

Global Giving Strategy Sprint

Landscape Analysis

JUNE 20, 2023

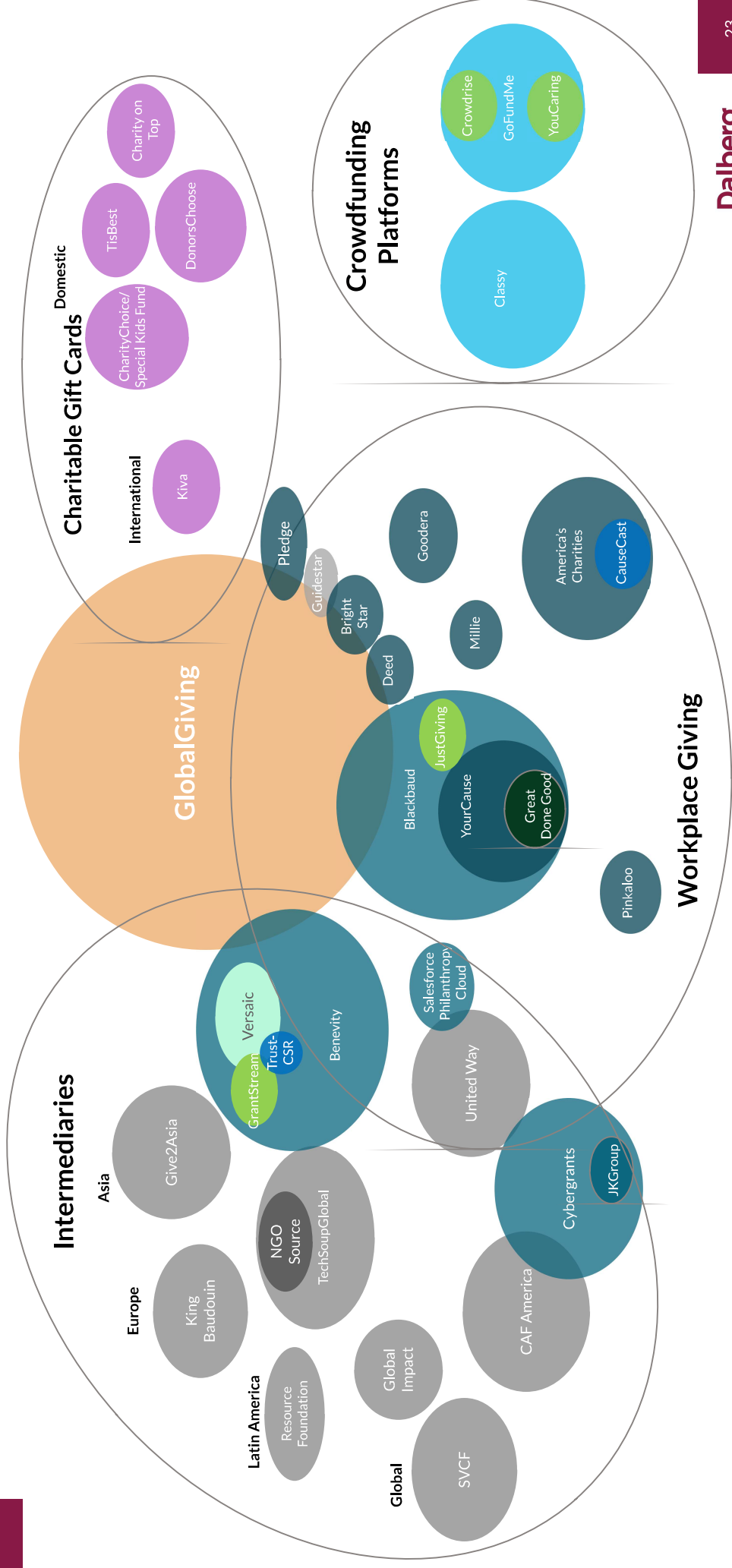
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 **GlobalGiving**

