M+R

2019

BENCHMARKS

WAYS OF LOOKING

I. Among twenty snowy mountains,
The only moving thing
Was the eye of the blackbird.

That's the first of Wallace Stevens' *Thirteen Ways of Looking at a Blackbird*. It is, like the others, evocative and thought-provoking. It invites close attention. And, crucially, it is not better than the other ways of looking. They are all true.

This is what we strive for with our annual M+R Benchmarks Study. We gather as much data from as many nonprofits as possible, because we know that every perspective adds depth and nuance. Then we explore that data from every angle. What does it mean for fundraising, for advocacy, for marketing? What does it mean for nonprofits, for their supporters, for their causes?

Our goal is to give you not just a mountain of information about what nonprofits are experiencing online, but new ways of looking at that data. We want to help you track the trends and spot the movement. We want to shine light on your experiences. We want to show you something you might not have considered. We want you to show us something *we* haven't considered.

This year, we are proud to be joined by 135 nonprofits encompassing a vast breadth of

viewpoints. Each of them contributed data, answered questions, and volunteered time to help make our Benchmarks dataset comprehensive and reliable. More importantly, each of our generous nonprofit participants brought a unique perspective to this moment.

We are deeply grateful for each and every one of them. The full list of participants can be found on page 78. If seeing that list of wonderful, groundbreaking, world-changing nonprofits leaves you feeling left out, please reach out to benchmarks@mrss.com to participate next time!

We would like to thank our friends at Mobile Commons and Hustle for providing information on text messaging interactions. We are also grateful to the wonderful folks at NTEN for helping the annual Benchmarks Study reach as many people as possible.

Collecting, coordinating, analyzing, and interpreting all these millions of data points requires a team wheeling and whirling in tandem, like a murmuration of starlings. The M+R Benchmarks team includes specialists from just about every area of expertise, each with a unique viewpoint.

Every one of us who sorted numbers, answered questions, and considered what it all means contributed to the full picture explored by the M+R Benchmarks Study. But of course, the most important way of looking is the one you bring. We hope you'll tell us about it.

THE FOREST + THE TREES

We are M+R. We are communicators, marketers, fundraisers, and campaigners who help causes inspire people to act. We work exclusively with nonprofits who are alleviating suffering, fighting for human rights and democracy, dismantling inequality, making art and knowledge accessible to everyone, and fostering a healthier and sustainable world. Our services include:

| Digital Fundraising + Advocacy | Digital Organizing | Media Relations | Advertising | Social Media |

We'd love to discuss working together! Find us at **www.mrss.com**

And if this sounds like work you want to be doing, we're hiring! More at **www.mrss.com/careers**

The complete Benchmarks Study is available for free at www.mrbenchmarks.com.

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DOWN THE RABBIT HOLE

This is what we are going to do: we are going to dig up a fact, hard and cold like a diamond, and hold it up to the light. We are going to brush it off, inspect the shape of it, consider it from each angle. We are going to examine its qualities and study the ways it reflects and refracts the other things we know.

Ready? Here is a fact:

Online revenue for nonprofits grew by just 1% last year.

This is the median change in revenue for the nonprofits in our study. You might find it scary, or surprising, or strangely familiar. Maybe you don't quite know what to think about it. That's okay. Let's take a closer look.

First, let's put that 1% revenue growth number in perspective. This marks the first time in 13 years of M+R Benchmarks Studies that we are reporting average revenue growth in the single digits. In 2017, this same group of nonprofits reported 23% growth.[1]

So if that 1% growth seems like a significant break from what we are used to seeing, that's because it *is* a significant break from what we are used to seeing. **After years and years of steadily increasing online revenue, including record-breaking 2016 and 2017 gains for many nonprofits, suddenly that trendline flattened out.**

Online revenue change since 2014

● 2015   ● 2016   ● 2017   ● 2018

All
- 13%
- 34%
- 69%
- 77%

Cultural
- 21%
- 68%
- 128%
- 129%

Environmental
- 11%
- 49%
- 88%
- 91%

Health
- 9%
- 18%
- 16%
- 13%

Hunger/Poverty
- 36%
- 3%
- 139%
- 141%

International
- 30%
- 35%
- 54%
- 38%

Rights
- 25%
- 54%
- 103%
- 98%

Wildlife/Animal Welfare
- 22%
- 28%
- 48%
- 67%

Change in online revenue

● 2016-17   ● 2017-18

All
- 23%
- 1%

Cultural
- 29%
- 1%

Environmental
- 20%
- 6%

Health
- 14%
- -5%

Hunger/Poverty
- 23%
- 0%

International
- 23%
- -9%

Rights
- 88%
- -14%

Wildlife/Animal Welfare
- 35%
- -2%

Large
- 16%
- 4%

Medium
- 24%
- 1%

Small
- 29%
- 0%
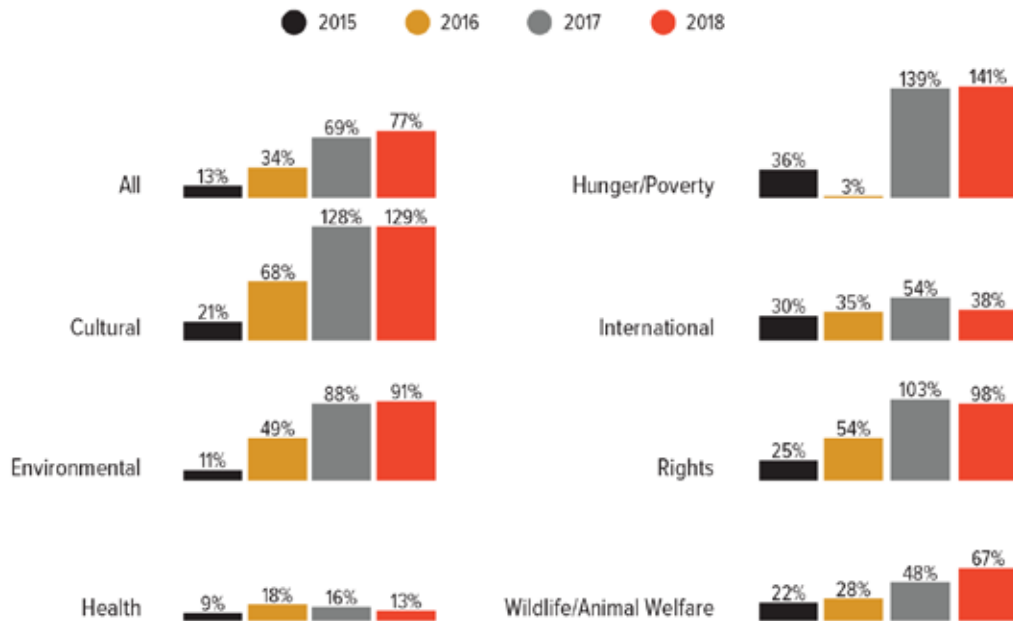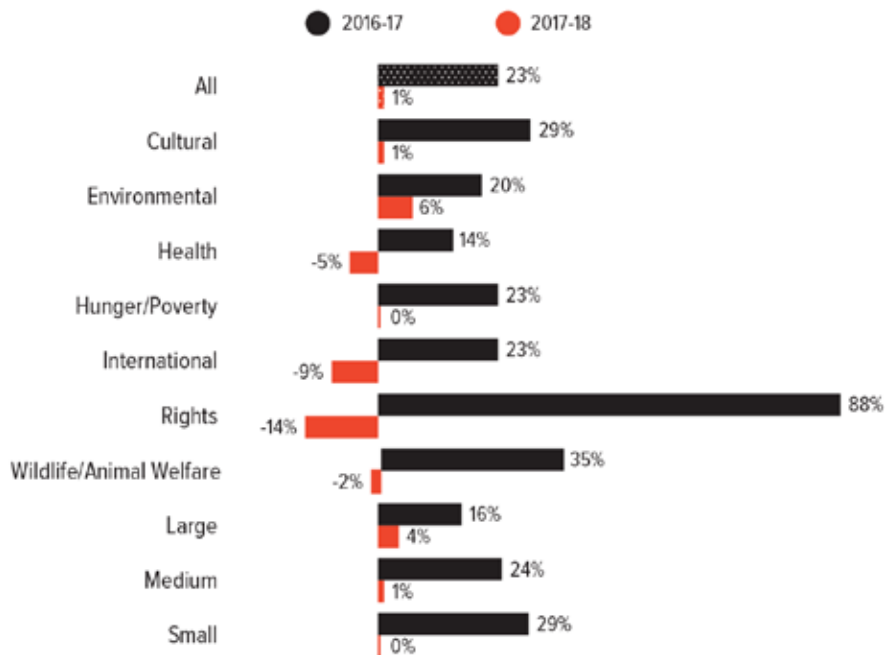
Those record-breaking prior years are crucial to understanding what happened in 2018. If we take a look back at the past five years, we can begin to see that 1% growth in a whole new light.

Let's take 2014 revenue as a baseline. In 2015, online revenue was 13% higher — substantial growth. The next year, revenue had grown by 34% — again, this is *over the 2014 baseline*, so it marked a fairly steady growth trajectory, rather than a massive jump.

But then: the massive jump happened. By 2017, online revenue was 69% higher than in 2014. That's a big bend in the curve, and then in 2018 we saw it bend right back.

