Changing Tides
The Next Generation of Giving

Ashley Thompson
Managing Director, Blackbaud Institute
Total Giving (In Billions Of Dollars)

Source: Giving USA 2019
By Recipient (In Billions)

- **2%** To Individuals ($19.06)
- **2%** Unallocated Giving ($6.53)
- **3%** Environment/Animals ($12.70)
- **5%** International Affairs ($22.88)
- **5%** Arts, Culture & Humanities ($19.49)
- **7%** Public-Society Benefit ($31.21)
- **10%** Health ($40.78)
- **12%** Gifts to grantmaking foundations* ($50.29)
- **12%** Human Services ($51.54)
- **14%** Education ($58.72)
- **29%** Religion ($124.52)

*Source: Giving USA 2019
Giving to Arts, Culture & Humanities (In Billions)

Source: Giving USA 2019

5% of giving since 2010
Giving to Environment & Animals (In Billions)

3% of giving since 2011

Source: Giving USA 2019
2018 Contributions By Source ($427.71 Billion)

- **68% Individuals**: $292.09 billion
- **18% Foundations**: $75.86 billion
- **9% Bequest**: $39.71 billion
- **5% Corporations**: $20.05 billion

Source: Giving USA 2019
Giving By Source

Giving by source: percentage of the total in five-year spans, 1979-2018
(in billions of dollars)

- Individuals
- Foundations
- Bequests
- Corporations

1979-83: 83% Individuals, 7% Foundations, 5% Bequests, 6% Corporations
1984-88: 80% Individuals, 7% Foundations, 6% Bequests, 7% Corporations
1989-93: 80% Individuals, 7% Foundations, 5% Bequests, 7% Corporations
1994-98: 77% Individuals, 7% Foundations, 5% Bequests, 9% Corporations
1999-03: 76% Individuals, 8% Foundations, 5% Bequests, 11% Corporations
2004-08: 75% Individuals, 8% Foundations, 5% Bequests, 12% Corporations
2009-13: 73% Individuals, 8% Foundations, 5% Bequests, 15% Corporations
2014-18: 70% Individuals, 8% Foundations, 5% Bequests, 16% Corporations

Source: Giving USA 2019
WHY GENERATIONAL GIVING?
Matures: before 1945 (74+)
Baby Boomers: 1946-64 (55-73)
Generation X: 1965-1980 (39-54)
Millennials: 1981-1995 (24-38)
Generation Z: 1996 and beyond (23-)
GZ 44% Give
- 9.3M donors
- $341 yr./avg.
- 4.6 charities

GZ 51% Give
- 34.1M donors
- $591 yr./avg.
- 3.5 charities

GX 55% Give
- 35.8M donors
- $921 yr./avg.
- 3.8 charities

M 75% Give
- 55.3M donors
- $1,061 yr./avg.
- 4.2 charities

Ma 78% Give
- 23.5M donors
- $1,235 yr./avg.
- 6.3 charities

@Blackbaud @AshlyThmpsnn #AFPICON
Contribution to Total Giving

23% Generation X
$32.9 billion/yr.

41% Boomers
$58.6 billion/yr.

14% Millennials
$20.1 billion/yr.

2% Generation Z
$3.2 billion/yr.

20% Matures
$29.0 billion/yr.

Source: Blackbaud Institute
WHICH CHANNEL IS BEST?
Channel Giving Over Time

Source: Blackbaud Institute
## Percent of Fundraising from Online

<table>
<thead>
<tr>
<th>Year</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>8.5%</td>
</tr>
<tr>
<td>2017</td>
<td>7.6%</td>
</tr>
<tr>
<td>2016</td>
<td>7.2%</td>
</tr>
<tr>
<td>2015</td>
<td>7.1%</td>
</tr>
<tr>
<td>2014</td>
<td>6.7%</td>
</tr>
<tr>
<td>2013</td>
<td>6.4%</td>
</tr>
<tr>
<td>2012</td>
<td>7.0%</td>
</tr>
</tbody>
</table>

*Source: Blackbaud Institute*
### Percent from Online by Sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Welfare</td>
<td>9.8%</td>
</tr>
<tr>
<td>Arts and Culture</td>
<td>9.5%</td>
</tr>
<tr>
<td>Environment</td>
<td>6.8%</td>
</tr>
<tr>
<td>Faith Communities</td>
<td>9.6%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>5.0%</td>
</tr>
<tr>
<td>Higher Education</td>
<td>5.4%</td>
</tr>
<tr>
<td>Human Services</td>
<td>7.2%</td>
</tr>
<tr>
<td>International Affairs</td>
<td>9.5%</td>
</tr>
<tr>
<td>K–12 Education</td>
<td>9.9%</td>
</tr>
<tr>
<td>Medical Research</td>
<td>7.0%</td>
</tr>
<tr>
<td>Public and Society Benefit</td>
<td>5.5%</td>
</tr>
</tbody>
</table>

