



Understanding Monthly Sustainers

Presented By: Alexa Langford, One & All
Thursday, September 30, 2021 | 2:00 – 3:00 p.m.



A little housekeeping...



We're recording this webinar!

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



Feel free to ask questions!

Use the Questions chat box to ask your questions. We will have a Q&A session at the end of the presentation.



We will be live-tweeting!

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**Performance Marketing Agency
for Social Good**

Today's Speaker



Alexa Langford | Vice President, Giving Sciences at One & All

Alexa hails from Atlanta, GA, and has been with One & All for almost 14 years. She leads a diverse group of analysts who use market research and data science to further the missions of social good organizations.

She's proud knowing that her work is going towards helping men, women, children, and animals in her community and around the world. Alexa's specialties are developing talent, complex multi-channel analyses, predictive modeling, and generating actionable insights for clients and programs.



Unpacking Sustainers

Vol 1. Understanding Monthly Sustainers | September 30, 2021

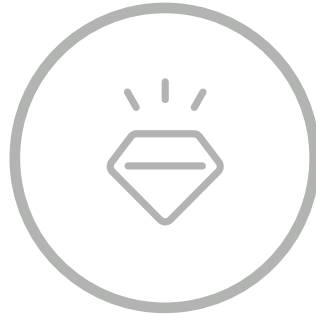
PASSION LED US HERE

Objective

UNPACKING SUSTAINERS:



WHO ARE THEY?



WHY ARE THEY VALUABLE?



**HOW DO THEY GIVE TO
SOCIAL GOOD ORGS?**

/sə'stān/ :

to continue or be prolonged for an **extended period or without interruption**

sustaining donation :

a sustaining gift is a recurring donation of any amount made weekly, monthly, or annually; for social good organizations, **the most common sustaining donation cadence is monthly**

The terms **sustainer**, **monthly**, and **recurring** are used to refer to these supporters. While in the industry we may use the phrase *sustainer*, most donors are more familiar with the term *monthly*.

Our Approach



BEHAVIORAL DATA

donor transactions



ATTITUDINAL & DEMOGRAPHIC DATA

self-reported survey data

SECTION 1

Who are sustainers?



1/ AVERAGE AGE

Monthly: 43.1

Non-Monthly: 49.8



2/ HHI > \$100,000+

Monthly: 32.1%

Non-Monthly: 18.5%



3/ MEDIAN ANNUAL DONATIONS

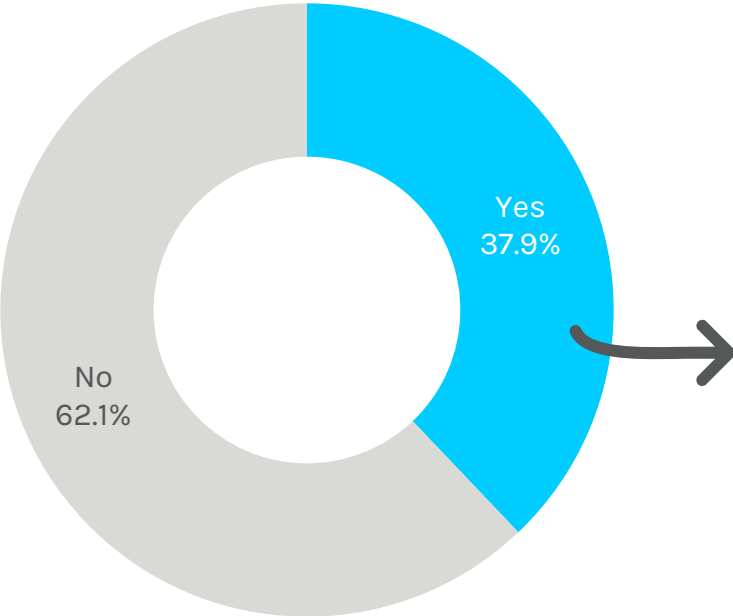
Monthly: \$400

Non-Monthly: \$100

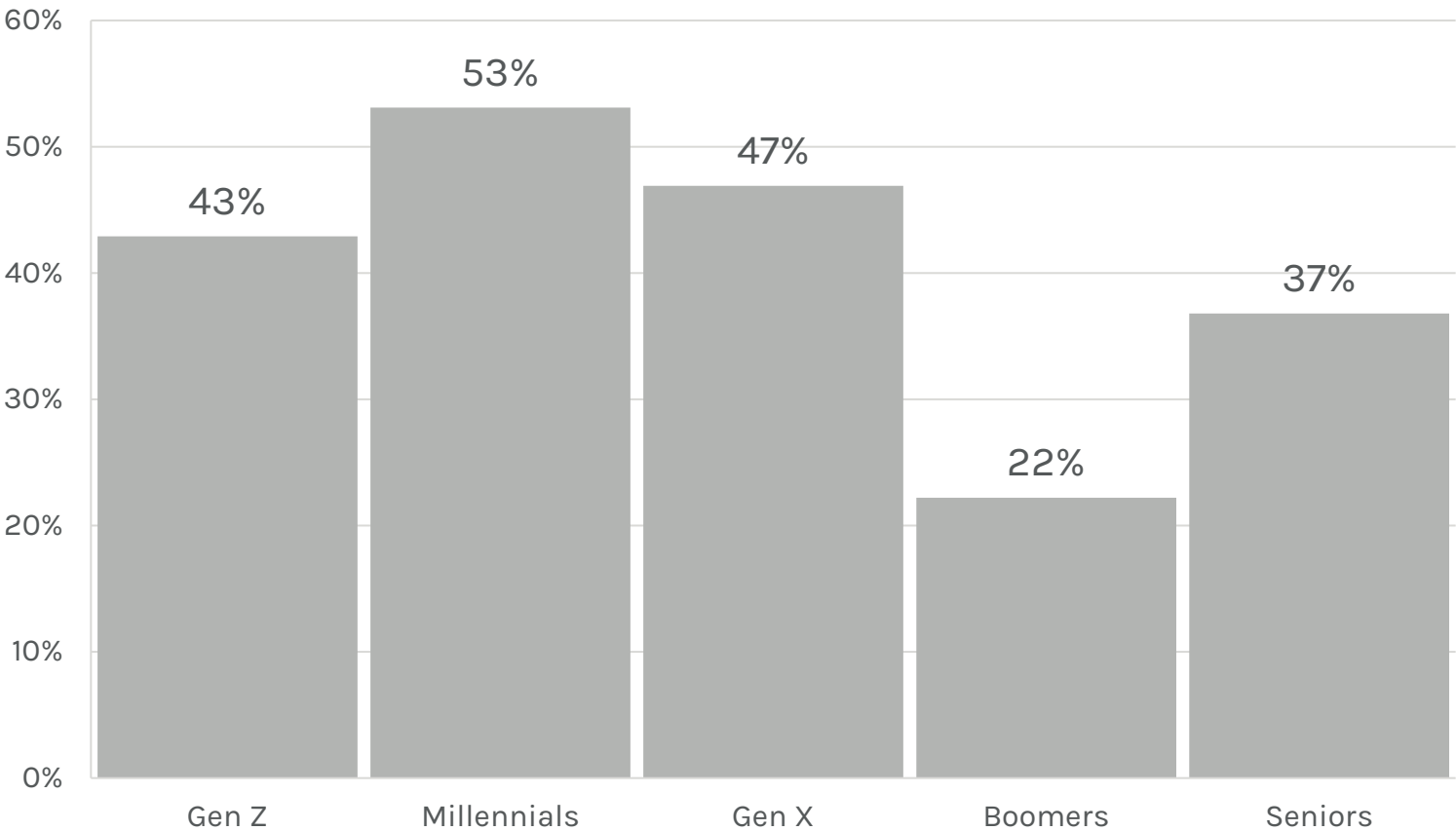
MONTHLY DONORS ARE YOUNGER, HAVE HIGHER INCOME, AND ARE MORE ENGAGED COMPARED TO THEIR NON-SUSTAINING CHARITABLE PEERS.

