

Charitable Giving Report

Using 2020 Data to
Transform Your Strategy



CONTENTS

INTRODUCTION

- 3 Executive Summary
- 5 How to Use a Benchmark

OVERALL GIVING TRENDS

- 6 Overall Giving Trends by Size
- 6 Three-Year Overall Giving Trend
- 7 U.S. Donor Profiles and Behaviors
- 9 Overall Giving Trends by Subsector
- 10 Three-Year Overall Giving Trend by Subsector
- 11 Average Donation Amount by Subsector
- 12 Overall Giving Trends by Month

ONLINE GIVING TRENDS

- 13 Online Giving Trends by Size
- 14 Percentage of Total Fundraising from Online

- 16 Mobile Giving Trends
- 16 Online Donor Retention
- 17 Online Giving Trends by Subsector
- 18 Three-Year Online Giving Trend by Subsector
- 19 Average Online Donation by Subsector
- 20 Online Giving Trends by Month

INTERNATIONAL TRENDS

- 21 Canada
- 23 The United Kingdom
- 24 Spotlight on JustGiving
- 25 Australia and New Zealand

ABOUT THE CHARITABLE GIVING REPORT

CONTRIBUTORS

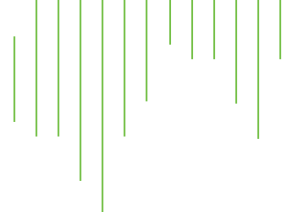
CONTRIBUTORS:

Steve MacLaughlin, Vice President, Product Management, Blackbaud and Senior Advisor, Blackbaud Institute

Emily Perrotti, Data Analyst, Blackbaud

Ashley Thompson, Managing Director, Blackbaud Institute

Angele Vellake, Data Scientist, Blackbaud



INTRODUCTION

\$40B+ Tracking over \$40B in charitable giving

2% Overall Giving Increase in 2020

8,800+ The Number of Organizations Tracked by the Blackbaud Institute Index

21% Online Giving Increase in 2020

EXECUTIVE SUMMARY

In a year when a pandemic altered how we live, work, and give—combined with a call to address injustice and support equality—it was the light of giving that shone through. Despite an unprecedented number of challenges with people, politics, and a pandemic, Americans' charitable giving grew in meaningful ways during 2020.

This year's *Charitable Giving Report* will explore giving trends in what must be considered one of the most transformational years the social good sector has seen in a long time. The report leverages the largest data set of giving and donor trends to help organizations understand the past and prepare for the future.

In 2020, charitable giving in the United States grew by 2% based on a careful analysis of \$40.7 billion in donations by the Blackbaud Institute. Additionally, an analysis of \$3.2 billion in online donations tells us that online giving grew by 20.7% compared to 2019.

The overall and digital giving trends in 2020 would be considered quite remarkable in a typical year. But

2020 was interrupted by dramatic global events, an economic rollercoaster, withering wildfires and other natural disasters, unprecedented strains on the healthcare system, surging social movements, and political uncertainty. Despite all these headwinds, the generosity of people rose to meet the multitude of challenges.

as we all know, 2020 was interrupted by dramatic global events, an economic rollercoaster, withering wildfires and other natural disasters, unprecedented strains on the healthcare system, surging social movements, and political uncertainty. Despite all these headwinds, the generosity of people rose to meet the multitude of challenges.

Looking back, there were a series of notable trends in 2020. During the first two months, overall giving and online giving continued to grow. But the



It was online giving that, once again, showed its importance as the first response channel of choice for donors.

acceleration of the Coronavirus (COVID-19) around the globe and the United States during March had a significant impact on giving. As schools went virtual, businesses adjusted operations, and organizations went remote, there was a measurable contraction in charitable giving.

Analysis of the data shows that, in April, May, and June of 2020, nonprofits of all sizes experienced a significant drop in charitable giving. Smaller nonprofits dropped more than 17% compared to the same period of 2019. But the importance and resiliency of giving began to recover during the second half of 2020. It may not have felt like it, but giving recovered in many remarkable ways.

During the ups and downs of 2020, it was online giving that kept climbing higher. It was online giving that, once again, showed its importance as the first response channel of choice for donors. During the sharpest lows of overall giving, the data shows that online giving was reaching the highest peaks. Online giving was up 36% in the second quarter of 2020 compared to 2019. The double-digit growth trend continued through the rest of 2020.

2020 was also the year that online giving eclipsed an important milestone. Even before the first edition of this report, the Blackbaud Institute measured the percent of overall giving from online donations. Over the years, it has been one of the most requested statistics. In 2020, 13% of fundraising came from online donations—and this is the highest level ever measured. This mirrored similar trends in online retail sales during 2020. It is a significant next step as digital fundraising continues to be an integral part of the modern nonprofit's strategy.

For several years, the *Charitable Giving Report* has tracked many key metrics. 2020 was a year of growth in a multitude of ways. The average gift amount increased from \$617 to \$737 in 2020. The average online gift amount also increased from \$148 in 2019 to \$177 in 2020. Donor retention rates also showed improvement for the first time in many years. As social good organizations faced many challenges, there was an inspiring response from donors.

“2020 was a year to forget for most of us. But the growth in giving and generosity made it an unforgettable year across the social good sector.”

— Steve MacLaughlin, Vice President, Product Management, Blackbaud and Senior Advisor, Blackbaud Institute





HOW TO USE A BENCHMARK

“The data trends in this report go beyond tables and charts— they provide an opportunity for organizations to make informed strategic decisions for their mission.”

—Ashley Thompson, Managing Director, Blackbaud Institute

It's easy to lose sight of the ways you can shift your strategy to reach big-picture goals. Benchmarking is a practice that gives you a higher-level view of your performance to achieve those goals. Using trend data from resources like the *Charitable Giving Report*, you can assess how your organization is performing compared to your peers and identify where your organization may have strengths and opportunities. As you launch into the new year and examine your approach, benchmarking is a powerful strategy that can help you target even more successful outcomes.

To embrace this as a tool in your work, keep these tips in mind:

- **Stay focused on the macro level:** While short-term performance metrics may be tempting, you can benefit even more by taking a step back and examining long-term trends in your data. By reviewing your performance year over year, you can pinpoint shifts due to campaigns, events, seasonal occurrences, and more. All this data arms you with a greater understanding of the factors affecting your performance and how you can compare your metrics to a benchmark.
- **Work inclusively to identify shared benchmarking goals across your organization:** Incorporate diverse voices into your conversations. Benchmarking should not be limited to your fundraising team. By including leaders from finance, I.T., programs, and leadership teams, you can gain a holistic view of the shared goals across your organization and ensure that you are all tracking toward the same objectives.
- **Stick with a common set of metrics:** While your goals may vary from year to year, it's important that you remain consistent in the metrics that you measure. From looking at your annual retention rate to how much you raised through online giving, ensure that the metrics you select can be regularly and uniformly collected to easily compare trends across longer spans of time.
- **Listen to your data and let it guide you:** Benchmarking is only valuable if you understand your findings and tweak your strategy accordingly. Be prepared to accept where you are underperforming. Adjustments in strategy are often best facilitated with team buy-in, and leadership can play a key role in getting staff on board. Educate your team on the importance of data collection and benchmarking so they can support this effort from where they sit.