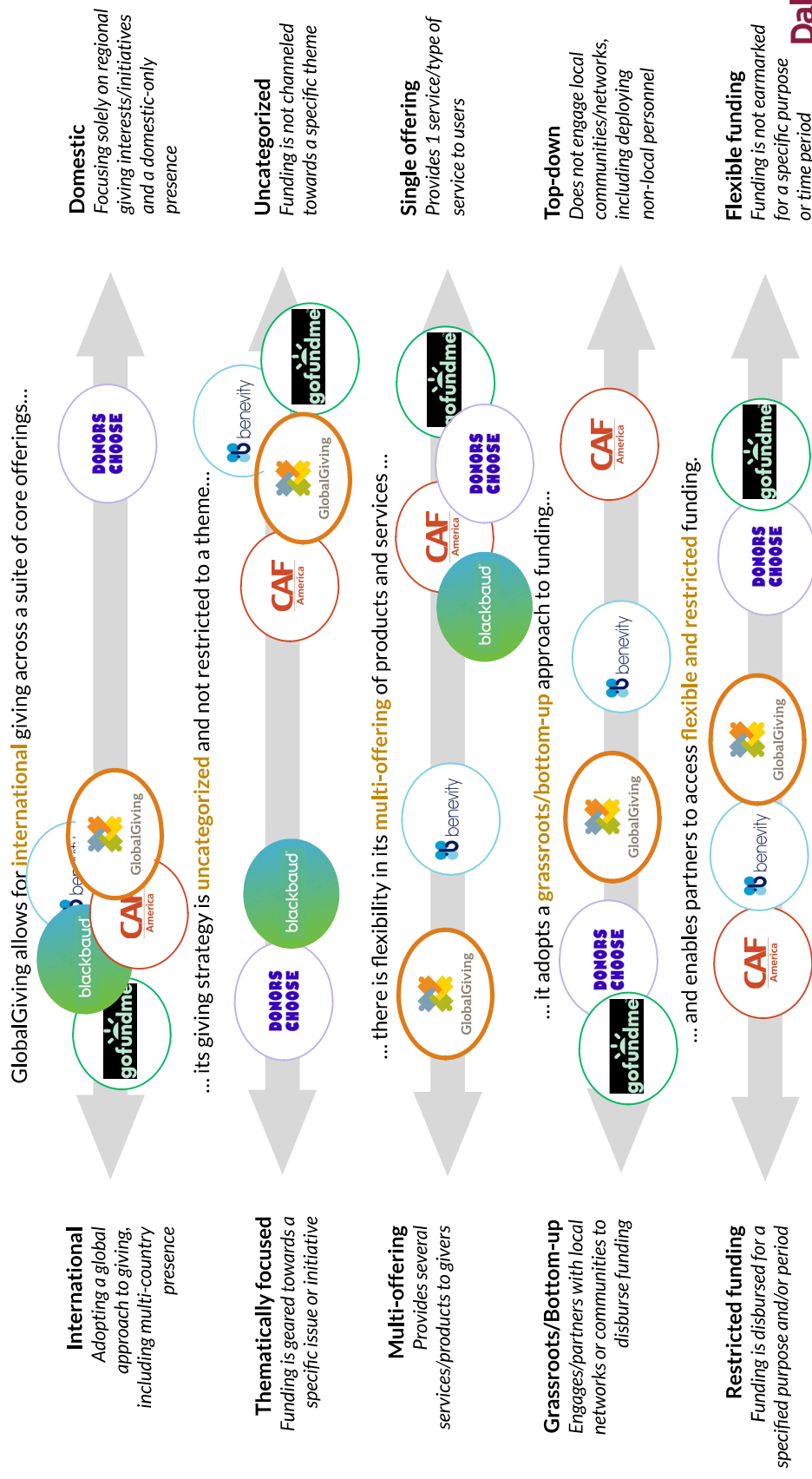
Landscape analysis
**Competitive
offering
mapping**



GlobalGiving operates in a competitive ecosystem, with many different players across each of its product and service offerings



Within this ecosystem, GlobalGiving provides a unique combination of characteristics that differentiates it from its peers



GlobalGiving's competitive advantage is based on credible vetting, a large network of partners, ease of giving and excellent disaster relief

Credibility & visibility through vetting



Thorough vetting procedures that give donors peace of mind when allocating or disbursing funds
Systematic due diligence methods that alleviate additional paperwork and streamline donor processes
Increased visibility for community partners and causes through partnership with GlobalGiving

International network of community partners



A global list of vetted community partners to help meet donor needs
Strong, long-term relationships with donors and nonprofits to mobilize funding where it's needed
Non-financial support to help foster learning and adaptation of donors and community partners

Disaster relief





















Local/grassroot networks that enable speedy engagement and ensure quick and effective giving
Rapid response disaster team equipped with operationalizing giving in new regions during a disaster

Ease of international giving



Versatile capabilities that offer flexibility to donors and community partners across multiple offerings
Simplified search and cause/issue identification, including underserved and/or niche initiatives

