



Plot Twist:

Reimagining
Philanthropy's
Next Chapter.

Blakely

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Authors' Note

We're in the midst of a pivotal moment for philanthropy. What we thought would be a mere moment in time in March 2020 became a global pandemic that is more of an era rather than just a moment — and one that will have far-reaching effects for generations. The uncertainty, separation and loss have changed us all. Yet in the face of these great challenges, we have found real inspiration.

Before the pandemic, fewer Canadians were giving. But those who were giving were doing more than they had in previous years. As COVID-19 swept across the globe, Canadians stepped up in massive numbers to help, from giving one-time gifts to making legacy commitments. In the process, many found the reason to give they'd been waiting for all along.

No matter how difficult or uncertain things became during the pandemic, Canadians continued to give. While other parts of the world experienced significant decreases in donor giving, the past two years have shown us one certainty: Canadians are willing to demonstrate how deeply they care — about their local communities, their country and the world at large.

There's no doubt the world has and will continue to change.

Over the past two years, Blakely conducted 18 donor affinity research surveys across multiple NFP sectors. We commissioned five North American donor attitudes research projects, including one large Canadian panel project. And we analysed aggregated results from a large group of clients in order to identify the right questions to ask and to start finding the answers you need.

The next chapter of the fundraising story will focus on harnessing the inspiration and care your donors have demonstrated. We'll do this by helping you invest in the donor experience with a focus on digital marketing and by putting a greater focus on the user experience so that donors understand the true impact of their gifts. There is a heightened awareness of the role of philanthropy in the world right now, and it's an important time for charities to align strategies with action in order to deliver for the communities they serve.

If you can help donors understand their vital role in solving the problems your cause exists to tackle, they'll remain part of the story for years to come, working alongside your staff, stakeholders and communities.

We're looking forward to embarking on that journey with you, and reimagining ways to inspire donors in 2022 and beyond. We hope you'll join us.

Kimberley Blease - Executive Vice-President, Strategic Solutions

Rachel Hunnybun - Director, Strategic Solutions

The image shows two elegant, handwritten signatures in black ink. The first signature, 'Kimberley', is written in a cursive script with a large, decorative initial 'K'. The second signature, 'Rachel', is also in a cursive script with a large, decorative initial 'R'. The two signatures are written side-by-side.

Prologue

Over the past two years, COVID-19 has caused unprecedented levels of social, political and economic upheaval, marking a turning point for every sector from travel and hospitality to education and health care. Philanthropy is no exception. In the midst of this historic crisis, donors have responded by showing how much they really care.

The pandemic caused many people to reflect on what really matters. From new donors wanting to contribute to solving the key problem of our lifetime to loyal donors believing deeply in the power of charities to chart a path forward, the non-profit world is reimagining our way to a new normal. The current state presents a myriad of opportunities for charitable organizations to look at things differently, change the status quo, invest in an elevated donor experience and translate that care into long-term commitment and lifetime value.

The insights in this report draw from data analytics compiled from aggregated results, commonalities we've seen in our donor affinity surveys and attitudes research surveying thousands of Canadians who donated to charity in the past two years. From these insights we offer key takeaways that will empower you to better understand your donors and emerge stronger in the months and years to come.

This paper is the culmination of many trends we have been experiencing for years, realities that emerged during the pandemic, and curiosity about the future, post pandemic era.

We hope you will take these findings and start to ask your own questions — because this is only the start of the story.

The Characters

Aggregated Results

These are results we have anonymized and amalgamated from 13 Canadian organizations across the non-profit sector. The historical trends are based on results from 2018, 2019, 2020 and 2021 (partial year). When we reference this insight, we're talking about actual results across a broad spectrum of organizations.

Donor Affinity Research

Insight has been pulled from trends emerging from our affinity surveys from 18 organizations in 2019, 2020 and 2021. Affinity surveys are a deep dive into motivation, donor needs and connection. When we reference this insight, it's anonymized and based on trends and observations we have seen across multiple surveys.

Donor Attitudes Research

Along with three rounds of Google survey research in 2020 and into 2021, we used Leger to conduct an in-depth panel survey of Canadian donors. Leger is a leading Canadian research and analytics company with an online panel of about 400,000 members nationwide and a retention rate of 90%. In our latest research conducted from August 23-29, 2021, Leger facilitated an online survey of 1,003 Canadians who had donated in the previous 12 months. When we reference these insights, it's based on the full donor panel spanning a wide range of demographics.

Key findings

Short on time? Here are our key insights, along with where you can find more.

1. Donors trust charities and believe they have an important role in solving post-pandemic problems.

More than two-thirds of donors surveyed (71%) believed charities have a role in solving problems created by COVID-19. Younger donors were especially confident that the non-profit sector would be crucial in the next few years, and many intended to support health care and food banks specifically. The Canadian donating public believed in charities, despite high-profile scandals affecting the sector. We found that four in five donors viewed charitable organizations favourably, and 82% of donors surveyed said they trust the sector.

There's more on this in the story of COVID Donors on page 12

2. New donors who gave during COVID are not necessarily the same as traditional new donors ... or emergency donors.

New donors are much more than emergency supporters. COVID inspired donors renewed their support in the first six months of 2021 at the same rate as new donors in previous years. This trend held across all channels and levels of giving, acting as a strong reminder that for many, the pandemic was the moment — not the reason — they gave. For many organizations, new donors presented a different demographic. Many were donating to charity for the first time, many were younger (up to 70% in some files) and many were interested in different areas of work than previous new donors.

To read more about these new donors, go to page 12

3. Diversity, equity and inclusion really matter.

We saw interesting moves toward values-based expectations in 2020, with diversity, equity and inclusion strategies a big part of the transparency that is expected from charities. And it's not just a consideration for content — we have seen more young donors identify as non-binary, so data collection and the attention we pay to respecting how they want to be communicated with really matters.

More can be found on more page 14

4. Motivation matters.

We have validated the fact that why, rather than how, people give is the important factor when looking at donor experience and content needs. The good news is that although different motivations are being addressed across program areas, you can easily deliver more tailored journeys by following an 80/20 rule — 80% of the journey being core, and just 20% being more tailored and relevant to motivation. The 20% of the journey that is highly relevant will increase the overall relevance of the journey.

For more on motivation go to page 9

5. Digital donor experience needs a bigger space at the table.

Giving through digital channels has increased by more than 300% since 2019, driven by emails, digital media advertising and website visits. The trend that started pre-pandemic has accelerated during COVID-19 due to limited channel availability and an increased focus on online media, making the online user experience more crucial than ever. Charities have gotten better at content and engagement online, but the overall digital experience is still falling short for many donors.

If you want to read more on the digital story, go to page 10

6. To unlock repeat and upgraded giving, supporters want to see their impact.

Half of Canadians said they were more likely to give again if they were clear on what their gift achieved. In fact, we found that demonstrating a donor's impact is the single biggest motivator for repeat and upgraded giving. That means a more strategic and thoughtful approach to communicating not just organizational impact, but individual donor impact is essential.

See page 26 for more on Impact

7. Lapsed donors are stepping up like never before.

2020 saw reactivation rates increase by 17.3% from 2019, with many lapsed audiences even more engaged than active audiences. We heard loud and clear that donors don't always feel they are lapsed. Even if an organization had stopped engaging them, they still considered themselves a supporter. Some were supporting in different ways. Others simply didn't realize they had stopped donating. Lapsed donors have demonstrated they are valuable and can be a cost-effective way to increase your active donor bases.

If opportunity from lapsed donors sparks your interest, see page 16

8. Mid-value donor experience needs some new thinking.

In 2020, we saw the number of donors acquired at the mid-value level increase by 280% from 2019, and overall we were seeing many more people giving at the mid-value level. But our affinity research told us that one size does not fit all, and the amount donated was not perceived in the same way by every donor, so the expectation of the experience was not the same across the files. It's important to rethink how you engage with this audience as a whole and understand more in order to invest in the right way.

To get some thought starters, go to page 20

9. Monthly giving continues to play a pivotal role in lifetime value growth.

Monthly donors were more engaged (+6% response rate to surveys), they were the most open to cross/up-selling (top-up gifts up by 62.5% in 2020) and were great prospects to upgrade to mid value (increased by 88%) so we know they are valuable. And it's not just lifetime giving. Up to 20% of monthly donors told us they had made a legacy pledge or were open to considering a legacy gift. Investing in the retention of these donors as we move into 2022 is going to be vitally important.

