Quarterly Fundraising Report™

Year-to-Date Nonprofit Sector Trends

JAN 1, 2021 - MAR 31, 2021

Key Insights

- 2020 donor growth continues, with the highest Q1 donor growth ever seen in our data.
- Retained donors fueled this growth, including a 13.6% increase in new donor retention.
- We estimate YOY dollar growth to be 6%, when all Q1 data are in*.
- Our new data splits are key to interpreting this report - read more in our blog!

DONORS	DOLLARS	RETENTION
10%	6%	1.0%
(+/- 2%)	(+/- 2%)	(+/- 0.5%)
YOY change	YOY change	YOY change

- Visit https://data.givingtuesday.org/fep-report/ for an interactive version of this report, which includes additional data splits and organization-focused insights.
- We measure year-over-year change of year-to-date data. I.e. we take data through the current quarter for this year, and divide by data through the same quarter last year.
- *Note: We estimate these metrics by reviewing historical patterns of delayed data ('data drift'), using multiple methods. Ranges for each metric express uncertainty from data drift.

Our Dataset

Year-to-Date Nonprofit Sector Trends

JAN 1, 2021 - MAR 31, 2021

Key Limitations

- Data is limited to orgs with >= 3 years of data, with limited growth/loss constraints.
- Data is weighted across size and NTEE code for orgs raising between $5K-$25M.
- Some data are recorded late (e.g., ~4% of Q1 is recorded Q2-Q4).

DONORS	DOLLARS	ORGANIZATIONS
2.5M	$1.9B	9,561
in 2021	in 2021	in 2021

Revenue and retention metrics report on year-to-date (YTD) performance compared against the prior year total, based on a panel* of organizations selected from the Growth in Giving Database of 241 million transactions from more than 20,000 organizations since 2005.

Donors: Time Series

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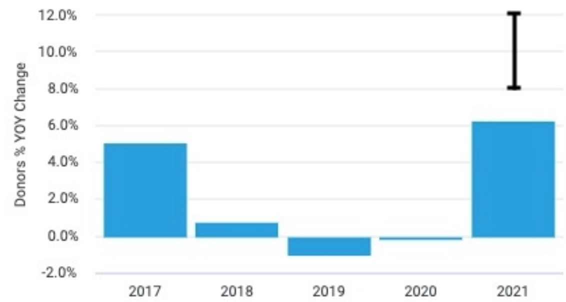
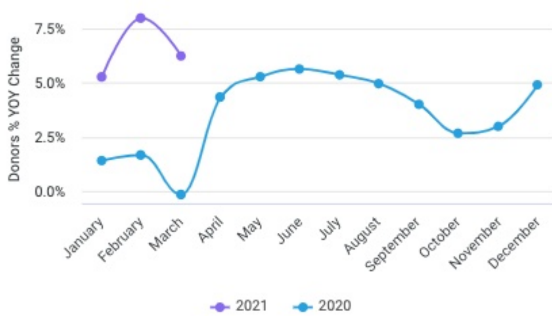
Key Insights

- The number of *donors grew the most across all 10 years of data available (6.2% reported).*
- With all Q1 data not yet reported, we estimate Q1 YOY donor growth will hit 10%*.



Black bar indicates expected range once late data is included



- The smallest donations (with 90% of the donors) represent a higher percentage of online and recurring donations, and we therefore get data sooner / have less data drift than with dollars.

NOTE: The pane for each year differs, based on our panel rules (stable organizations over the past 3 years w/ $5K - $25M received in the prior year, via the Growth in Giving database). This ensures consistent historical data & avoids biasing past results by filtering on future data.

UPPER: percent year-over-year change (on YTD totals) through this quarter, over the last 5 years. Shows what's typical across years.

LOWER: percent year-over-year change (on YTD totals) by month, this vs last year. Shows the evolution of changes over months, and how they compare this year to last.

Donors by Life Cycle

Year-to-Date Nonprofit Sector Trends

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Key Insights

- New retained donors - the lowest retention segment - had explosive YOY growth in Q1.
- This comes from new donor growth in 2020 and new donor retention up 13.6% in 2021.
- Repeat-retained and new donors were also up.
- We saw historic recapture in 2020, so a small drop in 2021 is not surprising.

NEW DONORS	NEW RETAINED DONORS	REPEAT RETAINED DONORS	RECAPTURED DONORS
3.0% YTD Change	34.5% YTD Change	5.5% YTD Change	-2.8% YTD Change
30.0% % of total donors	12.9% % of total donors	45.7% % of total donors	11.4% % of total donors

NEW DONORS - never gave to this organization before (in this dataset).
NEW RETAINED DONORS - gave last year to the organization, but never before.
REPEAT RETAINED DONORS - gave last year to the organization, but not for the first time.
RECAPTURED DONORS - did not give last year to the organization, but had given in the past.

