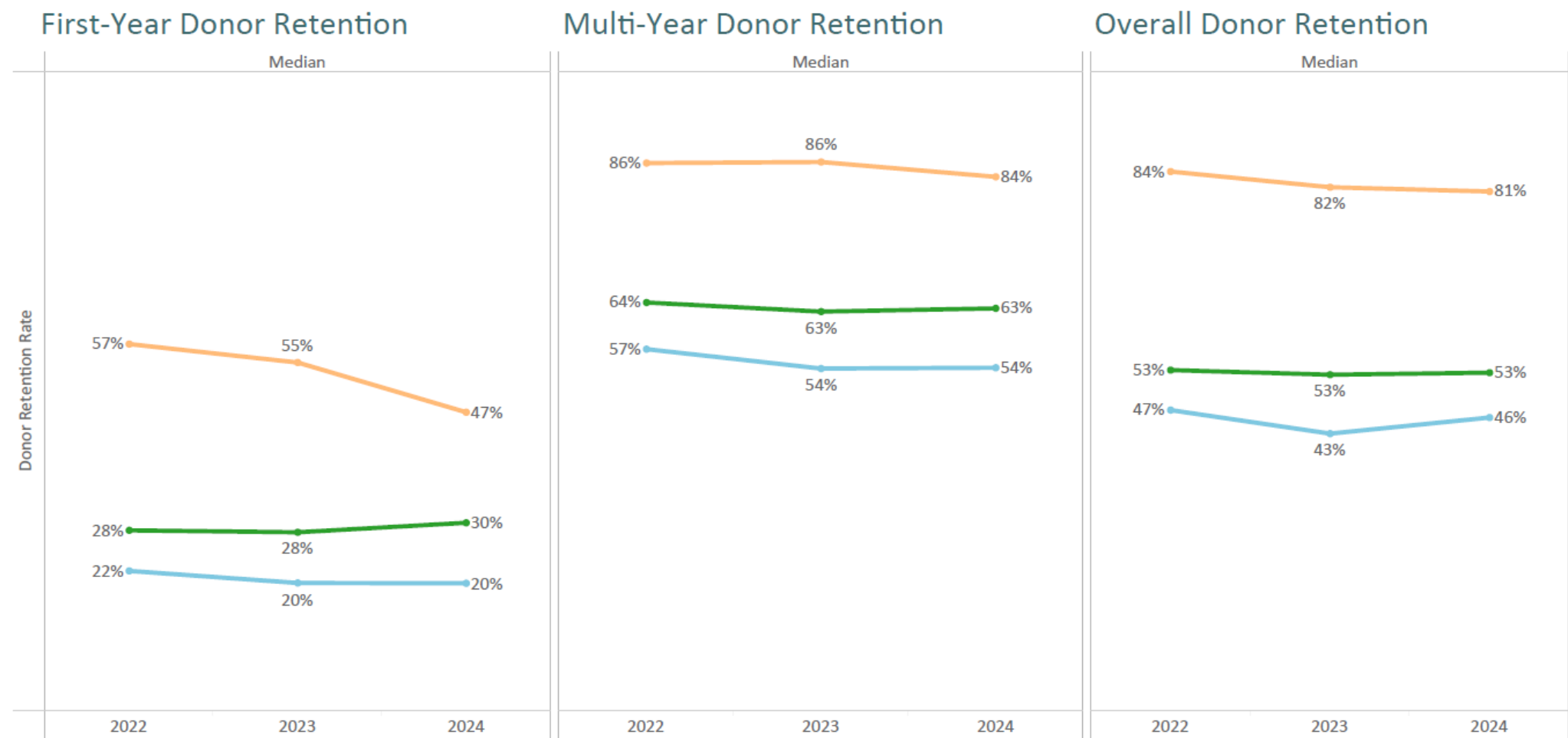


# NEW Sustainer Retention – Month 13

*donorCentrics™ Sustainer Summit*  
Findings 2020 - 2024



# Donor Retention by Loyalty and Gift Type



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

Gift Type in the Prior Year

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

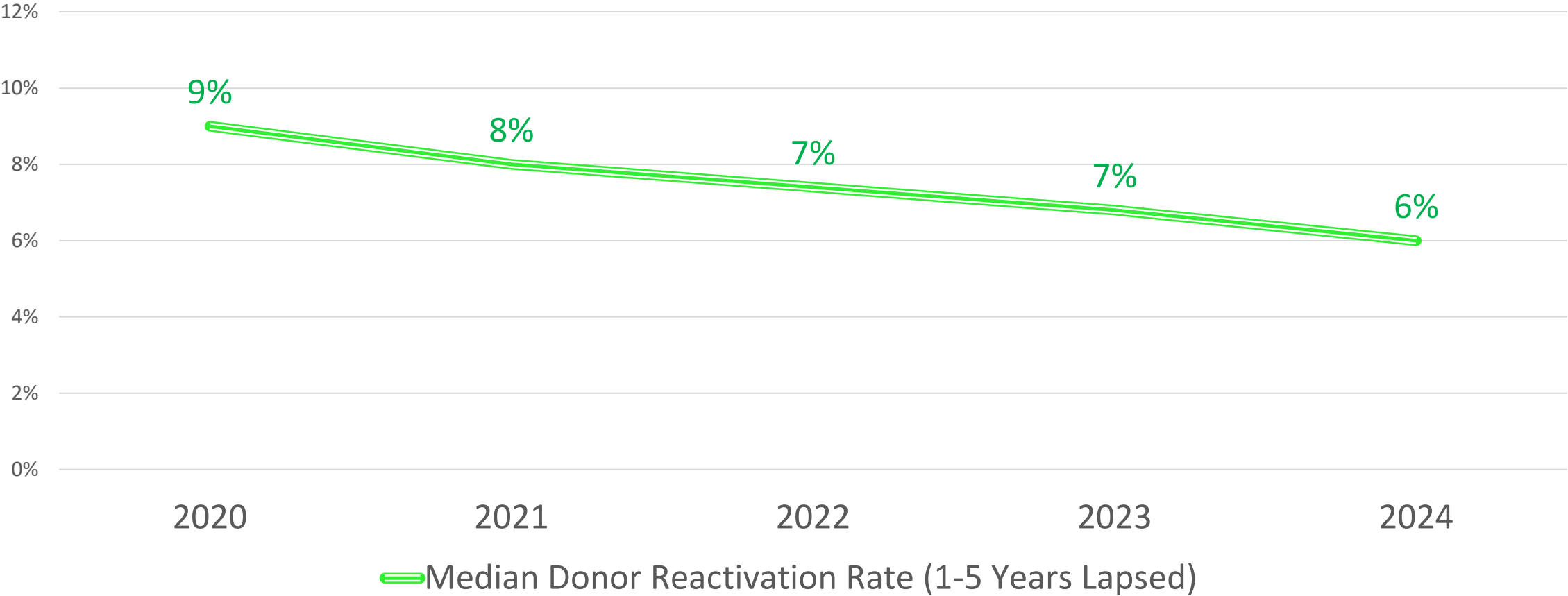
The background is a dark teal color. It features several decorative geometric elements: a