There's more on monthly on page 22

10. It's time to recognize the hidden “in memory ” inspired donors in your file.

Many donors told us that tribute motivations were central to why they gave to an organization. In one organization's affinity research, 24% of mid-level donors said they gave in memory of a loved one. In another, 27% of monthly donors said the same, yet none were identified as being “in memory of” donors. Focusing on how you identify, recognize and communicate in relevant ways with the hidden tribute donors in your files could hold the key to significant long-term return on investment.

Find out more about those hidden donors on page 24

11. Legacy giving offers untapped potential.

9% of Canadians told us they have left a gift to a charity in their will, which was up slightly from the pre-pandemic estimate of 6% of Canadians. One in three donors said they would be open to leaving a legacy gift to a charity they'd built a strong relationship with, but the age of people most open to making a long-term legacy commitment may be younger than you think. The opportunities to do more in this area in 2022 were clear, particularly given the long-term return on investment.

Learn more about our legacy insight on page 28

12. All roads lead back to the donor experience.

We've proven that a combination of affinity and donor experience leads to loyalty and lifetime value. Supporters who were happiest with their donor experience were more likely to identify that charity as their favourite. And favourite charity is a key lifetime value indicator. Understanding affinity is a powerful opportunity for charities — one that will have a noticeable impact on every part of your organization.

For more discussion starters on Donor Experience, go to page 30

What each of these stories have in common is

opportunity: Opportunity to understand why donors give, what they need to stay engaged and committed, and how to harness the outpouring of support from the past two years so your organization can emerge stronger than ever before. In the pages that follow, a story unfolds that will prepare you for the next chapter: **2022 and beyond.**

The story of motivation

Why do people give? And does it matter in relation to their ongoing experience? Historically, charities have separated donors into groups based on **how** they give. But what tells us most about the kind of experience donors need isn't how, it's **why**. In our affinity research work, we have seen far less difference between the needs of giving groups and channels (monthly/OTG/online/legacy) than the needs of people with different motivations. This leads us to the conclusion that **why someone gives and what problem they are trying to help solve are the most important pieces of information for effective and inspiring donor journey design**.

In our affinity research, we continued to see one or two different motivations or differentiators at play that change by organization. It can be geographic (national/local), temporal (long-term/short-term), programmatic (health care, environment), tribute (in memory/in gratitude) or informed by personal experience with a charity or cause.

At the mass fundraising level, different motivations are only important if they require a different experience. Often, more granular motivations don't have any differences at all in what they actually need from a journey. But in the vast majority of our affinity research, we have seen some core motivations with distinct needs spanning across channels and audiences.

Understanding the differentiators can guide you to the most effective journey — or journeys — to be delivered. **You can also use this information to develop refreshed offers and identify donors with the best potential return on effort.**

What do different donors need from the journey?

Engaging donors requires a multi-faceted approach. The more you know about your donors, the more you can employ relevant micro-target messaging and deliver propositions that drive action. And the more relevant the message, the more frequently you can communicate. We have seen through our affinity and attitudes research that **when content is relevant, donors are much less concerned about things such as the frequency of communications**. When they think you are over-soliciting or sending messages not meant for them, they either get annoyed or simply ignore you. Relevance is key.

The good news is that it doesn't need to be a completely different journey. Thinking about segmenting donors based on connection and motivation is a sizable shift, but if you want to really elevate the experience, it's something you need to consider. But it's also important to be realistic.

80% of the journey might be the same, uniting your donors under the clear and common high-level mission. **20%** of the journey should demonstrate more relevant content that aligns the donor motivation. This can be achieved on a basic level in a tactical way with a combination of variable copy, content, channel and format.

Key takeaway: You can't deliver a tailored journey to everyone, but by investing in the insight needed to identify key motivations, reimagining your segmentation and delivering 20% of the journey in a more relevant way, you'll ultimately deliver a more satisfying donor experience.

The story of digital

Online transactions have increased and will continue to do so. But what is inspiring people to take action and what do you need to invest in over the long term?

In 2020, digital donations as a proportion of total overall donor giving increased significantly as the pandemic created a captive audience and brought the need for emergency support sharply into focus. Organizations that stayed in market and ensured their message was present and invested in digital infrastructure before the pandemic reaped the rewards.

Overall **giving through digital channels (digital media, email, general web) grew 320% from 2019 to 2020.** For the food bank sector, which experienced incredible leaps in support during the pandemic, rates were even higher.

Our aggregated results showed that despite this digital surge slowing through early 2021, it was still up by about 25% on 2019, which signals the acceleration of a shift already in motion. And if you think digital isn't relevant for the traditional

charity audience, think again. **Behaviour shifted so radically in 2020 that we saw 80-year-old plus donors regularly making transactions online.**

This shift has created a new challenge. The way people consume content and make transactions has changed. In 2021, we continued to see a significant number of donors acquired in digital, but most renewals were still driven by offline channels. Direct mail was still the biggest driver to year-end 2020 and 2021 giving, even though we saw an increase of 50% in digital year-end gifts.

The name of the game is integration. We saw renewals increase by 10% using integrated strategies vs. digital only. And in our affinity and attitude research, while most donors said they wanted to receive information digitally, we heard that older donors (55+) were more likely to consume information offline.

Increases in online transacting as a percentage of overall giving

	2016	2017	2018	2019	2020	2021 (Q1/2)
Food Banks						
% Gifts: Online Transacted	28.95%	34.31%	38.56%	42.36%	70.07%	54.05%
% Revenue: Online Transacted	34.86%	39.44%	40.92%	45.92%	53.74%	39.90%
Hospitals						
% Gifts: Online Transacted	7.18%	8.30%	9.32%	7.19%	22.58%	17.95%
% Revenue: Online Transacted	9.68%	11.42%	11.41%	11.07%	28.15%	26.18%
Others						
% Gifts: Online Transacted	8.91%	8.80%	10.82%	11.72%	10.59%	7.56%
% Revenue: Online Transacted	17.64%	16.40%	20.93%	23.63%	19.66%	13.82%

The Blakely Donor Needs & Motivations Research Conducted by Leger Research September 2021



What do you need to focus on in the digital mix? The largest growth we've seen after overall online giving was engagement with email, which underpins the importance of first-party data and email collection. The more email addresses, the bigger the growth potential. In our affinity research, we found that donors wanted short bursts of information, and with the human attention span now at just 10 seconds, there's an opportunity to retool reports and newsletters to give donors what they want to consume. Shorter messages that connect are better than longer pieces that go unread.

We also saw that digital donors were no different from other donors in their motivations. They wanted to reach the same goals and solve the same problems, so in terms of content, they need a similar journey, but the mix of channels and content format needs to be different. They need the same story, **but how it's told needs to be digitally led.**

Our attitude research also suggested there's an opportunity to communicate more. We heard that 25% of donors older than 35 felt they received too much email from charities, yet these same people were happy to get daily emails from consumer brands such as Amazon where content is highly relevant. Understanding motivations and delivering a more versioned, segmented approach (as with direct mail) will better meet donor needs and should increase tolerance for more frequent email communications.

User experience is a crucial part of the digital donor experience. Consumer expectations are growing and without doubt, the digital user experience is now critical. This holds especially true for older donors. Although they are far more comfortable online than ever before, they report growing frustrated more quickly with technology that isn't intuitive and is overly complex or difficult to use. As the world moves toward a cashless system, some charities have succeeded in implementing express options through Apple Pay and PayPal. If digital user experience isn't top of your 2022 list of priorities, it's time to reassess.

Key takeaway: Digital channels offer a huge opportunity to speak to donors who want to solve the same problems on the same journeys as offline supporters. People with the same motivations want the same content—it's the format that presents an opportunity to differentiate. It's about changing the way we tell the story, not the story itself. If you want to improve your digital uptake, focus on content and user experience as a starting point!

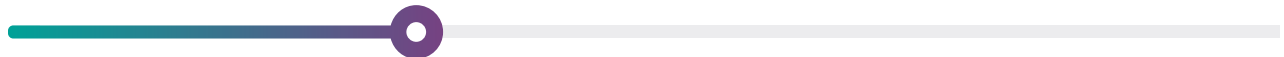
The story of COVID inspired donors

Who are our new COVID inspired donors? Are they like traditional new donors or more like emergency donors? And how do we retain them?

The pandemic shone a light on how critical philanthropy really is, and we saw big increases in donors for most of the clients we work with. In our attitudes research we found that almost **20% of surveyed donors said they gave to a charity to directly support pandemic relief efforts, with an average cumulative gift of \$232.** Many of those donors were giving to the charity for the first time.

