



# Global fundraising trends and the impact on fundraising practice

Swiss Fundraising Day 2025



# Emily Bracken

CEO, Consulting, Daryl Upsall International

- Based in Madrid, from the US, global work.
- 15 + years helping international NGOs to plan their growth or increase the efficiency of their fundraising programmes.
- For-profit sector background on international expansion planning.



# Daryl Upsall International

- Supporting non-profits for **20+ years** to get the insights and talent they need to achieve their missions
- Two divisions: **Consulting and Recruitment**
- Work directly with fundraisers from **80+ markets**, in Asia, Europe, Africa and the Americas, in addition to **international team**
- Aim to provide a **global perspective based on deep local inputs**

**Fundraising  
Strategy**

**Market  
Intelligence**

**Fundraising  
Readiness**

**Mentoring &  
Facilitation**

**Recruitment**



Growth in our sector is more difficult...

But it IS achievable!

Many organisations are  
struggling to grow at rates of  
years past

... but not all!

Some organisations are  
achieving record growth.

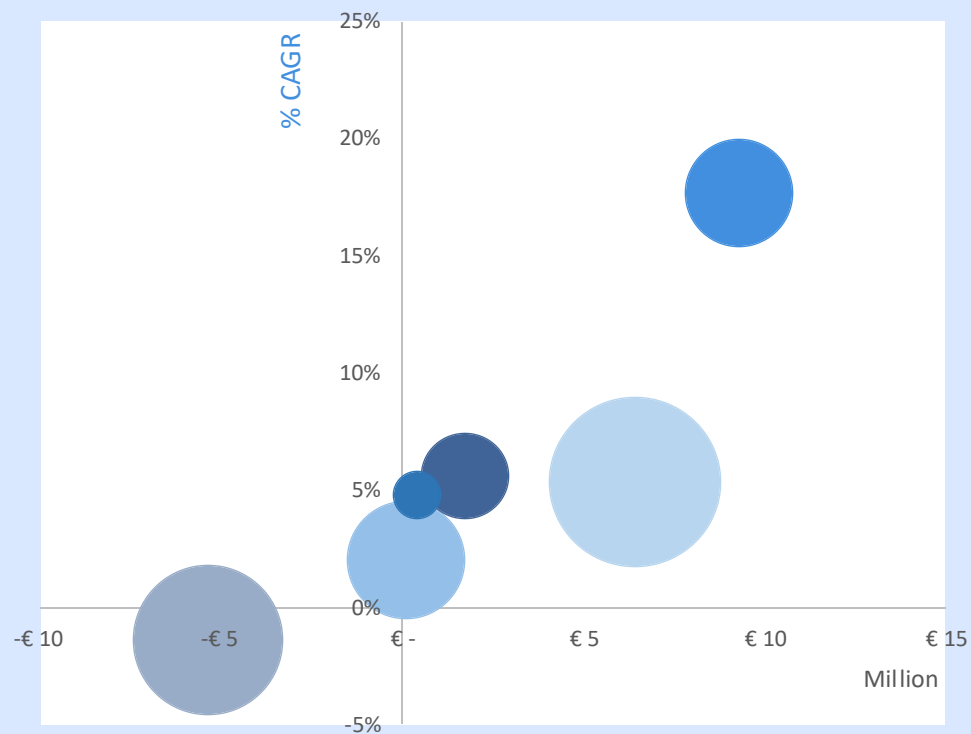
International Fundraising Leadership  
(IFL) organisations grew global  
income on average by only 3.5%  
CAGR over 5-year period:

- 4 of 17 in *decline*.
- 6 grew at **+5% CAGR**
- 4 of 17 grew by **+10% CAGR**

# There are always different growth trajectories for NGOs in the same market

## NORWAY MARKET GROWTH

Leading NGOs - Private income growth and CAGR 2019 - 2023



## AUSTRIA MARKET GROWTH

Leading NGOs - Private income growth and CAGR 2019 - 2023



# What's the disconnect?

Why are some organisations flying ahead while others struggle?

**“We should no longer be talking  
about digital marketing,  
but marketing in a digital world.”**

**- Keith Weed, Unilever 2019**

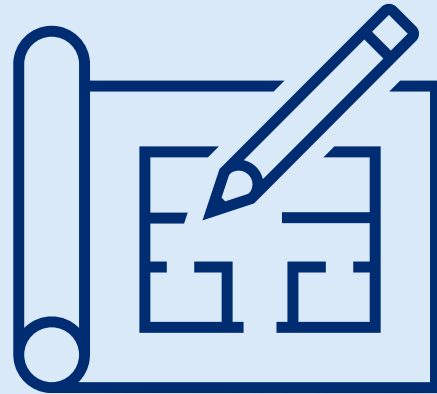


How are top  
organisations  
achieving growth  
in this context?

**By strengthening:**

- 1. Proposition & engagement**
- 2. Internal structures**
- 3. Marketing Technology**
- 4. Diversification & audience reach**
- 5. Leadership support**

