



SAMPLE REPORT · ILLUSTRATIVE DATA

# Donor personas

Every giver with a postal code we can place, in one of 20 personas by generation and the kind of place they live, ranked by how healthy their giving is and how much room they have to give more.

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ORGANIZATION

Example Relief Collective

GIVERS PLACED IN PERSONAS

90% of 24,223

REPORT DATE

Sep 30, 2026

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Example Relief Collective is a fictional organization. Every figure and every giver in this report is made up to show what the Personas screens in Donor Insights contain. The persona names, labels, and rules are the ones the product uses.

# Two facts per giver, 20 personas

A persona is a giver's generation, from their birth year, crossed with the kind of place they live, from their postal code. Four generations plus Age unknown, times four kinds of place, make 20 personas. A giver keeps their persona unless the birth year or address on file changes. What changes year to year is their lifecycle stage inside it.

|                                                                                                                                 | City<br>dense city neighborhoods      | Suburb<br>the suburbs of large metro areas | Town<br>small cities and towns  | Country<br>villages and open country |
|---------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|--------------------------------------------|---------------------------------|--------------------------------------|
|  <b>Gen Z</b><br>born 1997 or later            | <b>Zc</b><br>Gen Z City Dwellers      | <b>Zs</b><br>Gen Z Suburbanites            | <b>Zt</b><br>Gen Z Townies      | <b>Zr</b><br>Gen Z Country           |
|  <b>Millennial</b><br>born 1981 to 1996        | <b>Mc</b><br>Millennial City Dwellers | <b>Ms</b><br>Millennial Suburbanites       | <b>Mt</b><br>Millennial Townies | <b>Mr</b><br>Millennial Country      |
|  <b>Gen X</b><br>born 1965 to 1980             | <b>Xc</b><br>Gen X City Dwellers      | <b>Xs</b><br>Gen X Suburbanites            | <b>Xt</b><br>Gen X Townies      | <b>Xr</b><br>Gen X Country           |
|  <b>Boomer</b><br>born 1964 or earlier         | <b>Bc</b><br>Boomer City Dwellers     | <b>Bs</b><br>Boomer Suburbanites           | <b>Bt</b><br>Boomer Townies     | <b>Br</b><br>Boomer Country          |
|  <b>Age unknown</b><br>no birth year on file | <b>Uc</b><br>Age unknown, City        | <b>Us</b><br>Age unknown, Suburb           | <b>Ut</b><br>Age unknown, Town  | <b>Ur</b><br>Age unknown, Country    |