Monthly Giving

OVERALL



BY GENERATION



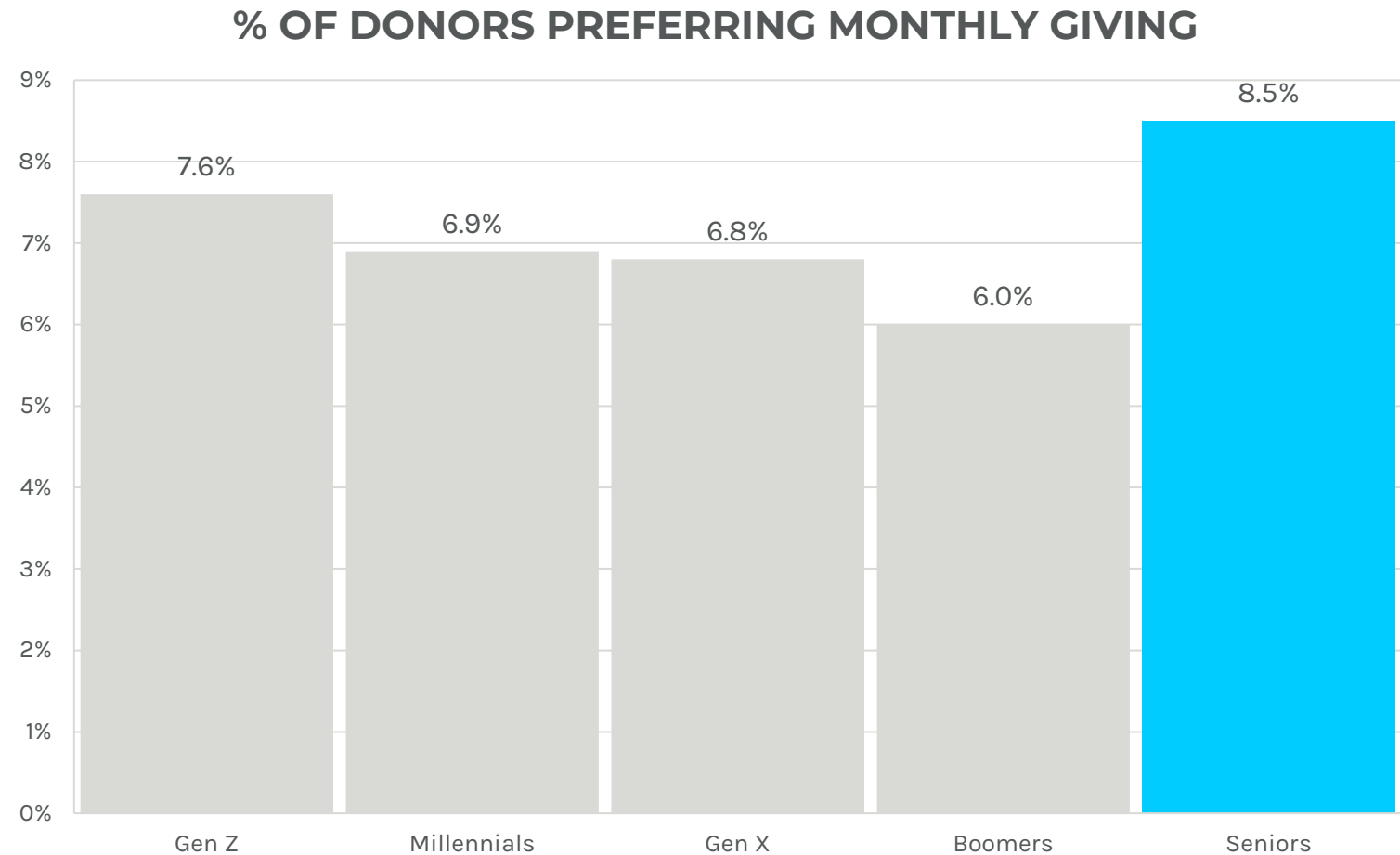
Source: US National Study, April 2021. Base: U.S. monthly donors, n=511.

Monthly Giving Preference by Generation



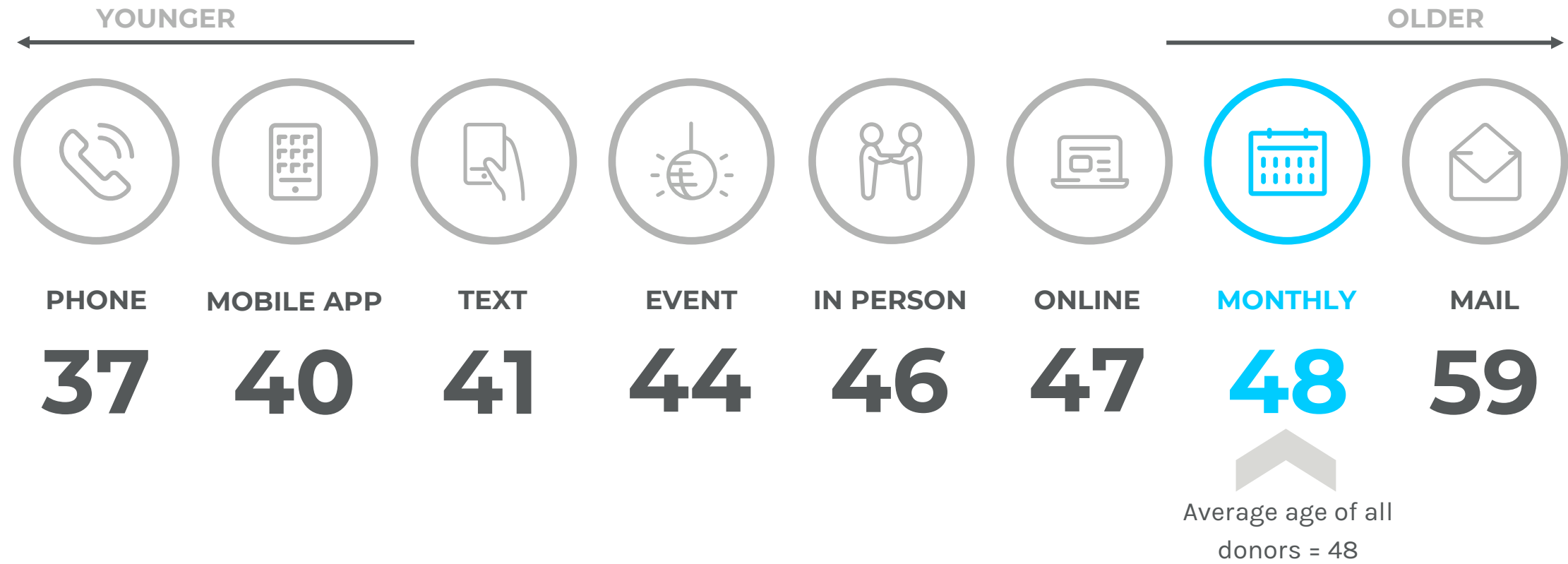
GIVING PREFERENCE

About 7% of charitable donors prefer monthly giving. This number is trending higher over time, with Seniors having the highest preference.



Source: One & All's DonorGraphics 2021. Base: U.S. donors (adults who are 12-month active donors), n=1,408. Nine methods of giving were evaluated for preferred method.