**Develop a proposition that donors  
trust and want**



**We have to create an offer, a relationship  
that donors want, *not just what we want to 'sell'.***



# Rework your proposition to match donor motivations

Outreach must be audience-led, with high segmentation



676 results



**Brewmasters  
Collection American  
Pale Ale**

Beer Type: Ale  
ABV: 4.6%  
Brand Origin: Denmark



**Brewmasters  
Collection California  
Steam Beer**

Beer Type: Pale Lager  
ABV: 4.7%  
Brand Origin: Denmark



**Brewmasters  
Collection India Pale  
Ale**

Beer Type: Ale, India Pale Ale  
ABV: 5.2%  
Brand Origin: Denmark



**Carlsberg 0.0%**

Beer Type: Alcohol Free  
ABV: 0%  
Brand Origin: Denmark



**1664 0.0%**

Beer Type: Alcohol-Free  
ABV: 0%  
Brand Origin: France



**1664 Blanc**

Beer Type: Wheat Beer  
ABV: 5%  
Brand Origin: France



**1664 Blanc 0.0%**

Beer Type: Alcohol-Free  
ABV: 0%  
Brand Origin: France



**1664 Blanc Fruits  
Rouges**

Beer Type: Wheat Beer  
ABV: 4.5%  
Brand Origin: France



**1664 Blonde**

Beer Type: European Pale Lager  
ABV: 5.5%  
Brand Origin: France

# Give donors more control, more choice

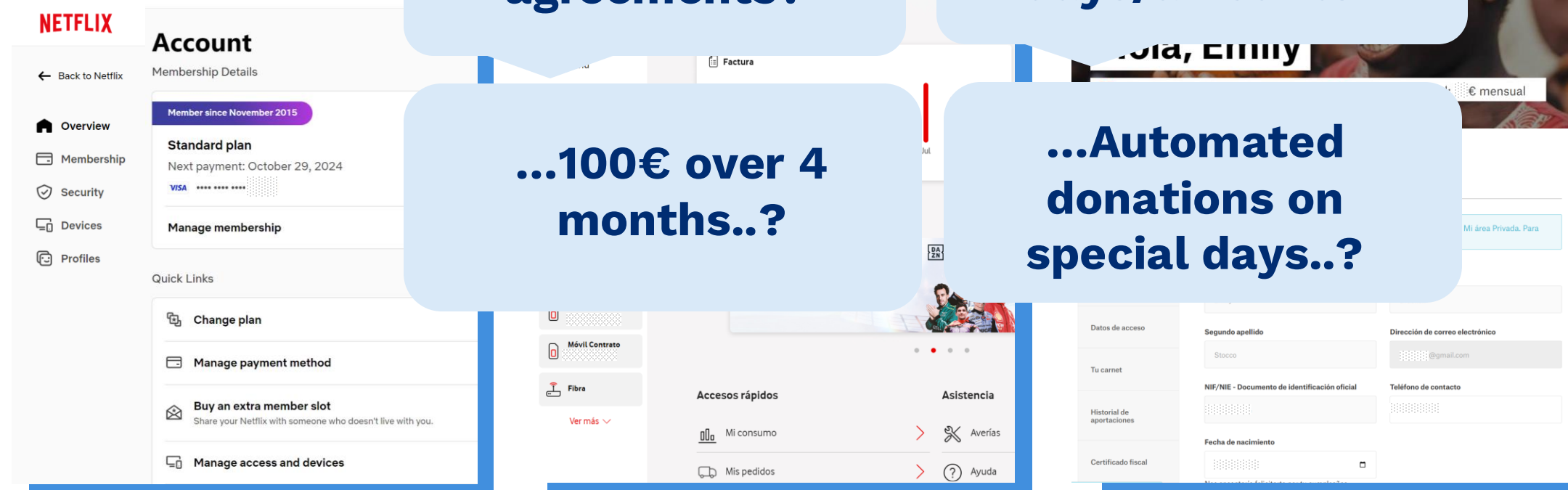
**What about:**

**Shorter-term giving agreements?**

**Control over days/amounts?**

**...100€ over 4 months..?**

**...Automated donations on special days..?**



# Multi-channel, personalized engagement with donors

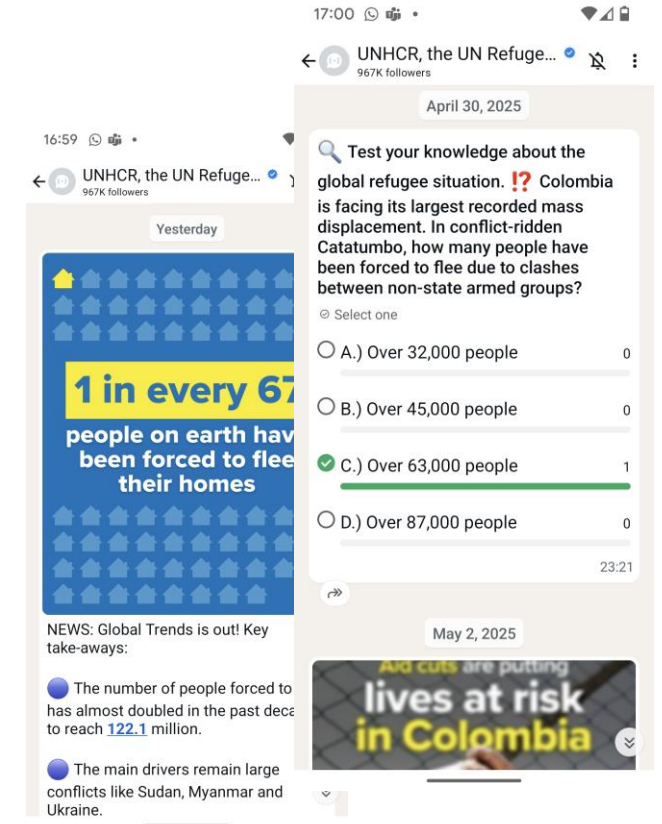
## Multi-channel communication



+

## Range of engagement

- Private donor groups on WhatsApp, Facebook or Slack
- Personalized thank you videos
- Milestone recognition
- AI-powered chatbots
- Gamification
- Incentives/priority touchpoints
- Interactive donor dashboards





# The importance of brand: Acquisition

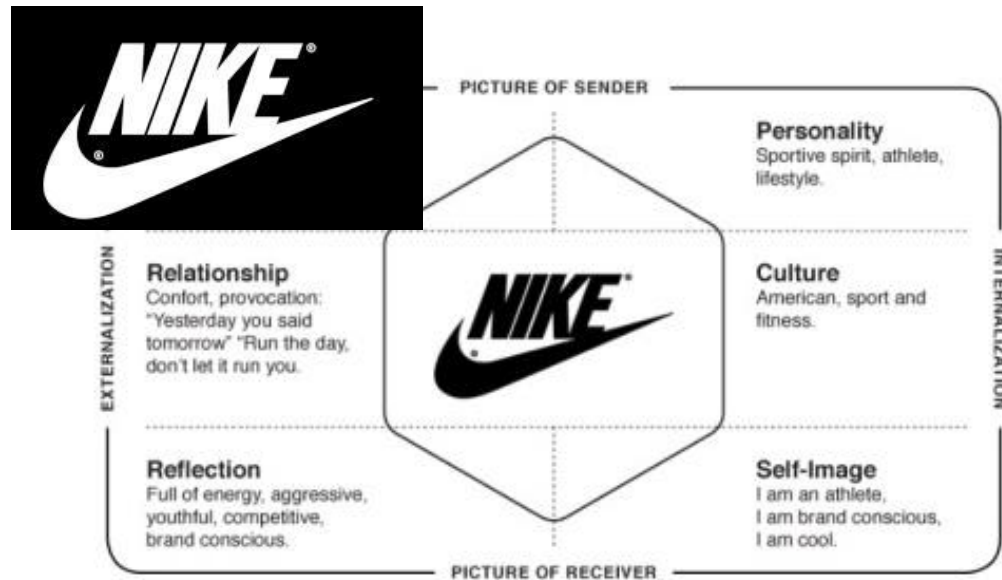
“Brand was seen as a source of efficiency because it acts as a time-saving device, providing a shortcut in the decision making of potential investors, customers, clients, and partners.”

StanfordSOCIAL  
INNOVATION<sup>Review</sup>  
*Informing and inspiring leaders of social change*

**Without this shortcut to trust, stronger messaging is critical.**

# The importance of brand: Long-term engagement

**Know what it means to be associated with your brand!**



# Know what you stand for!

PEOPLE FOR THE ETHICAL TREATMENT OF ANIMALS

[Report Cruelty to Animals](#)



## ANIMALS ARE NOT OURS

to experiment on, eat, wear,  
use for entertainment, or  
abuse in any other way.



### CURRENT CALLS FOR ACTION

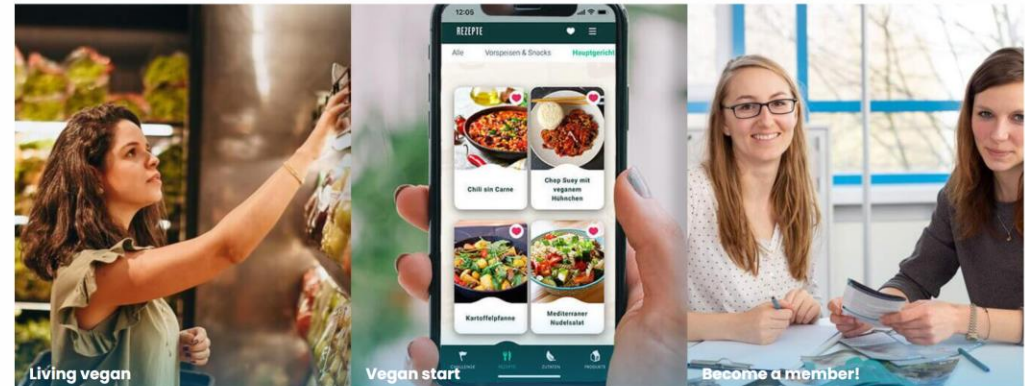


**Bears killed with crossbow for fur hats – help now!**



**Video: Hens suffer for "Eifel eggs from family farms" – help now!**

### OUR CURRENT FOCUS





# Know what you stand for!

## An international, independent medical humanitarian organisation

We provide medical assistance to people affected by conflict, epidemics, disasters, or exclusion from healthcare. Our teams are made up of tens of thousands of health pro and administrative staff - most of them hired locally. Our actions are guided by the **principles of impartiality, independence and neutrality**.