One way of thinking about these numbers. **It's not that there was no growth in 2018 revenue, at least relative to the long-term baseline. It's that the 2018 growth happened a year early, showing up in 2017.** Nonprofits were simply unable to maintain that momentum, and we have returned to a "normal" growth trendline.

If this is the case, it could be driven by the political reaction to the 2016 election. It could be a reflection of donor behavior in light of the new tax law. It could be caused by something else entirely, and most likely is the result of a combination of factors. But *if* it's the case, we would expect to see a return to double-digit growth in 2019. Time will tell.

Right now, we know that a 1% year-over-year change in revenue is unusual. When you dig up a number like this, you have a few options. You can scowl at it mistrustfully, double- and triple-check it to make sure it's correct. (We did that, believe us.) You can glare intimidatingly at the number, and hope it will change out of fear or guilt or embarrassment.

Or you can accept the data for what it is: a cold, hard fact, a true thing, but just a part of the truth. It shines new light on the state of our world. It's also the sort of fact that may obscure some other powerful trends.

That's when things get interesting. Suddenly we have a lot more to explore, the rabbit hole grows deeper. Because a shift from 23% revenue growth from 2016–2017 to 1% revenue growth in 2017–2018 — that doesn't happen without a lot of other changes along the way.

After all, the reality of digital programs in this moment is complicated, and getting more so all the time. Each new answer raises more questions, each new insight arouses curiosity, each new datapoint sends us off in search of a trendline. Even the meaning of a single number can shift depending on where you stand, a tilt of the head enough to dramatically change its outlines.

Now hold that image in your mind, of nonprofits ending 2018 with just 1% more in online revenue than in 2017. And then let's keep digging, keep exploring, and see what we find.

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[1] To be clear: that 23% is not the growth we reported in last year's Benchmarks Study; it's 2016–2017 data provided by this year's cohort. This is important — we strongly advise against comparing the numbers in this year's study to previous editions. We have a different pool of participants each year, so the data are not directly comparable. And okay yes, we did just talk about a dozen previous studies in that last paragraph, but we are just setting some background context here, so it's fine.

HAND OVER FIST: WHERE THE MONEY IS (AND WHERE IT ISN'T)

Of course, just because overall revenue was relatively flat, that doesn't mean there weren't sources of significant change hidden just beneath the surface. Some of the old standbys of online fundraising showed signs of wear, some long-term trends continued, and many organizations got a big boost from a new source of revenue they've never been able to count on before.

Let's start with the new thing first.

Facebook's fundraising tools didn't debut in 2018, but for many of our participants this was the first year the platform made a measurable impact on revenue.

The accounting here is a little tricky. Facebook fundraising includes a few different techniques, including direct donation links on a nonprofit's profile page. **The vast majority of Facebook revenue in 2018 came via the peer-to-peer tool known as Facebook Fundraisers. In fact, for participants in our study, it accounted for about 99% of all nonprofit revenue processed on Facebook.**

This revenue isn't processed in the same way as gifts made directly to a nonprofit. That means that it is not included in our calculation of 1% overall revenue growth.

On average, nonprofits raised $1.77 through Facebook for every $100 raised through other online channels.[2] For some sectors, the impact is even more dramatic. Rights groups, which saw a sharp decline in traditional one-time giving, received $13.02 in Facebook donations for every $100 in other revenue.

And for Health nonprofits, Facebook appears to be nothing short of transformative. **For every $100 in direct online revenue, Health nonprofits received $29.88 through Facebook.** In other words, for Health groups, Facebook donations accounted for about 30% as much revenue as *every other source of online revenue, including email, web giving, monthly donors, digital ads, and search*.

(One quick thing here. Take a close look at that chart. The number in the white box is the median figure. The blue and yellow bars to either side go down to the 25th percentile, and up to the 75th – anything in that range is what we generally consider "normal."

Now, notice that the 75th percentile for Health nonprofits is just shy of $90 in Facebook donation revenue per $100 in other online giving. **That is, some nonprofits received nearly as much revenue from Facebook as all other online giving.** Suddenly, that "flat growth year over year" is looking a little more complicated.)

For every $100 an organization raised through other online channels, they raised this in Facebook revenue...

All	$1.77
Cultural	$0.14
Environmental	$1.55
Health	$29.88
Hunger/Poverty	$2.69
International	$1.27
Rights	$13.02
Wildlife/Animal Welfare	$6.16

$0 $10 $20 $30 $40 $50 $60 $70 $80 $90
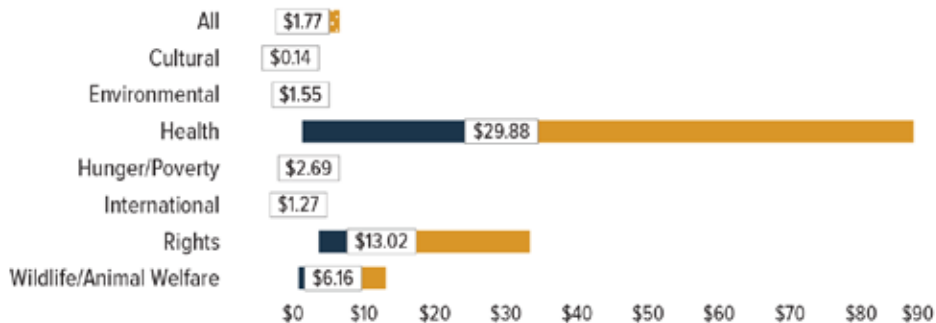
[2] This only includes funds given through the Facebook platform, not people giving on nonprofit donation forms after clicking through Facebook. These numbers apply only to those nonprofits who reported at least some Facebook revenue. Nonprofits that choose not to use Facebook Fundraisers, or are not eligible (e.g. 501(c)(4) organizations), are excluded.

Number of Facebook Fundraisers per organization
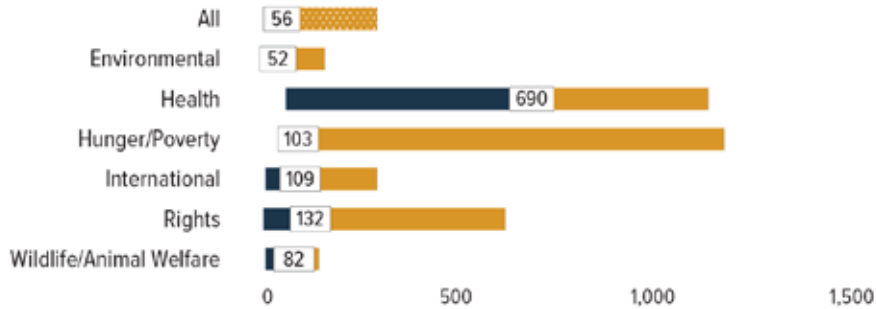
Category	Value
All	56
Environmental	52
Health	690
Hunger/Poverty	103
International	109
Rights	132
Wildlife/Animal Welfare	82

0 — 500 — 1,000 — 1,500

Average number of gifts to a Facebook Fundraiser

Category	Value
All	7.4
Environmental	7.3
Health	7.4
Hunger/Poverty	7.3
International	7.1
Rights	9.5
Wildlife/Animal Welfare	6.4

0.0 — 2.0 — 4.0 — 6.0 — 8.0 — 10.0

Facebook Fundraiser average gift

Category	Value
All	$31
Cultural	$28
Environmental	$29
Health	$37
Hunger/Poverty	$32
International	$33
Rights	$31
Wildlife/Animal Welfare	$28
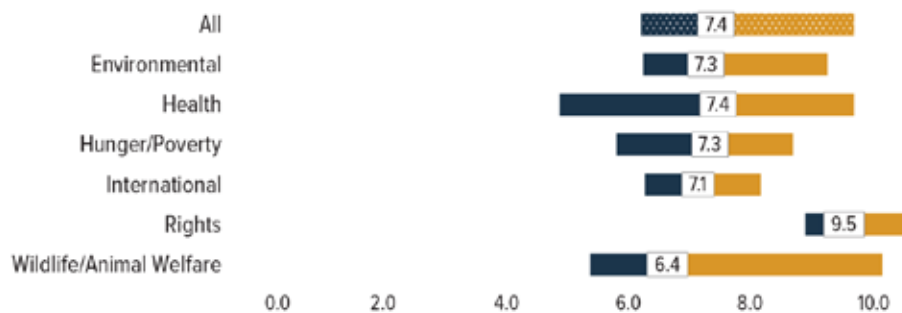
It looks like Facebook Fundraisers are a valuable new source of giving for many nonprofits, and that they're catching on in a big way among supporters. But wait. Does that mean there are teeming hordes of dedicated supporters diligently starting and sharing peer-to-peer giving efforts? Well…

On average, nonprofits received revenue from 56 individual Fundraisers over the course of 2018. To be sure, that number is much higher for some sectors and for some nonprofits in particular. But even a few dozen supporters willing to start a Fundraiser to celebrate their birthday, or Giving Tuesday, or Groundhog Day (the gift that keeps giving, and giving, and giving…) can make a substantial impact.

If a supporter wants to be one of those special Fundraiser-starting superstars, they can expect to generate about seven and a half donations. The average gift is a relatively modest $31.