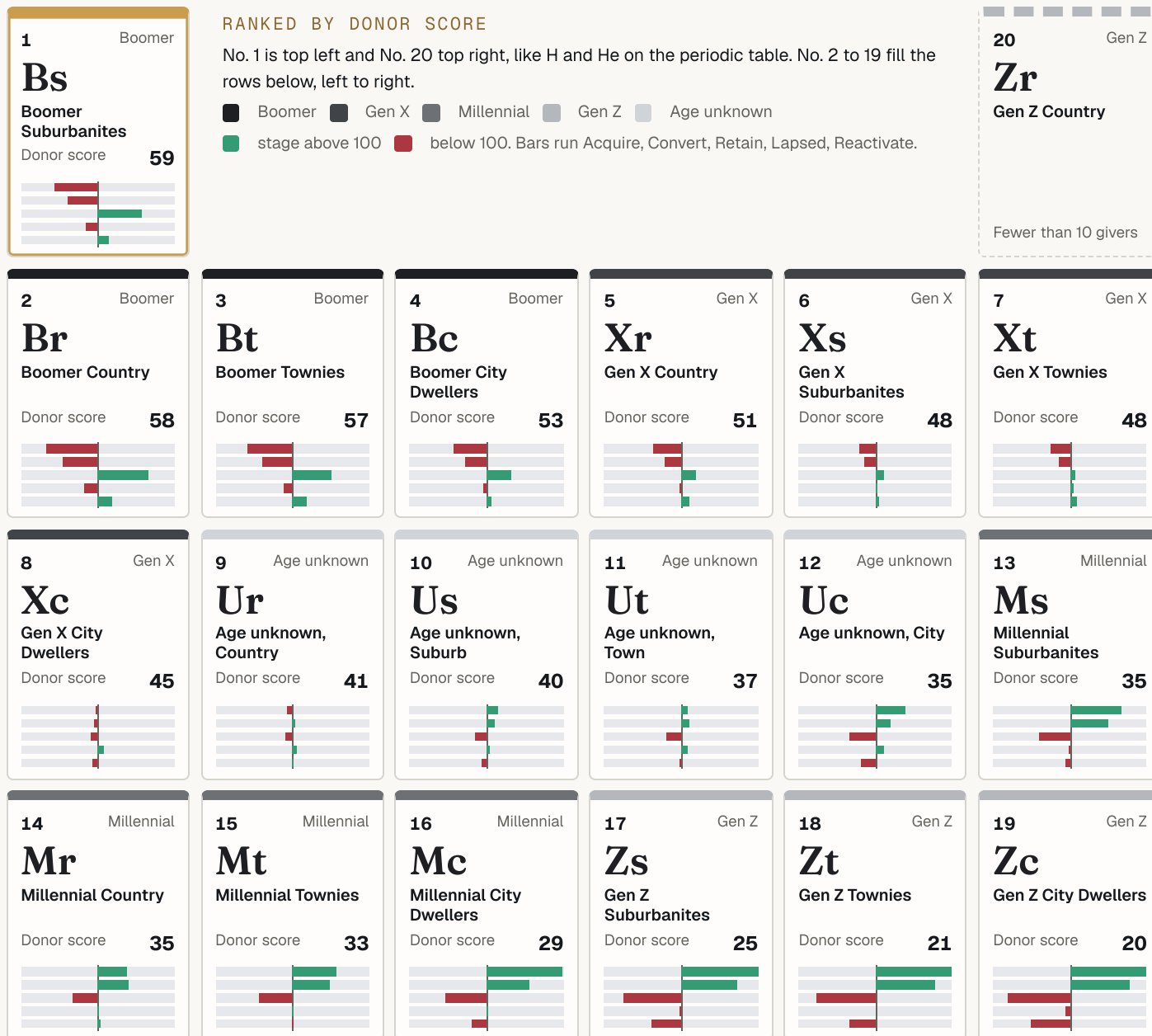
## Personas turn on when the file covers enough givers

The table needs each giver's birth year and postal code. Birth years must cover at least 25% of givers and a postal code we can place at least 50%. Example Relief Collective meets both: 90% of its 24,223 givers have a postal code we can place. Givers without one are in no persona. The dark tick is the minimum.



Postal codes are placed in the United States, Canada, the United Kingdom, and Australia, using our own mapping of each postal area to City, Suburb, Town or Country, built from official public geography files with our own density cut-offs. Nothing is bought or appended to place a giver. A giver with no birth year joins an Age unknown persona.

# Your 20 personas, ranked by Donor score



Each persona takes the median Donor score of its givers: how healthy their giving is to date. A persona with fewer than 10 givers keeps its place and shows no numbers, so no card describes a handful of people. In the app, a Rank by toggle switches the table to the Opportunity score.

# Strongest giving and most room to grow are different personas

Boomer Suburbanites rank No. 1 by Donor score and No. 12 by Opportunity score. Millennial City Dwellers rank No. 1 by Opportunity score and No. 16 by Donor score. Steady givers have less room left. New givers have the most.