large teal diamond in the top-left corner with a white outline; a small purple diamond in the top-center; a teal diamond in the bottom-left; a purple diamond in the bottom-left; a white outline of a triangle in the bottom-center; and a large teal diamond in the bottom-right corner with a smaller teal diamond inside it.

# Sustainer Summit

## Lapsed Donor Reactivation

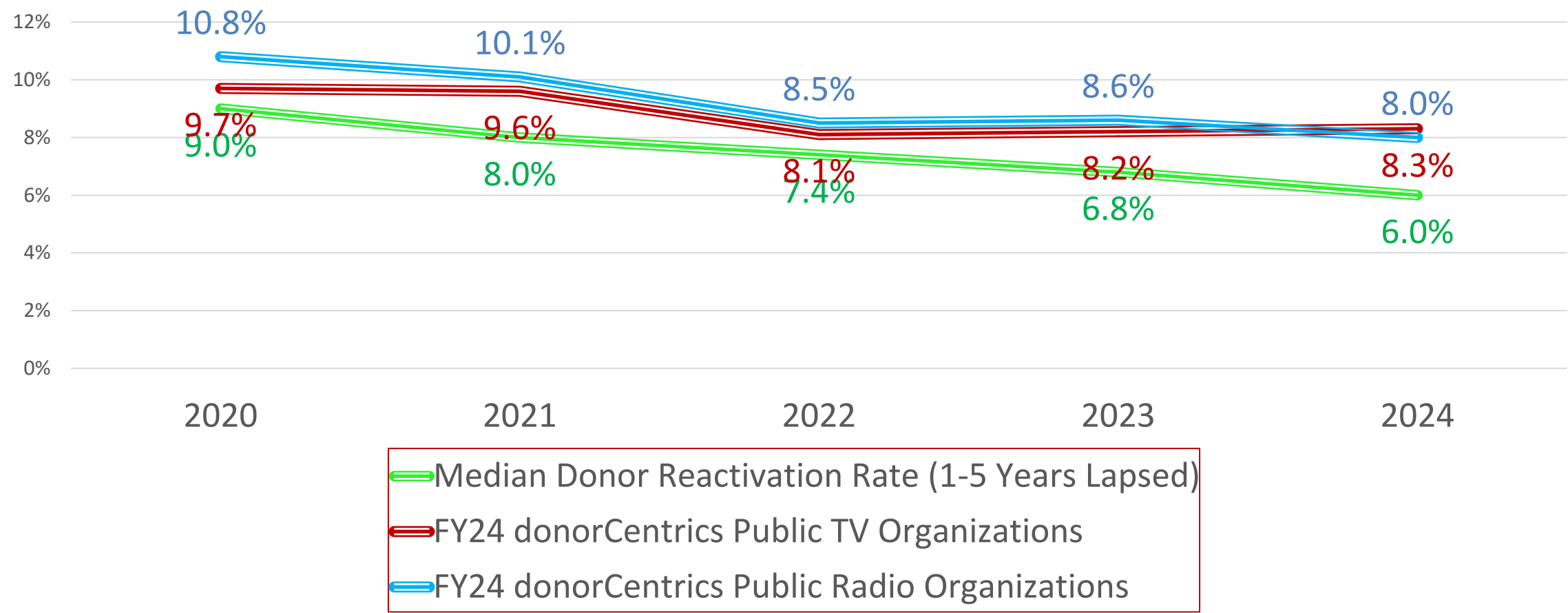
# Trend 7: Declining Return of Lapsed Donors