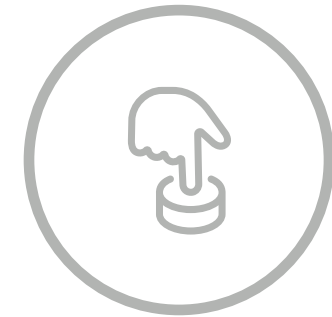
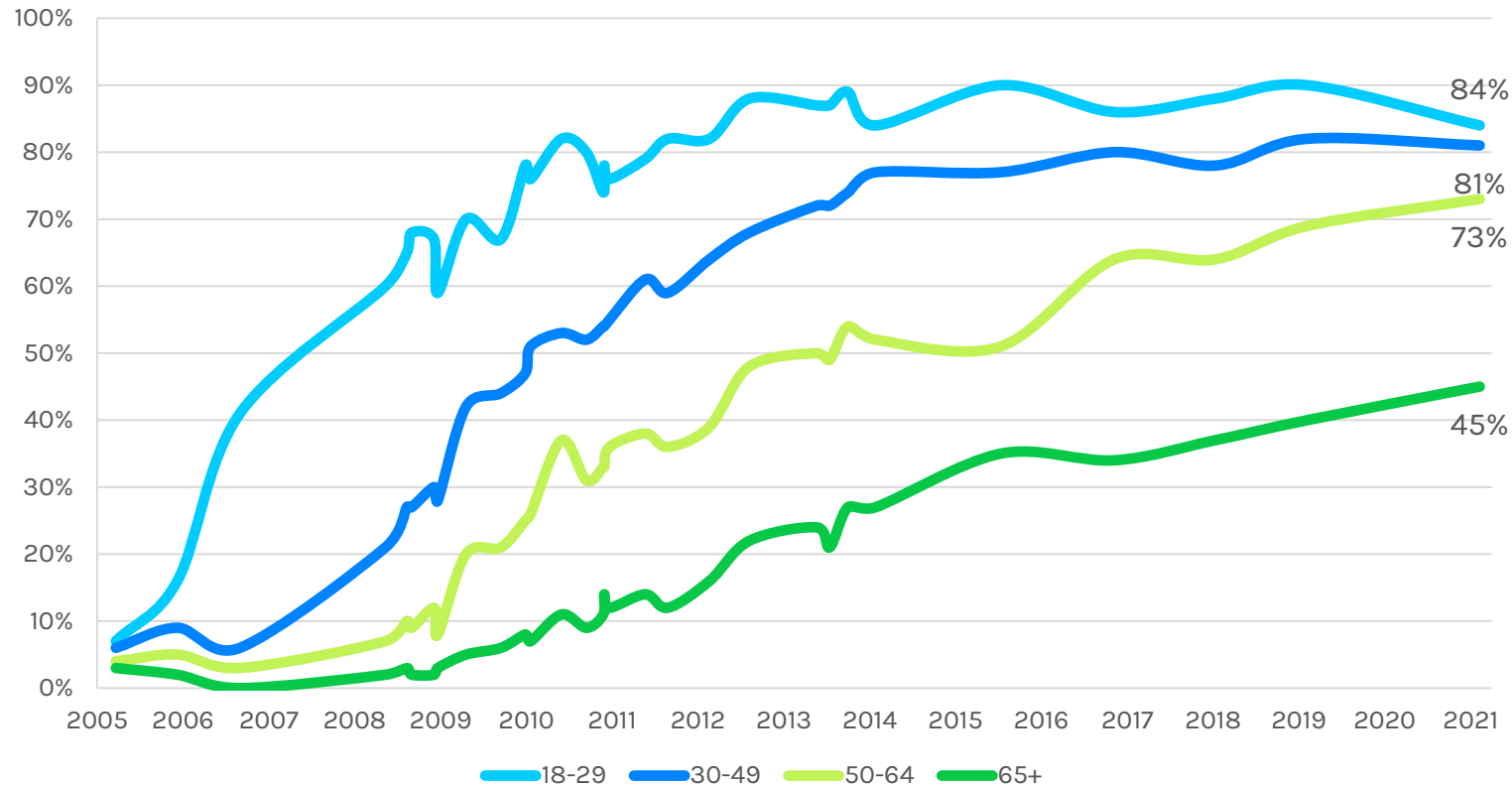
Preferred Channel of Giving by Average Age



Source: One & All's DonorGraphics 2021. Base: U.S. donors (adults who are 12-month active donors), n=1,408.

Social Media Use is Increasing

PERCENTAGE OF US ADULTS WHO USE AT LEAST 1 SOCIAL MEDIA SITE, BY AGE



MAKE IT EASY

As the percentage of older US adults (65+) continues to rise, ensure it's easy for people to sign-up to give monthly.

Source: Pew Research, Surveys of U.S. adults conducted 2005-2021. <https://www.pewresearch.org/internet/fact-sheet/social-media/?menultem=81867c91-92ad-45b8-a964-a2a894f873ef>

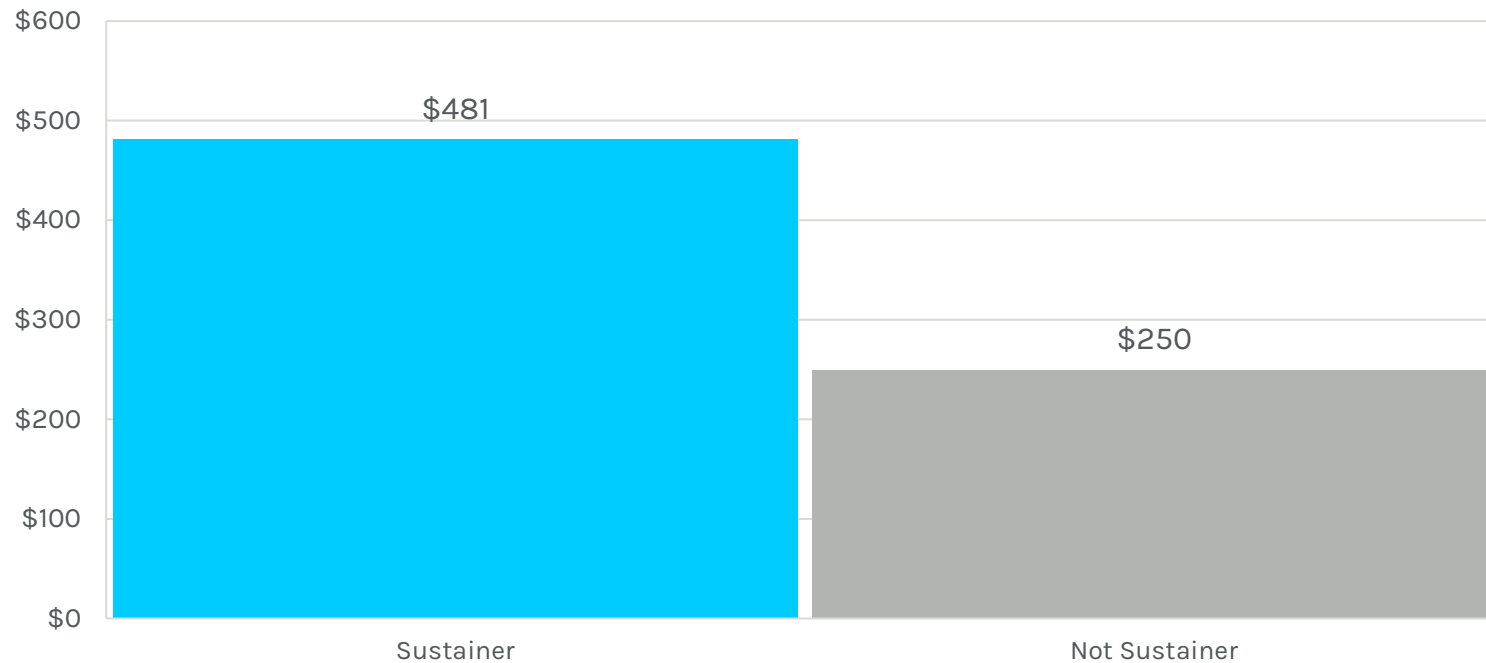
SECTION 2

Why are sustainers valuable?