New growth was consistent across the entire country, presenting a unified sense of Canadian values. In our affinity research work, we've seen COVID-19 donor files with more younger demographics than in core files. **In fact, in some programs, up to 70% of new donors were younger than 55.**

20% of donors said they gave to a charity to support COVID



49% of donors were informed and aware about how the donation was being used



More than emergency supporters. These new donors are much more than emergency supporters. And they are giving again. Our aggregated results showed that COVID inspired donors across all cause areas renewed their support in the first six months of 2021 at the same rate as new donors in previous years. This trend held true across all channels and levels of giving.

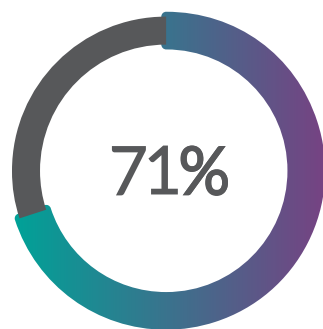
Another trend that emerged among new donors was their likelihood to give multiple gifts in their first year. We know that a donor who makes multiple gifts through multiple channels is more likely to keep giving. And COVID inspired donors are proving that to be true: **For those who made at least two gifts in 2020, we saw renewal rates 70% higher than one-time-only supporters.**

This is a clear reminder that **the pandemic was the moment — not the reason — they gave**, meaning their care and generosity have the potential to endure long after COVID-19 has passed.

The pandemic has opened the door to a new prospect pool of donors, many of whom will go on to become loyal supporters, but the proposition and experience really matters. Donors are realizing COVID-19 is a long-term problem, and they believe charities have a role to play in the recovery. In our attitudes research, we found that **more than two-thirds of donors believe charities will help guide society out of problems created by COVID-19.** This resonated stronger among under 35s (81% vs. 68% of those older than 35) and those who make more than \$80,000 (76% vs 68% under \$80,000). The opportunity lies in finding those COVID donors who have similar motivations to pre-pandemic new donors did — demonstrating to them why they're needed as much now as they were in 2020. We need to bridge COVID to cause!

The balance between pandemic relief and communicating need based on core mission priorities needs to be considered. **In our most recent attitudes research, only 24% of donors said they would support a charity solely on their COVID-19 relief efforts.**

A significant number of donors (45%) would still donate to a charity based on its non-COVID initiatives and mission. But it's important to recognize that a lot of need will arise in the post-pandemic era that has been caused or exacerbated by COVID-19. We shouldn't shy away from this. COVID relief work and problems caused by the pandemic are different. It's a vital consideration for building fundraising propositions moving forward for those charities that have a role in problem solving after the pandemic.



of donors in our research feel that charities will be important in solving problems post-pandemic.

Key takeaway: New donors in 2020 are so much more than emergency supporters, and younger donors represent a massive opportunity for growth. Think about what role the pandemic has had on your mission, and don't be afraid to communicate this. COVID fatigue is real – but ignoring the impact COVID has had could mean your cause feels less urgent to donors.

The story of retention

What really contributes to retention and how do we harness it? Retention is all about motivation, affinity and donor experience. We know that supporters who feel personally connected to the work a charity does, and who clearly understand the mission driving that work, are more likely to stay loyal to that organization. And building loyalty is essential as we know that renewal rates directly correlate to a donor's consecutive years of support.

A donor who has been giving for 10 or more consecutive years often has a similar renewal rate to a monthly donor (85% or more). Our aggregated results and affinity research also supported the thinking that a donor who supports a charity through multiple channels is far more likely to give again in the years to come.

The newer a donor, the more you have to work at retention — and our research showed that organizations investing in a specific onboarding experience were seeing higher levels of retention, especially if that onboarding was guided by motivation.

Favourite charity is a lifetime value indicator



Is favourite charity status important in terms of retention?

Our affinity research has shown us that donors who say the organization is their favourite non-profit are more likely to stay committed over the long-term — and not just committed. They are also more likely to consume and share content, engage in multiple channels and do more for the charities they give to.

We found that **files with a higher number of people who say the organization is their favourite tend to be higher value**, with larger numbers of donors either having given or considering giving a legacy donation. In fact, some of our results showed that **people with favourite charity status were more than five times more likely than other donors to consider a legacy gift.**

Monthly donors were more likely to say an organization was their favourite, but we have not seen the same correlation with higher-value donors, which has led us to question what really contributes to this status.

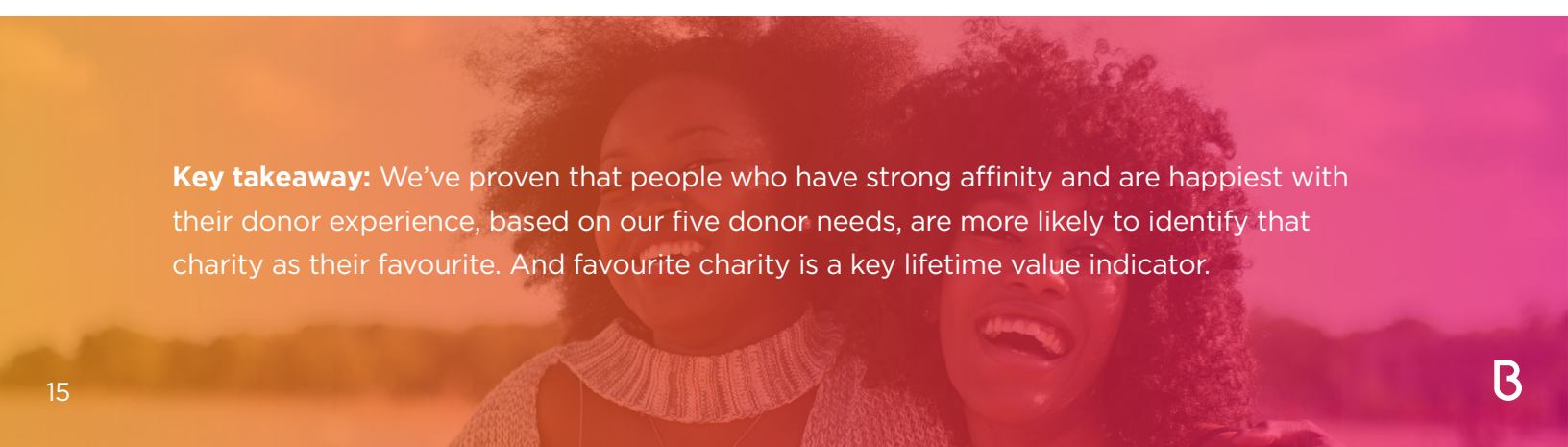
The benefit to getting in this 'favourite charity' status is clear. Through our affinity research work, we have demonstrated that we can impact the likelihood that a donor perceives a charity as their favourite.

Our work has validated that the key donor needs of trust, motivation, impact, need and values all contribute to delivering a positive donor experience that drives loyalty. **Files with donors who indicated higher levels of satisfaction in these five areas had a higher percentage of donors saying the charity was their favourite.**

Charities that were building and designing donor journeys and experiences based around equal importance on donor needs and specific business objectives (what the charity needs to achieve) were achieving the optimal experience. An unbalanced experience in either direction was ineffective. Too much business need and donors were turned off. Too much donor need, and the objectives of the mission were at risk.

The importance of values-based connections. In both our attitudes and affinity research, we have seen interesting moves toward values-based expectations. Donors were expecting non-profit organizations to focus on diversity, equity and inclusion as well as transparency. People wanted to see policies reflected in how they act, what they say and how they represent the people and communities they serve. This was especially expressed with younger audiences in our affinity research work.

And it's not just a consideration for content. The entire non-profit sector must consider how best to communicate in the future. A recent affinity project showed a glimpse into future gender diversification, with 3% of under-35s identifying as non-binary, compared to 0% of over-35s — so data collection and the attention paid to respecting how donors want to be treated really matters. As increased social acceptance takes place, it's important to question and understand what it means for communication. Your ability to renew and re-engage donors is going to depend more on this, and systems and approaches must keep pace with value statements, policies and content strategies.