OVERALL GIVING TRENDS

Overall giving in 2020 grew 2.0% on a year-over-year basis for the 8,833 nonprofit organizations in the analysis. This is the ninth consecutive year where the *Charitable Giving Report* has reported an increase in giving.

2% Overall Giving Growth YOY

20% Percentage of Contributions in December

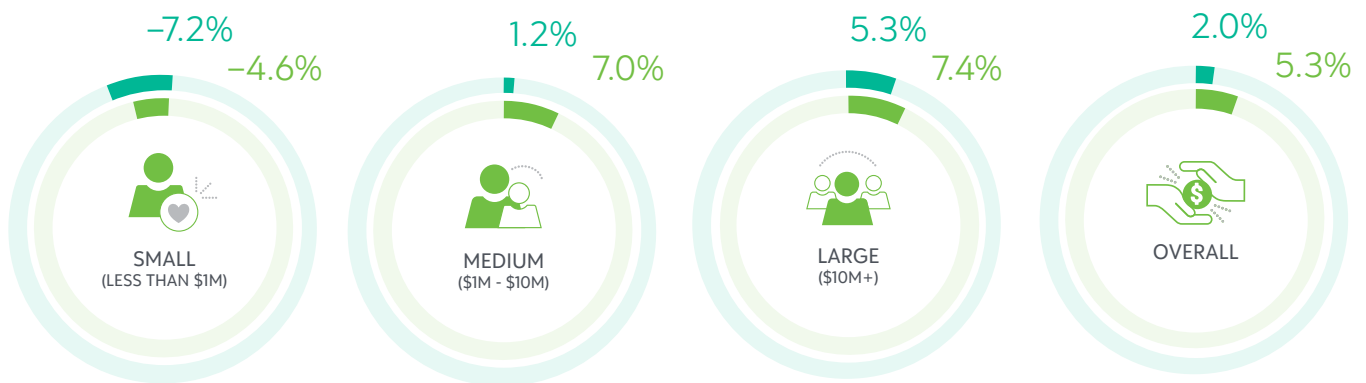
5.3% Three-Year Increase in Overall Giving

\$737 Average Donation Amount

Overall Giving Trends by Size

Fundraising by large organizations, with total annual fundraising of more than \$10 million, was up 5.3%. Medium-sized organizations, with total annual fundraising between \$1 million and \$10 million, had an increase of 1.2% on a year-over-year basis. Small nonprofits, with total annual fundraising less than \$1 million, experienced a 7.2% decrease in fundraising results compared to 2019.

A three-year view of fundraising from the same organizations revealed a 5.3% growth in overall giving. Taking a longitudinal view of giving trends helps provide a more representative perspective of what is happening with charitable giving in the United States. Fundraising challenges in 2020 clearly impacted smaller nonprofits and is apparent in the three-year view as well. Large- and medium-sized organizations continued to have a very positive three-year growth trend.



2020 Overall Giving Trends by Size

Three-Year Rolling Trend

“In a year when a global pandemic altered how we live, work, and give combined with a call to address injustice and support equality, it was the light of giving that shone through.”

—Steve MacLaughlin, Vice President, Product Management, Blackbaud and Senior Advisor, Blackbaud Institute

U.S. Donor Profiles and Behaviors

Using data science and data assets, Blackbaud Target Analytics® is in a unique position to provide key insights into the U.S. nonprofit subsector and its donors. These insights provide answers to some of the most common questions asked by fundraising and nonprofit professionals.



DONOR AGE

64 Average Age of Donor in the U.S.

Long recognized as one of the most reliable predictors of giving, age reflects life experience and correlates to earning capacity and relative debt reduction. More critically, age is just one of many demographic indicators that provides a solid foundation for identifying, connecting with, and stewarding your most valuable constituents.



DONOR RETENTION

29% First-year, Offline-Only Donor Retention Rate

59% Multiyear, Offline-Only Donor Retention Rate

Your organization should calculate your overall donor retention rate annually to assess who chooses to stay in your donor circle every year. While organizations with a high retention rate keep or renew many donors from year to year, those with a low rate must acquire new donors to keep their bottom lines above water. This reinforces the significance of calculating retention to benchmark your internal progress from year to year.





DONATION AMOUNTS

\$737

Average Donation Amount

\$177

Average Online Donation Amount

\$20

Median Donation Amount for Gifts Above \$1,000

\$2,500

Median Donation Amount for Gifts Below \$1,000

In addition to these figures, you can better target the right donors—those with the capacity and a propensity to give to your cause—just by knowing more about their spending habits. Resources like the *Share of the American Wallet* report illuminate trends in spending and the demographic indicators that support organizations in efficiently identifying top prospects.

One facet of retention—sustainer giving—is a long-term strategy by which donors regularly commit to giving a pre-specified donation amount. By allowing donors to give the amount of their choice, sustainer programs automatically support retention while ensuring a dispersed revenue source. Returns on sustainer giving are long-term, and the success of your sustainer program relies on excellent retention strategies.



Overall Giving Trends by Nonprofit Subsector

Each organization in The Blackbaud Institute Index is categorized by one of 12 subsectors using its National Taxonomy of Exempt Entities—or NTEE—code as reported on Form 990. These subsectors are Animal Welfare, Arts and Culture, Environment, Faith-Based, Healthcare, Higher Education, Human Services, International Affairs, K-12 Education, Medical Research, and Public and Society Benefit. Each subsector is weighted based on Giving USA data to ensure that no individual organization or subsector is overrepresented in the analysis. The

Index also includes giving to Foundations, but this data is not currently used to calculate giving trends to avoid the potential of double-counting revenue.

Human Services nonprofits grew by 12.1% in 2020, followed by Faith-Based organizations with an increase of 3.1%. The impact of COVID-19 on other organizations stifled their growth in 2020 compared to 2019.

2020 OVERALL GIVING TRENDS BY SUBSECTOR

SUBSECTOR	YOY % CHANGE	SUBSECTOR	YOY % CHANGE
Animal Welfare	-0.7%	Human Services	12.1%
Arts and Culture	-9.5%	International Affairs	-3.5%
Environment	-7.0%	K-12 Education	-4.6%
Faith-Based	3.1%	Medical Research	-11.9%
Healthcare	-2.1%	Public and Society Benefit	0.8%
Higher Education	-5.4%		



Taking a longer view of subsector trends, nonprofit organizations in the Human Services, Public and Society Benefit, Faith-Based, and Animal Welfare subsectors have had the best three-year giving trend performance.

