



# THE VIRTUAL FUNDRAISING MONITOR 2021

In partnership with

**JustGiving™**

from Blackbaud

**massive**



## ONE YEAR ON

**A year ago, with the country in and out of lockdown, events cancelled, enforced home working, and the pandemic putting charity budgets under pressure, the mass fundraising world had been turned on its head.**

Physical events were forced to pivot quickly, new virtual events were created and existing digital challenges adapted to cope with demand, as charities across the sector rose to the challenge.

In this fast-changing world, we partnered with JustGiving to produce The Virtual Fundraising Monitor with the aim of helping charities understand the new mass participation fundraising landscape, share learnings and help people make the most of these new opportunities.

12 months on, it's time for an update. So, after this period of rapid innovation and creativity, new platform launches, the rise of Facebook fundraisers, and changes in how people live and work, how do things look now? What has changed in the last year? And where are the new opportunities to get more from both physical and virtual events in the year ahead?

We hope you find this report useful as we all look ahead to what 2022 will bring.



**John Tasker**

Partner  
Massive



**Sally Falvey**

Head of Retention  
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## KEY FINDINGS

In 2020's survey, we shared information on 150 virtual campaigns with over 400,000 active participants, all delivered since the start of the first lockdown.

**A year on, to get an up-to-date view of the market, we surveyed the same number of events, this time with 450,000 participants collectively raising over £39M for 93 charities of different sizes and causes and combined this data with JustGiving's insight and research.**

In comparison to 2020 the make-up of events has changed, we've seen a significant increase in multi-day events and month-long challenges, the rapid growth of Facebook as a fundraising platform and the influence of the gradual return of real-life physical events.

The number of virtual pivots of physical events has declined and the number of new entrants to the market has increased.

Just as they did in 2020, physical challenges still dominate virtual events making up 87% of the events in this year's survey. Overall, running and walking challenges remain the most popular, accounting for 57% of our 150 events and 73% of funds raised.

This year, JustGiving reported an increased focus on walking, with numbers of running events starting to slow, and cycling remaining relatively stable. Diabetes UK's One Million Steps raised more than £2M and was one of five walking events in the 10 most successful campaigns we looked at.

And while last year saw a host of pick your own challenge type events these have all but vanished from our survey and lockdown-specific activities like stair challenges have disappeared entirely.

# OUR SURVEY At a glance

## OUT OF 150 CAMPAIGNS:

 **14 events raised more than £1M**

 **44% raised more than £100k**

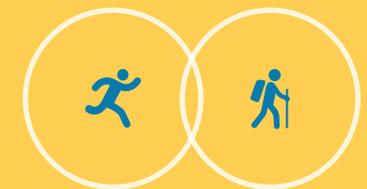
 **Median figure raised was £45K**

## OUT OF 150 CAMPAIGNS:

 **54% were new**

 **17% were pivots of existing events**

 **29% were repeats**



**Running and walking made up 57% of Events & Delivered – 73% of income**



## EVENTS ARE RECRUITING AND RAISING MORE

From our data, we've seen virtual events on average raising more than in 2020. Almost half of our 150 raised over £100K in 2021 – twice as many as in 2020, while the number of events raising more than £1M also doubled.

It appears that this growth is driven by volume, not value, with participant numbers having risen significantly since last year.

To us, this suggests that after the initial rush to take fundraising events virtual, charities now better understand what works, and are able to design, deliver and market their virtual events more effectively.

However, despite improvements in stewardship, average value is flat or falling and it still appears that virtual fundraisers are less committed than their counterparts in physical events. Remittance rates for virtual events remain low.

In fact, we've seen a slight fall in the average number of participants going on to fundraise at just 48% of those signing up challenges.

But while more people are taking part, there are still challenges to overcome. The narrowing of events around a smaller number of activities is causing crowding and with the gradual return of competing real life physical events this has made it harder than ever for virtual events to gain cut through.



Average participant numbers more than trebled from 893 in 2020, to **2,921** in 2021

### AVERAGE VALUE PER PARTICIPANT:



Run **£160**



Walk **£148**



Cycle **£175**



Exercise challenges **£34**



# THE FACEBOOK EFFECT

## A SIGNIFICANT SHIFT THIS YEAR, HAS BEEN THE INCREASING ROLE OF FACEBOOK.

Whether used as a fundraising platform for Facebook Challenges, marketing, building and hosting online communities or a mix of all 3, Facebook has been integral to the success of more virtual fundraisers than we have ever seen before. Bringing in income, driving growth in supporters, strengthening stewardship, and lowering costs.



**A third** of our events used Facebook as a fundraising platform



**6 of the biggest earning** campaigns were Facebook fundraisers



80% of charities cited Facebook and social as their **most effective marketing channel**



**8 out of the 10** biggest events had Facebook communities



Of events raising over £1M, Facebook fundraisers reported **significantly lower marketing spend**

Teenage Cancer Trust for example was an early adopter with its 2,800 Squats in February Facebook Challenge raising over £1.8M.