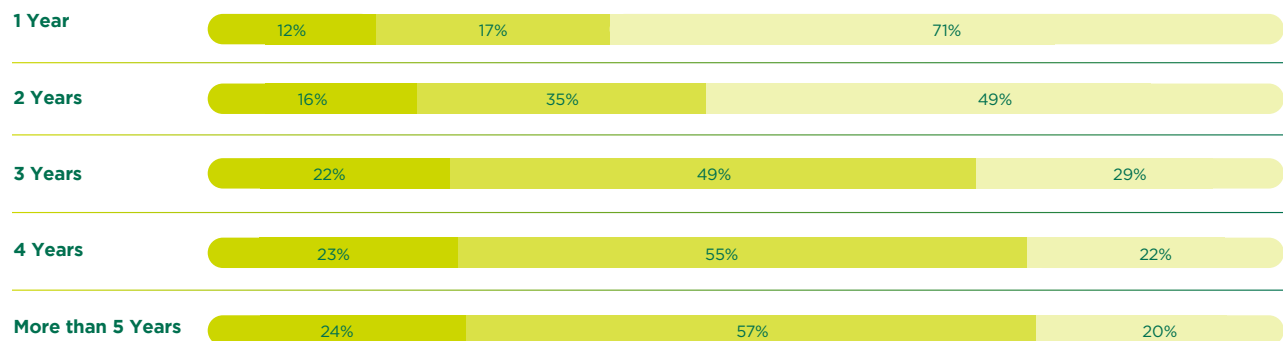
Key takeaway: We've proven that people who have strong affinity and are happiest with their donor experience, based on our five donor needs, are more likely to identify that charity as their favourite. And favourite charity is a key lifetime value indicator.

Spotlight on **lapsed** & **reactivated** donors

Should we be seeing lapsed donors as a viable acquisition source in 2022? One thing the pandemic has demonstrated is the engagement levels of lapsed and inactive donors to give again. Our aggregated results showed a **43% overall reactivation rate of lapsed donors during COVID-19**. With local urgent causes nearly doubling over their pre-pandemic rates. **Digital channels drove the engagement, with increases in lapsed giving of +13% and inactive of +33%.** But the engagement we're seeing in our affinity work showed that a donor labelled as lapsed may not always think of themselves that way. In fact, some lapsed donor groups responded at a higher rate than active donors.

Another major trend we observed in the aggregated results was an influx of long-lapsed donors returning to give to charities they hadn't supported in years. In some cases, they'd been lapsed for 10 years or more, and they returned without any active soliciting. This suggests there may be a different way to re-engage these supporters, but it may take a different proposition (as the pandemic messaging has demonstrated) to realize the opportunity.

In a scenario where a donor has stopped donating to a charity they support, as the years go by, the expectation to hear from the charity decreases.



The Blakely Donor Needs & Motivations Research Conducted by Leger Research September 2021

● I don't know ● No ● Yes

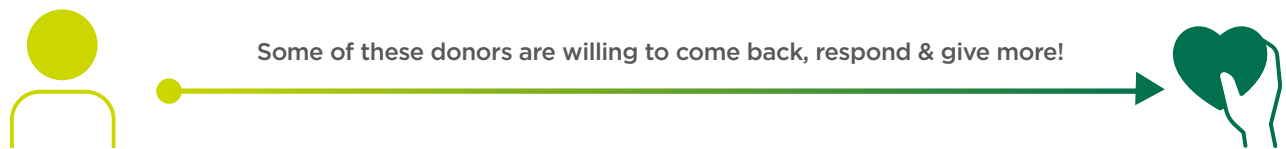
Why do donors lapse? And when is a lapsed donor really lapsed? Do they see themselves as still supporting the cause? In our affinity research, up to 50% of donors said they had lapsed because they were no longer able to donate. It's a common catch-all. But often this is subtext for the fact they are **giving to other charities** and when open-ended questions are included, this is the most frequent answer. Other common answers were that they were **not clear what their donation** achieved or they **didn't feel their donation was needed**. We also heard that donors **weren't asked to donate again**, and several monthly donors were **not even aware they were not still giving monthly**.

This all offers opportunities for charities to reconnect, but it has to be in the right way. In some cases, that's what the donor is waiting for. Our attitudes research showed that a **quarter of donors who gave \$100 or more still expect to hear from a charity four years after their last gift.** In our affinity research we often found that donors don't think that they are being communicated with, even when the CRM is saying they are. This may tell us something about whether our communications are actually cutting through. You may be communicating but is it being noticed?

Which leads us to the question: Do these donors have a motivation that isn't covered in mass communications? Are the things that lapsed donors receive simply not relevant? **If you could deliver more relevant content, is that the key to re-engagement?**

This brings us to the way you communicate with inactive donors. You can't speak to them the same way you do to someone who has made an impact over the past two years. It's important to speak to them in an authentic way. You can't tell them they have changed the world if they haven't given for a few years. They need different messages in order to engage. Just lumping them in with standard stewardship and impact communications may do more harm than good.

Investing in a more robust reactivation approach will pay off in the long term. Our aggregated results have shown that **when these donors do come back, they give even more — at times increasing their support by as much as 30%.** They also have long-term potential: donors who reactivated during the pandemic are maintaining at the same rates, or above, what we've seen in recent years. Interestingly, this trend holds true for donors no matter how long they've been lapsed, suggesting that with the right inspiration, even long-lapsed donors are an opportunity.



The sector has historically focused investment on acquiring new donors rather than going back to longer-lapsed supporters, but **when it comes to the cost to reactivate, longer-lapsed donors had the same or better cost ratios than new donors.** In addition, **retention of reactivated donors was 5 to 10% better than new-to-file donors.** In fact, a reactivated donor was more valuable in the long term than a new donor (\$757 vs. \$570), so investing in the time to communicate with these donors in a more relevant way that re-engages them has a demonstrable return on investment.

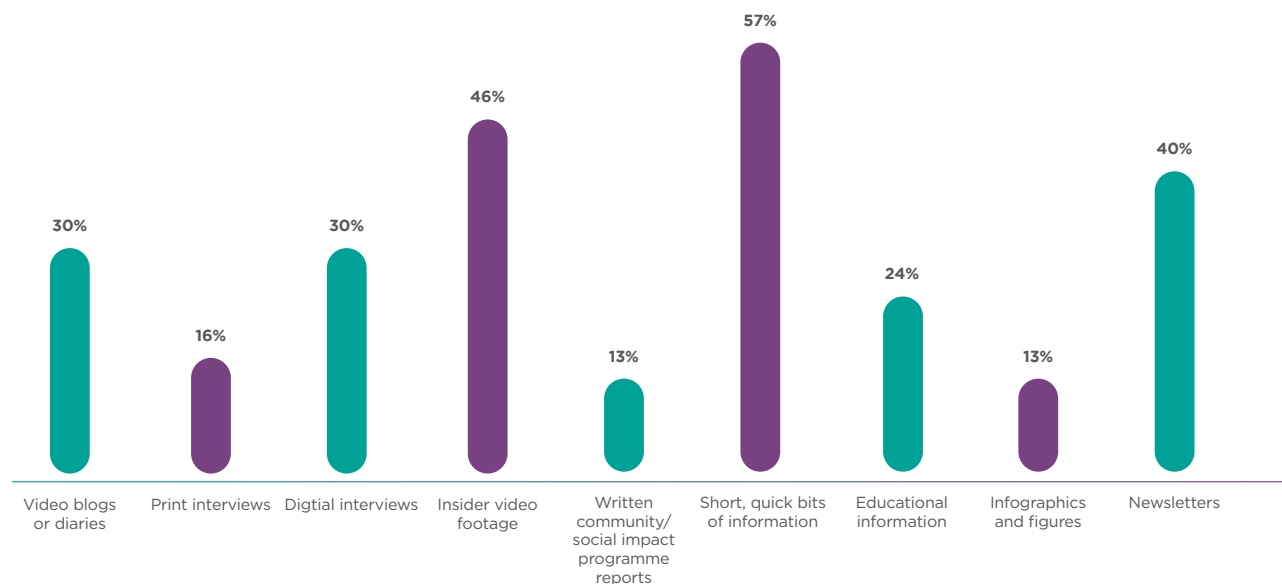
Key takeaway: When lapsed donors come back, they come back strong. And when they come back strong, they stay. Increased investment in understanding this audience and engaging them differently can lead to increased lifetime values. Take a special look at your fulfilled legacy gifts – because many of them have annual giving as a source and are 10+ years lapsed at the time the gift is fulfilled!

The story of content

What kind of content do donors want to consume? Has it changed? And most importantly, are you listening? The biggest trend in our affinity research across every segment was the desire for short pieces of communication. It's no surprise when we think about people's ever-decreasing attention span and increasing competition for attention. **The option of short bursts of information has been selected by more than 60% of donors**, with more traditional formats such as project reports and annual reports being less desirable for some key donor groups.