Annual Value is Higher

In 2020, the revenue per active donor of sustainers was 92% higher than non-sustainers.

2020 REVENUE PER ACTIVE DONOR

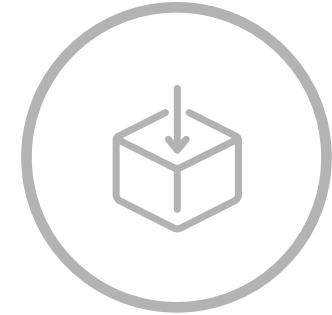
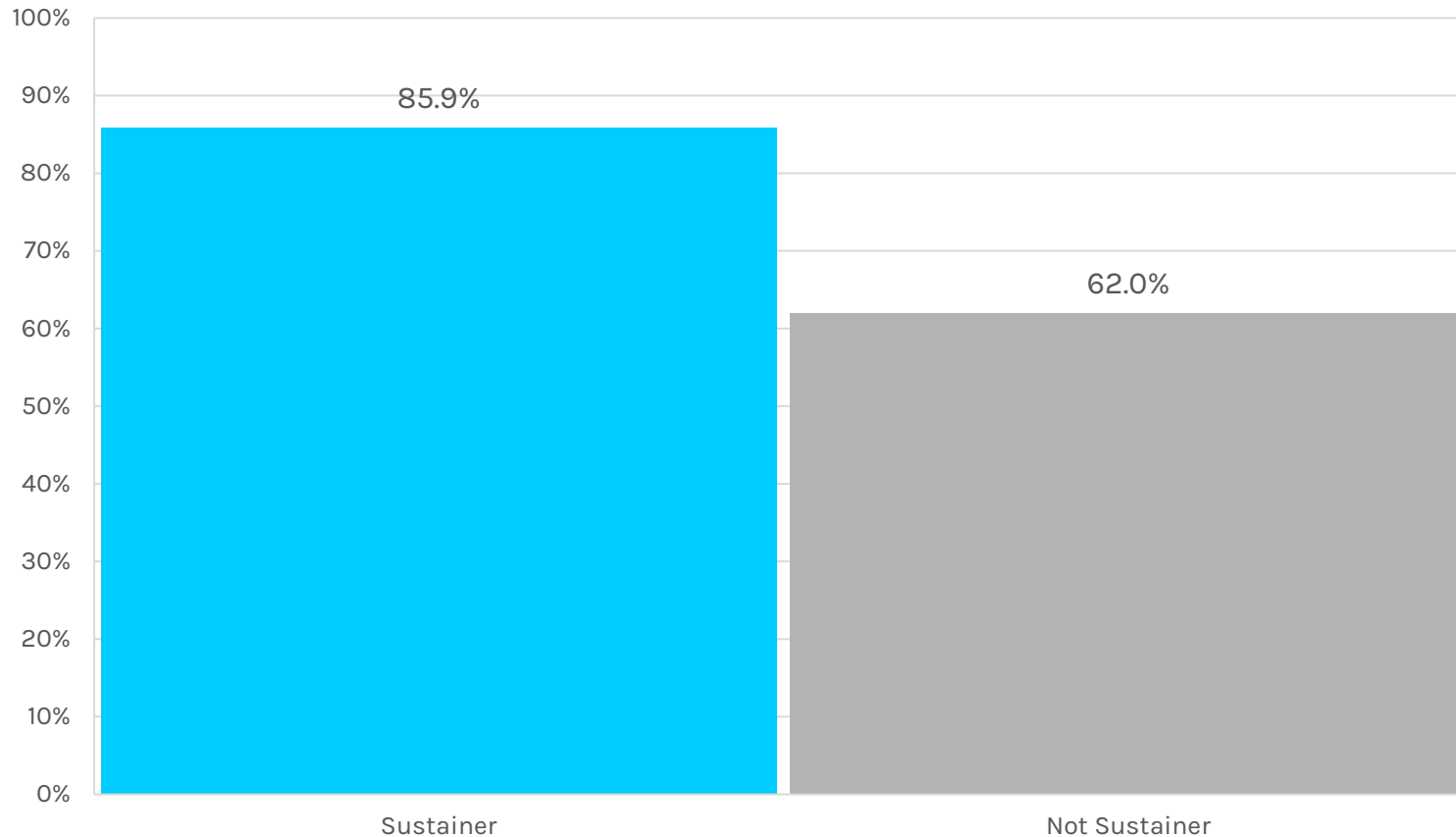


Source: One & All Food Bank, Animal Care, Missions, and The Salvation Army USA clients. Includes all gifts < \$10,000. Active donors gave at least 1 gift within 2020.



Sustainers Retain Better

2020 RETENTION RATE



SUSTAINERS RETAIN

The biggest differentiator in retention rate is in second year new donors. Second year sustainers retain at 74% vs. 33% for non-sustainers.

Source: One & All Food Bank, Animal Care, Missions, and The Salvation Army USA clients. Retention rate is calculated as the percentage of last year's donors who gave again during the current year.