Percent of Facebook revenue raised in each month

Month	Percent
Jan	5.17%
Feb	5.37%
Mar	4.87%
Apr	4.99%
May	5.11%
Jun	6.54%
Jul	8.51%
Aug	8.42%
Sep	7.29%
Oct	7.70%
Nov	23.02%
Dec	7.78%
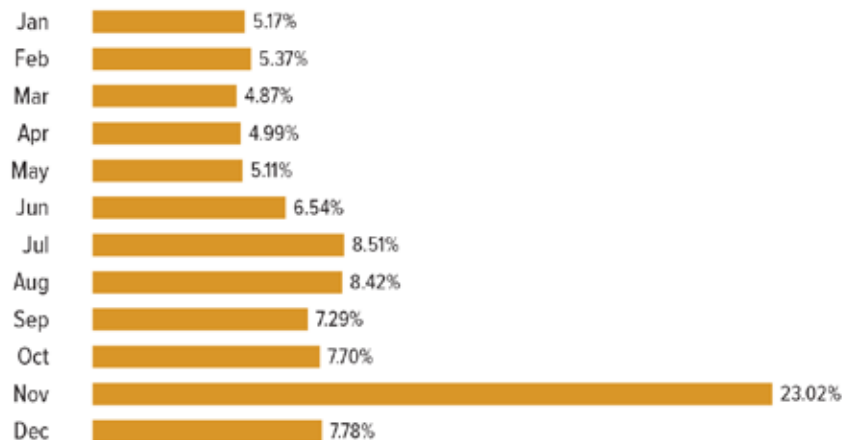
The number of gifts per Fundraiser, and the average size of those gifts, is relatively consistent across sectors. Yes, Fundraisers for Rights nonprofits tend to generate a couple more donations on average, and the average gift for Health groups is a few bucks higher. But the really big difference stems from the number of Fundraisers started to support a nonprofit in the first place.

That means that if you want to reap the rewards of this emerging revenue source, your most effective path forward is to find ways to motivate supporters to start their own Fundraisers. As it happens, there may be a particularly promising time of year to do so.

On the whole, giving through Facebook was higher in the second half of the year than the first. It remains to be seen whether this is indicative of Fundraisers gaining traction with users over time, or if this reflects seasonal shifts that may play out year over year. Tune in to next year's Benchmarks to find out!

What is clear right now is that November is _the_ month for Facebook Fundraisers – nearly a quarter of revenue came in during that month. This should come as no surprise to anyone whose News Feed was suddenly quite crowded with Fundraisers from friends and family on and around Giving Tuesday.

And just as notable: December doesn't seem to be anything special, at least for Fundraisers. While nonprofits may see the end-of-year deadline as crucial to driving revenue through other sources, it does not seem to have much impact on Fundraisers.

These trends – a big spike in November, a relatively tame December – may indicate supporter preferences. It could be the type of person who starts a Fundraiser prefers to do it around Giving Tuesday rather than any other time.

They may also be the result of nonprofit recruitment efforts. If nonprofits heavily encouraged Fundraisers for Giving Tuesday (possibly in response to a quickly-exhausted matching gift offer from Facebook and PayPal last year), that could contribute to the spike in that month. These patterns open up possibilities for taking advantage of a bandwagon effect, or for counter-programming in what are typically quieter times for Fundraisers.

Facebook Fundraisers are the big new sparkly thing, and potentially very exciting. We expect nonprofits to continue to pursue emerging opportunities to increase revenue – especially as other fundamental parts of digital fundraising programs may be losing their luster. As important as it is to spot the new sources showing increased revenue, we also have to keep an eye on shifts showing trouble on the horizon.

While online revenue grew by 1% in 2018, email revenue decreased by 8% — though email still accounted for 13% of all online giving.

Which is to say that email fundraising is important, but it is also hard, and getting harder. **For every 1,000 email appeals sent, nonprofits raised an average of $45.** Most of the key metrics, from open rates to page completion rates, declined. Response rates for fundraising messages were down 13% (to 0.06%). For advocacy messages, response rates declined by 15% (to 1.8%).

Email rates by message type

	Open rate		Click-through rate		Page completion rate		Response rate		Unsubscribe rate	
All	15%	(-4%)							0.15%	(-2%)
Fundraising	14%	(-2%)	0.44%	(+4%)	14%	(-18%)	0.06%	(-13%)	0.16%	(-10%)
Advocacy	15%	(-5%)	2.4%	(-16%)	72%	(-7%)	1.8%	(-15%)	0.12%	(-2%)
Newsletter	16%	(-6%)	1.3%	(+0%)					0.14%	(-4%)

The numbers in parentheses represent the percentage change in rate since 2017.

While email metrics declined, nonprofits landed more messages in more inboxes in 2018. Email lists grew by 5% in 2018, and nonprofits increased messaging volume slightly, sending 4% more fundraising messages than in 2017.

Taking a step back to look at long-term trends, nonprofits are facing serious challenges to email fundraising — but the steady expansion of monthly giving helped to stabilize online revenue in 2018. **While overall online revenue may have been flat year-over-year, revenue from recurring monthly gifts increased by 17%.**

Change in online revenue by type 2017 to 2018

● One-time   ● Monthly

Category	One-time	Monthly
All	-2%	17%
Cultural	7%	20%
Environmental	3%	12%
Health	-4%	22%
Hunger/Poverty	0%	20%
International	-14%	21%
Rights	-15%	32%
Wildlife/Animal Welfare	-3%	14%
Large	0%	13%
Medium	-4%	20%
Small	-7%	17%
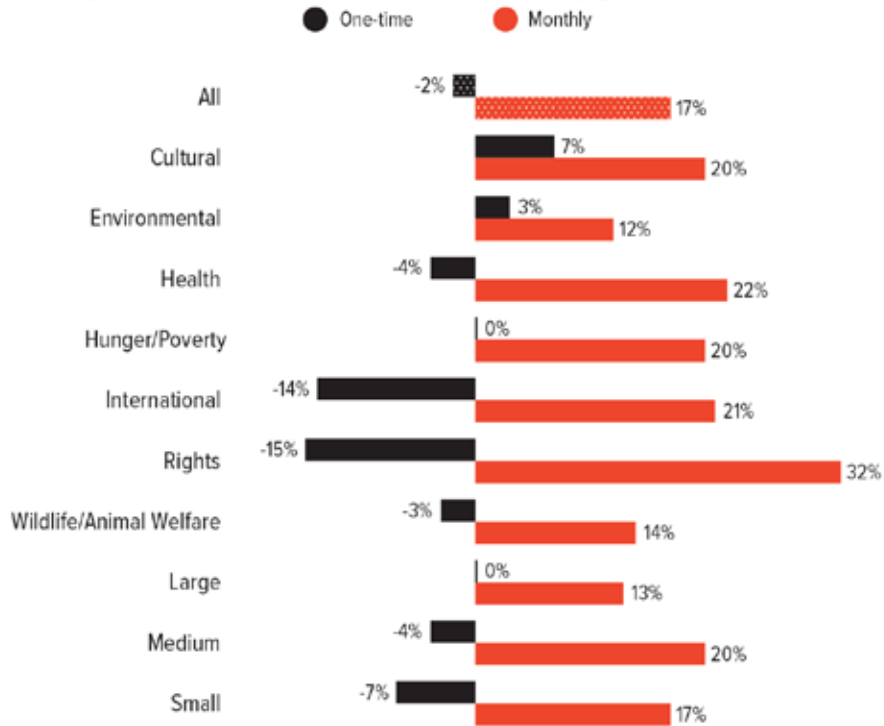
At the same time, revenue from one-time gifts declined by 2% in 2018. Without that growth in monthly giving, overall online revenue would have gone down last year.

As we've reported in previous years, and as is the case with Facebook Fundraisers, the continued growth in monthly giving is likely the result of both supporter preferences and nonprofit strategy.

On the one hand, more and more donors see monthly giving as a convenient, affordable way to make an impact on the causes they care about. On the other, nonprofits value the steady source of revenue and are increasingly likely to pursue a monthly-first strategy. Together, those preferences are changing the face of online fundraising programs – monthly giving accounted for 16% of all online revenue in 2018, up from 13% in 2017.

"Small" refers to nonprofits with annual online revenue below $500,000;
"Medium" includes those nonprofits with revenue between $500,000 and $3,000,000; and
"Large" covers all those with online revenue greater than $3,000,000.