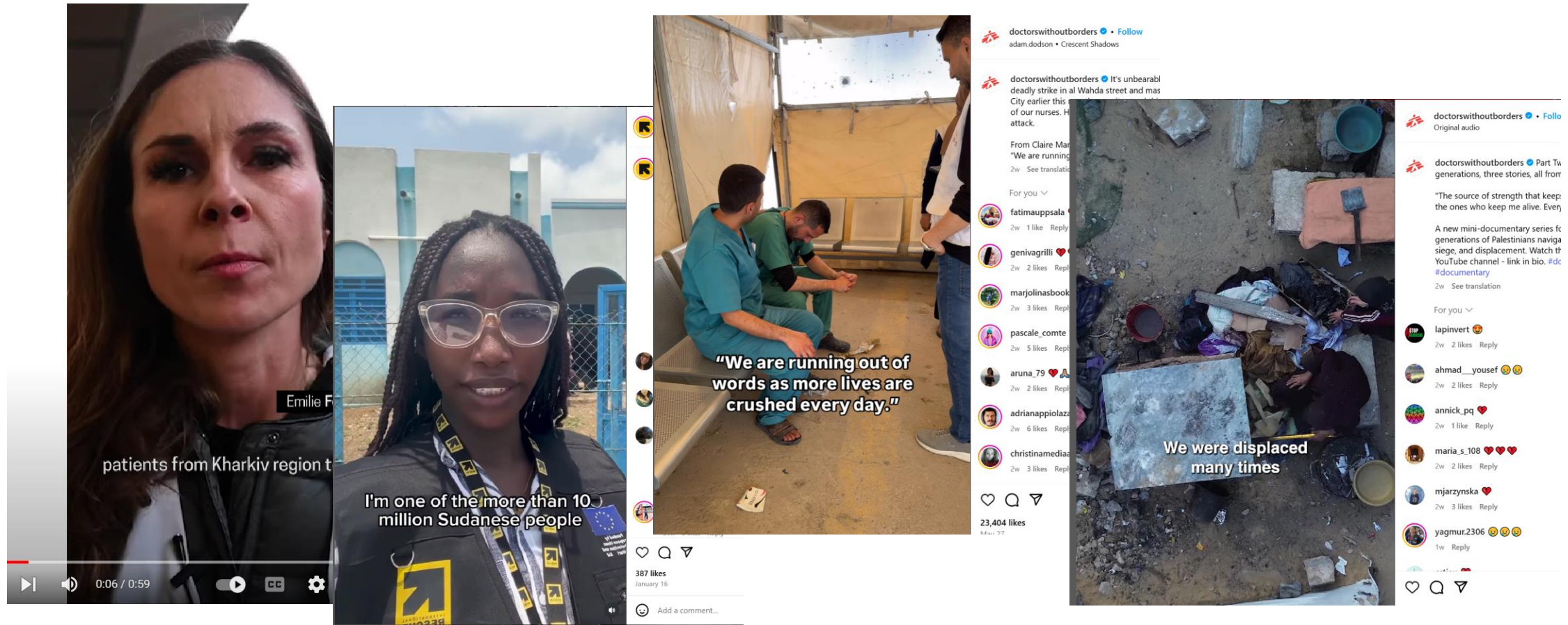


### Medical care where it's needed most.

MSF teams treat a wide range of medical issues, from disease outbreaks to malnutrition to war wounds. And we put our decades of experience to work to produce groundbreaking medical research.

[Explore medical issues>](#)

# Authenticity: Less 'filter' into what you are doing



# Authenticity: Less 'filter' into what you are doing

**Don't underestimate the importance of video**

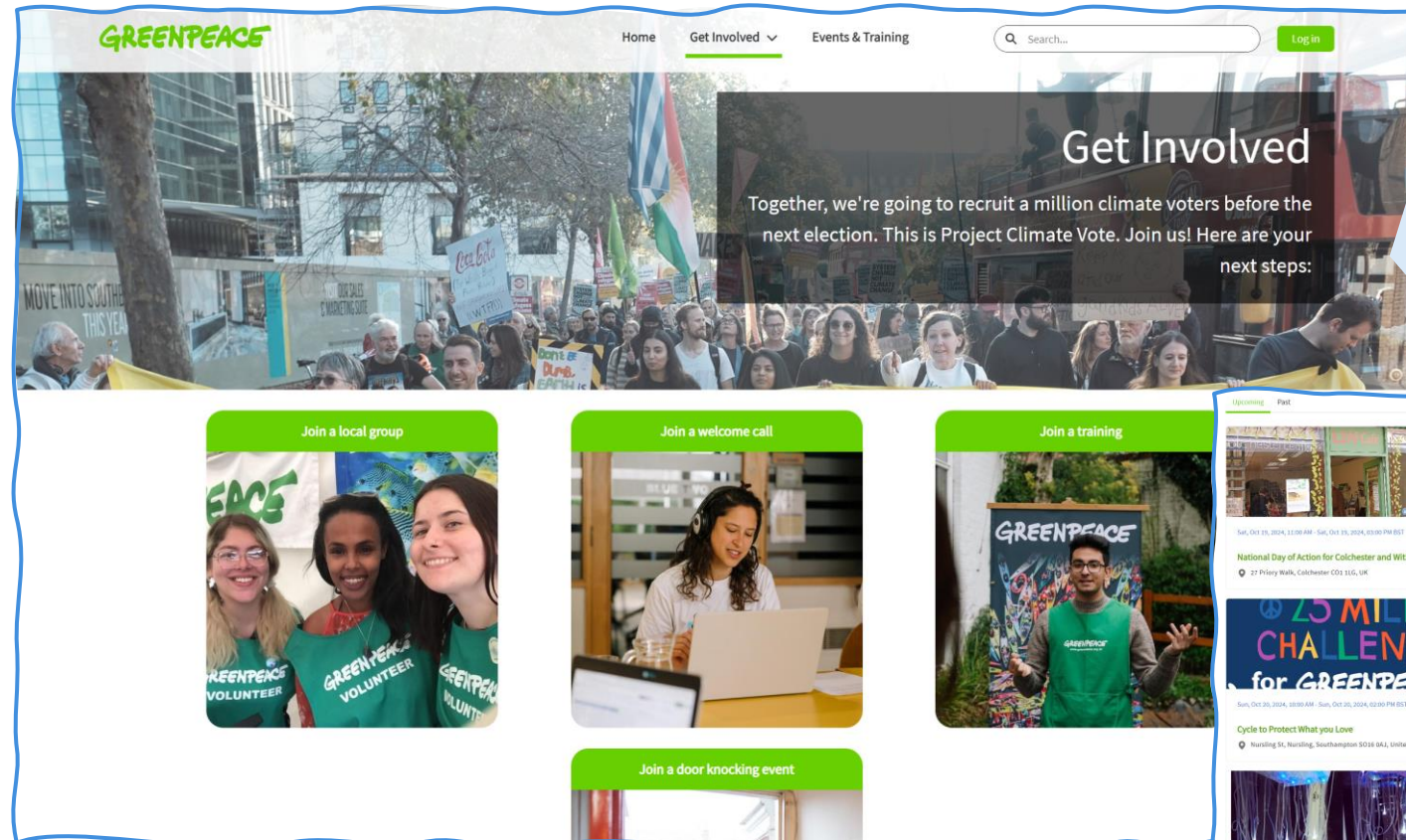


**The Saltways**

Want to make a film that matters?



# Building a community, even in offline engagement



**‘Big organizing’**

**From top-down to decentralization**

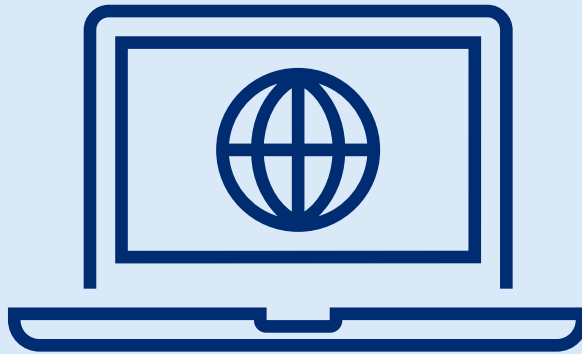
**Putting ‘radical’ trust in volunteers**



# Do your research on what your donors want!



# **Optimize Marketing Technology**



**We are facing similar challenges as the  
for-profit sector.**

**Growing organisations are testing and applying  
many key lessons as top companies.**

## For-profit marketers struggle with data...*but less than NGOs?*

Only **31%** of marketers are fully satisfied with their ability to unify customer data sources.