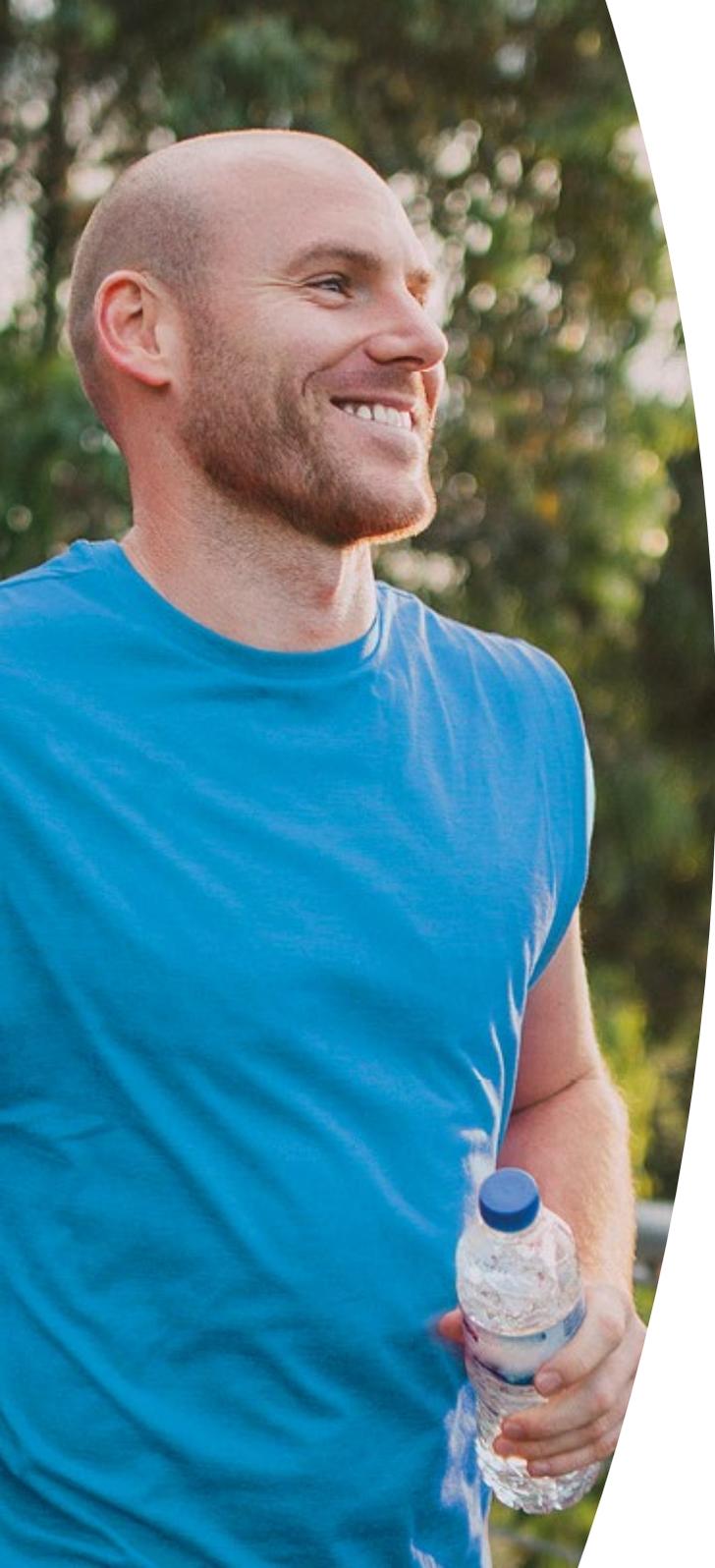
Even those events that weren't specifically hosted on Facebook saw the benefits with the creation and use of online communities appearing to drive higher average fundraising values for those events that used them.

“We’ve used Facebook groups to build a community of supporters this year - even for events that aren’t Facebook Challenges.”

**Helen Lam** – Innovation & Digital Fundraising Manager, Young Lives vs. Cancer

When it comes to marketing, 80% of respondents said Facebook and social were the most effective marketing channel used. Of those events in our survey that raised more than £1M, Facebook fundraisers reported significantly lower marketing spend. However CPA's are rising.

The flip side to more effective recruitment and higher volumes is that Facebook Challenges saw significantly lower page values, at an average £141 versus £1K+ for active pages on traditional giving platforms like JustGiving, and lower rates of active fundraisers at 31% vs. 51%.



## THE RETURN OF PHYSICAL EVENTS

With real life physical events gradually making a comeback this year, we saw some changes in the make-up of events in our survey.

Unsurprisingly, pivoted events have decreased, by more than half – from 38% of the 150 campaigns studied in 2020, to 17% this year. Overall, these activities also saw the biggest income drop with 67% in our survey reporting it as flat or falling as supporters more suited to physical events sought them out elsewhere.