Monthly giving as a percentage of online revenue

● 2017   ● 2018

Category	2017	2018
All	13%	16%
Cultural	2%	4%
Environmental	17%	18%
Health	5%	4%
Hunger/Poverty	10%	11%
International	15%	27%
Rights	8%	16%
Wildlife/Animal Welfare	20%	23%
Large	12%	11%
Medium	16%	21%
Small	10%	13%
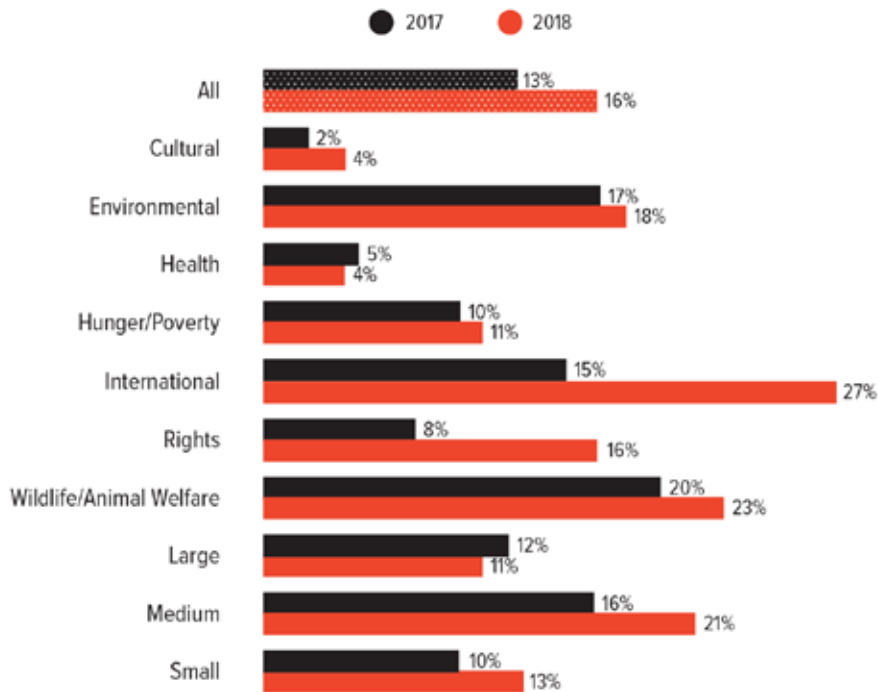
The steady growth of monthly giving, especially compared to one-time giving, stems from one other key factor: retention. One-time donors need to affirmatively choose to complete another gift in order to maintain their support from year to year. Monthly donors just need to keep their payment method current. So even when we see big swings in one-time giving, monthly programs have less donor churn, and a better chance of steadily chugging up, up, up.

FOOD FOR THOUGHT: RETENTION + GIVING LEVELS

Since retention appears to be an important part of this story, let's take a closer look.

Overall, 37% of donors who made a gift online in 2017 donated online again to that nonprofit in 2018. That retention rate is about 3% lower than in 2017. This includes monthly donors whose sustaining gift continued from one year to the next. It does *not* include donors who made gifts through other channels — we are looking only at online-to-online retention here.

There's a marked difference in retention between new donors (those who made their first gift in 2017) and prior donors (those who gave in 2017, and at least one previous year). New donors had a retention rate of just 25% — that's 34 percentage points lower than the retention rate of prior donors. That should be intuitive: donors with a history of repeated giving are more likely to repeat their gifts.

For both cohorts, retention was down from 2017 levels – and the drop was much greater for new donors. Retention among first-time donors declined by 13.6% in 2018. If we are looking for reasons that total revenue growth flattened out in 2018, this is a key part of the story. **A large group of donors made their first gift in 2017, causing growth to spike – and then, they just didn't come back in 2018.**

Online donor retention

● Overall ● New donors ● Prior donors

	Overall	New donors	Prior donors
All	37%	25%	59%
Cultural	21%	14%	48%
Environmental	40%	26%	58%
Health	20%	12%	49%
Hunger/Poverty	40%	27%	64%
International	40%	25%	63%
Rights	32%	23%	55%
Wildlife/Animal Welfare	37%	22%	62%

Change in online donor retention 2017 to 2018

● Overall ● New donors ● Prior donors

Category	Overall	New donors	Prior donors
All	-3.0%	-13.6%	-5.3%
Environmental	-0.9%	-8.7%	-6.8%
Health	-3.0%	-11.2%	-5.5%
Hunger/Poverty	-5.7%	-14.1%	-1.6%
International	-2.1%	-9.8%	-1.8%
Rights	-8.4%	-20.6%	-7.4%
Wildlife/Animal Welfare	-1.3%	-7.1%	-2.3%

While the overall retention rate is an important metric to track, it's worth scratching below the surface. After all, bringing back fifty $10 donors will help your retention rate – but retaining a single $1,000 donor makes a bigger impact on revenue.

When we break out retention rates by gift level, we see that donors at the lowest giving levels tend to have the lowest retention rates. Just 10% of donors who made gifts under $25 in 2017 gave again online in 2018. As we move up the gift-size ladder, retention rates increase as well.

And then it peaks. **The cohort with the highest retention rate includes donors in the $250-$499 range.** This cohort had a retention rate of 54%, meaning that more than half of

donors who made a gift in this range in 2017 came back the next year.

This is in part due to the impact of monthly donors. The average monthly gift size in 2018 was $23, which would annualize to $276 if the donor maintained their giving for all twelve months. That means that a substantial portion of monthly donors fall within this cohort, helping to improve retention.

Online donor retention by donor level

	$1-24	$25-49	$50-99	$100-249	$250-499	$500-999	$1,000-4,999
Retention 2015-16	14%	22%	29%	43%	58%	46%	53%
2016-17	11%	23%	33%	45%	56%	49%	50%
2017-18	10%	18%	29%	42%	54%	43%	49%
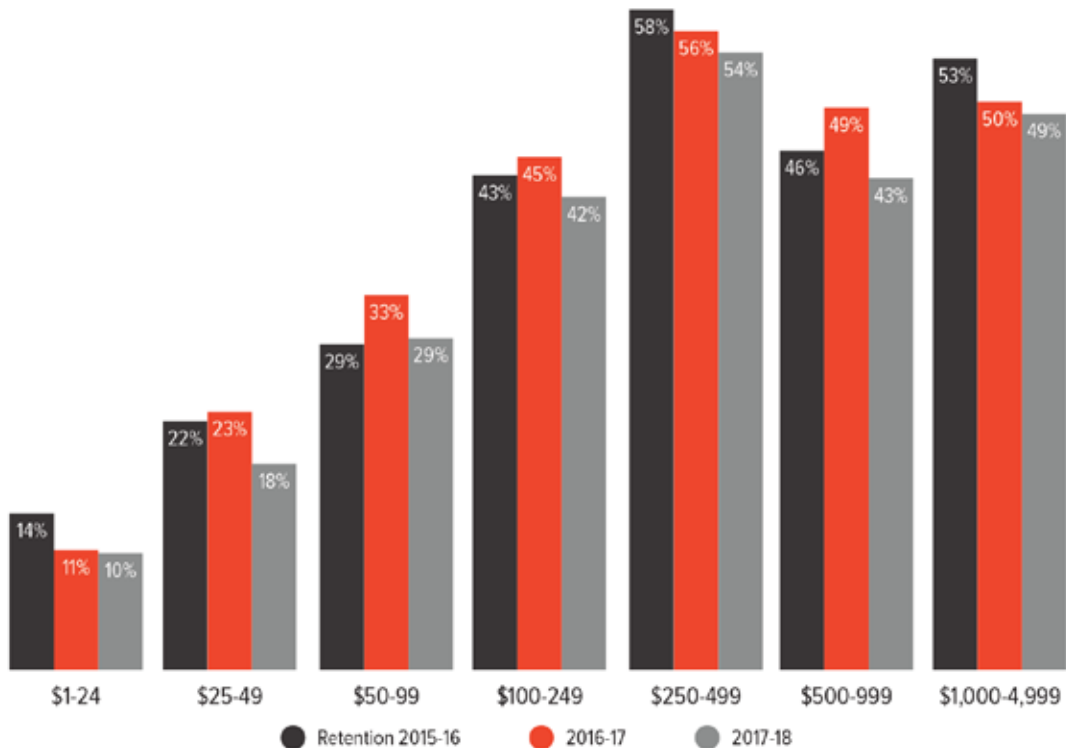
Retention rates dropped for all giving levels in 2018, with no particular pattern connected to size of gift. While some declined more than others, the differences were relatively minor, so each donor level made up just as big a piece of the pie in 2018 as in previous years. (Unfortunately, our data team will not allow us to use pie charts even when we use pie metaphors, so take a look at the stacked bar chart on the next page instead.)

Distribution of donors & revenue by donor level

Percent of donors

	$1,000 - 4,999	$500-999	$250-499	$100-249	$50-99	$25-49	$1-24

Percent of donors

Level	2016	2017	2018
$1,000 - 4,999	4%	4%	3%
$500-999	4%	4%	5%
$250-499	8%	8%	9%
$100-249	27%	27%	27%
$50-99	22%	22%	22%
$25-49	20%	20%	18%
$1-24	15%	15%	16%