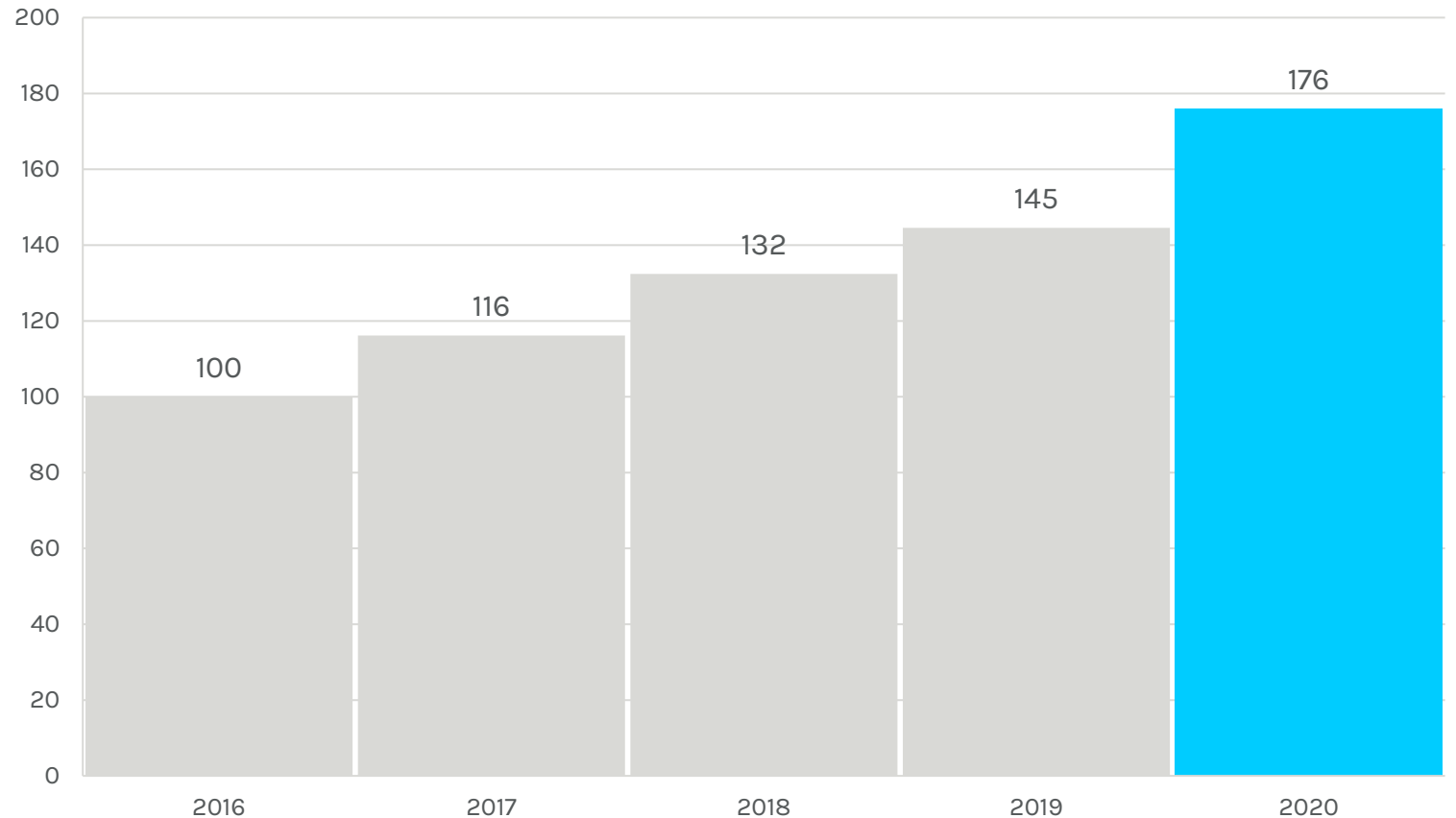
Sustainer Contribution is Increasing



GROWTH, BABY!

In 2020, sustainer giving indexed at 176
(compared with 2016).

SUSTAINER REVENUE INDEX



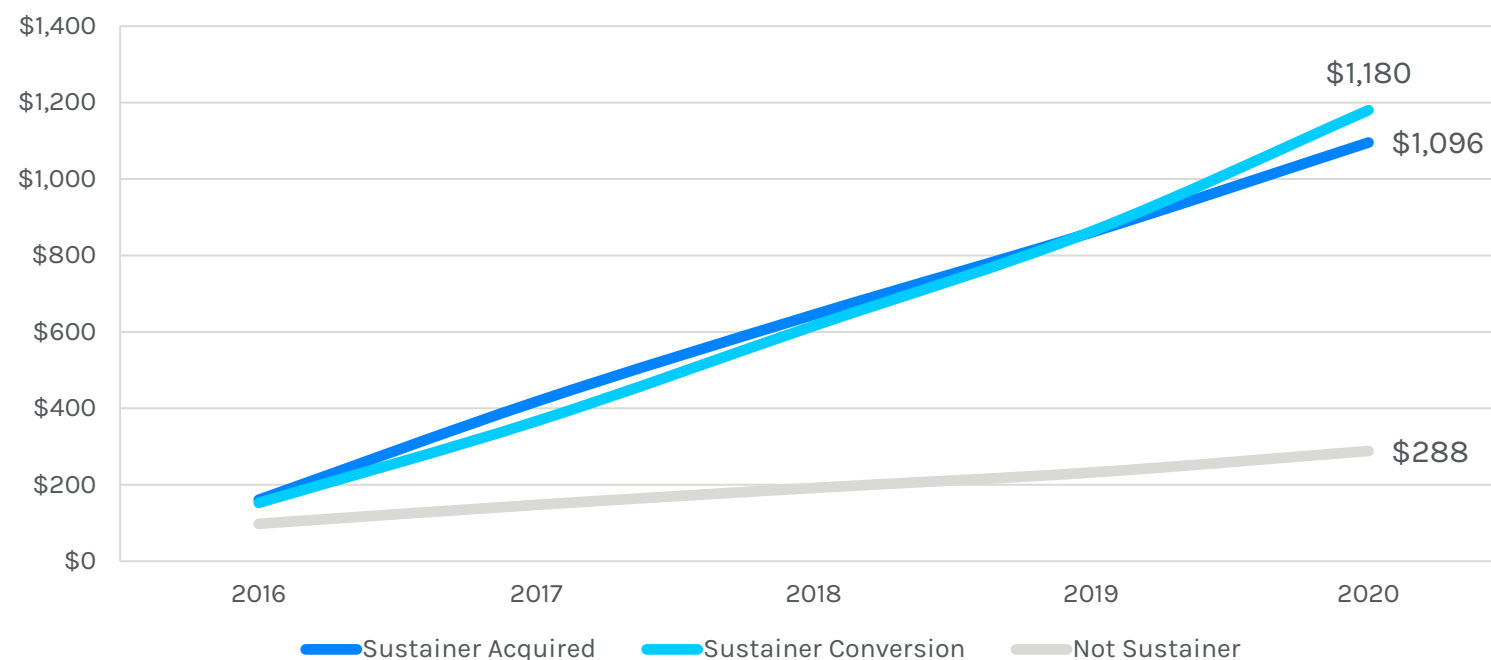
Source: One & All Food Bank, Animal Care, Missions, and The Salvation Army USA clients. Includes all gifts < \$10,000.



Higher Lifetime Value

The lifetime value of supporters acquired as sustainers vs. converted to sustainers is very similar. Converted sustainers are actually 8% higher than acquired sustainers.

5 YEAR DONOR VALUE



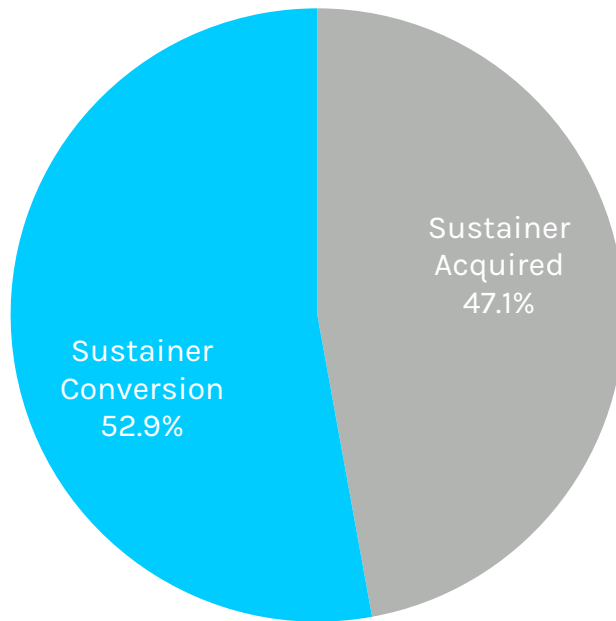
Source: One & All Food Bank, Animal Care, Missions, and The Salvation Army USA clients. Includes donors acquired in 2016 and all subsequent gifts from these donors. Long-term donor value is a 5-year metric.

SECTION 3

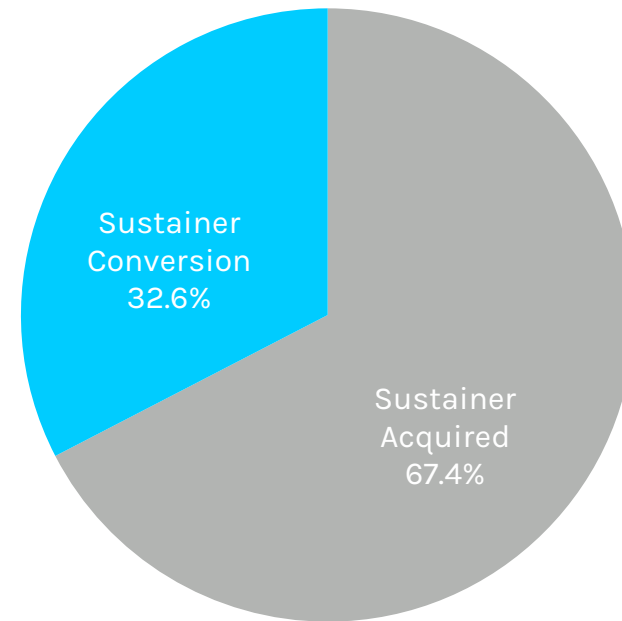
How do sustainers give?