| NO. | PERSONA                  | TOTAL GIVERS                            | TOTAL GIVING | MEDIAN LTV | DONOR SCORE | OPPORTUNITY SCORE | OPPORTUNITY RANK |
|-----|--------------------------|-----------------------------------------|--------------|------------|-------------|-------------------|------------------|
| 1   | Boomer Suburbanites      | 2,583                                   | \$4.5M       | \$694      | 59          | 48                | 12               |
| 2   | Boomer Country           | 786                                     | \$1.6M       | \$746      | 58          | 43                | 17               |
| 3   | Boomer Townies           | 1,237                                   | \$1.9M       | \$642      | 57          | 46                | 15               |
| 4   | Boomer City Dwellers     | 942                                     | \$1.5M       | \$602      | 53          | 48                | 13               |
| 5   | Gen X Country            | 553                                     | \$700K       | \$445      | 51          | 49                | 11               |
| 6   | Gen X Suburbanites       | 1,864                                   | \$2.1M       | \$459      | 48          | 53                | 9                |
| 7   | Gen X Townies            | 842                                     | \$936K       | \$436      | 48          | 52                | 10               |
| 8   | Gen X City Dwellers      | 659                                     | \$666K       | \$416      | 45          | 54                | 8                |
| 9   | Age unknown, Country     | 1,362                                   | \$1.0M       | \$287      | 41          | 41                | 19               |
| 10  | Age unknown, Suburb      | 4,421                                   | \$3.3M       | \$285      | 40          | 45                | 16               |
| 11  | Age unknown, Town        | 1,990                                   | \$1.3M       | \$255      | 37          | 41                | 18               |
| 12  | Age unknown, City        | 1,669                                   | \$1.0M       | \$246      | 35          | 46                | 14               |
| 13  | Millennial Suburbanites  | 1,073                                   | \$655K       | \$234      | 35          | 63                | 2                |
| 14  | Millennial Country       | 289                                     | \$202K       | \$242      | 35          | 59                | 5                |
| 15  | Millennial Townies       | 465                                     | \$257K       | \$202      | 33          | 61                | 3                |
| 16  | Millennial City Dwellers | 388                                     | \$189K       | \$191      | 29          | 64                | 1                |
| 17  | Gen Z Suburbanites       | 385                                     | \$95K        | \$95       | 25          | 57                | 6                |
| 18  | Gen Z Townies            | 160                                     | \$34K        | \$85       | 21          | 56                | 7                |
| 19  | Gen Z City Dwellers      | 125                                     | \$29K        | \$82       | 20          | 60                | 4                |
| 20  | Gen Z Country            | Fewer than 10 givers. No numbers shown. |              |            |             |                   |                  |

Total giving is lifetime net giving of every giver in the persona. Median LTV is the median lifetime giving per giver to date, not a forecast. Scores are medians of the givers' scores, from 0 to 100.