Percent of revenue

Level	2016	2017	2018
$1,000 - 4,999	28%	29%	27%
$500-999	15%	14%	15%
$250-499	15%	15%	15%
$100-249	25%	25%	25%
$50-99	10%	10%	10%
$25-49	5%	5%	5%
$1-24	2%	2%	3%
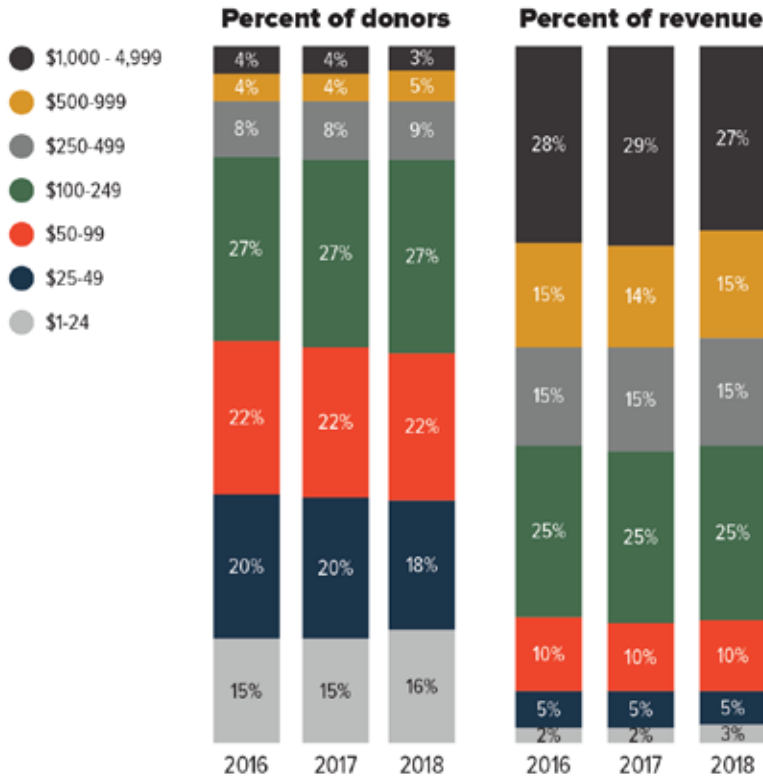
About a third of all online donors made gifts under $50 in each of the last three years. And in each of the last three years, they accounted for less than 10% of all revenue.

Donors who gave at least $250 accounted for 17% of all gifts in 2018, and 57% of revenue. That is nearly identical to the 16% of gifts and 58% of revenue they generated in 2017 (which, in turn, was unchanged from 2016).

None of this is to suggest that donors who give $10 are less committed or important than those who give $1,000. Movements are powered by people, and any person who makes a gift to support a cause they care about deserves our gratitude. But it's a reminder that even simple measures like retention rate are vast and contain multitudes. It's worth considering not only how many donors are sticking with you year after year, but who those donors are.

BIRDS OF A FEATHER: MEMBERSHIP + TICKET REVENUE

Most of the time, when you make an online donation you don't get a whole lot back. Yes, a very nice thank-you message / tax receipt / sustainer upsell ask. Yes, the satisfaction of knowing that you are contributing to a cause you care about, alleviating suffering, and making the world a better place. All of that. But often, nothing tangible. No *stuff*.

Membership and ticket sales are different. Here, the nonprofit provides something of quantifiable value in return for a donation.

We asked our participants whether their online offers include membership or ticket sales. Tickets are pretty clear-cut: you either purchase a ticket to enter a museum (or a zoo, or a symphony, or some kind of combination zoo-symphony) or you don't.

Membership can be a little trickier, because many nonprofits offer primarily symbolic memberships that amount to little more than a printed card in the mail (not to disparage this kind of offer — it can help build loyalty and strengthen the donor's sense of belonging). **But for this analysis, we are focused on those membership programs that offer substantial tangible benefits.** That could be discounted or free admission, or it could be a magazine subscription, a t-shirt, a hat, a fancy pin, or a tote bag to hold your magazines and shirts and hats and pins.

Membership as a percentage of total online revenue

2017	67%
2018	77%

Change in membership revenue

2016-17	21%
2017-18	5%

Tickets as a percentage of total online revenue

2017	27%
2018	29%

Change in ticket revenue

2016-17	32%
2017-18	52%

In the charts above that report on membership, unless specified otherwise, we're only including groups that reported membership revenue. The same is true for tickets.

Retention for groups with membership programs

Donation retention for all groups	37%
Membership retention among groups with membership programs	33%
Donation retention among groups with membership programs	17%

What we found is that membership giving makes up the bulk of total online revenue for nonprofits that have a membership program — more than three quarters of all online revenue in 2018. **And membership giving followed a similar trajectory to other kinds of online revenue. After robust 21% growth in 2017, nonprofits saw a 5% increase in membership revenue in 2018.**

Another consideration for nonprofits that offer both membership and non-member giving is loyalty. For groups with membership programs, members had a retention rate about double that of non-member donors. About 33% of 2017 members made another membership gift in 2018; just 17% of non-member donors were retained.[3]

While shifts in membership giving appear to mirror movement among other sorts of giving, ticket revenue stands apart. From 2016 to 2017, ticket revenue increased by 32%. That could

be seen as part of the broad growth in online giving. Then in 2018, ticket revenue increased by another 52%. That stands out.

As with so many top-line changes, this one is likely composed of a few different moving pieces. We measured revenue, rather than the number of tickets sold, so higher ticket prices could contribute to this increase, although attendance is also a big factor. If there was a high-profile event or an exciting new exhibit or program, that would have an impact that would be less replicable from year to year.

But we may also be seeing a shift to online sales from other sources. As nonprofits make it easier to purchase tickets online, and as supporters grow increasingly comfortable with buying tickets online (including on mobile devices), ticket revenue that might otherwise come in via phone, mail, or box office will appear as online revenue.

[3] One note: these retention rates are within each category. So, a 2017 donor who became a member in 2018 would not count toward retention; neither would a supporter who switched from membership to a non-member gift. It's possible that the relatively low donor retention rate is due in part to nonprofits successfully transitioning these donors to member status.

DEEP DIVE INTO DIGITAL ADS

Declining retention. Lower email response rates. Reduced revenue growth overall. No matter how you look at it, nonprofit digital programs are faced with serious challenges. It is imperative to reach new audiences, acquire fresh donors, activists, and prospects, and re-engage existing supporters.

Part of the answer, for many nonprofits, lies in digital advertising.

Not all Benchmarks participants invested in digital ads, but those that did reported a sharp increase in spending.

Overall, digital ad budgets grew by 144% in 2018.

The increased investment was especially pronounced among nonprofits in the Rights sector, which spent 300% more on ads in 2018 than in 2017.

Small nonprofits also more than tripled their investment in digital ads, outpacing the 156% growth for Medium nonprofits and 116% growth for Large nonprofits.

Change in investment in digital advertising 2017 to 2018

Category	Value
All	144%
Environmental	172%
Health	16%
International	36%
Rights	300%
Wildlife/Animal Welfare	112%
Large	116%
Medium	156%
Small	311%
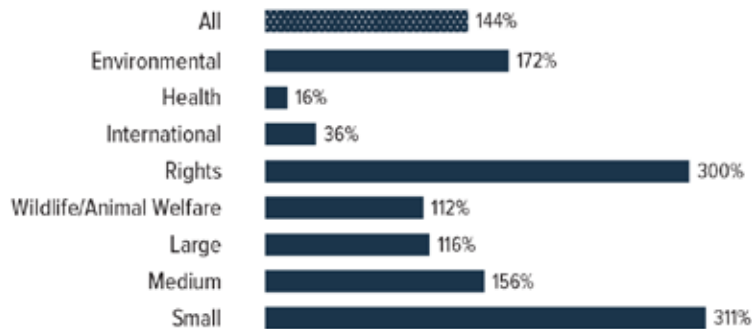
Overall, nonprofits invested ten cents for every dollar they raised in online revenue. This is a slippery datapoint, so be careful. This is NOT a measure of return on investment (which we will get to in just a moment, promise). What this describes is the ratio of digital ad spending to total online revenue, a measure of the level of investment nonprofits of different sizes made. For example, a nonprofit with online revenue of $1,000,000 might be expected to spend about $100,000 on digital ads.

Investment in digital advertising divided by total online revenue

Category	Value
All	$0.10
Cultural	$0.03
Environmental	$0.08
Health	$0.02
Hunger/Poverty	$0.05
International	$0.18
Rights	$0.19
Wildlife/Animal Welfare	$0.07
Large	$0.10
Medium	$0.09
Small	$0.13
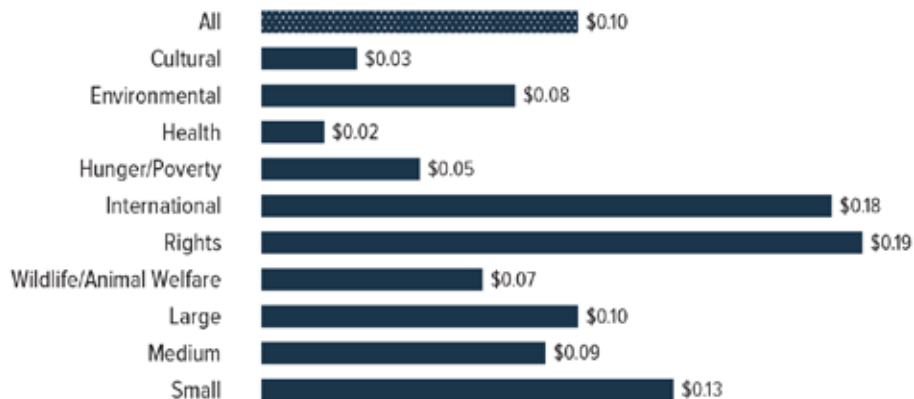
Whether that investment paid off is a different question. Let's try to answer it!

First, it's important to note that there is more to digital ad strategy than fundraising.

About 55% of nonprofit ad budgets were dedicated to direct fundraising – the kind of ad that will have a big shiny GIVE NOW button and land supporters on a donation page.