The Pandemic Accelerated Sustainer Acquisition

**DONORS ACQUIRED
2016-2019**

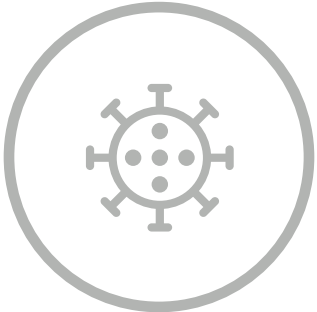
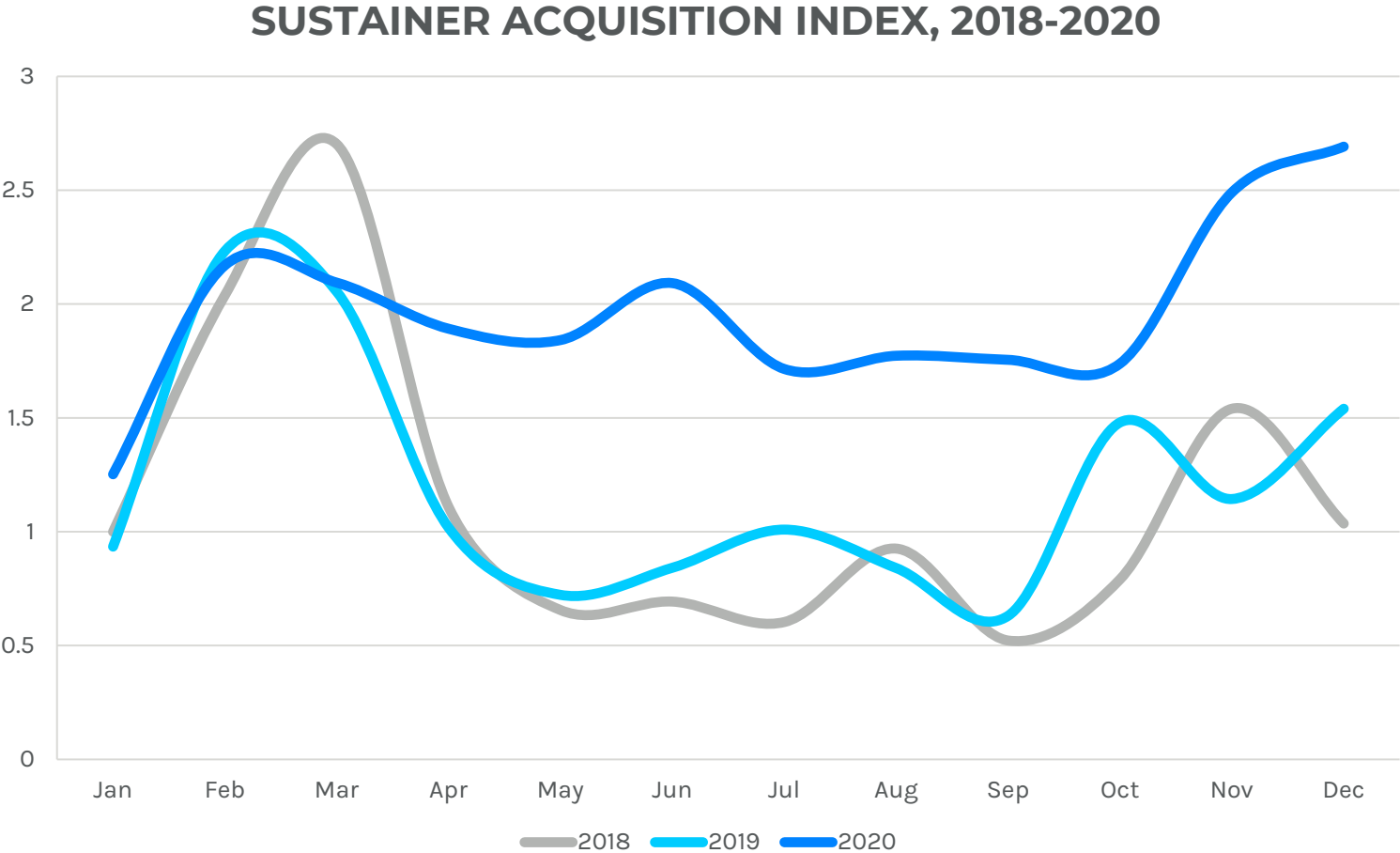


**DONORS ACQUIRED
2020**



Source: One & All Food Bank, Animal Care, Missions, and The Salvation Army USA clients. The percentage of donors acquired vs. converted to sustainer from 2016-2019 was fairly consistent year over year (in the 40-50% range for acquired).

Most Sustainer Acquisition & Conversion Happens in Q1



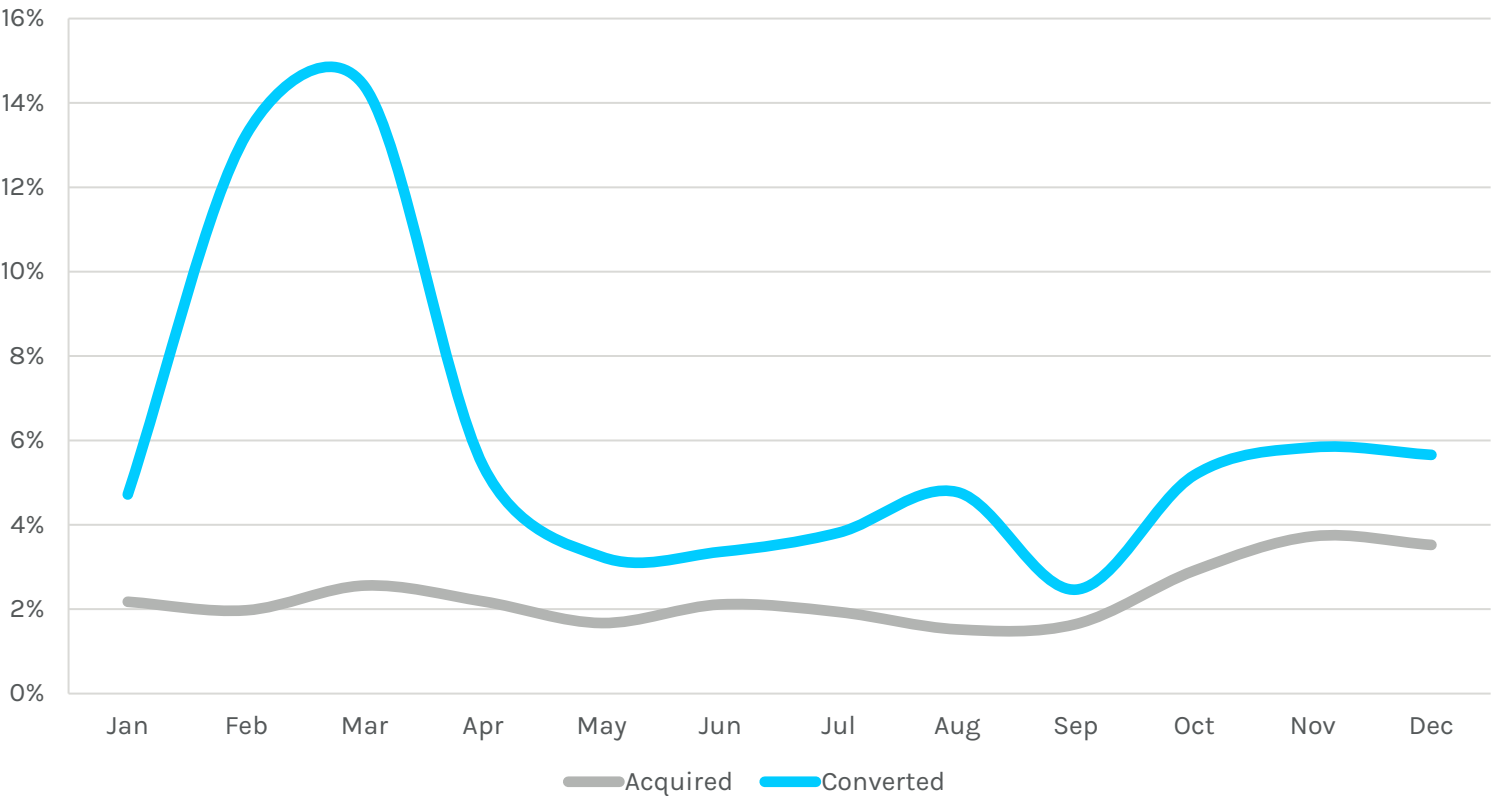
PANDEMIC TRENDS

The pandemic fundamentally changed when donors were acquired & converted to sustainer giving in 2020.