THREE-YEAR ROLLING TREND

SUBSECTOR	YOY % CHANGE	SUBSECTOR	YOY % CHANGE
Animal Welfare	3.3%	Human Services	18.5%
Arts and Culture	-4.1%	International Affairs	-2.2%
Environment	1.3%	K-12 Education	-4.7%
Faith-Based	4.2%	Medical Research	-14.0%
Healthcare	0.8%	Public and Society Benefit	9.7%
Higher Education	-1.3%		

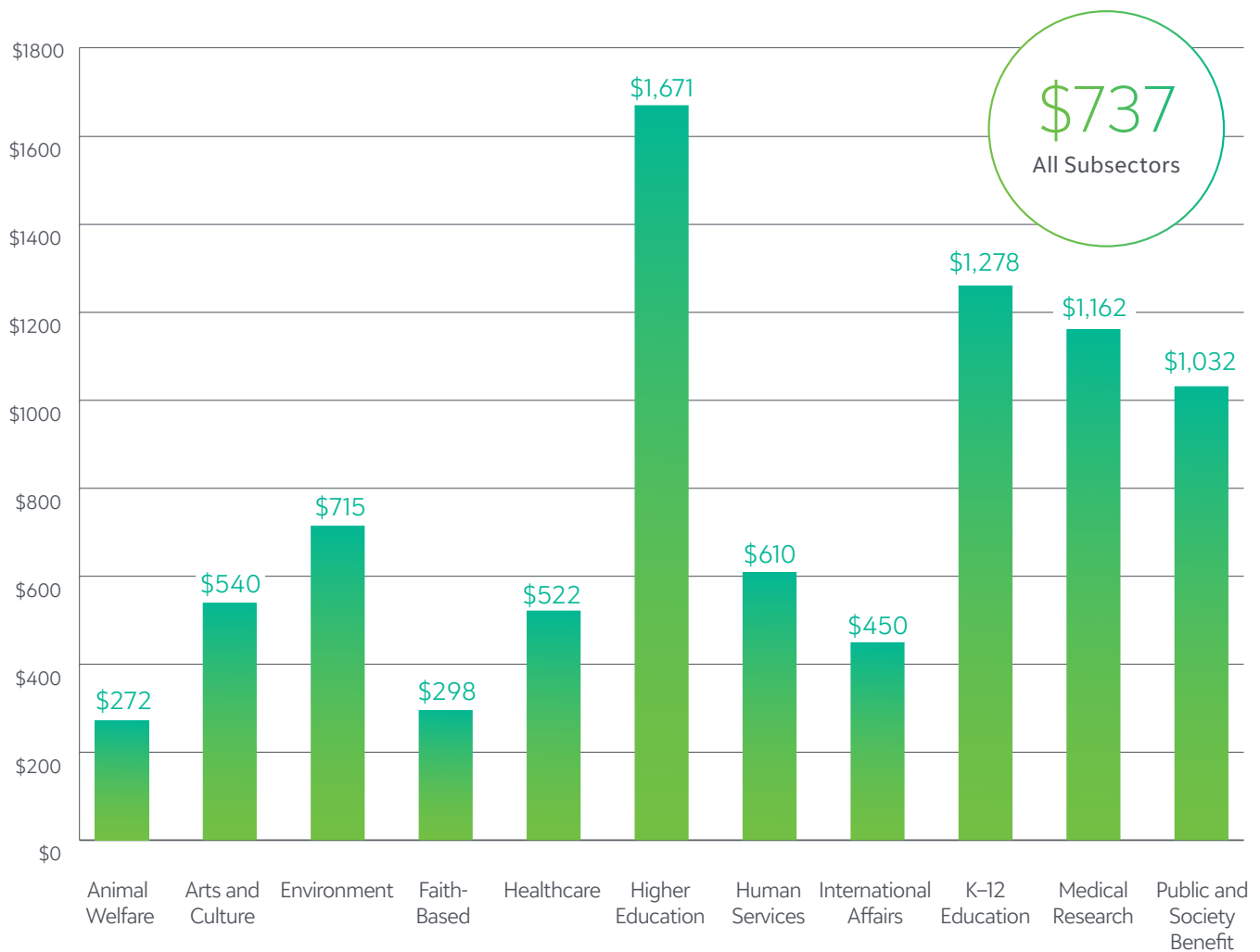


2020 Average Donation Amount by Subsector

New this year in the *Charitable Giving Report* is the measure of average donation size by subsector. Across all subsectors, the average donation amount is \$737. There is a significant variance among different subsectors. It is attributable to organizations with a larger number of major and principal donations from donors. For example,

Higher Education organizations have an average donation of \$1,671 compared to \$272 for Animal Welfare nonprofits. This analysis includes all donations, including large major donations. Nearly every subsector experienced significant growth in average gift amounts in 2020 compared to 2019.

AVERAGE DONATION AMOUNT BY SUBSECTOR



Overall Giving Trends by Month

Last year was a continuation of multi-year trends in monthly giving patterns. October, November, and December continue to represent 36% of charitable giving, which has been true for many years now. While December remains the largest month as a percentage of giving, June continues to drive giving due to end-of-fiscal year fundraising campaigns.

While a look at year-over-year change provides a glimpse into recent months, we must look at data from a multi-year perspective to understand the full scope of giving trends. Organizations should anticipate growth as they kick off giving days and end-of-year campaigns. Know which months yield the highest giving for your organization, and ensure that you are prepared to use these opportunities and maximize your end-of-year campaign.

Your organization is likely one of many vying for the attention of supporters during the end of the year, and a thoughtful campaign approach can help you stand out from the asks your supporters are receiving. Most organizations target end-of-year communications at the supporters who have given in the last three years. You'll want to be sure that your files and records are in order to execute a seamless campaign. Your message must resonate with your audience while inviting them to once again partner with you by renewing their support.

2020 OVERALL GIVING DISTRIBUTION BY MONTH BY SUBSECTOR

SUBSECTOR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Animal Welfare	6.6%	7.1%	9.0%	6.2%	6.9%	6.8%	7.6%	6.9%	5.6%	7.7%	8.6%	21.0%
Arts and Culture	8.6%	6.1%	6.7%	7.7%	7.4%	8.7%	7.0%	6.0%	7.1%	7.7%	7.7%	19.4%
Environment	6.0%	5.4%	5.0%	7.8%	6.2%	10.6%	7.5%	8.4%	6.8%	10.4%	7.3%	18.8%
Faith-Based	6.8%	6.3%	7.6%	7.0%	7.5%	8.5%	7.5%	6.2%	7.4%	8.2%	7.8%	19.1%
Healthcare	7.7%	6.1%	7.9%	8.5%	7.5%	7.3%	6.4%	6.0%	6.7%	6.4%	7.6%	21.7%
Higher Education	6.8%	6.4%	6.8%	5.0%	5.9%	12.9%	7.7%	6.5%	6.3%	7.8%	8.5%	19.6%
Human Services	6.1%	5.4%	7.6%	10.4%	7.7%	8.0%	6.8%	6.2%	6.5%	6.9%	8.3%	20.2%
International Affairs	6.7%	6.6%	7.9%	11.8%	6.9%	8.5%	7.4%	5.6%	5.6%	6.9%	6.5%	19.5%
K-12 Education	8.6%	6.2%	5.6%	5.0%	6.4%	13.5%	5.6%	6.0%	6.2%	7.3%	7.4%	22.3%
Medical Research	9.0%	7.1%	8.7%	6.0%	4.5%	7.4%	6.1%	4.4%	6.7%	6.9%	7.0%	26.0%
Public and Society Benefit	7.1%	6.3%	7.3%	5.7%	5.8%	10.9%	9.1%	7.4%	7.1%	9.3%	8.0%	16.0%
ALL SUBSECTORS	7.1%	6.1%	7.1%	7.3%	6.7%	10.2%	7.1%	6.2%	6.4%	7.4%	7.9%	20.3%

ONLINE GIVING TRENDS

Online engagement is a critical component of a nonprofit organization's communication, fundraising, advocacy, and stewardship strategy. 2020 showed the vital role that online engagement and giving play in donors' lives and nonprofits' goals. We continue to see that the

digital landscape is transforming the social good sector. In this section, we're providing a specific look at online engagement trends to help you understand how to keep pace with this transformation.