*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024



# Trend 7: Declining Return of Lapsed Donors

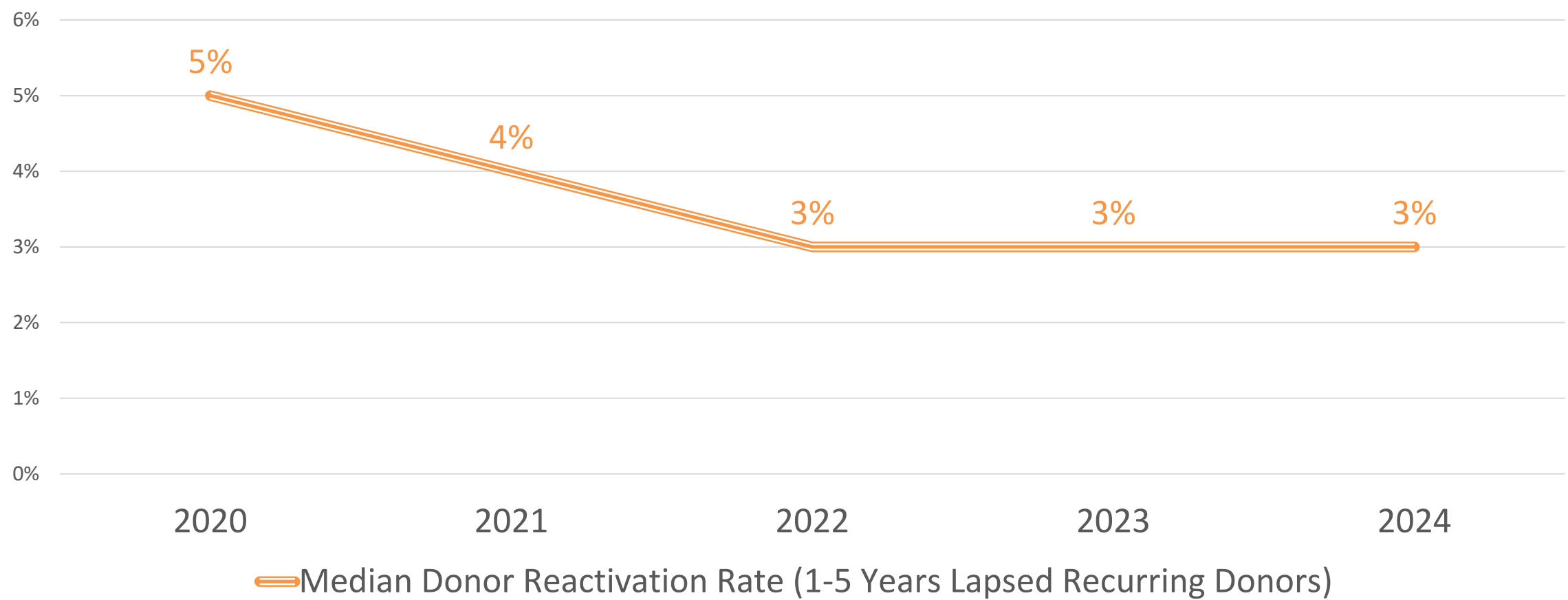
*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024