Newsletters were favoured by some donors in some organizations but not by others, suggesting the quality of content plays a role. But **one of the biggest differences in content needs and appetite was age**. Donors aged 55 and older told us they want different kinds of communication than the under-55s, with older donors being keener on offline pieces and showing much less appetite for content overall. Younger donors gravitated toward social media, infographics and videos that address how their gift has helped. **Suddenly an email is too long, so it's vital to learn how to get the message across in a more bite-sized way.**

We know donors feel that evidence of impact is connected to continued financial support, so finding effective ways to show impact more regularly is key. Relying solely on an impact report once a year that you assume donors read could mean your donors don't see any impact at all.



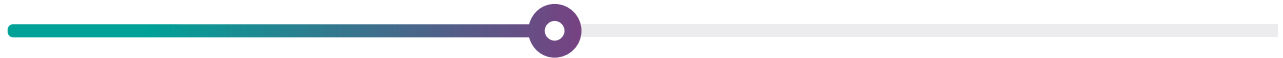
Are there donors who want more substantial information? And can we use content to cross-sell into other ways of giving? Our attitude research showed donors who gave more than \$100 at a time favoured more substantial communications such as annual reports or newsletters. But overall, mid-value donors still wanted to be served smaller, more easily digestible pieces of information, especially over digital channels. Those who were giving at the high end of the mid-value group average still love print, but don't forget integration with other channels is key here too. Mid-value donors need to see that your communications and messages are actually for them — in other words, they are tailored, personalized and most importantly, relevant.

We have also seen a real openness to cross marketing in our affinity and attitudes research. More than **10% of Canadian donors would consider monthly giving** as an option and up to **12% would consider legacy giving**. The key is finding who these donors are and engaging them in a relevant, inspiring way.

10% of donors would consider monthly giving



12% of donors would consider legacy giving



Being able to choose how to support in other ways — advocacy, sharing content, volunteering, surveys — is very attractive to donors overall. And the impact of providing these options in your communications can help facilitate retention, whether they are acted on or not. It's often as important to be invited to the party as it is to attend.

Finding the right voice. Our affinity research has shown that the appetite for hearing from senior charity staff such as the CEO is low overall for most groups. **It's the “on the ground” staff people want to hear from**, especially in the medical and international development fields, followed by beneficiaries. Telling stories through the eyes of staff on the ground is a compelling approach to illustrate impact that will resonate with donors. The exception to this is higher-level donors and volunteers who are interested in hearing from more senior staff.

Sometimes the best thing you can do for your cause is to help get yourself out of the way of your own great content. It's not about what you want to tell the donor, it's about what they want to hear. Consider reframing your communication strategy to give donors the content they actually want, rather than just the content you want to deliver. Less is often more — and content that is consumed is better than content that is ignored.

Key takeaway: Let's deliver content that people want, not just what we want to provide! In other words, let's deliver content that is relevant and interesting and get out of our own way. Giving choice and variety in content and asks will make it more relevant, which will mean more is consumed.

The story of mid value donors

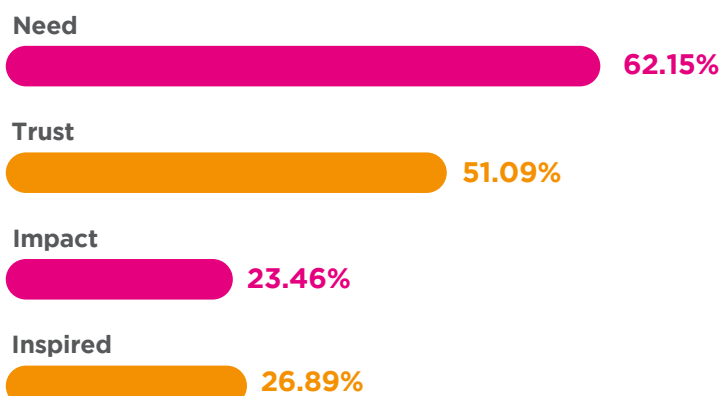
How do you grow mid-value donors to maximize the increases seen in 2020? Are mid-value givers any different than lower-value one-time gift donors? Or is the value of their gift individualized based on their financial status? In 2020, our aggregated results showed the number of donors **acquired at the mid-value level (\$1000+) increased by 280% from 2019, with an increased average annualized value of \$450 per donor, bringing revenue per donor to just over \$3,000.** Donors upgrading to mid level increased their gift by nearly \$1,400, representing a \$200 increase on previous years.

Our affinity research revealed that mid-value donors were more similar to core one-time giving donors than we previously imagined. **Which lead us to question: Is the value of the gift contextual to financial status?** One person's perception of a \$500 gift may be very different from another's, which may impact expectations on experience. Again, understanding your unique audience groups is important in tailoring the journey. Truly understanding what constitutes a mid-value gift and understanding the different audiences within mid value is important to building strategies (hint: there are at least three and possibly more if you have specialty cases in the mix!).

Are we delivering the right experience to higher-value donors? What is important to them? Top tier mid-level donors reported less satisfaction with their journey. According to our affinity research, 25% said their needs weren't being met by their current programs. **They need a journey that treats them differently from core or entry-level mid-level donors, which means a one-size-fits-all mid-level program isn't effective.** In some programs, a donor giving \$500 is getting the same experience as one who gives \$10,000. And it's more than just assigning a relationship manager to the donor. It's the actions being taken that make the difference.

Our affinity research suggested mid-level donors prefer shorter bursts of communication, particularly in digital (similar to all donors). Higher-value mid-level donors said they appreciate behind-the-scenes access to the charity they're supporting, either through exclusive events or communication. It's about feeling that they're closer to the organization. A journey that delivers on that desire will set these donors on a path to increased giving, as their affinity and wealth grow in tandem. **Feeling needed and having a high level of trust in the organization were the biggest contributing factors to higher-level support.**

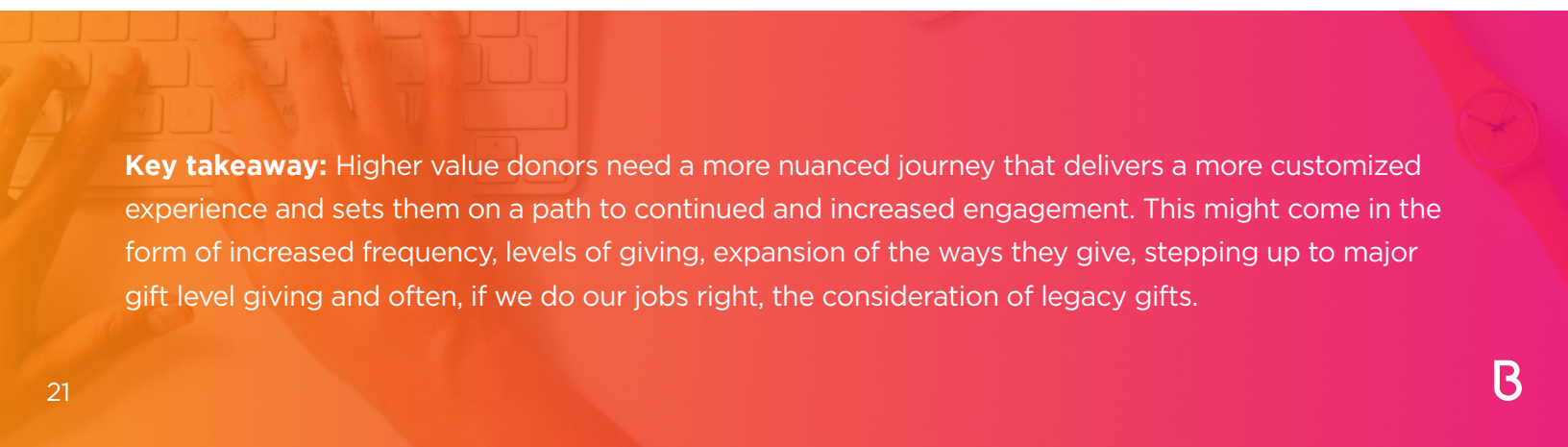
Need and trust are the biggest contributing factors to higher level support .



Attitudes research also showed that the amount a donor gave can change how they feel about their support. For example, donors who gave less than \$100 often described their giving as spontaneous. Donors who gave more than \$100 ranked higher on viewing the sector very favourably and trusting the charity very much.