21% Online Giving Growth YOY

13% Percent of Total Fundraising from Online Sources

32% Three-Year Increase in Online Giving

28% Percentage of Online Contributions from a Mobile Device

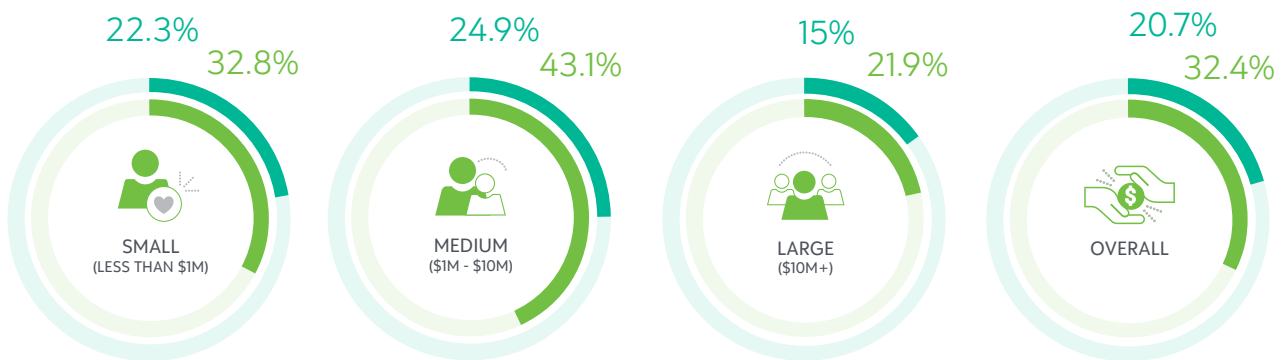
Online Giving Trends by Size

Online giving in 2020 grew 20.7% year over year for the 4,964 nonprofit organizations in the analysis. These growth rates harken back to the early days of online giving, but they are much more significant now that the medium has matured. Online giving grew in size, gift amounts, retention rates, and the overall percentage of giving in 2020.

of more than \$10 million, had an increase of 15.0% in their online fundraising in 2019. Medium-sized nonprofits, with total annual fundraising between \$1 million and \$10 million, had an increase of 24.9% in their online fundraising. Small nonprofits, with total annual fundraising less than \$1 million, grew their online fundraising 22.3% compared to 2019.

Nonprofit organizations of all sizes had positive online giving growth in 2020 compared to 2019. Large organizations, with total annual fundraising

Taking a more longitudinal three-year view of fundraising from the same organizations revealed a 32.4% increase in online giving.



2020 Online Giving Trends by Size Three-Year Rolling Trend

Percentage of Total Fundraising from Online Giving

13% 2020 Percentage of Total Fundraising from Online Giving

We have measured the growth of online giving for over 20 years. A key metric is the percentage of total fundraising that comes from online giving. Nonprofit organizations can use this metric to benchmark their online giving performance against peer organizations within each subsector or of a similar size.

2020 signified a tremendous amount of growth and maturity in online giving. In 2020, 12.9% of total fundraising came from online giving. This is the highest percentage ever for online giving and marks an important milestone.

As a point of comparison, the U.S. Department of Commerce estimates that e-commerce sales in the third quarter of 2020 accounted for 14.3% of total sales. The data reveals once again that consumer behavior is also donor behavior.



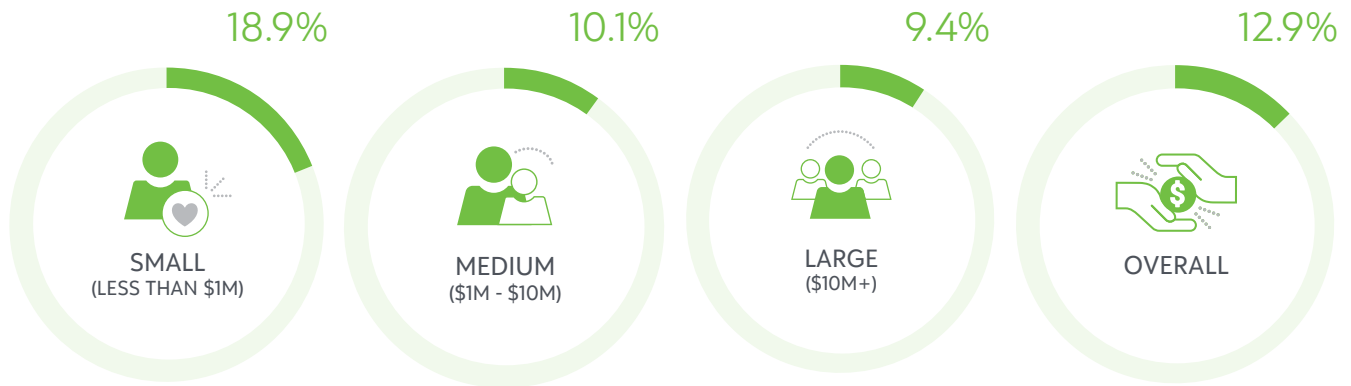
We have patiently predicted that online would grow beyond 10% of total giving, and 2020 was the year it finally happened.

“The events of 2020 paved the way for substantial disruption to the status quo. That has never been more apparent than in online giving, where it represented more than 1/8 of all giving in 2020—an impressive four-point increase year over year. Organizations would be keen to build on the momentum by ensuring a continued focus on digital progress.”