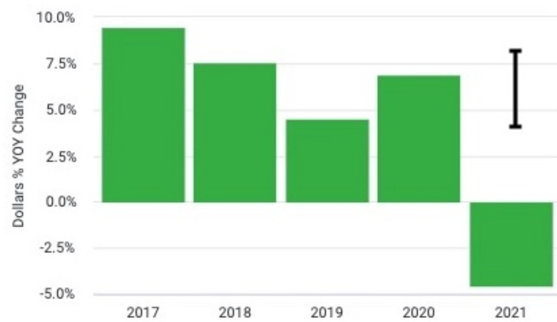
Dollars: Time Series

Year-to-Date Nonprofit Sector Trends

JAN 1, 2021 - MAR 31, 2021

Key Insights

- We estimate that, when all donations are eventually recorded, Q1 YOY growth in dollars will be 6%*.
- Dollars are more impacted by late data than donors, due to late reporting in the largest donation sizes.



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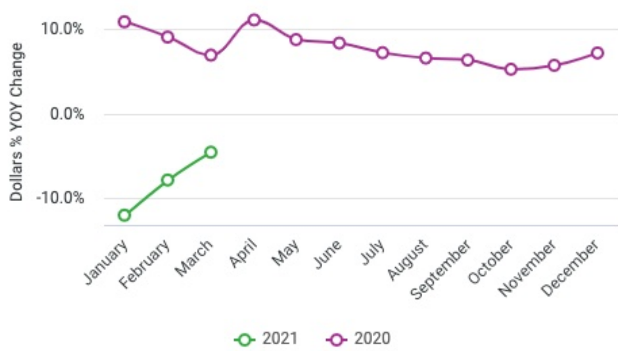

- Note that late data reporting affects 2020 results as well: Dollars increased 2% (from 5.2% to 7.2%) since GivingTuesday published their 2020 Lookback report.

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UPPER: percent year-over-year change (on YTD totals) through this quarter, over the last 5 years. This graph highlights what's typical across years.

LOWER: percent year-over-year change (on YTD totals) by month, this vs. last year. This graph highlights the evolution of changes over month, and how they compare this year to last.

Dollars by Donor Size

Year-to-Date Nonprofit Sector Trends

JAN 1, 2021 - MAR 31, 2021

Key Insights

- The smallest donors show gains in dollars, largely because the number of small donors grew.
- Mid- and large donors failed to show dollar growth, likely because of donor data that has not yet arrived.
- We expect these numbers will increase later this year as Q1 data continues to arrive.

MICRO (Under $100)	SMALL ($101 - $500)	MIDSIZE ($500 - $5K)	MAJOR ($5K - $50K)	SUPERSIZE ($50K+)
9.7% YOY Change	4.4% YOY Change	-7.9% YOY Change	-7.8% YOY Change	-3.5% YOY Change
4.7% % of total dollars	7.6% % of total dollars	16.1% % of total dollars	25.4% % of total dollars	46.1% % of total dollars

Donor size is computed on a donor's total year-to-date dollars given. Donor size segments were chosen to span both dollars and donors, with each segment representing 1-50% of the total.

Retention Rate: Time Series

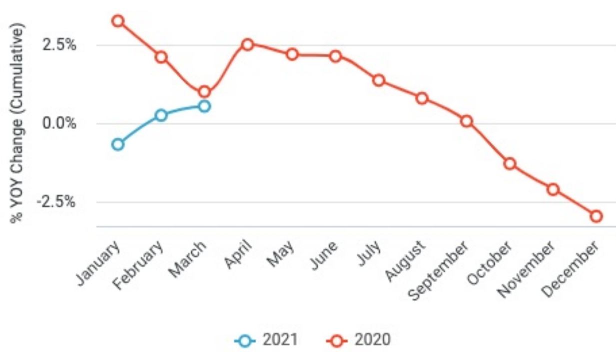
Year-to-Date Nonprofit Sector Trends

JAN 1, 2021 - MAR 31, 2021

Key Insights

- We estimate that retention will land around 1.0% in Q1 after full reporting.

Black bar indicates expected range once late data is included



- Retention tends to decline over the year, as repeat/recurring donors are accounted for in Q1.
- Thus, we think this growth indicates shifts in giving to repeat/recurring giving.

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Retention Rate: Donor Type

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Key Insights

- In 2020, 'new' donors spiked due to new and shifted giving to COVID-related causes.
- In Q1 2021, we saw a spike in retention of these 2020 new donors (+13.6%).
- This was a surprise for this traditionally challenging segment.
- The drop in recaptured donor rate is expected after historic recapture last year.