Source: One & All Food Bank, Animal Care, Missions, and The Salvation Army USA clients. Index is generated based on the value of new sustainers acquired in January 2018.

Sustainer Acquisition vs. Conversion

PRE-PANDEMIC TIMING OF SUSTAINER ACQUISITION VS. CONVERSION

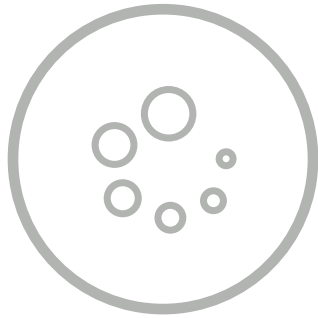


SEASONALITY COMPONENT

A majority of sustainers convert in Q1, while new sustainers have less seasonality, although Q4 is a strong performer.

Source: One & All Food Bank, Animal Care, Missions, and The Salvation Army USA clients. Includes donors converting to sustainer giving and acquired via sustainer gifts in 2018 & 2019.

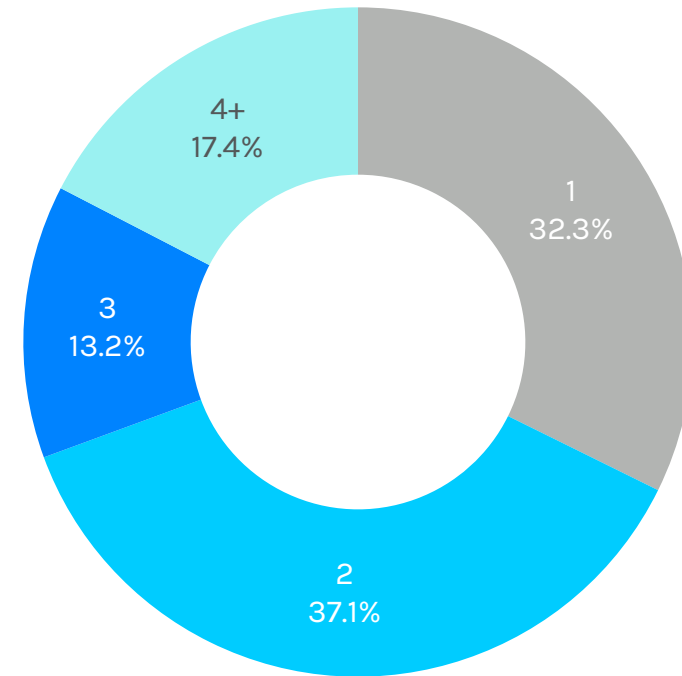
Number of Organizations Supported



MULTIPLE ORGS

Two thirds of monthly donors support two or more organizations.

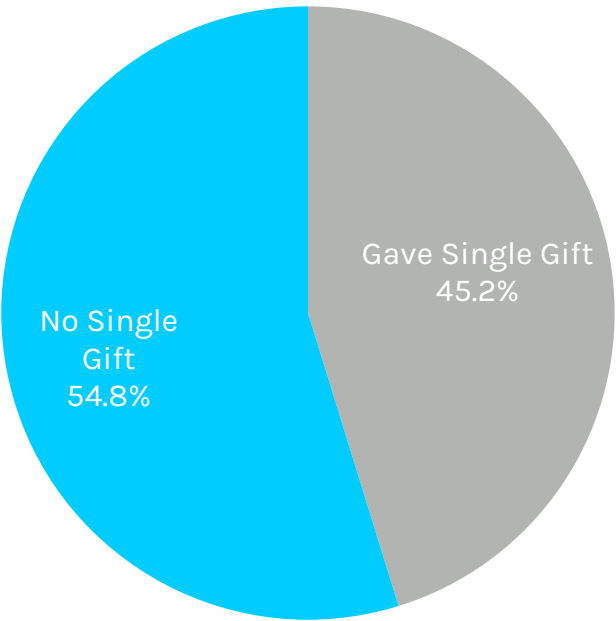
NUMBER OF ORGANIZATIONS SUPPORTED AS A MONTHLY DONOR



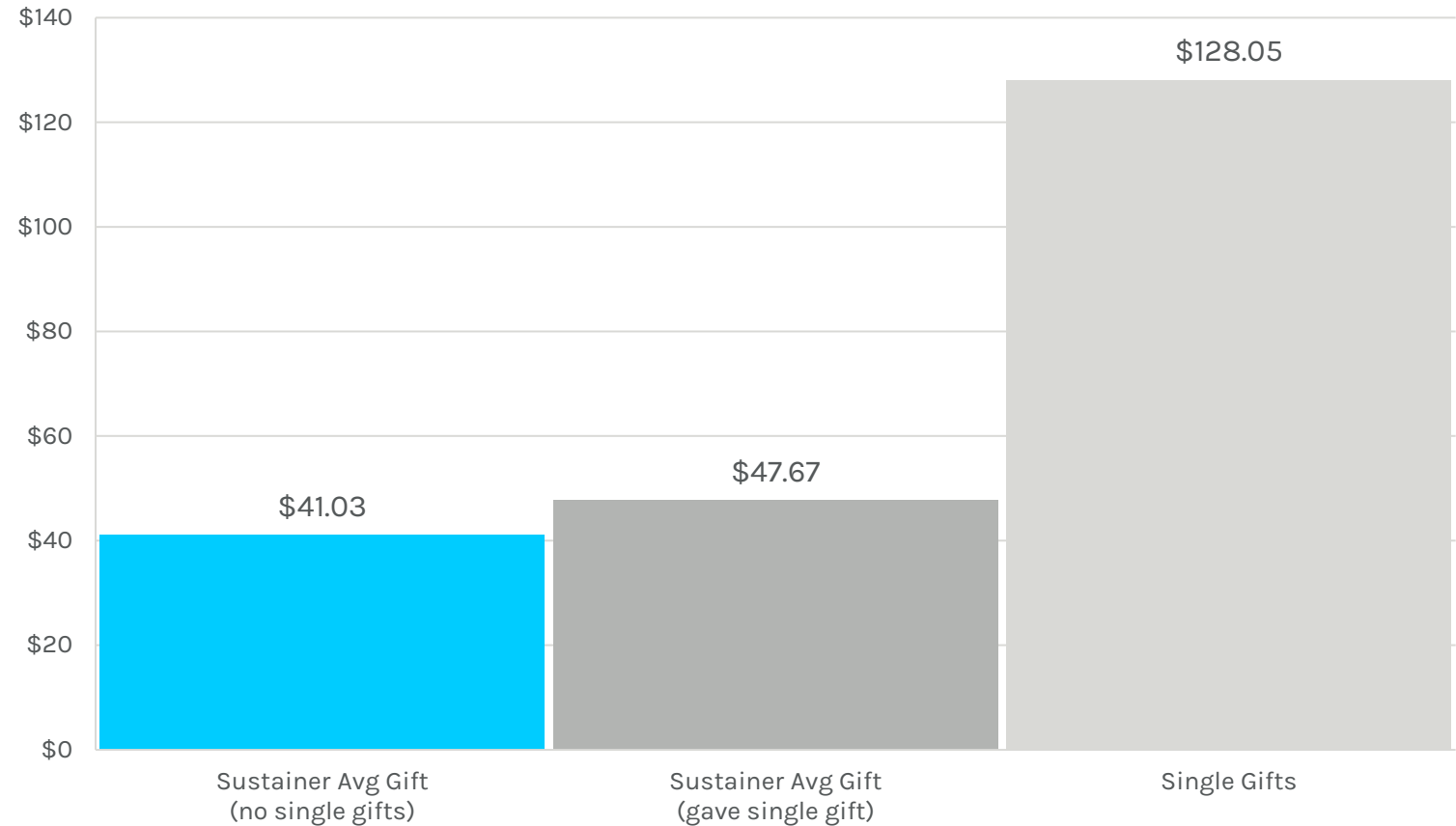
Source: One & All national research study of U.S. charitable donors, November 2020. Base: U.S. monthly donors, n=167.