—Ashley Thompson, Managing Director, Blackbaud Institute



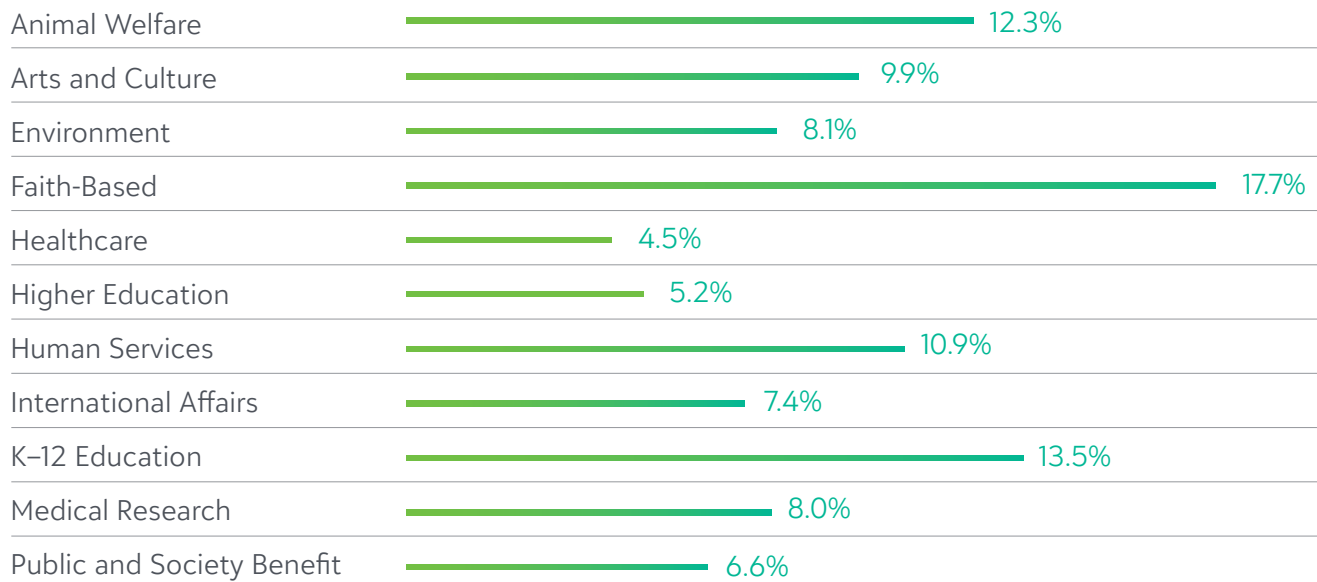
PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING BY SIZE



Small nonprofits continue to grow their digital fundraising programs, with 18.9% of their total fundraising coming from online giving. Medium-sized organizations saw 10.1%, and larger nonprofits increased to 9.4% in 2020.

PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING BY SUBSECTOR

SUBSECTOR



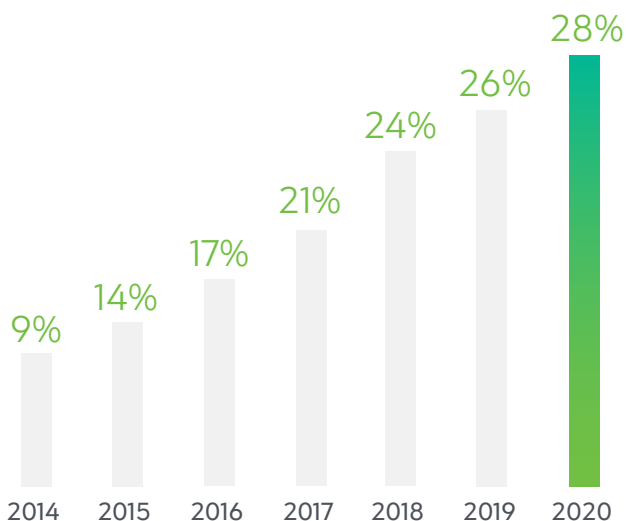
In terms of the percentage of total fundraising from online giving, Animal Welfare, Faith-Based, Human Services, and K-12 Education organizations have all now crossed over the 10% threshold in their online giving programs. We should expect to see this trend increase across a broader set of subsectors.

Mobile Giving

The Blackbaud Institute has measured the growth in online donations made on mobile devices for many years now. In 2020, an estimated 28% of online donations were made using mobile devices. This has grown steadily since 2014, when it was just 9% of online donations.

With the age of mobile giving in full swing, organizations must be equipped to process mobile transactions and readily optimize and test their platforms.

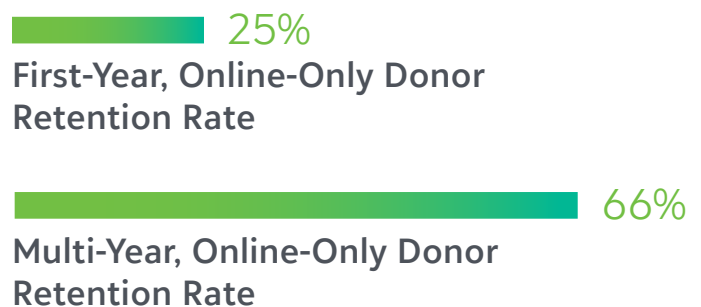
PERCENTAGE OF ONLINE DONATIONS MADE USING A MOBILE DEVICE



Mobile-friendly websites, email, and donation forms should work together seamlessly to maximize the supporter's giving experience.

Online Retention

Donor retention reflects how you keep in contact with your donors and build a pathway for continued support. It is a direct, quantifiable reflection of how you are engaging your donors and communicating your mission, and your online presence can amplify these aims. As online giving continues to grow each year, calculate these figures at your organization so you can benchmark the growth of giving channels from year to year.



Like the rise of today's subscription economy, sustainer programs reflect many of the trends seen in online giving. Providing supporters with even more control over how they engage with a cause and giving them the flexibility to donate in bite-sized increments, sustainer programs offer countless benefits to supporters and organizations. Ensure that your organization has the necessary backend supports and practices to implement a multi-channel, sustained giving option throughout your next campaign.

Online Giving Trends by Subsector

When examining online giving trends by nonprofit subsector, we see that Human Services, Faith-Based, and Animal Welfare organizations had online giving growth above 20% in 2020. There were double-digit gains for a wide range of other subsectors in 2020.

2020 ONLINE GIVING TRENDS BY SUBSECTOR

SUBSECTOR	YOY % CHANGE	SUBSECTOR	YOY % CHANGE
Animal Welfare	29.0%	Human Services	45.8%
Arts and Culture	7.0%	International Affairs	7.6%
Environment	13.7%	K-12 Education	8.7%
Faith-Based	26.9%	Medical Research	-26.2%
Healthcare	11.7%	Public and Society Benefit	0.3%
Higher Education	10.4%		

The three-year analysis of online giving found that nine of the 11 subsectors experienced double-digit growth in their digital fundraising programs.

THREE-YEAR ROLLING TREND

SUBSECTOR	YOY % CHANGE	SUBSECTOR	YOY % CHANGE
Animal Welfare	37.9%	Human Services	57.8%
Arts and Culture	11.9%	International Affairs	14.0%
Environment	30.8%	K-12 Education	6.7%
Faith-Based	42.7%	Medical Research	-24.1%
Healthcare	21.1%	Public and Society Benefit	10.0%
Higher Education	18.1%		