*Source: Blackbaud Institute*
Acceptable Giving Channels

<table>
<thead>
<tr>
<th>Method</th>
<th>GEN Z</th>
<th>MILLENNIALS</th>
<th>GEN X</th>
<th>BOOMERS</th>
<th>MATURES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friend or their family member</td>
<td>71%</td>
<td>67%</td>
<td>65%</td>
<td>67%</td>
<td>60%</td>
</tr>
<tr>
<td>Letter in the mail</td>
<td>59%</td>
<td>58%</td>
<td>58%</td>
<td>54%</td>
<td>50%</td>
</tr>
<tr>
<td>A radio/TV program</td>
<td>65%</td>
<td>59%</td>
<td>51%</td>
<td>43%</td>
<td>29%</td>
</tr>
<tr>
<td>Email</td>
<td>54%</td>
<td>54%</td>
<td>49%</td>
<td>37%</td>
<td>22%</td>
</tr>
<tr>
<td>Social network message</td>
<td>50%</td>
<td>43%</td>
<td>33%</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>Request to leave a gift in your will</td>
<td>35%</td>
<td>30%</td>
<td>24%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Call to update you on current activities</td>
<td>44%</td>
<td>35%</td>
<td>19%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Text/SMS message</td>
<td>30%</td>
<td>32%</td>
<td>21%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Street canvasser</td>
<td>49%</td>
<td>27%</td>
<td>19%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Phone call</td>
<td>26%</td>
<td>25%</td>
<td>11%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>Representative at your door</td>
<td>33%</td>
<td>22%</td>
<td>12%</td>
<td>7%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Online Channels to Connect with Orgs (at least Monthly)

- View/post videos: 53% (31% gen Z, 20% millennials, 12% gen X, 11% boomers, 3% matures, 2% others)
- Sign online petition: 50% (28% gen Z, 21% millennials, 12% gen X, 11% boomers, 4% matures, 3% others)
- Audio/podcast: 43% (22% gen Z, 15% millennials, 9% gen X, 4% boomers, 3% matures, 2% others)
- Participate in Virtual Reality: 34% (18% gen Z, 9% millennials, 2% gen X, 9% boomers, 0% matures)
- E-newsletter: 50% (38% gen Z, 17% millennials, 31% gen X, 22% boomers, 2% matures)
- Read/post blog: 47% (32% gen Z, 21% millennials, 26% gen X, 18% boomers, 2% matures)
- Forward message/link: 42% (32% gen Z, 21% millennials, 21% gen X, 15% boomers, 3% matures, 1% others)
- Live chat: 31% (18% gen Z, 10% millennials, 2% gen X, 8% boomers, 1% matures)
- Purchase a product: 50% (29% gen Z, 27% millennials, 15% gen X, 8% boomers, 2% matures)
- Online mag/newspaper: 43% (30% gen Z, 27% millennials, 26% gen X, 18% boomers, 9% matures)
- Contribute to forums: 37% (25% gen Z, 15% millennials, 18% gen X, 15% boomers, 2% matures, 1% others)
Donors Willing to Give Via Mobile

Source: Blackbaud Institute
Percent of Online from Mobile

<table>
<thead>
<tr>
<th>Year</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>9%</td>
<td>14%</td>
<td>17%</td>
<td>21%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Source: Blackbaud Institute
Planned Gifts

- Gen Z + Millennials
- Gen X
- Boomers
- Matures

- Have Will/Estate Plan
- In the Process
- No Will/Estate Plan
RECOMMENDATIONS

1. Focus on the generations that matter today.

2. Redouble your focus on the fundamentals.

3. Get your house in order.

4. Commit to testing.
“Fundraising is not mining or hunting; it’s farming.”
## 2019 Quarterly Overall Giving Trends by Sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>Q1 2019 V Q1 2018</th>
<th>LAST 12 MONTHS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Welfare</td>
<td>3.9%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Arts and Culture</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faith Communities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Healthcare</td>
<td></td>
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</tr>
</tbody>
</table>

In 2018, overall charitable giving in the United States increased 1.5% on a year-over-year basis. For the first time in 2018, the Charitable Giving Report split giving to Environment and Animal Welfare organizations into two separate sectors. The Environment sector experienced a 2.9% decrease in overall giving and a 1.4% decrease in online giving. Environment organizations received 6.8% of total fundraising from online giving in 2018.
The Next Generation of American Giving
The Charitable Habits of Generation Z, Millennials, Generation X, Baby Boomers, and Matures

How do you focus the ways different generations give today and plan for how they’ll give tomorrow?

Don’t miss the return of this highly anticipated report, last published in 2013, for the answers.

The key to building meaningful relationships with supporters is to learn about them at a fundamental level. The next generation of American Giving helps you to do just that, by revealing behavioral preferences and charitable habits of Millennials, Generation X, Baby Boomers, Matures, and by giving you a first look at the charitable perspective of up-and-coming Generation Z.

Key findings include:
- From Americans give, so understanding and retaining the donors you have is more important than ever.
- Giving is distributed across more channels than ever before.
- Baby Boomers remain the most generous generation, and the number of Boomers saying they give is growing.
- Generation X is on decline...and there are many more Gen Xers than you think.

Thank you!

ashley.thompson@blackbaud.com
www.blackbaudinstitute.com