Over **25%** cannot confidently prove ROI



# Challenges faced by B2Cs in delivering customer centricity

DATA	Gathering, storing, analysing & using data effectively.
TECH	Having the right MarTech stack & AI capability.
SKILLS	Insufficient expertise across the organisation. Difficulty keeping up with digital trends & regulatory changes.
WAYS OF WORKING	Siloed working leads to absence of shared goals but also weak linking of data to create a fuller picture of customers.
UNDERSTANDING	Lack of common definition of customer centricity within the organisation.
CULTURE	Organisational culture not data driven or aligned around customer needs.

## Most common barriers to being donor-centric reported by non-profit fundraisers.....

DATA	Difficulty navigating & attributing non-linear journeys, unclear “source of truth”.
TECH	Lack of investment in the tools & systems it requires.
SKILLS	Little budget to recruit or develop the right capabilities.
WAYS OF WORKING	Siloed working, especially between digital and non-digital teams.
UNDERSTANDING	Little understanding of what good supporter experience is and the value it can bring.
LEADERSHIP	No one to push the supporter experience agenda or lead the scale of change required.

# The importance of customer centricity

80% of US adults want **multiple, personalised touchpoints**, including a mobile app & digital display ads.

(McKinsey, US, 2023)

**Consistency across departments** leads to a good customer experience. Yet, 54% say it generally feels like sales, service, and marketing teams don't share information

(Salesforce: State of the Connected Customer, 2022)

Only 27% of consumers completely understand how companies use their **personal information**, and 86% want more **transparency**.

(Salesforce: State of the Connected Customer, 2022)

62% of business leaders cite **improved customer retention** as a benefit of personalisation efforts

(State-of-Personalization-Report-Twilio-Segment, 2023)

Organisations that build **digital trust** are more likely than others to see **annual growth rates** of at least **10%**.

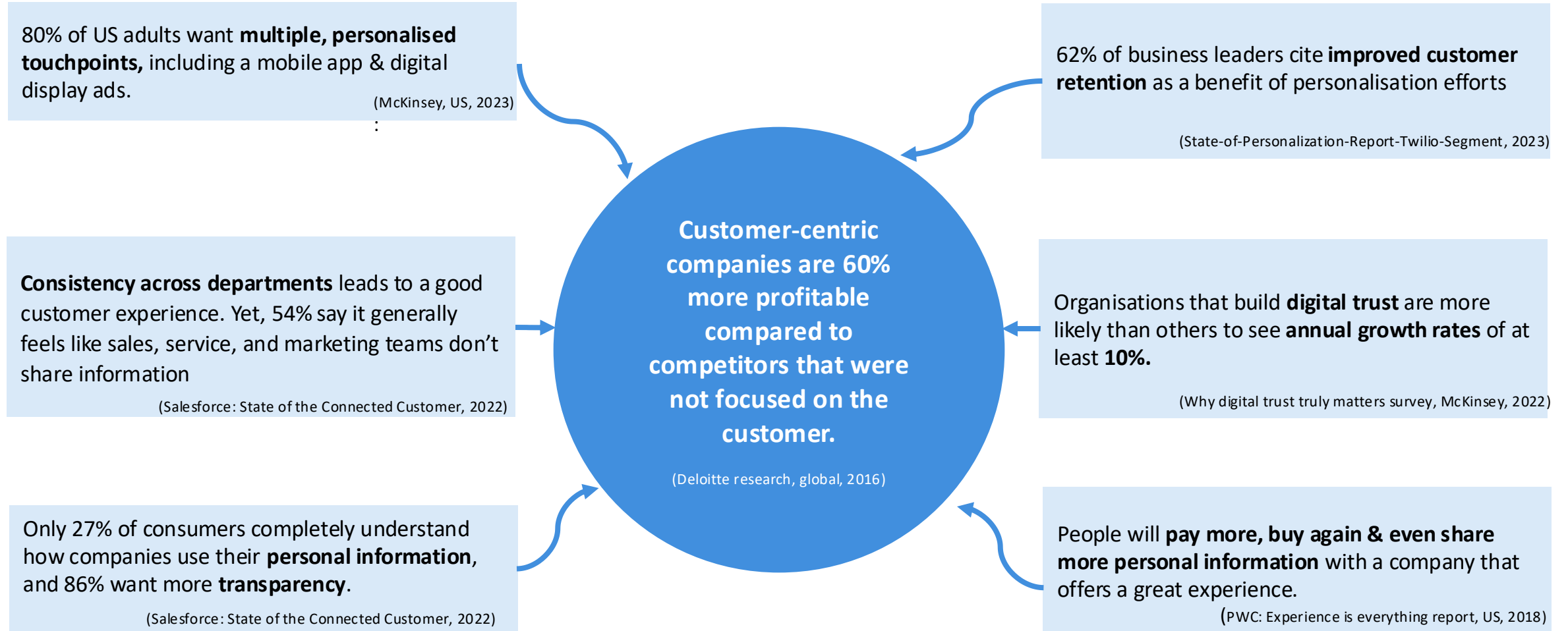
(Why digital trust truly matters survey, McKinsey, 2022)

People will **pay more, buy again & even share more personal information** with a company that offers a great experience.

(PWC: Experience is everything report, US, 2018)

Customer-centric companies are **60% more profitable** compared to competitors that were not focused on the customer.

(Deloitte research, global, 2016)



# Effective use of marketing technology

Use **cloud-based, integrated** MarTech solutions across teams for data collection and **personalized outreach**.

Focus on simple, **customer-centric measurement**

Leverage **AI/ML**, likely within existing tools

Ensure **skilled resources** to optimize tool use.

... as described by e-commerce giants:





# Fit for purpose Marketing Technology stack: The building block of optimization

## Integration of

CRM

Marketing automation

Payment processing

Predictive modelling tools

Reporting and analysis tools

Website analytics

Email marketing

Testing and personalization tools

augedo

salesforce  
marketing cloud

dataro

braze

dotdigital

HubSpot

Fundraise Up

Google  
Analytics

boodlebox

Power BI

+ a b | e a u

# Data-driven decision making: Quality data and reporting

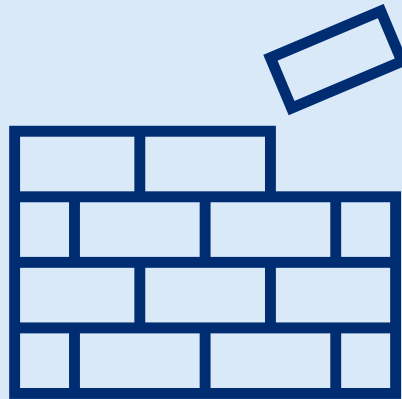
## Strong data quality:

- Clear definitions
- Data privacy compliance
- Data quality checks with external providers