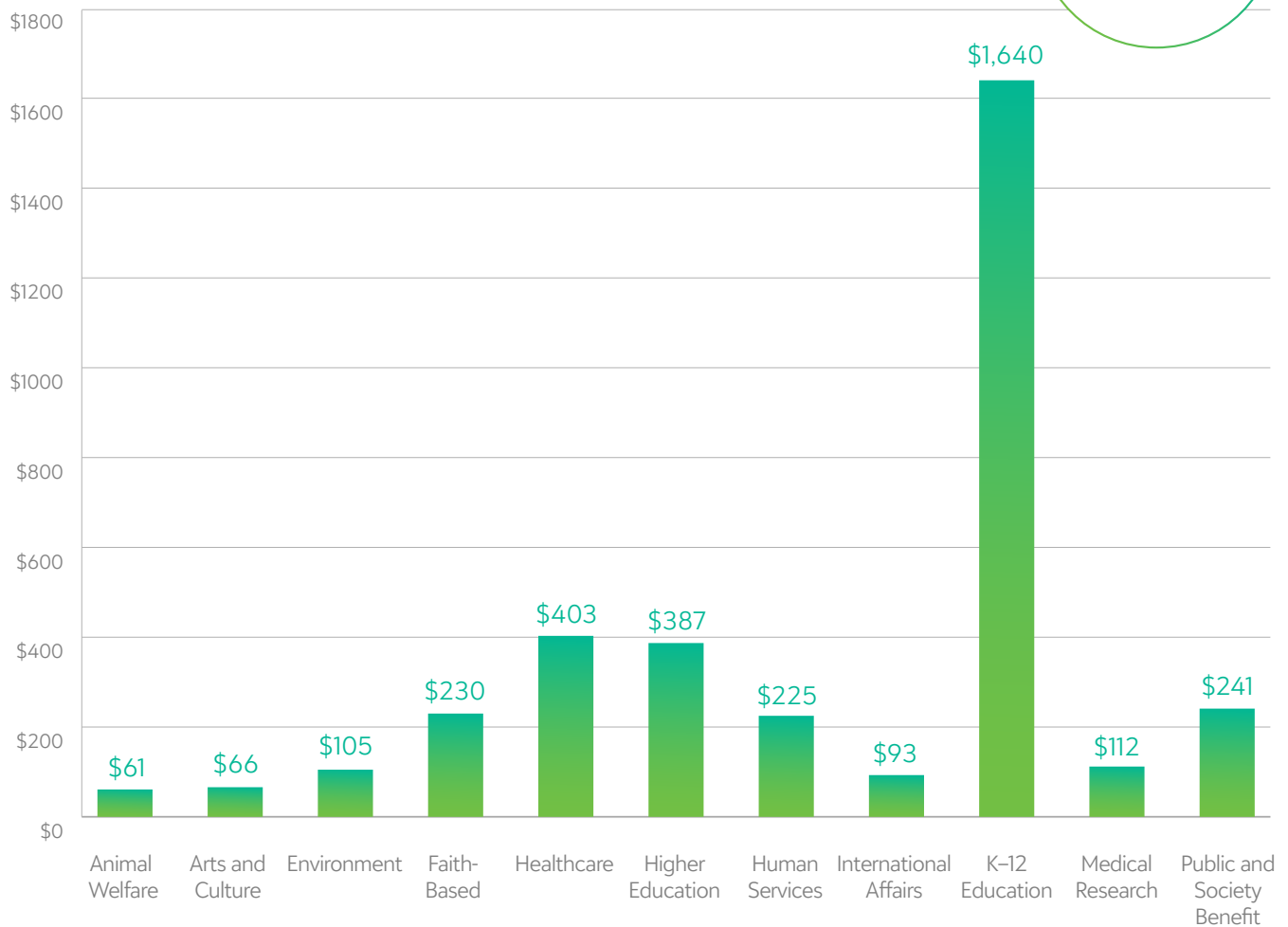


Average Online Donation Amount by Subsector

The *Charitable Giving Report* continues to measure average online donation size by subsector. Across all subsectors, the average online donation is \$177. Just like with overall giving, we see a wide variance in average online donation amount among subsectors. This analysis includes all donations, including large major donations, which could also account for the higher numbers in some subsectors.

2020 AVERAGE ONLINE DONATION AMOUNT BY SUBSECTOR

\$177
All Subsectors



Online Giving Trends by Month

2019 ONLINE GIVING DISTRIBUTION BY MONTH BY SUBSECTOR

SUBSECTOR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Animal Welfare	5.6%	6.2%	7.5%	8.0%	7.5%	6.6%	6.5%	7.0%	7.0%	6.6%	7.8%	23.7%
Arts and Culture	10.6%	8.5%	6.3%	5.9%	8.0%	7.5%	6.6%	5.4%	7.3%	7.6%	7.2%	19.0%
Environment	6.4%	6.0%	5.2%	5.4%	7.6%	7.9%	6.9%	7.0%	7.3%	7.6%	8.0%	24.7%
Faith-Based	5.1%	7.0%	7.0%	8.7%	9.8%	6.4%	6.3%	7.0%	6.9%	6.6%	8.4%	20.8%
Healthcare	6.9%	8.4%	7.5%	8.9%	6.9%	5.2%	4.5%	5.2%	6.7%	7.1%	7.7%	24.9%
Higher Education	5.7%	5.7%	5.8%	6.1%	7.1%	9.3%	4.6%	5.5%	7.2%	8.0%	7.7%	27.4%
Human Services	1.9%	2.0%	8.3%	17.1%	9.8%	5.1%	4.2%	4.1%	4.2%	4.7%	9.7%	28.8%
International Affairs	5.4%	5.3%	7.0%	9.2%	7.5%	6.3%	5.7%	7.1%	6.8%	6.6%	8.5%	24.8%
K-12 Education	7.2%	9.5%	6.6%	5.0%	7.5%	11.4%	3.7%	3.9%	5.3%	8.3%	8.2%	23.3%
Medical Research	7.7%	13.2%	7.0%	4.6%	6.5%	6.2%	5.0%	6.9%	11.9%	12.4%	5.3%	13.3%
Public and Society Benefit	8.4%	8.4%	6.6%	5.9%	6.5%	6.3%	5.8%	6.4%	7.3%	8.2%	9.0%	21.4%
ALL SUBSECTORS	5.3%	6.4%	7.2%	9.9%	8.1%	6.5%	5.0%	5.5%	6.6%	7.2%	8.2%	24.1%

In 2020, there was a spike in online giving during December. Organizations in the analysis still drive a significant amount of online giving in the final month of the year. Additionally, nearly 40% of all online giving happened in the last three months of 2020.

With end-of-year spikes in giving, be sure that your campaigns translate well online and offline. Your campaign must convey a core message that resonates with supporters. Think about what you want to say and how you'll need to tweak it for every platform. Consider this an opportunity to try out new strategies, like a planned email series stretching throughout several weeks or months. Tap into practices like automation and segmentation to support your team's stamina.

INTERNATIONAL TRENDS

The *Charitable Giving Report* also offers a glimpse into international giving trends. As 2020 continued to unfold and produce rapidly evolving challenges and change, the social good community found itself navigating an unprecedented landscape.