An additional 23% went to lead generation and advocacy – including user experiences like signing a petition, completing a survey, taking a quiz, or otherwise submitting an email address. Finally, 21% of digital ad budgets went toward branding, awareness, and education campaigns.

Share of digital advertising budget by investment type

	All	Large	Medium	Small	
Branding, Awareness or Education	21%	22%	9%	35%	
Direct Fundraising	55%	59%	42%	45%	**Percentage of digital advertising budget by goal**
Lead Generation & Advocacy	23%	17%	49%	18%	
Other	1%	2%	0%	2%	

	All	Large	Medium	Small	
Display	44%	47%	29%	38%	
Search	16%	15%	14%	27%	**Percentage of direct fundraising advertising budget by channel**
Social Media	35%	33%	52%	32%	
Video	5%	5%	5%	3%	

Digital advertising: cost per lead

All	$1.83
Environmental	$1.67
Health	$1.25
International	$2.33
Wildlife/Animal Welfare	$1.04
Large	$2.03
Medium	$1.79
Small	$2.23

Digital advertising: cost per donation

● Display ● Search ● Social media ● Video

All
- Display: $359
- Search: $33
- Social media: $67
- Video: $279

Large
- Display: $170
- Search: $21
- Social media: $60
- Video: $280

Medium
- Display: $171
- Search: $27
- Social media: $61
- Video: $195

Small
- Display: $1,168
- Search: $83
- Social media: $107
- Video: $102
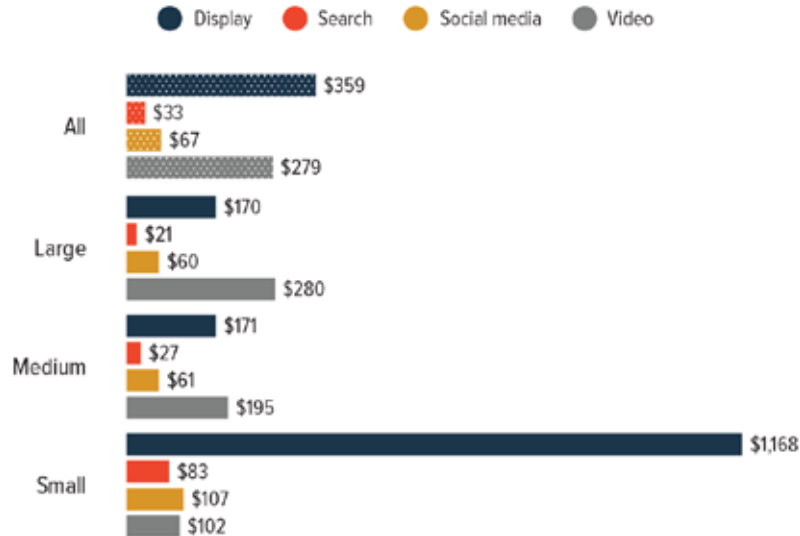
Now, let's take a closer look at ad spending devoted specifically to fundraising. The cost to generate a single donation varies dramatically depending on channel.

For display advertising (e.g. banner ads), nonprofits spent an average of $359 to convert a single donor. However, there was a noticeable split here depending on organization size. Small nonprofits reported a $1,168 cost per donation, while Medium and Large nonprofits averaged around $170 cost per donation for display advertising.

At the other end of the cost spectrum, nonprofits spent an average of $33 to acquire a donor via search. Once again, we see that Small nonprofits experienced substantially higher costs per donor ($83) than Medium ($27) or Large ($21) nonprofits.

It may be that name recognition plays a role here. Medium and Large nonprofits may also benefit from greater resources, whether that means more experienced staff, the ability to work with agency partners, or funding to test and optimize ad content and strategy.

Whatever the cause, we may see that gap closing as Small nonprofits continue to increase investments in digital ads and gain valuable experience.

In many ways, the mirror image of cost per donation is return on ad spend (ROAS). Those channels with the highest cost to acquire a donor tend to have the lowest ROAS.

For display, which takes up the largest share of nonprofit digital ad budgets, ROAS is $0.36. That is, nonprofits received 36 cents back for every dollar they spent in this channel. Social

Digital advertising: return on ad spend (ROAS)

● Display　● Search　● Social media　● Video

All
- Display: $0.36
- Search: $4.78
- Social media: $0.83
- Video: $0.30

Large
- Display: $0.60
- Search: $6.02
- Social media: $0.85
- Video: $0.30

Medium
- Display: $0.31
- Search: $5.59
- Social media: $0.73
- Video: $0.49

Small
- Display: $0.06
- Search: $1.58
- Social media: $0.88
- Video: $0.30
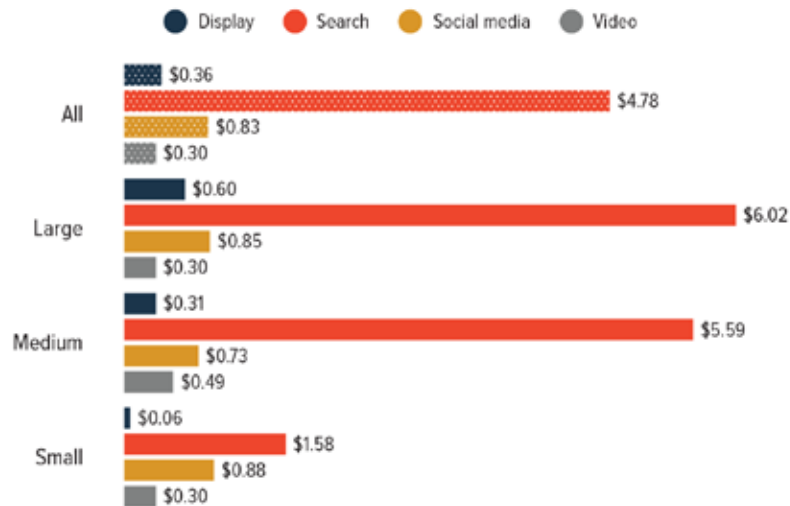
media advertising, the next largest budget category, generated a $0.83 ROAS. For search, a dollar of ad spend returned $4.78 in revenue.

You might look at this and think that since search returned the most revenue per dollar spent, nonprofits should shift more resources to that channel. You might even be tempted to declare that channels like display or video that fall short of a $1 ROAS are losing money, and not worth investing in.

But the picture is more complicated than that, and ROAS is an incomplete measure of performance. It does not capture the long-term value of a donor, who might make additional gifts beyond the immediate donation, or whether that donor is new to your organization or not.

The truth is, attribution is a fraught and difficult task, and nonprofits employ many different models. A supporter might see a pre-roll video ad, choose not to click right away, but visit a nonprofit's site later to make a gift – and that single interaction can be seen and measured in a variety of ways. Whether that gift is attributed to the ad or included in a ROAS calculation varies quite a bit.

We recommend using ROAS as a baseline measure, while looking more broadly at user behavior and long-term data to assess the value of ad investments. As we look ahead, it will become increasingly critical to understand what supporters are doing not just in the moment they interact with a message, but throughout their relationship with a nonprofit.

EVOLVE OR DIE: THE MOBILE EXPERIENCE

The time between viewing an ad and making a gift or taking an action is not the only opportunity to lose track of a supporter. The reality is, many supporters are engaging with nonprofits on multiple devices, from the text alert they receive before getting out of bed in the morning, to the desktop computer they use to check email at the office, to the tablet they use to browse the web at home.

In 2018, users on mobile devices accounted for 48% of all traffic to nonprofit websites, compared to just 44% for desktop. This marks a tipping point, and as mobile traffic continues to grow relative to desktop traffic, there's no reason to think we're going back any time soon.

That's why most nonprofits are taking a very close look at the mobile experience, especially when it comes to making a donation. Here's the worrying part: **while mobile users were about half of all nonprofit web traffic, they accounted for just 30% of gifts, and 21% of revenue.**

Website share by device

● Desktop ● Mobile ● Tablet

Traffic	44% (no change from 2017)	48% (+2%)	8% (-9%)
Transactions	63% (-7%)	30% (+20%)	7% (-1%)
Revenue	71% (-2%)	21% (+15%)	8% (-9%)
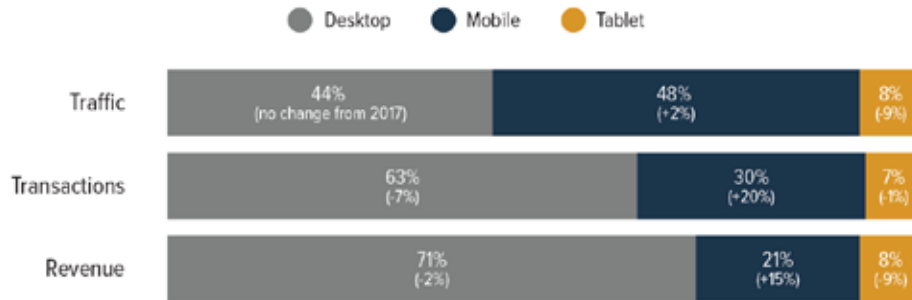
The numbers in parentheses represent the percentage change in rate since 2017.