# Boomer Suburbanites

Boomer

**Bs**

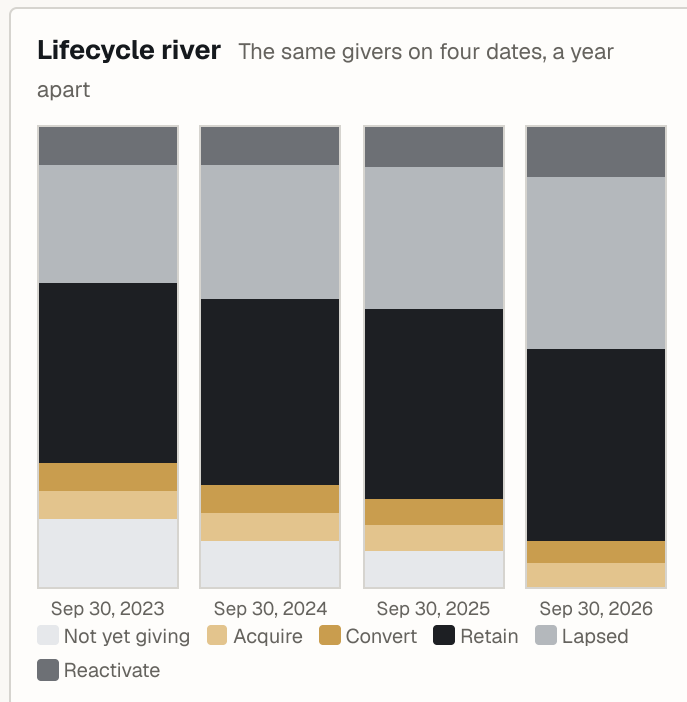
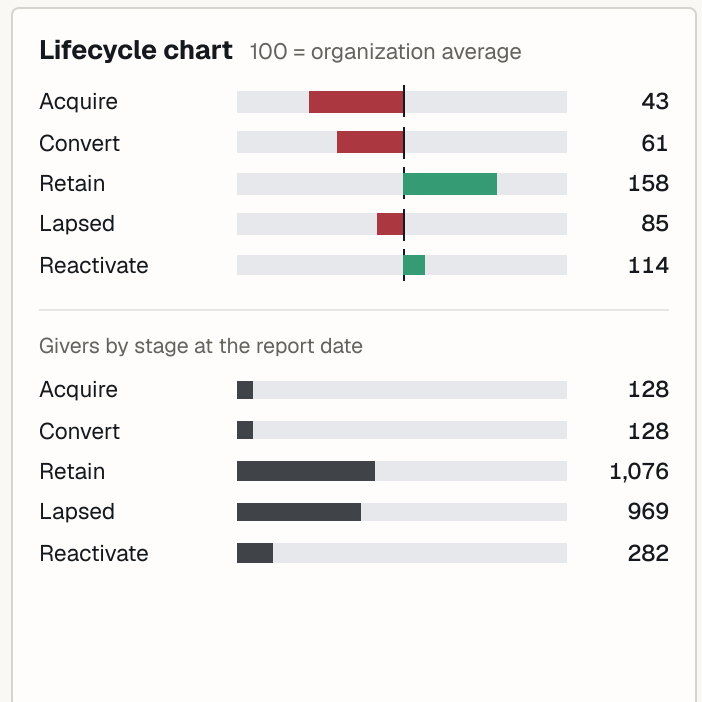
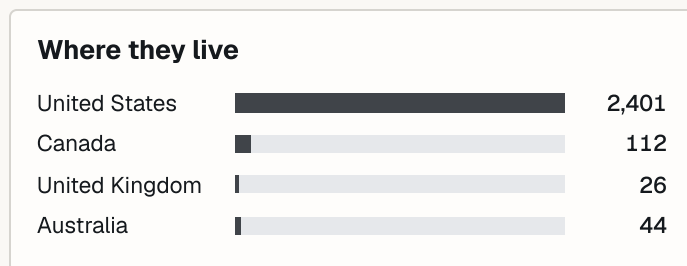
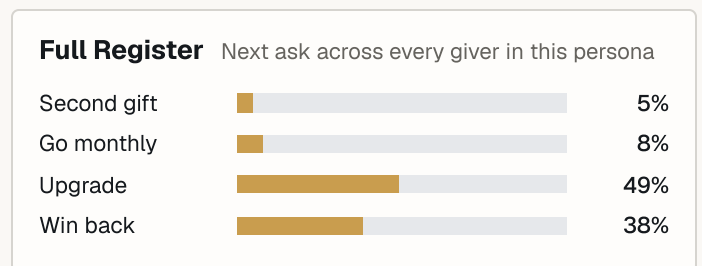
**59**

Persona Donor score

Givers born 1964 or earlier living in the suburbs of large metro areas. Most live in the United States. More of them kept giving year after year than your organization average. Fewer than average gave for the first time this year. Their median lifetime giving is among the highest of your personas.

No. 1 of 20 by Donor score · No. 12 of 20 by Opportunity score

|                                                                      |                                                                                |                                                                       |                                                                 |                                                                        |
|----------------------------------------------------------------------|--------------------------------------------------------------------------------|-----------------------------------------------------------------------|-----------------------------------------------------------------|------------------------------------------------------------------------|
| <p>Total giving</p> <p><b>\$4.5M</b></p> <p>lifetime, all givers</p> | <p>Median LTV</p> <p><b>\$694</b></p> <p>lifetime giving per giver to date</p> | <p>Total givers</p> <p><b>2,583</b></p> <p>with at least one gift</p> | <p>Donor score</p> <p><b>59</b></p> <p>median · No. 1 of 20</p> | <p>Opportunity score</p> <p><b>48</b></p> <p>median · No. 12 of 20</p> |
|----------------------------------------------------------------------|--------------------------------------------------------------------------------|-----------------------------------------------------------------------|-----------------------------------------------------------------|------------------------------------------------------------------------|



# First 100 to call: Boomer Suburbanites

The hundred givers in the persona with the most room to do more, in Opportunity score order. Each row carries a Next ask: the single step most likely to land for that giver, given their lifecycle stage. The first 10 are shown here.