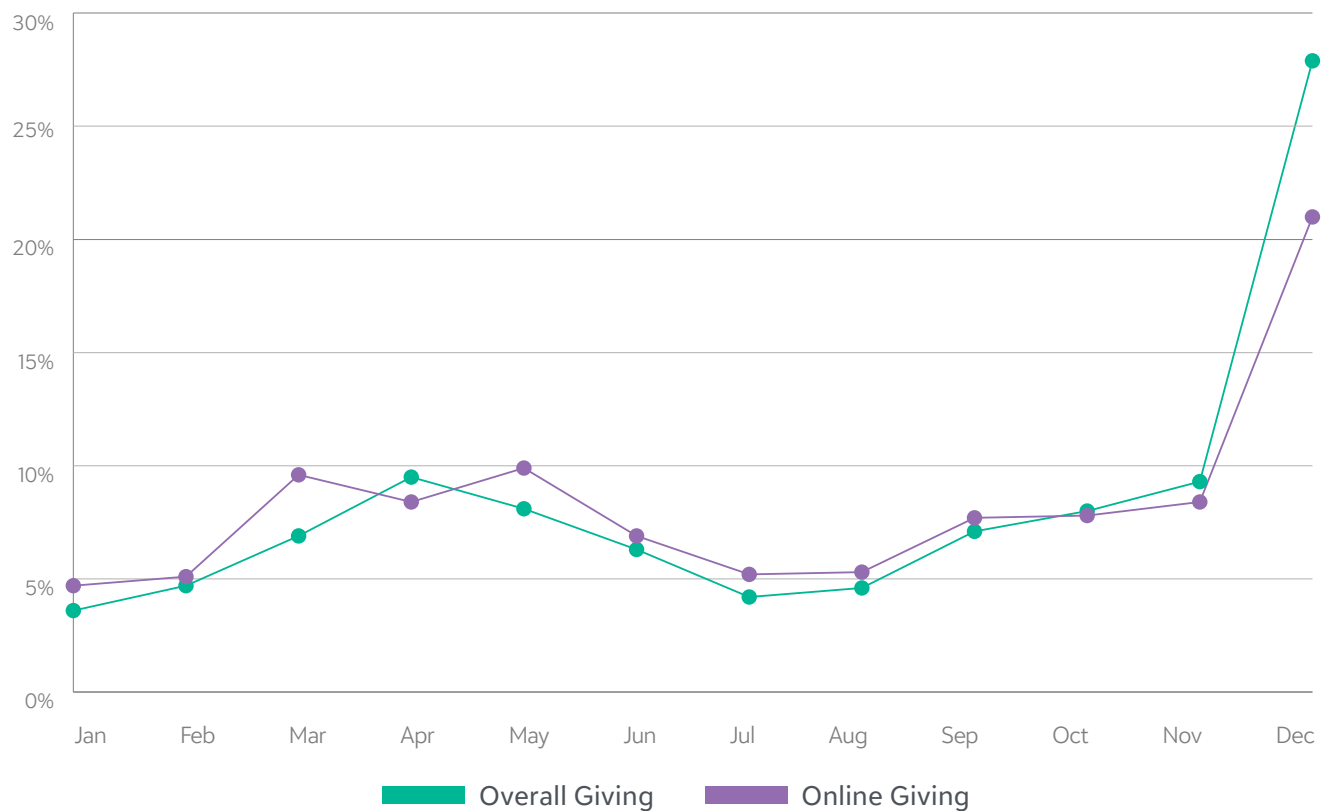
The COVID-19 pandemic forced organizations to grapple with seismic shifts to their operations, from canceling major fundraising events to working remotely and altering service delivery. We saw firsthand in the data the impact of COVID-19 on fundraising in several countries.

Canada

Since its launch in 2014, the Blackbaud Institute Index has grown to include approximately 390 Canadian organizations and more than \$950 million in giving. The Index is updated each quarter and reports year-over-year percent changes.

For quarterly updates on Canadian giving trends, visit:
<https://www.blackbaud.ca/industry-insights/blackbaud-index>.

OVERALL AND ONLINE GIVING DISTRIBUTION BY MONTH



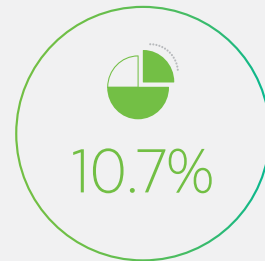
CANADA 2020 PERCENT CHANGE IN OVERALL AND ONLINE GIVING, YOY



Overall Giving YOY



Online Giving YOY



Percentage of Total Fundraising from Online Giving

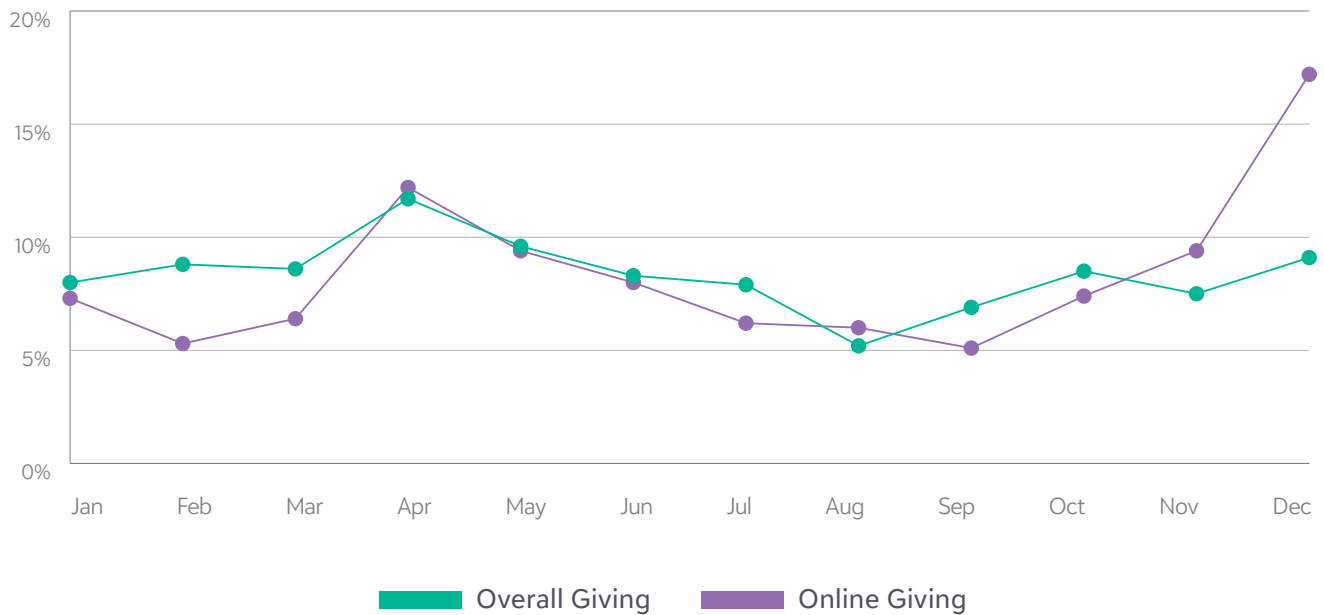


The United Kingdom

Tracking more than £310 million from approximately 300 organizations in U.K.-based charitable giving, the Blackbaud Institute Index is updated each quarter and reports year-over-year percent changes.

For quarterly updates on giving trends in the United Kingdom, visit: <https://www.blackbaud.co.uk/industry-insights/blackbaud-index>.