Main donation page conversion rate

21% Desktop **9%** Mobile **16%** Tablet

Average gift
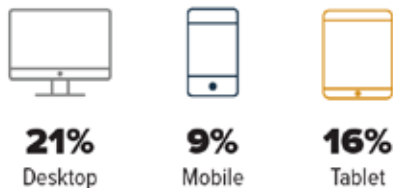
$133 Desktop **$80** Mobile **$105** Tablet

Mobile has narrowed the gap with desktop when it comes to online giving. The share of online revenue coming from mobile users increased by 15% in 2018, eating into both the desktop and tablet shares.

But a desktop user is still more likely to make a gift, and those gifts are likely to be larger (the average for a desktop gift was $53 higher than for a mobile gift).

Nonprofits reported a 21% conversion rate for desktop users on their main donation page. That is, if 100 desktop users clicked the big donate button on the homepage, 21 of them would actually complete their gift. For mobile users, that conversion rate was just 9%. So just getting mobile users to land on a donation page isn't enough – there's more to be done to make sure they complete a gift.

Some of these differences may be due to demographics and cultural differences, over which nonprofits have limited control. If mobile-first users have lower incomes on average than desktop-first users, we might expect their average gifts to be lower. And if supporters feel more secure using their home WiFi connection to process donations rather than pulling out a credit card while in public or completing a transaction via Apple Pay on a donation form, it will take time to change those attitudes.

It's up to nonprofits to make giving easy, compelling, and irresistible regardless of the device or platform.

Homepage load time (seconds)

● Desktop ● Mobile

Category	Desktop	Mobile
All	2.62	2.67
Cultural	2.58	2.63
Environmental	2.37	2.50
Health	2.95	2.78
Hunger/Poverty	4.29	3.69
International	3.94	3.56
Public Media	2.16	1.82
Rights	2.53	3.15
Wildlife/Animal Welfare	2.66	2.76
Large	3.67	3.72
Medium	2.48	2.50
Small	2.54	2.53
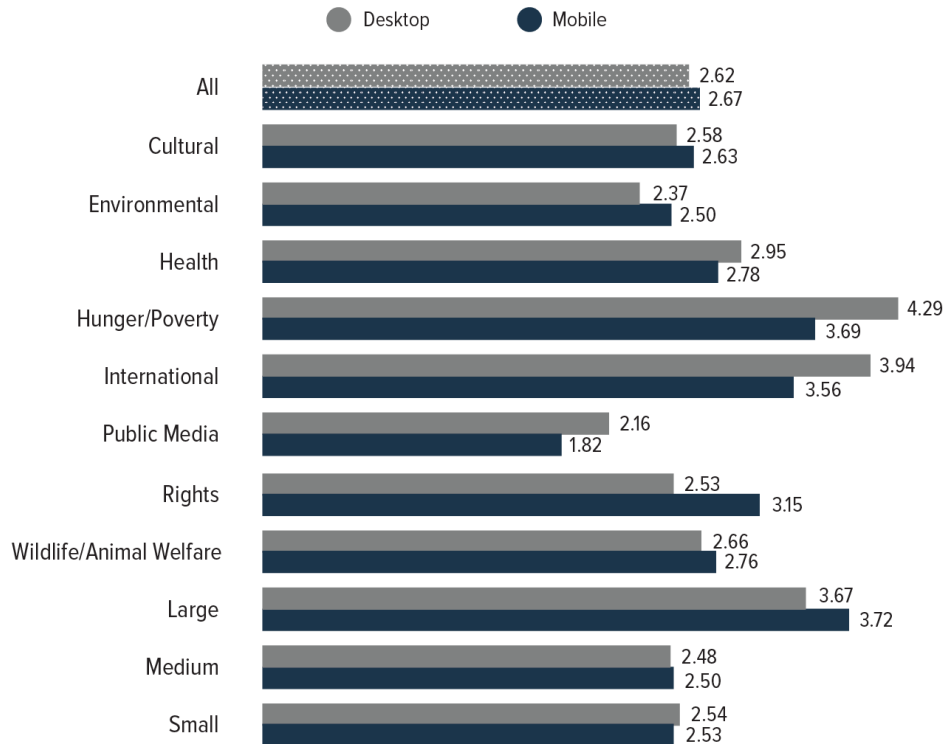
Beyond the web and email experience, the move to mobile has opened unique channels for nonprofits to reach supporters – and for supporters to connect with each other. Mobile lists (that is, supporters who have given nonprofits permission to send them text messages) grew by 14% in 2018.

While mobile lists tend to be much smaller than email lists (on average, nonprofits had 63 mobile subscribers per 1,000 email subscribers), mobile users engage at relatively high rates.

Text messaging metrics

	Click-through rate		Response rate	Unsubscribe rate	
Mobile All Messages	13%	(+76%)		0.63%	(+0%)
Mobile Fundraising	13%	(+49%)		0.53%	(-8%)
Mobile Advocacy Click Messages	15%	(-10%)		0.52%	(+17%)
Mobile Advocacy Call Messages			4.1%	0.35%	(+35%)

Fundraising text messages had a click-through rate of 13%, which suggests relatively high engagement – the average email fundraising message click-through was orders of magnitude smaller, at just 0.44%. However, we are unable to report on response rates or revenue for text appeals, as those results are recorded separately from the Mobile Commons platform.[4]

The click-through rate for advocacy text messages, 15%, was also far higher than the equivalent email rate of 2.4%. That's for messages where the goal is to encourage supporters to click through to an action page, which typically asks a person to sign a petition or send a letter to elected officials.

But text is a mobile phone technology, and phones can also make phone calls! That means that text campaigns are particularly well suited to driving calls to decision makers. For this type of message, the response rate was 4.1%. **So text messages successfully drove phone calls at more than twice the rate that email advocacy messages drove traditional web-based actions.**

The possibilities for using text technology to mobilize supporters extend beyond bulk messaging. **Peer-to-peer text messaging from platforms like Hustle[5] have gained significant traction as part of electoral and advocacy campaigns.**

These platforms connect volunteers, staff, and organizers with donors, voters, and supporters, enabling them to have one-on-one text message conversations at scale. This is in contrast to bulk text through a platform like Mobile Commons, which allows the nonprofit to send a single message to a full list at once and manage replies automatically or via an in-box.

A benefit of a well-run peer-to-peer program is that it creates a direct conversation between a targeted supporter and the staff or volunteer who is texting them. Nonprofits use peer-to-

[4] There are other mobile platforms out there, but all mobile messaging data reported in Benchmarks was provided by Mobile Commons. We are grateful for their generous contributions of time and sweet, sweet data.

[5] Remember that footnote about Mobile Commons? The same thing applies to Hustle. While there are other peer-to-peer text solutions, this data was provided by Hustle, and we appreciate their help.

peer text to recruit supporters for event attendance, volunteering, advocacy, and fundraising, as well as to drive voter turnout. As with Facebook Fundraisers, peer-to-peer texting opens up the possibility of mobilizing committed supporters to expand the reach of nonprofits.

The median response rate for a peer-to-peer text among our study participants was 15%. Response rate in this case is quite literal – it is the percentage of recipients who reply to a peer-to-peer text message, which may or may not indicate that recipient completing an action, donating, or voting. Recipients were sent about 1.5 messages per month, and had a 2.9% opt-out rate per month.

Peer-to-peer text messaging metrics

Response rate (% of messages sent that receive a text message back)	15%
Monthly opt-out rate (% of individuals who opt out each month)	2.9%
Number of messages an organization sends to its peer-to-peer list members each month	1.5

TIP THE SCALES: WHAT COMES NEXT

Another way of looking at 2018 online revenue: nonprofits were poised, with nearly perfect balance, between growth and decline.

Look at the solid bedrock. Long-term trends that have helped nonprofits consolidate gains year after year continued to rise. Email list sizes have grown. Monthly giving programs keep expanding. Investments in digital ads are bringing in new supporters.

Look at the challenges. Email response rates and revenue declined. The energy and enthusiasm that flooded nonprofit supporters in 2017 may have reached its high-water mark. Gravity has not been repealed, and the rush that powered record-breaking results in 2017 began to ebb.

Look at the opportunities. In this moment, it can be hard to tell what is solid, and what is a momentary flash. Facebook Fundraisers could become a difference-maker for nonprofits (or... not). Nonprofits may find ways to leverage mobile platforms in ever more powerful ways. And another election is right around the corner, ready to remake the landscape again.

Look at the data now, carefully. Recognize the trends that track to your own experience. Consider the metrics that diverge from your results. Scrutinize each true thing, until it reveals something you can use to grow your program and advance your cause.

That's what we're going to do. Dig up some facts, hold them up to the light. And then keep digging.

The right way to look at this data

The 2019 M+R Benchmarks Study includes input from 135 wonderful nonprofit partners. They work to cure diseases, to protect wildlife, to preserve the planet, to advance equality, to promote science, to defend human dignity, to share cultural wonders, to end hunger, to make the world a better and kinder and more just place.

And then, in addition to all that, they generously share the results of their hard work so that we can all learn to do those things more effectively. They really are quite amazing.

Because the perspective and experience of nonprofits in different issue areas are so unique, we have broken out the findings by sector wherever possible. If you're not sure which sector applies to you, take a look at the full list of participants on page 78 – find your closest peers, and you'll find where you belong.

We also sort our participants by size. For our study, "Small" refers to nonprofits with annual online revenue below $500,000; "Medium" includes those nonprofits with revenue between $500,000 and $3,000,000; and "Large" covers all those with online revenue greater than $3,000,000.