| #  | GIVER            | CITY            | LIFECYCLE STAGE | OPPORTUNITY SCORE                                                                      | NEXT ASK    | DONOR SCORE | LAST GIFT    | 12-MO GIVING |
|----|------------------|-----------------|-----------------|----------------------------------------------------------------------------------------|-------------|-------------|--------------|--------------|
| 1  | Sample giver 001 | Quillmere       | Retain          |  99   | Upgrade     | 91          | Sep 14, 2026 | \$1,200      |
| 2  | Sample giver 002 | Ostrel Park     | Retain          |  99   | Upgrade     | 88          | Aug 29, 2026 | \$960        |
| 3  | Sample giver 003 | Varrow Bend     | Reactivate      |  99   | Upgrade     | 74          | Sep 2, 2026  | \$500        |
| 4  | Sample giver 004 | Fennick Vale    | Retain          |  98   | Go monthly  | 86          | Sep 21, 2026 | \$420        |
| 5  | Sample giver 005 | Dunmarrow       | Retain          |  98   | Upgrade     | 83          | Jul 30, 2026 | \$750        |
| 6  | Sample giver 006 | Quillmere       | Lapsed          |  98   | Win back    | 61          | Jun 11, 2025 | \$0          |
| 7  | Sample giver 007 | Tolvern Heights | Convert         |  97   | Upgrade     | 72          | Aug 8, 2026  | \$300        |
| 8  | Sample giver 008 | Ostrel Park     | Retain          |  97   | Go monthly  | 81          | Sep 25, 2026 | \$360        |
| 9  | Sample giver 009 | Varrow Bend     | Lapsed          |  97   | Win back    | 58          | Apr 19, 2025 | \$0          |
| 10 | Sample giver 010 | Dunmarrow       | Acquire         |  96 | Second gift | 52          | Jun 3, 2026  | \$250        |

Givers and places are made up for this sample, so no row matches a real person. In the app these are your own givers, by name, for your team's use. The Full Register adds an age band, never a birth year, and every download is recorded.

## The four Next asks

|             |                                                                             |
|-------------|-----------------------------------------------------------------------------|
| Second gift | for a giver in Acquire: the gift that makes a one-time giver a repeat giver |
| Go monthly  | for a giver who is not lapsed and has never given monthly                   |
| Upgrade     | for a giver in Retain, Convert or Reactivate: a larger gift                 |
| Win back    | for a lapsed giver: the gift that brings them back                          |

# Scores, stages, and what stays private

## Donor score

How healthy a giver's giving is to date, from 0 to 100. It weighs the chance they give in the next 12 months, how much and how often they have given compared with your other givers, whether their last 12 months are up or down on the 12 before, and their lifecycle stage.

## Opportunity score

How much room a giver has to do more. It takes the giver's strongest Next ask and ranks it against every giver in your organization as a percentile, so 90 means more room than 90% of your givers.

## Lifecycle stages

|                   |                                                                                            |
|-------------------|--------------------------------------------------------------------------------------------|
| <b>Acquire</b>    | first gift in the last 12 months, and only one gift day so far                             |
| <b>Convert</b>    | first gift within the last 24 months, and two or more gift days                            |
| <b>Retain</b>     | first gift more than 24 months ago, and gave in each of the last two 12-month windows      |
| <b>Lapsed</b>     | no gift in the last 12 months                                                              |
| <b>Reactivate</b> | first gift more than 24 months ago, gave in the last 12 months after a year without a gift |

## What stays private

- Nothing is bought or appended to place a giver. Birth year comes from your CRM, the postal code from the giver's address, and the kind of place from our mapping of official public geography files. A giver whose postal code we cannot place is in no persona.
- Birth year sets the generation and is never shown. Lists show an age band, from 18 to 24 up to 65 and over. A birth year that would make a giver younger than 18 is treated as unknown.
- A persona with fewer than 10 givers shows no numbers and has no page, list, or download.
- Lists are named, for your own team. Downloads are recorded and limited per person per day.

SEE YOUR OWN 20 PERSONAS

Start with a conversation about your file at [donorinsights.com/get-started](https://donorinsights.com/get-started).