NEW DONOR RETENTION RATE	REPEAT DONOR RETENTION RATE	RECAPTURE RATE
13.6% YOY Change	2.5% YOY Change	-12.3% YOY Change
8.1% retained YTD	24.2% retained YTD	1.2% retained YTD

NEW DONORS - never gave to this organization before (in this dataset).
REPEAT DONORS - donors who gave last year to the organization, and were not new last year.
RECAPTURED DONORS - donors who did not give last year to the organization, but had given in the past

Organizations

Year-to-Date Nonprofit Sector Trends

JAN 1, 2021 - MAR 31, 2021

Key Insights

- Organization size and cause were critical factors to benchmark fundraising in 2020.
- As in 2020, giving to Human Services showed most growth; most others were down.
- Orgs not reporting data increased in Q1; this may change as late Q1 data arrive by Q4.

Organization Size Impact	Organization Cause Impact	Organizations Not Reporting
-17.5%	-24.6%	221.6%
YOY Change	YOY Change	YOY Change
Size matters less than in 2020	*Cause matters less than in 2020*	*More orgs did not report in 2021*

Our 'impact' metrics measure the importance of size and cause on organization results. These are meant to be more directional than quantitative, but numbers help track these trends year-over-year.

Organization Size Impact: Splits

Year-to-Date Nonprofit Sector Trends

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Key Insights

- We provide organization size splits on dollars raised - for transparency.
- We will be able to interpret these data after we analyze data drift by org size in Q2.

	ORGANIZATION SIZE	% 2021 DOLLARS	% GROWTH (MEAN)	% GROWTH (MEDIAN)
1	1. <=$100k	1.7%	-6.6%	-13.5%
2	2. $100k-$250k	4.9%	-10.5%	-10.5%
3	3. $250k-$1M	16.6%	-5.8%	-8.2%
4	4. $1M-$5M	35.3%	-4.1%	-4.8%
5	5. $5M-$25	41.5%	-4.3%	4.7%

% DOLLAR GROWTH (MEAN) - Year-over-year dollar growth for all organizations of this organization size.

% DOLLAR GROWTH (MEDIAN) - The median year-over-year dollar growth across each organization of this organization size.

Organization Cause: Split

Year-to-Date Nonprofit Sector Trends

JAN 1, 2021 - MAR 31, 2021

Key Insights

- We provide organization cause splits on dollars raised, for transparency.
- Human Services continues to thrive, while other sectors continue to contract.

ORGANIZATIONAL CAUSE	% 2021 DOLLARS	% DOLLAR GROWTH (MEAN	; DOLLAR GROWTH (MEDIA
I. Arts, Culture, and Humanities	3.3%	-13.2%	-20.5%
II. Education	13.0%	-17.7%	-13.7%
III. Environment and Animals	5.1%	3.7%	-5.6%
IV. Health	14.1%	-8.4%	-13.2%
V. Human Services	32.3%	11.1%	-2.3%
VIII. Religion Related	10.2%	-10.7%	1.6%
VI. International, Foreign Affairs	2.5%	-20.2%	-13.0%

% DOLLAR GROWTH (MEAN) - Year-over-year dollar growth for all organizations of this NTEE major group.

% DOLLAR GROWTH (MEDIAN) - The median year-over-year dollar growth across each organization of this NTEE major group.

FUNDRAISING EFFECTIVENESS PROJECT

The Fundraising Effectiveness Project (first established in 2006) and the Growth in Giving database (created in 2012) are both administered jointly by the Association of Fundraising Professionals and GivingTuesday. The Growth in Giving database is the world's largest public record of donation activity, with more than 241 million donation transactions, and is continuously updated by top fundraising software partners (in alphabetical order) Bloomerang, DonorPerfect, and NeonCRM. Additional partners include the 7th Day Adventists, The Biedermann Group, DataLake Nonprofit Research, and DonorTrends (a division of EveryAction). For more information and how you or your fundraising software provider can participate, please visit www.afpfep.org

METHODOLOGY

We removed organizations that did not have a minimum of 25 donors and $5,000 in revenue in each of the previous three years. We removed organizations at either tail of the growth curve for donors and dollars. If revenue growth was more than 300% or less than -66% in any of the past three years, organizations were removed. We weighted our data by organization size and NTEE major group, to make it reflective of 2018 IRS filers in the $5K - $25M range of contributions. In 2018, there were 222K IRS filers in this contributions range and passing our growth and size filters, making this report representative of 3.6% of the total relevant filers.

DATA PROVIDERS

The FEP wouldn't be possible without data. These software providers make the collection of data for this analysis possible.

DATA REPORTING

The Quarterly Report wouldn't be possible without the data processing and analytics provided by these firms.