## Quick access to accurate reporting:

- Meaningful KPIs
- Regular, customized reporting
- Integrated systems

# Internal structures



# Move to audience-led structures within fundraising

**Channel silos will not create a sufficient donor experience.**

**Cancer survivors**

**Family/Friends of  
Cancer patients**

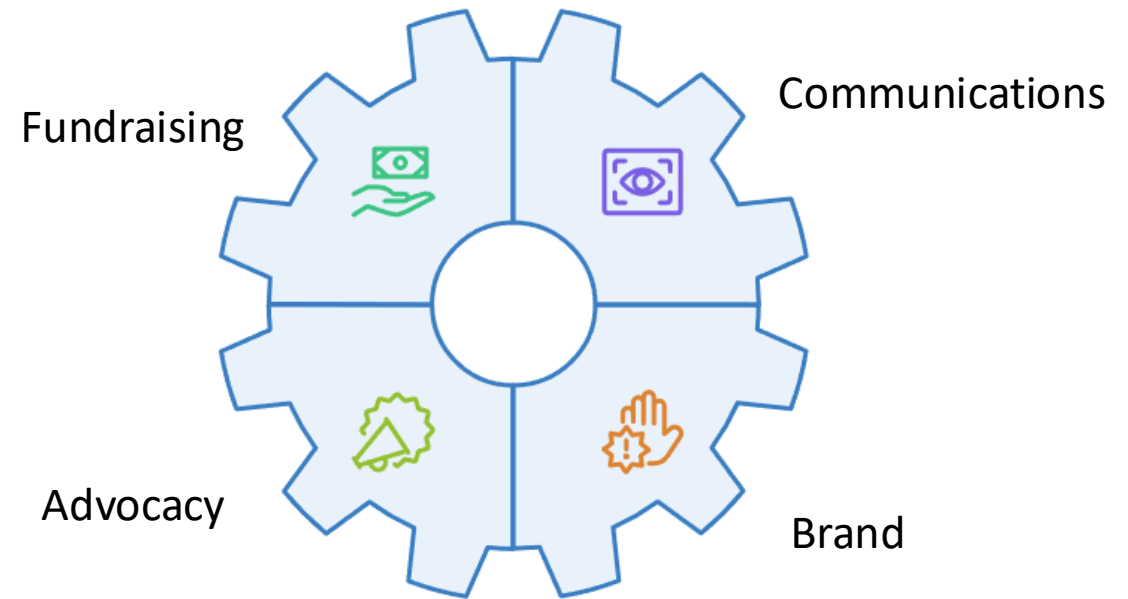
**(Yet) Unaffected**



# Integrated, agile structures across departments also

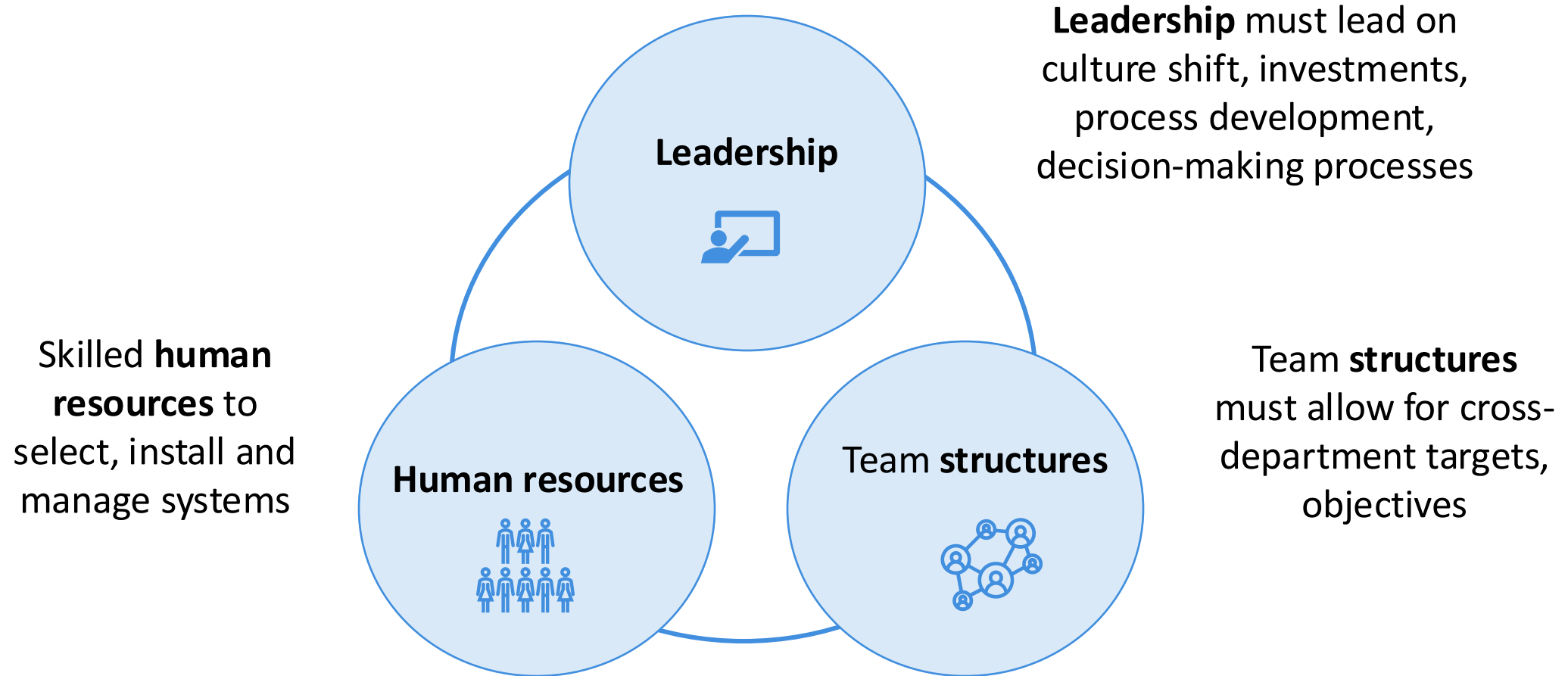
Integration and **consistency in brand and messaging** is necessary to:

- to **amplify reach**, increase authenticity, **avoid diminishing return**
- Create and follow **common KPIs**, metrics
- Create **audience-led responsiveness**





# Transformation must be led by top leadership



# The 1st of Amazon's 14 principles is .... Customer Obsession



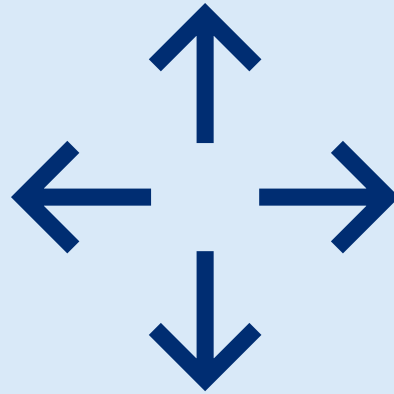
Including the customer perspective in decision-making, “working backwards” from their needs right through to operations.

Gathering customer data 24/7. Analysing, documenting & using it with rigor.

Having an organisational structure that allows real-time responsiveness to customer data.

Accountability for customer experience sits with each member of staff but led from the top.

# **Diversification and audience reach**



# Prioritize testing and optimization of emergency donors

**1. Test, test, test**

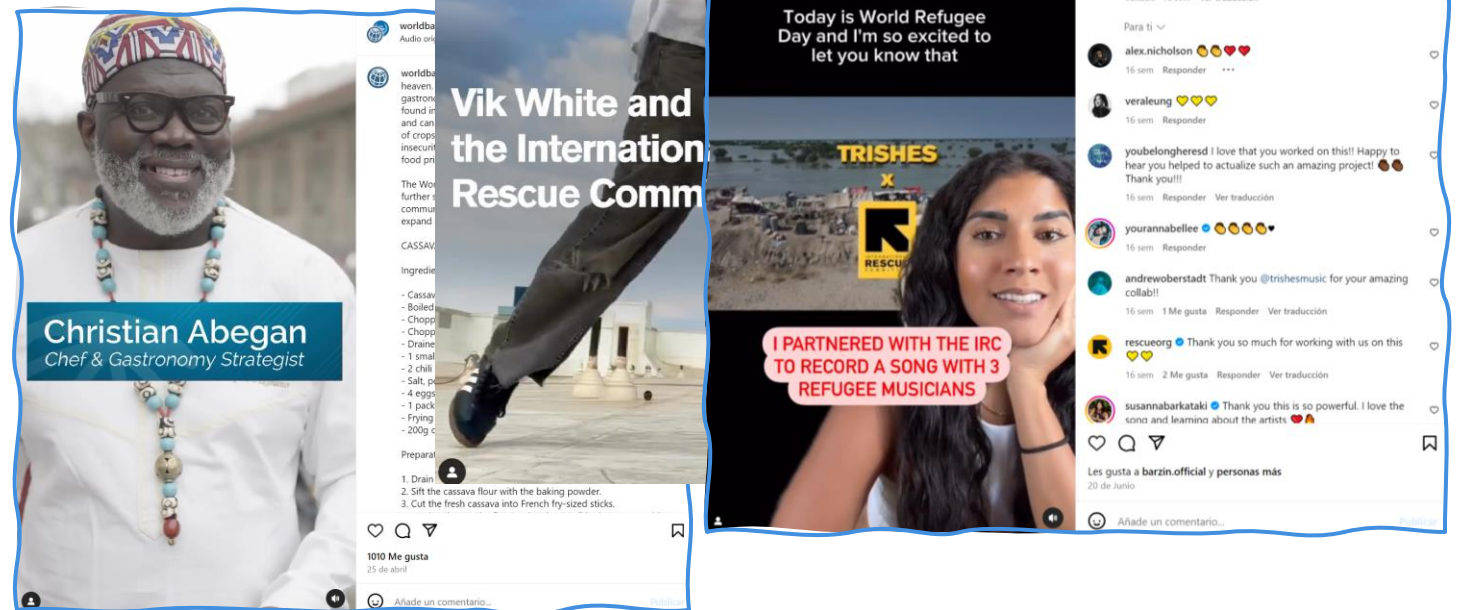
**2. Have processes ready to be quick to market in emergencies** (where you can authentically show your work)