Those who gave more than \$500 were more likely to feel informed, strategic, calculated and ambitious, suggesting they make decisions that are directly informed by an understanding of where their gifts are going. Donors across all mid-levels reported feeling generous, proud and socially connected by their gifts. We can tap into these emotions when structuring your donor journeys to validate the positive feelings of giving at a higher level.

Looking at your mid-level program through the donors' eyes will help you determine what kind of experience is needed. One thing was clear in all our research: Mid value is different in different organizations, from the definition through to the resources and investment. We found some surprising insight that has led us to plan further research in 2022 of donors who are giving at this level. We have a suspicion that money is being left on the table and that the way organizations have been approaching mid-level programs may need to change. More to come on this in 2022!



Key takeaway: Higher value donors need a more nuanced journey that delivers a more customized experience and sets them on a path to continued and increased engagement. This might come in the form of increased frequency, levels of giving, expansion of the ways they give, stepping up to major gift level giving and often, if we do our jobs right, the consideration of legacy gifts.

The story of **monthly giving**

How have monthly donors fared over the past two years? Are they still an important part of the high-value mix? During 2020, our aggregated results saw monthly donors retain at rates 4% higher than previous years, regardless of the channel source that the monthly donor started with. **We also saw extra-gift rates increase** by 63% and overall value increase, demonstrating once again that for those programs with substantial numbers of monthly donors, these donors were amazing supporters. Over the past two years, we have also seen more cancelled monthly donors reactivating (up just less than 10% from 2019), which again demonstrates the value of monthly donors and lapsed strategies.

And it's not just now. These donors are worth investing in over the long term. Our aggregated results showed monthly donors upgrading at an average of 15%, yet our affinity research showed a much higher level of upgrade is achievable, with up to 30% of monthly donor respondents indicating they would consider upgrading. Our affinity research told us the two biggest factors (identical to that of mid-level donors) behind an upgrade were feeling needed and having a high level of trust in the organization. The important question for fundraisers is this: Are we building these critical elements into our monthly donor journeys?

63%

increase in extra gift rates and overall value increase!

Are monthly donors different than one-time gift donors? Or is it just the way they choose to give? In our affinity research we have seen some interesting differences in the motivation of monthly givers who have a tendency to be more interested **in long-term work, choosing to help solve bigger problems rather than contributing to short-term quick fixes.** Levels of engagement and satisfaction with the donor experience directly correlate to organizations with a formal monthly program rather than those that treat monthly donors the same as other donors.

We have seen several programs in which monthly donors did not feel as impactful or informed as single-gift donors, and were less likely than expected to say the organization was their favourite charity.

This may be because they are not getting as many solicitations that also inform them of the work being undertaken, and often there are few or no alternative communications. **In organizations with a well-thought out and specific journey, we found increased engagement, overall satisfaction and a higher number of donors who would consider upgrading their support.**

Monthly donors are good higher-level prospects with the right motivation to upgrade. There are monthly donors who demonstrated amazing connection and commitment to the charities they care about. We can get a sense of engagement by survey response, and we often saw monthly donors responding to our donor research surveys at up to +6% over one-time gift donor segments. These donors are often targeted for legacy giving because of the commitment factor, and our affinity work has validated that they are great prospects for legacy giving. One recent project saw 20% of monthly respondents either having made a legacy pledge or open to considering a legacy gift. And don't forget that these amazing donors are also incredible champions of your cause, so opportunities to share and engage are high.

Just like mid-value donors, monthly donors need the same top two drivers to inspire them to keep giving. 48% said matched-gift offers inspire them to do more, and 41% said knowing their donation makes an impact is motivating. Our affinity research told us that monthly donors give the way they do so they can give more over a period of time and make more impact. So it makes sense that as changes in personal wealth occur, these donors make excellent mid-value and legacy prospects whether they become single-gift givers or mid-level monthly donors.

48% said matched gifts inspires them to keep giving.



41% said knowing that their donation is making impact inspires them to keep giving.



Key takeaway: Investing in the experience for monthly donors now will result in increased lifetime value both now and in the future. A thought through and relevant experience that focuses on their impact along with inspiring opportunities to give in different ways will help retain and upgrade these valuable supporters.

Spotlight on **tribute donors**

Do we really know who is giving in tribute? Is it an important motivation to be aware of? In all our research, across every type of charity, we saw a key finding that represents a huge opportunity. Among donors overall, there are many more in-memory donors than formally accounted for — something we have always suspected. **In several organizations, it was revealed that nearly 70% of donors said they were giving in memory, but were not identified as in-memory donors.** In fact, we found large percentages of donors identifying “in memory” as the key connection across every kind of charity, from hospital and health-care charities to food banks and environmental organizations, were formally recognized as such in the donor base.

It's important to know this motivation in order to maximize support. Our aggregated results showed that in-memory second-gift rates are as low as 4%, but the minute an in-memory donor makes a second gift, they are far more likely to stay loyal to a charity and renew. **They are also far more likely to leave a legacy gift so we know there is an opportunity to inspire a deeper commitment in these donors but they must be recognized.**

70% of donors could be giving **in memory or as a tribute** in your file!

Where are the differences in opportunity and experience between in memory and in gratitude? Among tribute givers, in memory makes up the largest segment by far. It's the largest by overall percentage in the healthcare and hospital charity sectors, making up as much as 85% in some cases. Our aggregated results showed that although tribute giving overall (in gratitude, in honour and in memory) was down 6% in 2020, **in honour and in memory were up 89% and 55% respectively** — which is why thinking about the mix and the unique drivers in your tribute program is key.

85% of donors giving in the healthcare and hospital sectors are **tribute donors**.

We know from prior research that in-memory and in-gratitude donors are very different, yet they are often treated as a more general bucket of tribute donors. 2020 polarized this difference even further, with in-gratitude donors often motivated to give in appreciation of frontline workers — sometimes with little or no connection to the cause.

In-memory donors who were close to the deceased have a particularly personal connection at play. Although we have seen low engagement in our survey work, which suggests low engagement overall, we know that with the right journey there is an opportunity for the right non-profit organization to be a part of the healing process. By creating an experience that walks alongside the donor in the journey from grief to remembrance, you can create a connection that will be remembered. In general, experiences at times of pain are more memorable, so a good experience will be cherished and a bad one shared.

Harnessing this opportunity lies in the right digital offers. Although in-memory donors migrated online, continuing a trend we've seen over the past several years, 2020 presented significant barriers to giving, not least of which was a lack of funerals and in-person gatherings to commemorate lost loved ones. This meant that charities with digital offers for in-memory donors were able to offer something that represented ease and value for donors.

Knowing that the key to retention lies firmly in the second gift, it's critical to create digital offers that are rooted in acquisition and lend themselves to ongoing giving, with an online experience that is positive and inspiring to make that second gift an easy decision. **And remember: These donors stay over the long term and give legacy gifts at a rate 6x that of a non-tribute donor.**

Giving in memory is an opportunity for cross-marketing as well. **Our affinity research showed that the opportunity to dedicate an in-memory gift monthly is highly appealing.** That suggests that by first identifying these donors and then taking them on a specific journey — such as providing an opportunity to dedicate an in-memory monthly gift — you'll create a deeper and more sustained connection with these donors.

When we linked our research with market scans, we saw a gap in the digital space in offers for those wanting to remember someone special. It's more than simply putting a box on a donation form. The opportunity is in creating an offer that inspires and creates an element of value, both at the time of grief and in remembrance later. This will be an even more important strategy for charities in the future and could hold the key to new markets.

Key takeaway: In-memory donors have a relationship that extends beyond the charity — a relationship with another human being — that's being missed in current offerings. A journey that speaks to that can inspire a deeper commitment. But donors with a specific connection need and deserve recognition and engagement based on that uniqueness — finding ways to uncover these connections and acting upon them in the journey will increase engagement in all ways moving forward.