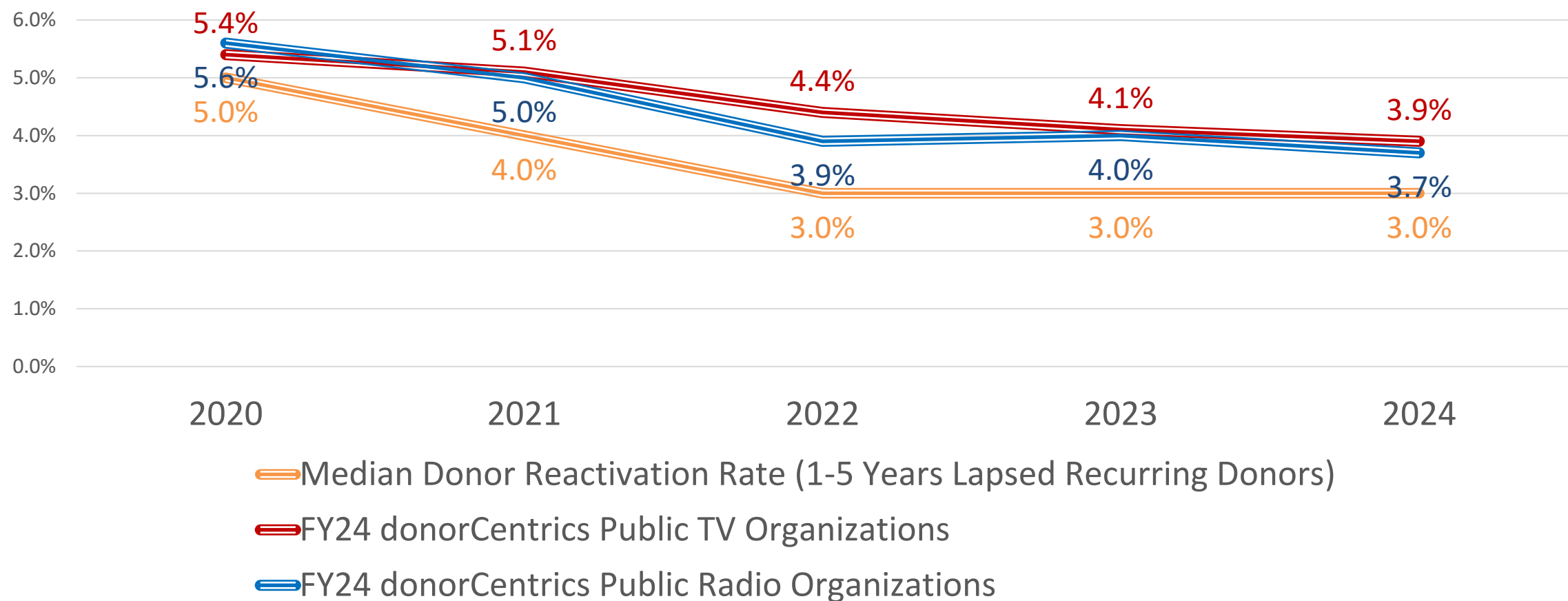
# Recurring Donor Reactivation

*donorCentrics™* Sustainer Summit  
Findings 2020 - 2024



# Recurring Donor Reactivation

donorCentrics™ Sustainer Summit  
Findings 2020 - 2024

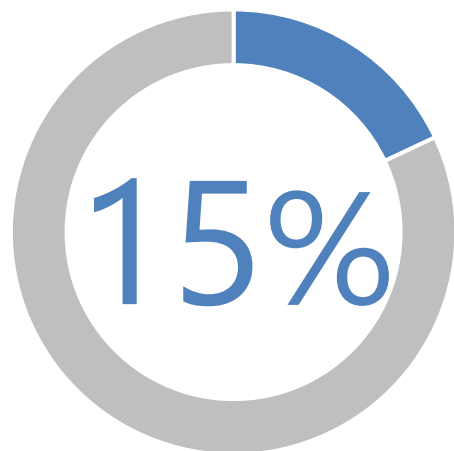


The background is a dark teal color. It features several decorative geometric elements: a large teal diamond in the top-left corner with a white outline; a small blue-to-purple gradient diamond in the top-center; a teal diamond in the bottom-left; a purple diamond in the bottom-left; a white line forming a peak shape in the bottom-center; and a cluster of overlapping teal and blue diamonds in the bottom-right.