# Use influencers... and in particular, micro influencers

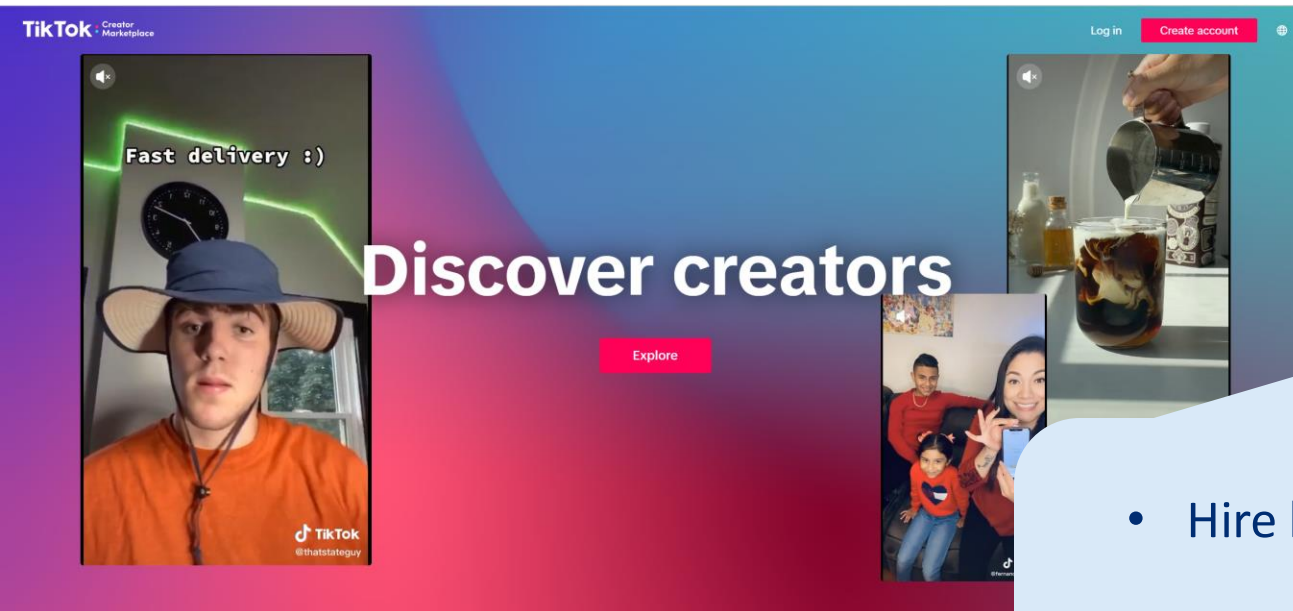
## Why are they important?

- The way to stop the scroll
- Build community and trust





# Find influencers that expand your network



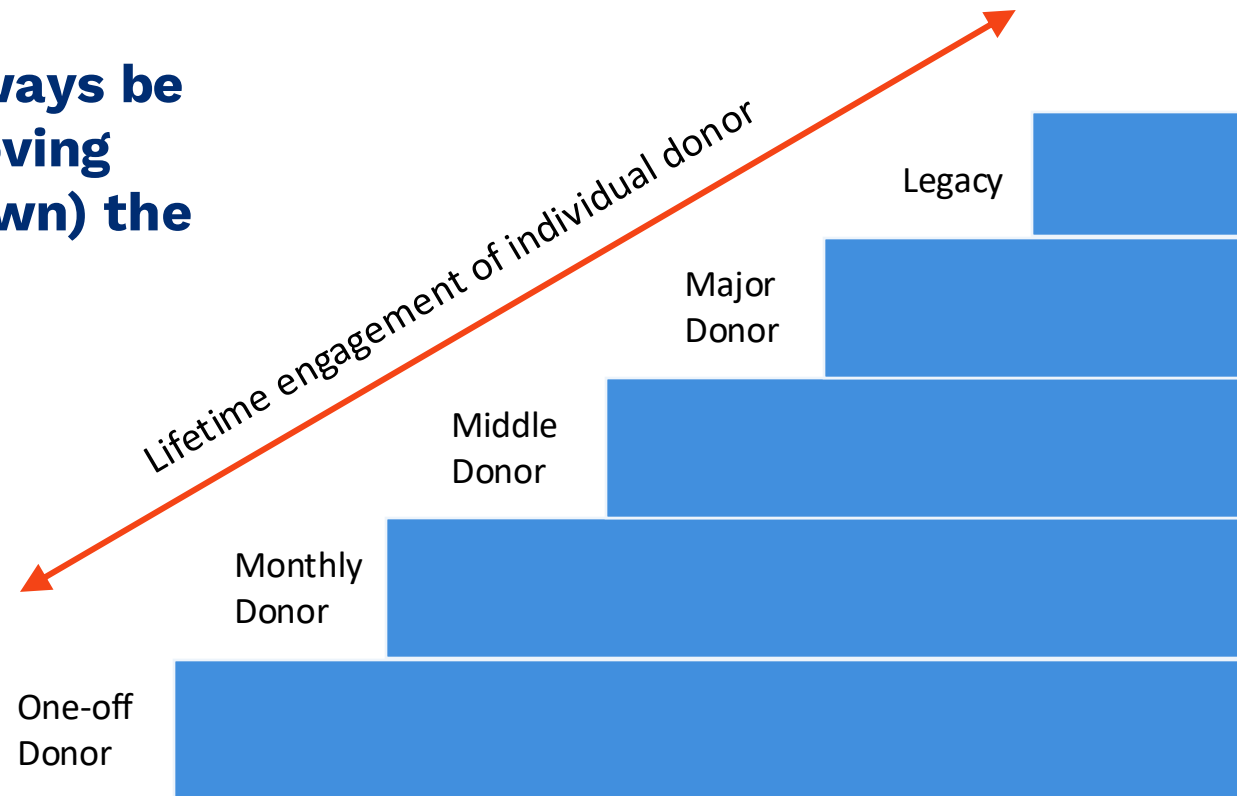
**Introducing Creator Marketplace, Where Brands Can Discover Creators to Collaborate With**

de julio de 2022

- Hire brokers
- Creator marketplace on Meta and TikTok

# Focus on a full funnel for long-term engagement

**There should always be  
a focus on moving  
donors up (or down) the  
'funnel'**



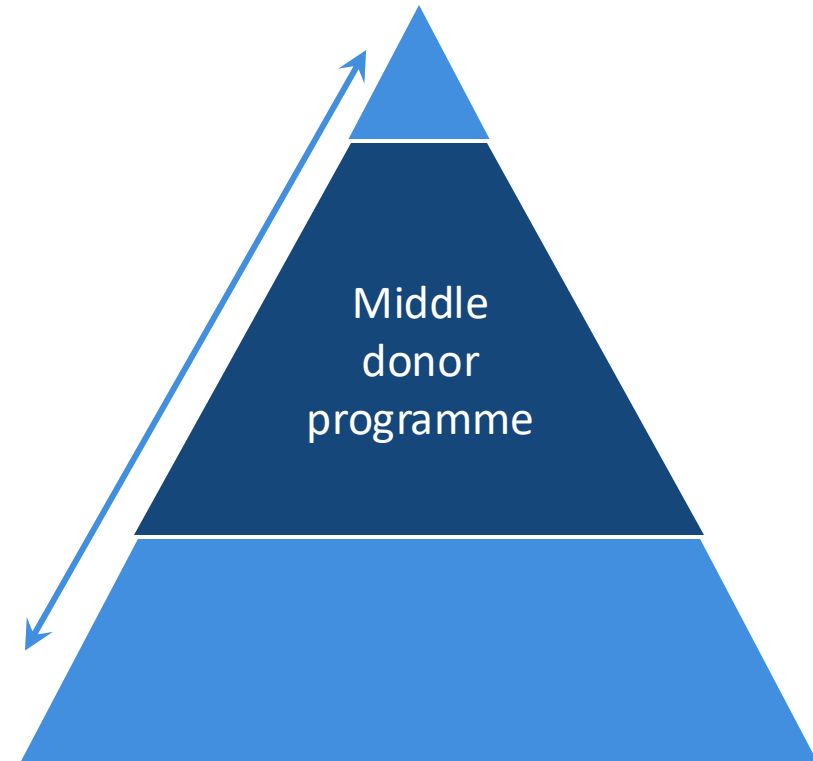
# Organize a middle-donors programme

We are *not* talking about:

- €100 - 250 annual giving
- A separate direct mail file that gives a little more than others

Instead a dedicated, resourced programme:

- E.g. €500 – 5,000 annual gifts
- Programme with unique positioning, messaging
- Dedicated team providing stewardship at a mid-point of major donor and pledge giving levels
- Cross-team focus on moving donors.



# Why middle donors? In select markets, there are massive success stories



Multiple, leading US organisation report this as the “jewel” of their fundraising programme and a “key area of growth”.



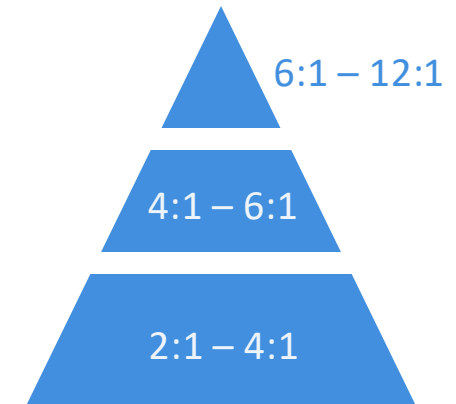
The Chronicle of Philanthropy (USA) reported that the average NPO counts mid-level giving for 1% of donors and more than a third of income



US/European examples show programmes with middle donor programmes, end up converting 3-3.5% of IG donors to major gifts, compared to 0.2 – 2.2%



Investment in higher ROI programmes



## Major donors: Ensure a well-orchestrated effort



Prospects can come from database, as well as high-profile leads



Essential to have clear roles between fundraisers, SMT, board



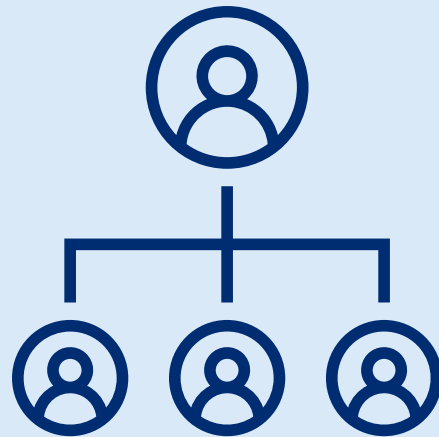
Back-end processes must support and track progress



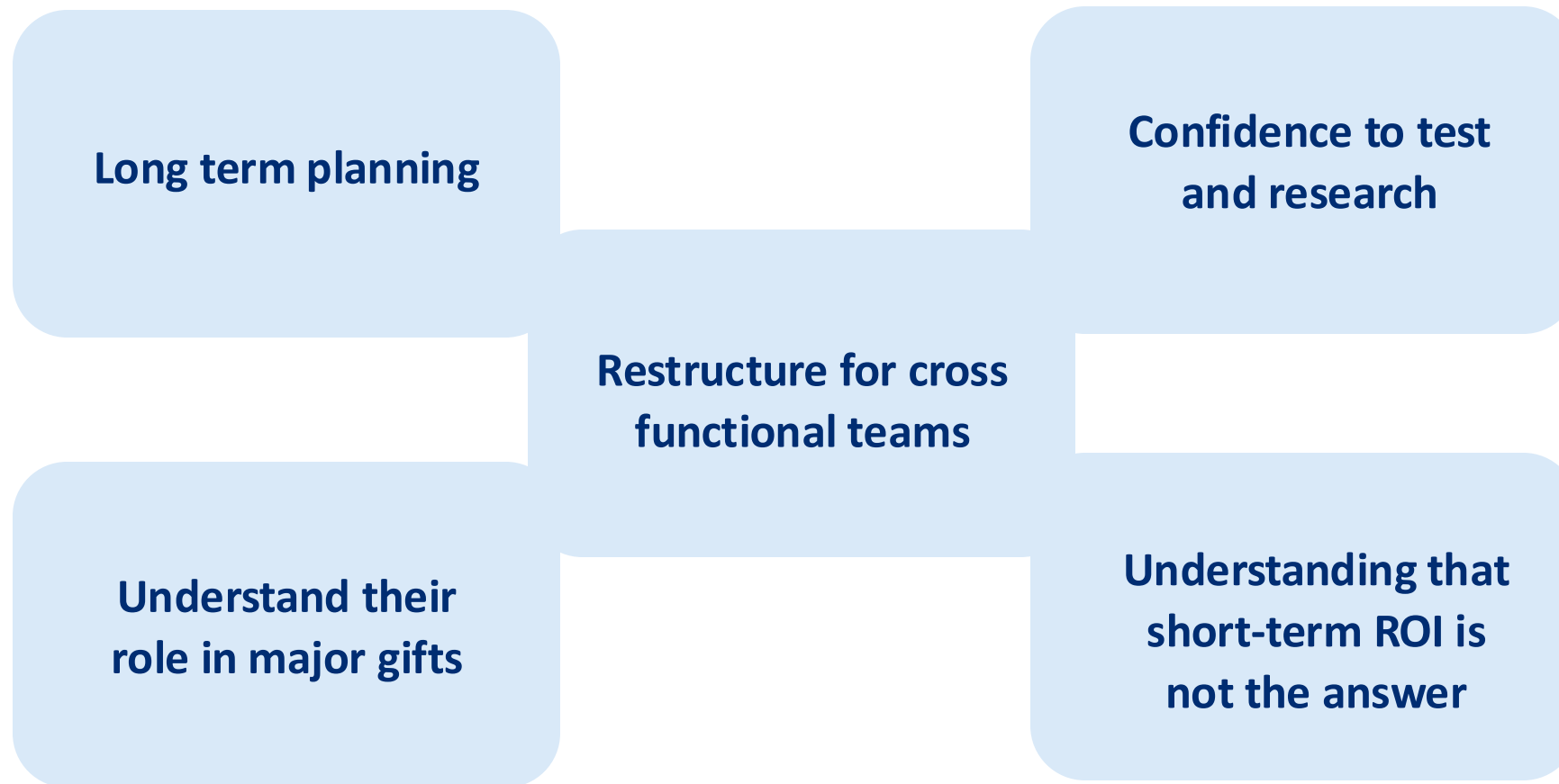
Get help when needed!