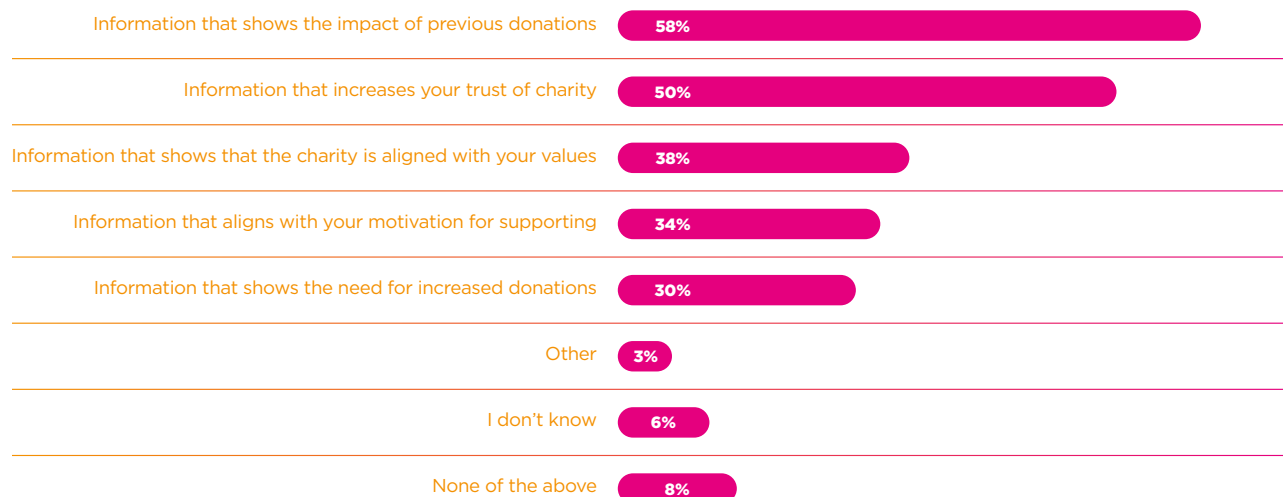
The story of impact

Why is demonstrating impact so important? How can you do more in this area? In our affinity research, we confirmed that impact is the one thing that will inspire people to give again and again. Not only is communicating impact an important driver of trust, it can also inspire donors by showing how larger donations would make a difference. In our attitude research, when asked what motivates repeat donations, **about three in five donors (58%) said that information on the impact of their previous donations was the top motivator, followed by trust of the charity (50%).**

Are we really showing donors the impact they are making? A third of all Canadian donors we surveyed feel they're making an impact. Which leads us to ask: What about the other two thirds? When we asked donors in our affinity research if they had been told what their donation achieved, we saw that as few as 15% understood their impact. **This was particularly low with new donor files, which suggests that impact and donation achievement must be a bigger part of the onboarding experience.**

Unfortunately, of those who made a donation to support COVID-19 relief specifically, only half (49%) said they were informed of how their donation was actually used. In our donor research work, we have seen a real mix, with anywhere from 10% to 70% of pandemic donors knowing the impact of their gifts. Organizations that invested in a formal COVID inspired donor onboarding experience are seeing more favourable retention rates and higher levels of donor satisfaction.

Information that could motivate donors to increase their support



The Blakely Donor Needs & Motivations Research Conducted by Leger Research September 2021

How do donors want to receive impact? To truly harness the outpouring of care of the past two years, improving the **way** you demonstrate impact is where the greatest opportunity lies to drive up donor satisfaction. **It's not just a nice-to-have part of the experience, it's an essential part of any fundraising strategy.**

Donors want to see more impact more quickly, more regularly and in easily digestible formats. Our affinity research showed they want it not just in the form of an annual impact report, but in smaller bursts of communication across the year, from stories and statistics to reports, newsletters and blog posts. Inspiring content in frequent, small amounts will drive engagement and help donors to feel more connected — something every charity can deliver on. Now is the time for more reporting back, particularly on what charities have achieved with the support they received during COVID-19 to date.

Impact at the local level is proving inspiring. Our attitudes research showed the same thing: People want to see tangible effects and impact in their communities. Food banks have benefited from this focus and are experiencing unprecedented growth. Some have seen an increase of more than 650% in digital giving alone. These local charities are experiencing not just massive revenue growth but new donor onboarding and engagement.

The key is the bridge we create from COVID to cause and showing the local impact that has been made during the pandemic as well as the longer-term impact. Moving into 2022, the focus on local is expected to get even stronger as donors look to charities to solve problems introduced or intensified by the pandemic. So geographically targeted impact reporting will become a valuable tool in any charity's fundraising mix, even for organizations that work nationally.



Key takeaway: Donors who understand the impact of their support — and know what their gifts achieved — will feel lasting affinity toward a charity. Do your donors truly know the impact their giving in the last two years has made, regardless whether it's COVID related or not?

The story of legacy & lifetime value

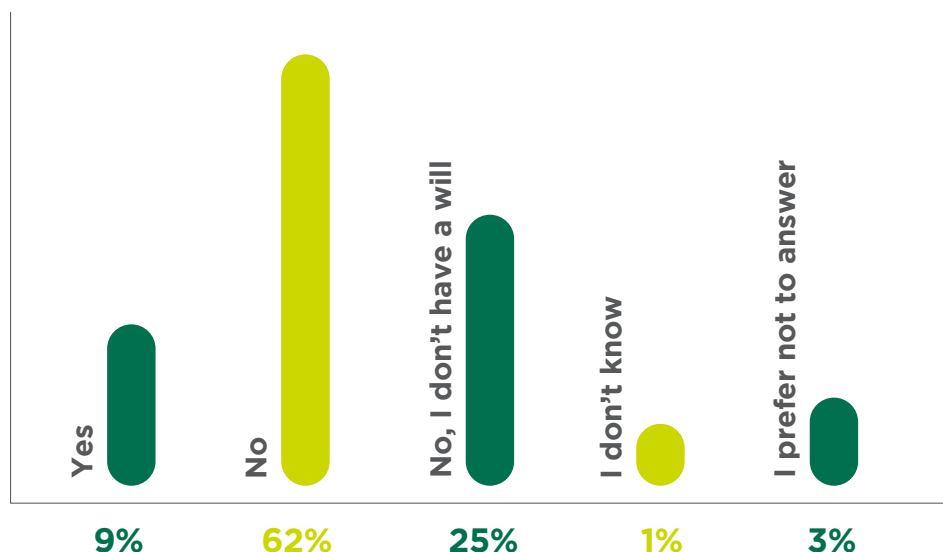
Has the pandemic impacted people's perception of mortality? And are we maximizing the legacy opportunity? Legacy giving has grown during the pandemic, with people flocking to make wills for the first time. As the Canadian donor population ages, many more charities are focusing on how to tap into legacy giving. The use of digital will-making platforms has exploded, and organizations such as WillFora have reported increases of up to 600% in online will making in early 2020, which is making marketing for charitable gift consideration even more vital.

In our attitudes research, we found that **only one in five donors had been asked to consider a legacy donation. This figure doubles for those who gave more than \$250**, which is likely driven by the very narrow focus of the marketing strategies in most charities.

What's holding us back? The first stumbling block to increasing support through legacy donations is related to the number of donors who have a will. 9% of donors surveyed say they have left a gift to charity in their will — up from 6% pre-pandemic, with 25% still saying they have no will at all.

The historical barriers to increased investments in legacy marketing continue. Organizations fail to invest in the amazing lifetime value that legacy giving provides because they are focused on the short term or can't see cause and effect, and don't recognize all the amazing ways people can be inspired to take action. The ROI for legacy investment is there, but it's not a one-year turnaround. It's a vital part of the diversification mix for charities.

Few donors have left a gift in their will to a charity.



Who should we be asking? When donors are thinking about leaving a legacy donation, many lean toward charities they support regularly. In our attitudes research, **36% said they would be likely to leave a legacy gift to a charity to which they donate regularly and have a relationship.** Proximity to the cause is one part of the equation. Donor experience is the other. We found in our affinity research that those who said the organization was their favourite charity were far more likely to be open to leaving a legacy gift — and this is directly connected to an elevated donor experience (more on this in the following chapter of the story).

In our affinity research, some other key groups have emerged: Monthly donors, younger than 55s and mid-level donors are all good legacy prospects. In some files we have researched, we found more than 20% of some segments said they would consider leaving a gift in their will. We have seen particularly strong results in arts organizations, local organizations and health charities. Weaker results were seen in international development charities. In several organizations, we have been able to identify donor groups that are more likely to consider a legacy gift based on motivation, with **donors who are most motivated by long-term impact most likely to consider a legacy gift.**

Legacy fundraising is not just about future return. Lifetime value increases with a legacy commitment.

Lifetime value matters in every program and to every charity, and nothing drives donor lifetime value more than people who make a legacy commitment or even handraise and inquire or show an interest in legacy giving during their donor relationship with the charity. **We consistently saw 45 times the LTV of a legacy committed donor vs those without a legacy inquiry or commitment – and that is actual value across the donor's lifetime.** Legacy return on investment is enormous — bigger than virtually any area of giving other than major gifts. Yet there is a lack of investment and vision on the role legacy can play in attracting and connecting to a wider audience and understanding of cause and effect. This needs to change in order for charities to remove the biggest barrier to engaging people: their own strategies and short-term focus.