# Sustainer Summit Long-Term Donor Value

# Long-Term Value: Donors Acquired in 2022

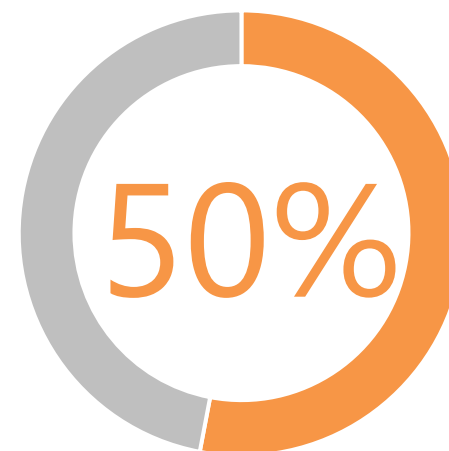
*donorCentrics*™ Sustainer Summit Findings



Percent of 2022 **Single Gift-Acquired** Donors  
Still Giving in 2024

\$161

Median **Lifetime** Revenue in FY24 per Donor  
Acquired with a Single Gift in FY22



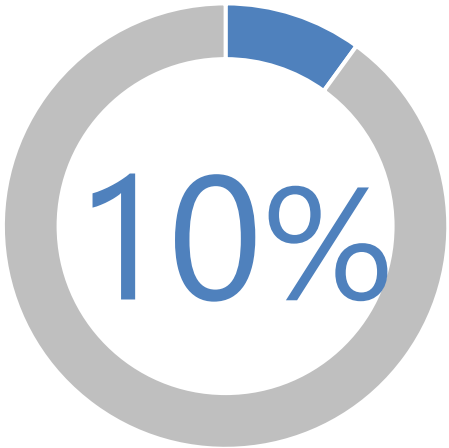
Percent of 2022 **Recurring Gift-Acquired**  
Donors Still Giving in 2024

\$405

Median **Lifetime** Revenue in FY24 per Donor  
Acquired with a Recurring Gift in FY22

# Long-Term Value: Donors Acquired in 2022

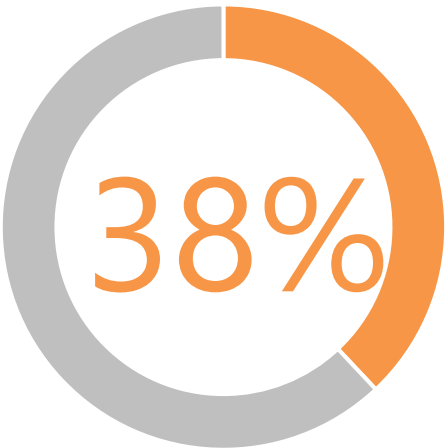
donorCentrics™ Sustainer Summit Findings



Percent of 2020 **Single Gift-Acquired** Donors  
Still Giving in 2024

\$196

Median **Lifetime** Revenue in FY24 per Donor  
Acquired with a Single Gift in FY20



Percent of 2020 **Recurring Gift-Acquired** Donors  
Still Giving in 2024

\$616

Median **Lifetime** Revenue in FY24 per Donor  
Acquired with a Recurring Gift in FY20

# Sustainer Summit Trends – FY24

- ❖ Donor counts and revenue from donors continued a decline across individual giving in 2024
- ❖ At the same time, donor **value** continues to increase – for the Sustainer Summit cohort and across sectors
- ❖ Acquisition has declined from **2020-2022 peaks** for most benchmarking participants
  - ❖ Acquiring new donors directly as recurring donors is the key to driving significant gains in recurring donor counts
- ❖ Multi-Year Sustainers continue to bring long-term stability through retention and increased value.
- ❖ Growth in mid- and major-level donors
  - ❖ DAF, IRA giving continues to rise

# What We're Hearing

## *Digital Acquisition of Sustainers is Critical*

The data shows: Recurring Donor populations continue to grow and, in years of declined acquisition, provide long-term reliable revenue. Across the Sustainer Summit, organizations are expanding digital outreach and utilizing Sustainer-First acquisition.

## *New Sustainer Approaches*

Outside of Public Media, Sustainer-focused organizations are beginning to experiment with Annual Sustainer programs. New **channels** are also a priority – from influencer-led to in-person (Door-to-Door and Face-to-Face canvassing)

## *Fundraising like Public Media*

As other organizations are seeing federal grant funding stripped under a new Presidential Administration, many Sustainer Summit participants are having to quickly pivot and focus solely on **individual** giving and look to lessons from Public Media organizations.

# Thank You!

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Please contact me with thoughts or questions at any time:

Meghann Batchelor

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