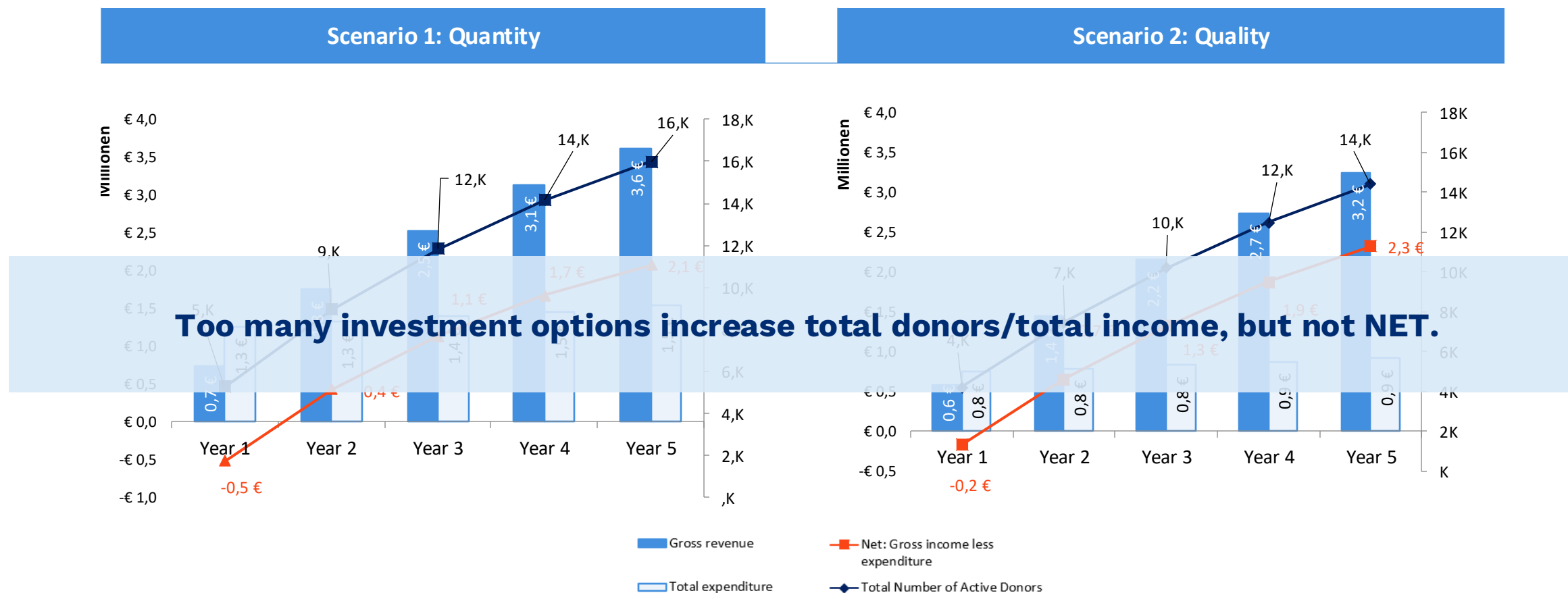
## 5. Leadership support



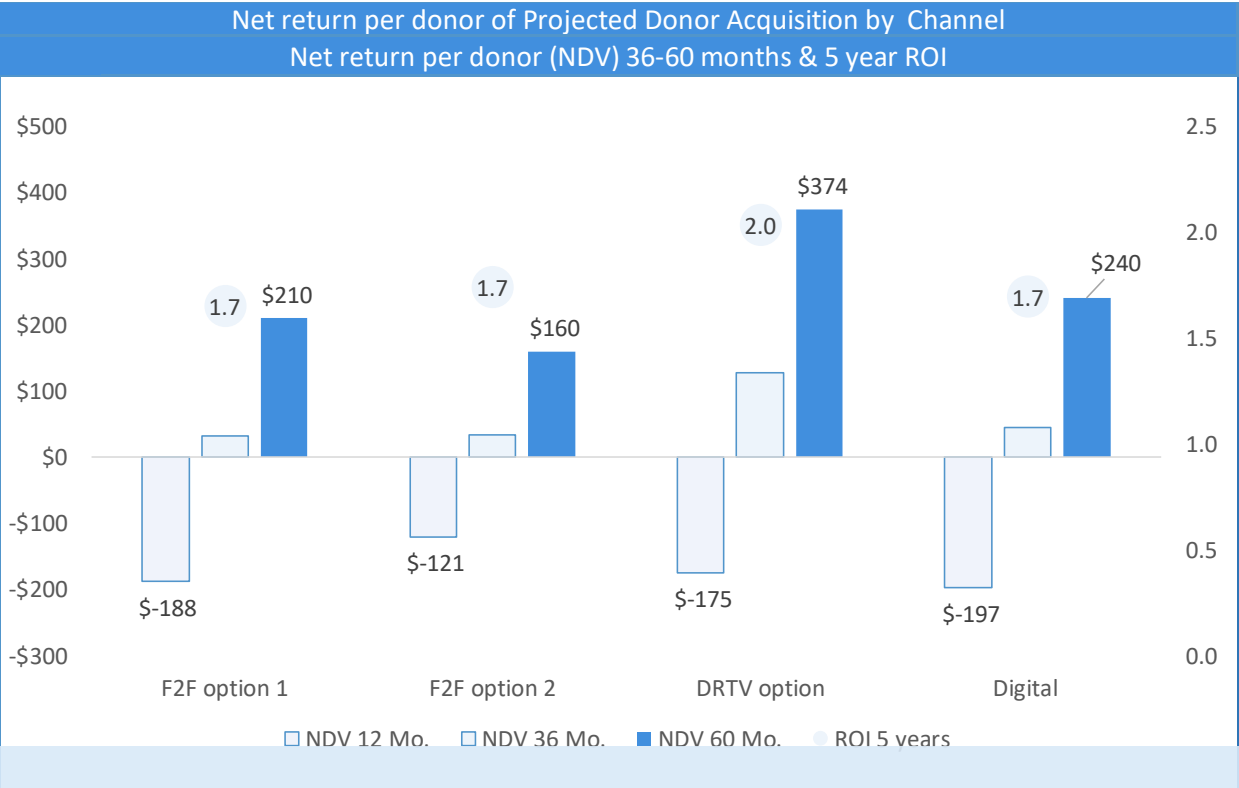
# Leadership needs to understand and support this shift



# Calculate and prioritize net return – always!



# Consider net donor value with each investment decision



Calculate the expected net per donor, across channels with each investment decision.

F2F option 1					
KEY LTV FACTORS					
Monthly regular giving entry level	14.00	Supplier 1:			
Average annual donation	168.00	Calc			
Cost per acquisition	322.00	Supplier 1:			
Gross income / cost ratio	0.5	Calc			
5 year LTV calculation					
Supporter costs % of donation	0%				
Retention year 1	80%				
Retention year 2	86%				
Retention year 3	90%				
Retention year 4	90%				
Retention year 5	90%				
Income received year 1	100%	Assumption			
	Year 1	Year 2	Year 3	Year 4	Year 5
Income this year	134	116	104	94	84
Additional income	0	0	0	0	0
Cumulative income	134	250	354	448	532
Support costs	0	0	0	0	0
Cumulative costs	322	322	322	322	322
LTV per donor 5 years	-188	-72	32	126	210
RoI 5 years	0.4	0.8	1.1	1.4	1.7

# Checklist!





# Optimization checklist

## Proposition & Engagement

- ✓ Rework your proposition with donor motivations
- ✓ Multi-channel donor engagement
- ✓ Clarity and consistency in brand and messaging
- ✓ Less filter in communications
- ✓ Community building
- ✓ Research and test

## Marketing Technology

- ✓ Integrated Marketing Technology stack
- ✓ Data-driven decision making
- ✓ Skilled resources

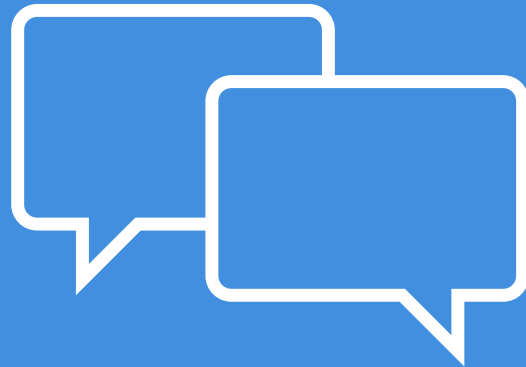
## Diversification

- ✓ Engage emergency donors
- ✓ Use influencers
- ✓ Focus on full-funnel for long-term engagement
- ✓ Establish a middle donor programme
- ✓ Optimize major donors

## Leadership support

- ✓ Audience-led structures
- ✓ Cross-functional teams
- ✓ Management focus on net and long-term

# Questions or comments...



# Contact us



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