Key takeaway: Audience understanding in legacy is important when looking at the opportunity to increase revenues and lifetime values in your program. There are both known and unknown audiences that you can reach, and overfocus on high value giving groups only (monthly, mid value and major) will not drive the big volumes of gifts available to you. More value on hand raising is needed and increased focus on engagement using legacy propositions as an alternative to brand or pure awareness is the big opportunity for market share and new engagement moving forward.

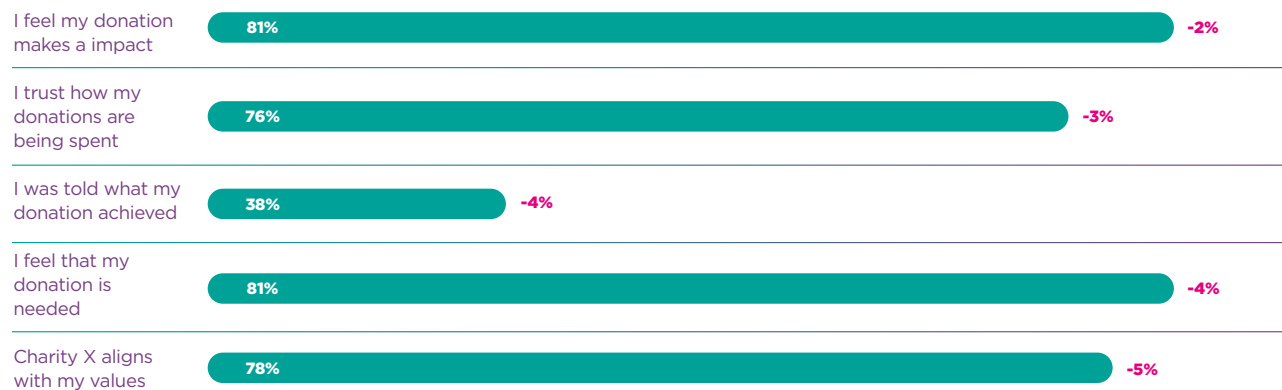
The story of donor experience

Does donor experience really matter? How do we know? Every aspect of the story builds up to the role and importance of donor experience. When we talk about donor experience, it's important to start from the moment a donation is solicited through to the offboarding of donors who are no longer supporting an organization.

Investment in this area can be hard to measure, but it's not impossible and we know it works. To help with business cases and investment, we've been working to prove there is a return on effort and investment in the donor experience.

An experience that meets donor needs results in a higher-value file. We hypothesized several years ago that donors have four core needs: trust, impact, need and motivation. We have been working to validate this and to prove that higher-value files correlate to those in which the donor's journey hits on those four areas. And prove it we have! **Across all our affinity research work, those files with the highest scores of these donor needs had the highest value.** Where we saw gaps in donor needs then the strategic response was to increase specific types of content and experience touchpoints in the journey in order to elevate the experience and grow file value.

New donors indexed slightly lower on donor needs, but very positively for a new relationship



The Blakely Donor Needs & Motivations Research Conducted by Leger Research September 2021

When we looked at donors acquired during the height of the pandemic, we found that those who scored highly on key donor needs, were most likely to have donated again. And those charities that invested and designed a specific experience for these new donors based on the identified needs, had a higher number of repeat donors.

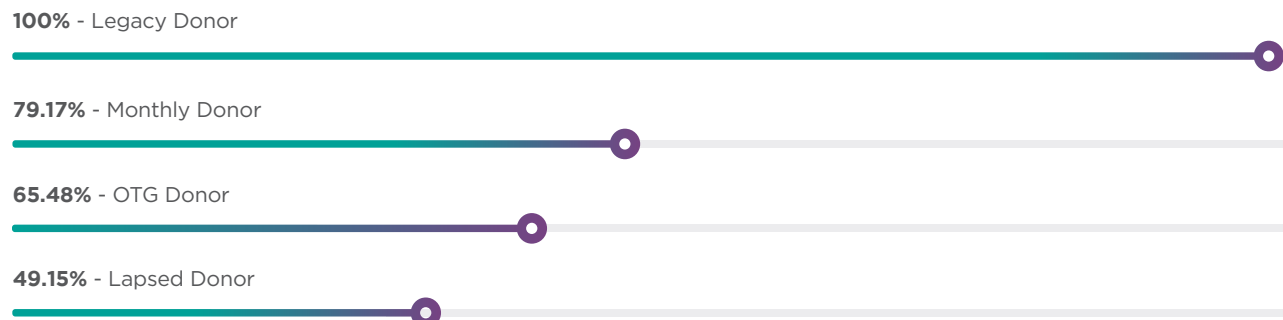
Since the pandemic started, a new donor need has emerged: values. This is where the importance of diversity, equity and inclusivity comes in. The values people have in common contribute to purchasing decisions. During the pandemic, we have seen consumers turn from companies that do not reflect their values.

The non-profit world is no different. This needs to be reflected in more than just your creative or your words, but in how your organization behaves and communicates. It's about beneficiaries, staff and donor approaches. In other words, it's about walking the walk, not just the talk.

How can we measure this? Are there any indicators to look for to ensure the experience is meeting donor needs? Throughout our affinity research, we found that donors who said a charity is their favourite scored all five donor needs very highly, meaning there is a correlation between donor needs and favourite charity status — which we also proved directly correlates to lifetime value.

Where a donor said the cause rather than the charity was their favourite, we found lower scores across the donor needs. **So our question is: Can these people be converted with an elevated experience? Everything we've learned so far points to yes.** By enhancing the donor experience using those donor needs, you can increase the likelihood of donors feeling favourite charity status. We have more research and strategy on this being published in 2022!

Donor lifetime value correlates with donor experience satisfaction



An elevated experience that combines donor needs with relevant content leads to increased lifetime value. By going back to the beginning of the story, taking motivation and affinity alongside donor needs, you can really start to elevate the experience. It means combining more relevant content to inspire and play to motivations while ensuring that all donor needs are met with content that builds trust, shows need, impact, and values.

All roads lead to the importance of an elevated donor experience as the essential ingredient for upgrading, migration to high value giving and retention. It takes focus and work to align and strengthen the experience.

Relevant Content aligned with Donor Motivation & Affinity + Donor Needs = Elevated Donor Experience = Favourite Charity = Lifetime Value

Key takeaway: A relevant donor experience that is built around affinity and core donor needs will cause more supporters to feel that you are their favourite charity which will deliver a high return on investment and lifelong affinity potential. For these donors, this isn't the end of the story—it's only the beginning.

The Next Chapter

The End of this Story is Just the Beginning.

How the rest of the story unfolds is up to all of us. You can't tackle every opportunity immediately, but you can identify the elements that are vital to the future and prioritize them based on opportunities for your own organization, your unique case, audiences, goals, resources, and aspirations for growth and change. You can start to really tackle some of the key challenges for your organization and build these into your strategies in 2022 and beyond — one page, one chapter, one story at a time.

You can also set up your future teams and organization for this new post-pandemic era in which we are all expected to know more about our donors and tailor their journeys and experience to the ways they want to engage and give.

We love to talk research, insights & analytics and trends. If you would like to ask a question or have a conversation about the trends you see or those that are most relevant to you and your organization, please reach out to Rachel (rachel@blakelyfundraising.com) or Kimberley (kimberley@blakelyfundraising.com) anytime.

Appendix of methodologies

About Leger's online panel

Leger's online panel has approximately 400,000 members nationally and has a retention rate of 90%. Leger is a leading Canadian based research and analytics company.

Quantitative research instrument

An online survey of 1003 Canadians who have donated in the past 12 months. The study was in field from August 23rd, 2021 to August 29th, 2021.

Quality control

Stringent quality assurance measures allow Leger to achieve the high-quality standards set by the company. As a result, its methods of data collection and storage outperform the norms set by WAPOR (The World Association for Public Opinion Research). These measures are applied at every stage of the project: from data collection to processing, through to analysis. We aim to answer our clients' needs with honesty, total confidentiality, and integrity.

Aggregated performance metrics rolled up from 25 clients for 2018, 2019, 2020 and 2021 partial year

Aggregated affinity survey results pulled from 15+ affinity surveys from 2020 & 2021