Backup: On average, GlobalGiving invests less on marketing than its peers

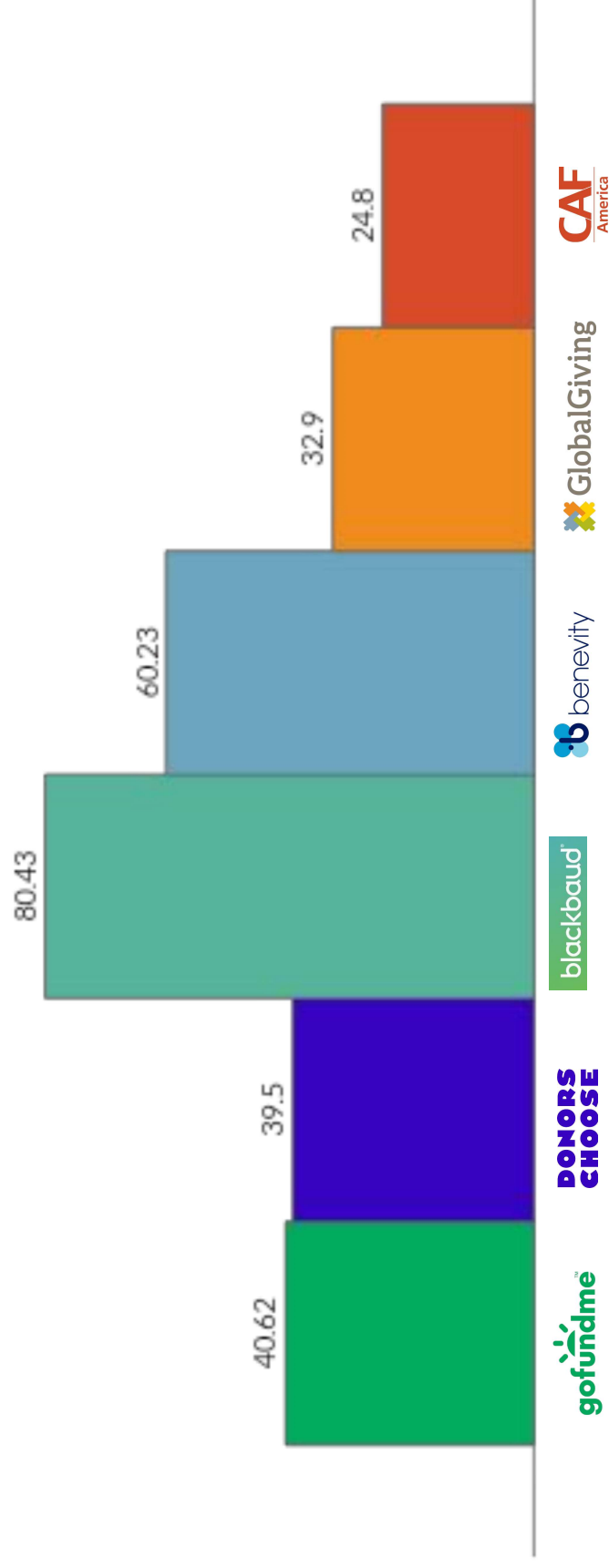
| | Marketing ratio | Social media followers |
|---|--|---|
|  | Marketing budget unknown. Benefits from free advertising via social media as well as paid and earned media opportunities by platform users |  ~40K  ~623k |
|  | Marketing represented 33.7% of total operational expenses in 2022 |  ~31K  ~252k |
|  | Sales, marketing, and customer success represented 20.9% of total operational expenses in 2022 |  ~88K  ~35k |
|  | Partnered with a digital marketing firm to boost digital marketing and doubled return on ad spend within 1st year (290%) |  ~37K  ~13k |
|  | Marketing was 5.15% of GlobalGiving's total organizational expenses for 2022 |  ~17K  ~106k |
|  | Fundraising costs were 12% of related contributions, also known as donations received as a result of fundraising activities, including marketing/advertising |  ~3,7K  ~2k |

Sources: Blackbaud 2022 Annual Report; Outshine & Benevity, 2017; GlobalGiving Expense analysis by Team 2019-2022;; DonorsChoose Financial Statements, June 30, 2022, and 2021; Give.org., Charity Aid Foundation Review

Backup: On average, organizations that invested in sales and marketing efforts, generated higher interest in the last year than their peers

Average interest last 12 months

(as calculated by search terms, possible total interest = 100)



Sources: Google Trends, June 2023.

Summary implications for GG from its competitive positioning within the philanthropic landscape

Selected findings¹

- Stakeholders felt that GlobalGiving's due diligence and vetting practices are a core differentiator for the organization, and this remained consistent across external interviews and desk research
- GlobalGiving's disaster and humanitarian relief network and capabilities remain a unique differentiator within the ecosystem, according to GG's stakeholders, for its rapidity and ease of use
- A vetted network of international and diverse community partners across regions and issues was repeatedly cited by GG donors as a distinct advantage for GlobalGiving
- When discussing GlobalGiving with external interviewees, there was a lack of brand awareness of GlobalGiving unique value proposition

Implications for GG

- Explore additional resources and capabilities to enhance current due diligence/vetting practices and further reinforce risk management for partners
- Develop new ways to smooth structurally the volatile revenue stream of disaster giving (e.g., a future disaster fund, converting one-time disaster donors into recurring donors, etc.)
- Consider ways to further enhance and engage new and existing partner networks by adopting multilingual and multi-currency capabilities
- Explore additional opportunities to communicate GlobalGiving's value proposition to new audiences and increase brand awareness (e.g., paid and earned media opportunities, hosting publicity events, speaking engagements, conference attendance, etc.)

1-Sources: Internal discovery interviews with GlobalGiving staff and teams, including Sprint team, E-team, SAT team, GG Board members, GG founders, and Executive Committee; Stakeholder interviews with GlobalGiving corporate partners; External interviews with non-GG stakeholders; GlobalGiving internal survey, including Corporate donor survey results and analysis (2021), Community partner survey results and analysis (2021), Community partner survey results across products, disbursements, lifecycle, and campaign, Nonprofit survey report 2020, General GlobalGiving report;