Single Gifts are Important!

2020 SUSTAINER DONOR BEHAVIOR



2020 AVERAGE GIFT BY TYPE



Source: One & All Food Bank, Animal Care, Missions, and The Salvation Army USA clients. The percentage of sustainer donors giving single gifts has been fairly consistent for the past five years (in the 35-45% range).

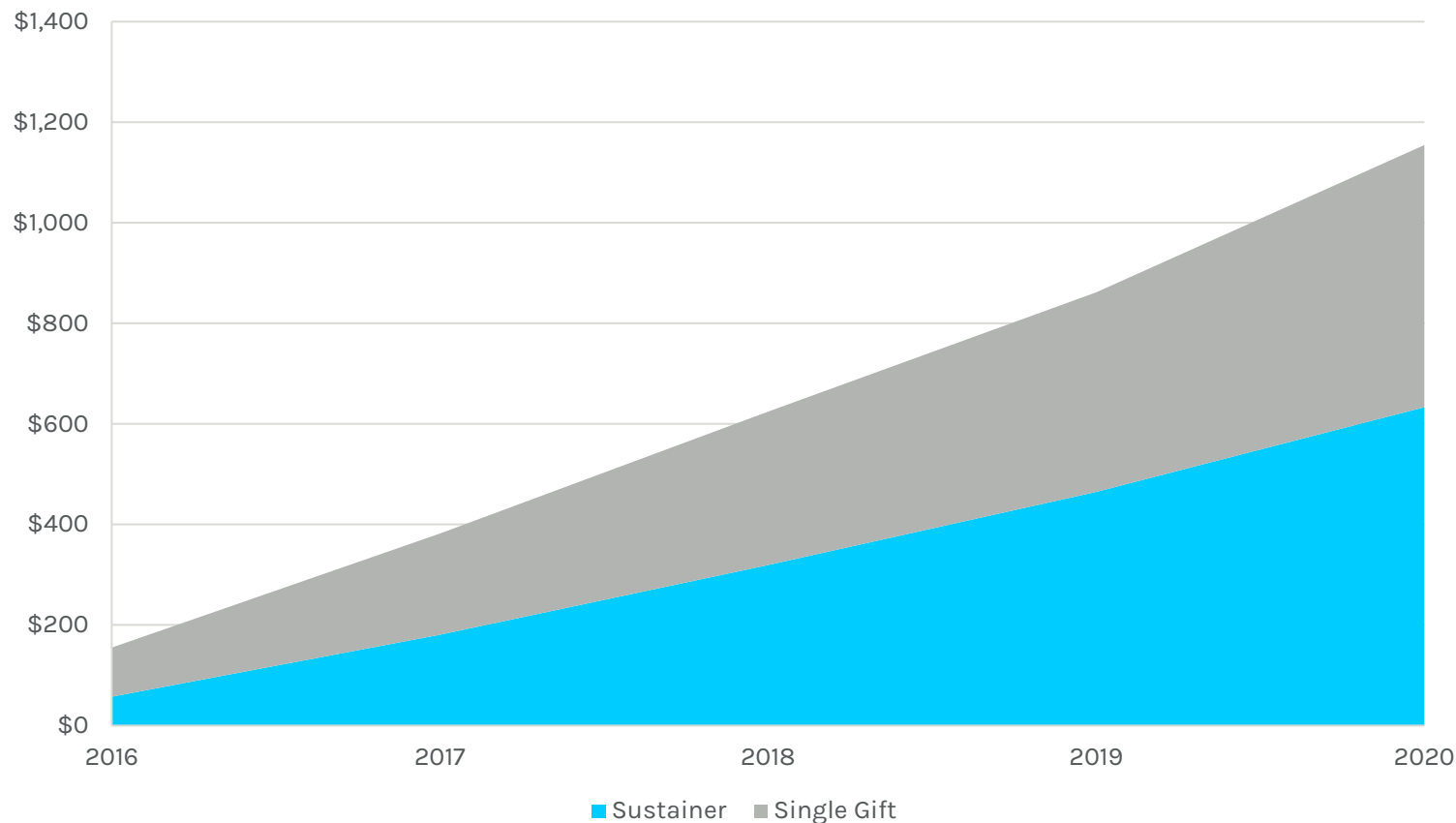
Single Gifts Contribute to Higher LTV



SINGLE GIFTS AFFECT LTV

Single gifts contribute 45.2% of sustainer donor value.

LTV CONTRIBUTION BY GIFT TYPE



Source: One & All Food Bank, Animal Care, Missions, and The Salvation Army USA clients. Includes donors acquired in 2016 and all subsequent gifts from these donors. Long-term donor value is a 5-year metric. Note: the value matches the prior slide's pie chart, however, it is different past the 2nd decimal point.

Summary & Conclusions

- 1 MONTHLY SUSTAINING DONORS ARE YOUNGER AND GENERALLY MORE AFFLUENT (VS. NON-SUSTAINERS)
- 2 OLDER SUPPORTERS DON'T HAVE THE HIGHEST RATES OF MONTHLY GIVING, BUT THEY DO HAVE THE HIGHEST PREFERENCE
- 3 SUSTAINERS HAVE A HIGHER LIFETIME VALUE, WHETHER ACQUIRED OR CONVERTED
- 4 SINGLE GIFTS MAKE UP A LARGE PROPORTION OF SUSTAINER REVENUE





Questions?



This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.



Thank you for joining!

For more information on Qgiv's fundraising platform, contact:

contactus@qgiv.com | 888-855-9595

For more information on One & All, contact:

alexa.langford@oneandall.com | oneandall.com

Appendix Methodology

BEHAVIORAL DATA

Includes One & All clients, through 12/31/2020 and is analyzed on a calendar year.

Includes a combination of Animal Welfare, Food Bank, Mission, and The Salvation Army organizations.

Gifts of \$10,000 or more are excluded.

Sustainer gifts were identified through gift appeal codes and/or behavioral flags.

ATTITUDINAL AND DEMOGRAPHIC DATA

The tenth annual DonorGraphics 2021 study (fielded online in Feb-Mar) was conducted among 2,596 U.S. adults, ages 18+, representative of the general population. 1,408 respondents were identified as 12-month active donors of nonprofit organizations (excluding churches/houses of worship & political campaigns), the demos of which are representative of charitable donors.

Generational views use Pew Research 2020 definitions due to Q1 2021 fielding, with the “silent” & ”greatest” generations combined into a “senior” segment due to small sample size for the latter.

Additional national donor surveys with insights into sustaining programs are referenced, as footnoted on each slide.