UNITED KINGDOM OVERALL AND ONLINE GIVING DISTRIBUTION BY MONTH



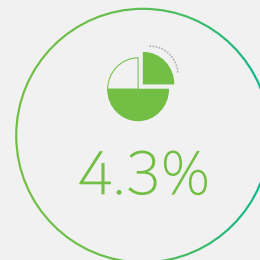
UNITED KINGDOM 2020 PERCENT CHANGE IN OVERALL AND ONLINE GIVING, YOY



Overall Giving YOY



Online Giving YOY



Percentage of Total Fundraising from Online Giving

SPOTLIGHT

JustGiving, whose mission is to ensure no great cause goes unfunded, has helped people in 164 countries raise over \$4.5 billion since its inception in 2000 for good causes through online fundraising and crowdfunding. Though COVID-19 impacted large charity participation events, JustGiving tracked strong giving rates throughout the year due to increased personal activations. Even without marathons and other traditional active events, consumers led the way through personal appeals, runs, and walks, such as Captain Tom Moore's nearly \$40M fundraiser. The profound response from individuals was a key driver of the increase, more than doubling the number of donations YOY in certain use-cases.

-48% Active Fundraising Donations (Cycling, Marathons, Walks, etc.)

199% Charity Appeals Overall YOY

56% In-Memory Appeals YOY



Australia and New Zealand

Tracking nearly \$550 million from more than 150 organizations in Australian and New Zealand-based charitable giving, the Blackbaud Institute Index is updated each quarter and reports year-over-year percent changes.

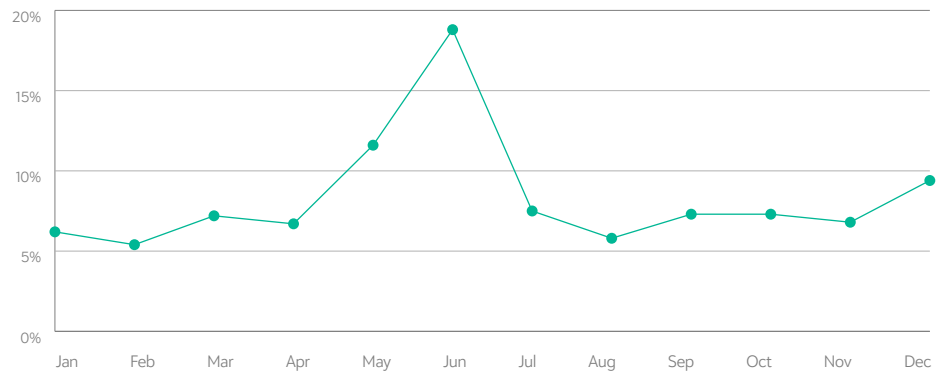
For quarterly updates on these giving trends, visit:

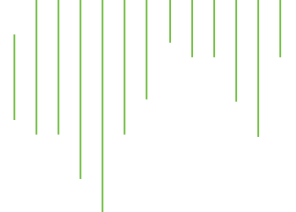
<https://www.blackbaud.com.au/industry-insights/blackbaud-index>.



2020 Percent
Change In Overall
Giving, YOY

OVERALL GIVING DISTRIBUTION BY MONTH





ABOUT THE CHARITABLE GIVING REPORT

The U.S. report's findings are based on giving data from 8,833 nonprofit organizations, totaling \$40.7 billion in fundraising revenue. The online fundraising findings are based on data from 4,964 nonprofit organizations and \$3.2 billion in online fundraising revenue.

Organizations were grouped into three size categories: total annual fundraising less than \$1 million (small), total annual fundraising between \$1 million and \$10 million (medium), and total annual fundraising exceeding \$10 million (large). It is based on recorded giving in each organization's fundraising system, reported fundraising in IRS Form 990 data, and matching completed through the National Center for Charitable Statistics.

Organizations that did not meet all the research criteria have been excluded. Organizations based outside of the United States have also been excluded. We have not included the unfulfilled portion of pledge gifts or recurring gifts processed offline in our research. *Giving USA*® figures are used to weight the data to ensure that no individual organizations or subsectors are overrepresented in the analysis.

To be included in the analysis, these organizations needed to have at least 27 months of complete giving data without gaps or missing information. Each organization was then classified by subsector using its NTEE code, as reported on its Form 990. If you are unsure which subsector your organization falls under, you may refer to your 990 to find your

NTEE code. Visit the [National Center for Charitable Statistics](#) for a complete list of subsectors.

The Blackbaud Institute Index has also grown to include additional data sets in other geographic regions. In addition to the U.S. Index, we have included a section to provide information on Canada, the United Kingdom, and Australia/New Zealand. For our Canadian Index, we analyze approximately 390 Canadian organizations, with more than \$950 million in giving. We track £310 million from approximately 300 organizations in U.K.-based charitable giving. And, we track nearly \$550 million from more than 150 organizations in Australian and New Zealand-based charitable giving. The Blackbaud Institute Index is updated for each of those regions each quarter and reports year-over-year percent changes and giving to date for the last 12 months.

For quarterly insights, see the [Blackbaud Institute Index](#) and sign up to receive quarterly updates via [The Source](#).



About The Blackbaud Institute Index

Economic conditions, natural disasters, and market fluctuations have made it extremely difficult for nonprofits to make fundraising decisions informed by the latest donor behavior. That is why we created the Blackbaud Institute Index—to provide insight into what happened in the prior few weeks and valuable analysis by leaders in the sector into what fundraisers can learn from it. The Blackbaud Institute Index brings you the most up-to-date information on charitable giving today. Tracking approximately \$36.3 billion in U.S.-based charitable giving, the Index is updated each quarter and reports year-over-year percent changes as well as giving to date for the last 12 months. Featuring overall giving trends, the Index can be viewed by organization size and subsector. Visit www.blackbaudinstitute.com/the-blackbaud-institute-index to experience interactive Index charts you can easily compare by size or subsector.

About The Blackbaud Institute

The Blackbaud Institute drives research and insight to accelerate the impact of the social good community. It convenes expert partners from across the philanthropic sector to foster diverse perspectives, collective thinking, and collaborative solutions to the world's greatest challenges. Using the most comprehensive data set in the social good community, the Blackbaud Institute and its partners conduct research, uncover strategic insight, and share results broadly to drive effective philanthropy at every stage, from fundraising to outcomes. Knowledge is powering the future of social good, and the Blackbaud Institute is an engine of that progress. Learn more, sign up for our [newsletter](#), explore our [knowledge base](#) of social good best practices and trends, see the [latest quarterly statistics on giving](#), and check out our most recent resources at www.blackbaudinstitute.com.

About Blackbaud

Blackbaud (NASDAQ: [BLKB](#)) is the world's leading cloud software company powering social good. Serving the entire social good community—nonprofits, foundations, corporations, education institutions, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through software, services, expertise, and data intelligence. The Blackbaud portfolio is tailored to the unique needs of vertical markets, with solutions for [fundraising and relationship management](#), [digital marketing](#), [advocacy](#), [accounting](#), [payments](#), [analytics](#), [school management](#), [grant management](#), [corporate social responsibility](#), and [volunteerism](#). Serving the industry for more than three decades, Blackbaud is headquartered in Charleston, South Carolina, and has operations in the United States, Australia, Canada, and the United Kingdom. For more information, visit www.blackbaud.com, or follow us on [Twitter](#)®, [LinkedIn](#)®, and [Facebook](#)®.