“We’ve seen a drop in virtual income and a movement back to physical events this autumn and we’re seeing a big increase in average gifts from those taking part.”

**Lawrence Wilson** – Events Fundraising Manager, Alzheimer’s Society

## A CROWDED MARKET

Alongside the return of real life physical events, the increased number of new virtual events launched and the rapid growth in Facebook fundraisers means many charities reported increased competition for attention and more difficulty in achieving ‘cut through’.

“Competition in the virtual sector is becoming ever more challenging. It’s harder to recruit people, you have to spend more, supporters are not as warm to the charity, and collectively, the amount they raise is steadily decreasing.”

**Ben Gibson** – Events and Virtual Challenge Manager, Breast Cancer Now



**36% of events** spent more than **£20K on marketing** in 2021 compared to only 14% in 2020

Comparing reported marketing spend with 2020, the average spent on marketing is increasing. 36% of events spent more than £20K on marketing in 2021 compared to only 14% in 2020 and 10% of events spent over £100k to recruit participants in 2021.

Clearly as more events enter the market this will become a bigger issue and almost half of respondents are already planning for this and expect to have to work harder to recruit in 2022.

“This year we’ve seen the cost per sign up for virtual events increase across the sector and expect that to continue.”

**Ellie Paskell** – Events Fundraising Executive, Refuge

## THE SHORTER VIRTUAL LIFESPAN

Of note too is the shorter lifespan we're seeing with virtual events. JustGiving report established events having to work harder to acquire participants and less than a third of this year's events were repeat campaigns from 2020.

Among those that were repeat events, more than half reported flat or falling numbers of participants, income, and active pages. One campaign raising more than £1M in 2020 saw its income fall by more than 75% when it was repeated in 2021.

New virtual events on the other hand are on the rise, accounting for more than half of our 150 this year. These include Dementia UK's March Dog Walking Challenge, which surpassed £2M fundraised in its first year.



2020's top 5 events saw income **fall on average by more than -40% this year**



7 of the 10 most successful events in 2021 were **new to the market**

This suggests that when it comes to virtual events people seem less committed to repeating experiences than they do for physical events, trying things out then looking for the next new experience. This echoes our findings from other, pre-Covid, research, which showed digital mass participation campaigns often having shorter lifecycles than their physical counterparts.





## THE YEAR AHEAD

### WHAT THEN, CAN WE EXPECT IN 2022?

Although our survey was completed before the arrival of Omicron, if current vaccines and boosters prove effective it looks like a full return to physical 'real life' events is still likely.

Of those that previously ran them, 93% expect to reintroduce physical events next year, and it will be interesting to see the impact of this on virtual events.

At present, the majority of our respondents are optimistic about the year ahead although there is an expectation of having to work harder as competition from other virtual, as well as physical, events grows.



80% are optimistic or very optimistic about the year ahead



42% expect to work harder to recruit to their virtual events



Only 39% forecast participant growth for virtual



71% expect to see flat or falling fundraising values and return rates

Overall, as life continues to open back up, we expect 2022 to bring opportunities as well as challenges for both physical and virtual events and campaigns. Virtual events will have to work harder to cut-through in an increasingly crowded market and launch fresh ideas and campaigns to provide new experiences.

As physical events return, the most successful campaigns will undoubtedly be shaped by what virtual has taught us, adapting their offer and use of digital to meet the changing expectations and attitudes of participants looking for something more than just a return to the way things used to be.

What is clear is that virtual events will no more replace real-life physical events than the return of physical events will bring about a decline in virtual challenges. They have co-existed before, but what may be new could be the way successful charities use elements of both type of events and different platforms to cost effectively recruit supporters, build communities and drive long term engagement through their mass participation portfolios.

**“Virtual events aren’t just a one off, we feel confident that a blended approach between virtual and real life physical events will continue for the next couple of years.”**

**Clare Salter** – Community Fundraising Manager, MND Association

As the market continues to evolve and attitudes to gathering in public change, there’s no doubt that this is an exciting time. If we have learnt one thing from the success of virtual events since 2020. It is that change brings opportunity, and for those agile enough to react quickly there is significant fundraising growth to be had in the year ahead.



**About Massive:** Massive offer a full suite of agency services focussed entirely on, and optimised for, mass participation event design, development and delivery. From bespoke research to campaign strategy, product innovation to project management support – we have the experience and specialist skills to support your team every step of the way.

We hope you enjoy the report and if you need any support with developing your own campaigns now or in the future don't hesitate to get in touch.

## JustGiving™ from Blackbaud

**About JustGiving:** JustGiving is the world's most-trusted online fundraising platform, enabling over 24 million people to raise more than £5bn for over 28,000 charities and good causes since launching in 2000. As a tech-for-good company, JustGiving develops world-class technology and innovative tools to fulfil its mission to connect people with the causes they care about.



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