Not all participants were able to provide data for every metric. In places where a chart does not include data for a certain sector or size, it's because we were not able to collect enough results to report a reliable average.

Sometimes comparing viewpoints can add depth and clarity; other times it simply creates confusion. Because our pool of participants changes from year to year, putting this year's numbers side by side with previous editions is more likely to muddy the waters than shed new light.

Wherever we discuss year-over-year changes, this is based on comparisons among our current pool of participants, who generously provided multi-year data. Didn't we tell you how wonderful they are?

The full Benchmarks Study is available for free at **www.mrbenchmarks.com.**

(i) How to read box-whisker charts

It's all well and good to have lots of different perspectives, but actually there is a correct way to read the information in these charts. It's like this:

☐ The middle square box indicates the median value.

▬ The horizontal line indicates the range of normal values of the segment. The segment to the right of the white box is the 75th percentile, and the segment to the left is the 25th percentile.

Bird's eye view

+ **Overall online revenue increased by 1% in 2018,** after 23% growth the year before. Revenue was relatively flat year-over-year for most sectors, but Rights nonprofits reported a 14% decline in giving (after extraordinary 88% growth in 2017).

+ **Revenue from one-time gifts decreased by 2%, while monthly giving revenue increased by 17%.** Monthly giving accounted for 16% of all online revenue in 2018, up from 13% in 2017.

+ **Email messaging drove 13% of all online revenue in 2018.** Email accounted for 21% of all online revenue for Environmental nonprofits, the largest share of any sector.

+ **Email revenue decreased by 8% in 2018.** Rights non-profits experienced the steepest decline, with a 40% drop from the previous year. Meanwhile, Health nonprofits reported a 40% increase in email revenue.

+ **On average, 37% of donors who made an online gift to a nonprofit in 2017 made an online gift again to that nonprofit in 2018.** Retention was 25% for donors who made their first gift in 2017, and 59% for repeat donors. Retention rates also varied widely by giving level – see for a detailed look at retention.

Change in online revenue

● 2016-17   ● 2017-18

Category	2016-17	2017-18
All	23%	1%
Cultural	29%	1%
Environmental	20%	6%
Health	14%	-5%
Hunger/Poverty	23%	0%
International	23%	-9%
Rights	88%	-14%
Wildlife/Animal Welfare	35%	-2%
Large	16%	4%
Medium	24%	1%
Small	29%	0%

Change in email revenue

Category	2017-18
All	-8%
Cultural	-11%
Environmental	-12%
Health	40%
Hunger/Poverty	11%
International	-7%
Rights	-40%
Wildlife/Animal Welfare	-20%
Large	-13%
Medium	-14%
Small	14%

Monthly giving as a percentage of online revenue

● 2017 ● 2018

Category	2017	2018
All	13%	16%
Cultural	2%	4%
Environmental	17%	18%
Health	5%	4%
Hunger/Poverty	10%	11%
International	15%	27%
Rights	8%	16%
Wildlife/Animal Welfare	20%	23%
Large	12%	11%
Medium	16%	21%
Small	10%	13%

Change in online revenue by type 2017 to 2018

● One-time ● Monthly

Category	One-time	Monthly
All	-2%	17%
Cultural	7%	20%
Environmental	3%	12%
Health	-4%	22%
Hunger/Poverty	0%	20%
International	-14%	21%
Rights	-15%	32%
Wildlife/Animal Welfare	-3%	14%
Large	0%	13%
Medium	-4%	20%
Small	-7%	17%

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Change in number of online gifts 2017 to 2018

All	5%
Cultural	4%
Environmental	5%
Health	4%
Hunger/Poverty	12%
International	2%
Rights	-1%
Wildlife/Animal Welfare	11%
Large	12%
Medium	5%
Small	3%

Average gift

● Monthly　● One-time

	Monthly	One-time
All	$23	$106
Cultural	$24	$80
Environmental	$20	$95
Health	$31	$130
Hunger/Poverty	$37	$161
International	$35	$144
Rights	$22	$88
Wildlife/Animal Welfare	$23	$59
Large	$26	$104
Medium	$23	$93
Small	$25	$115
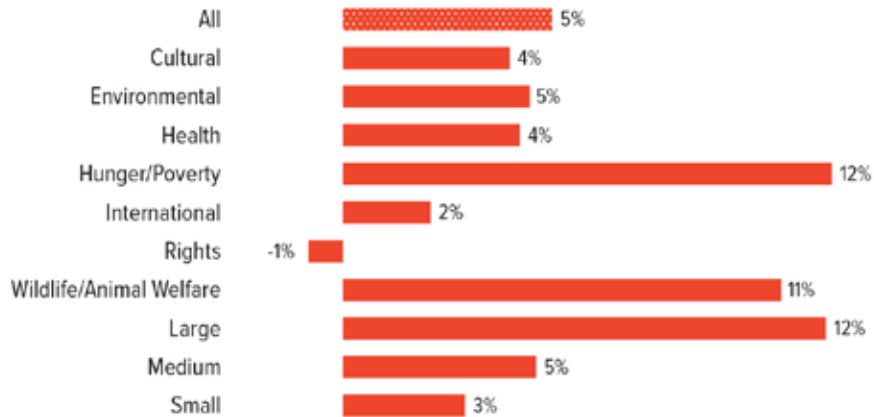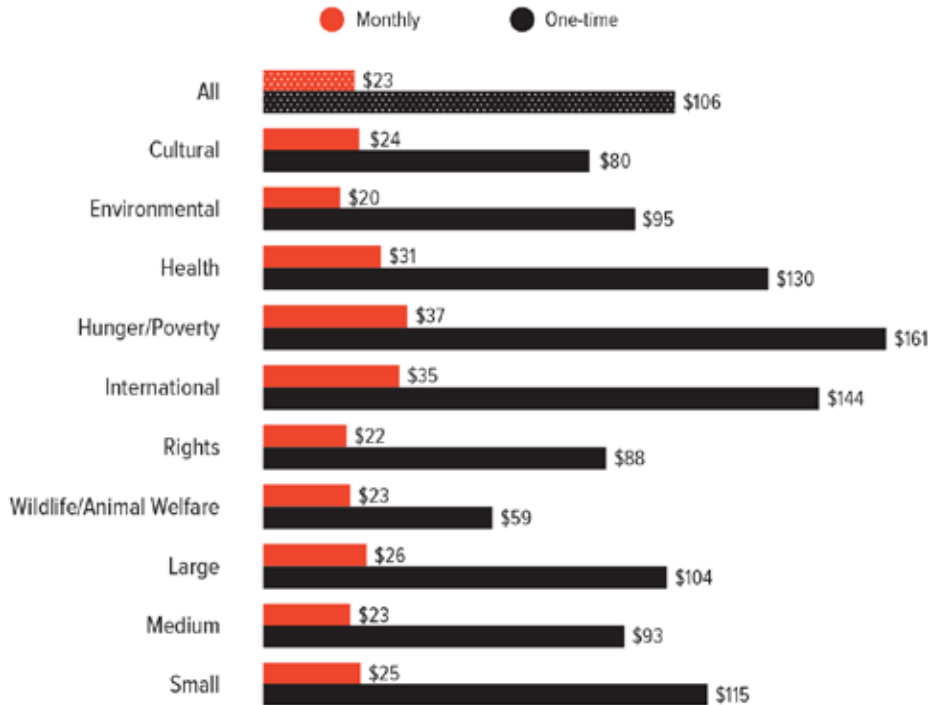
Change in average one-time gift 2017 to 2018

Category	Value
All	1.1%
Cultural	6.6%
Environmental	1.1%
Health	1.0%
Hunger/Poverty	2.2%
International	1.1%
Rights	-20.4%
Wildlife/Animal Welfare	-10.0%
Large	0.6%
Medium	1.3%
Small	1.1%
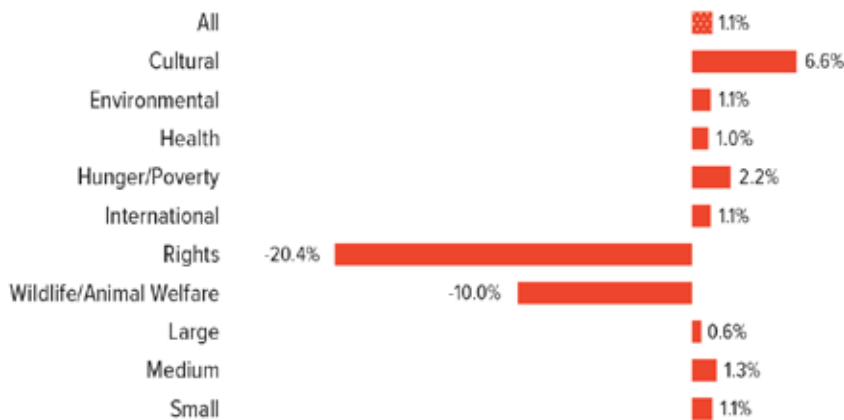
Change in average monthly gift 2017 to 2018

Category	Value
All	-1.9%
Cultural	-1.6%
Environmental	-2.7%
Health	-6.8%
Hunger/Poverty	0.4%
International	2.8%
Rights	-3.6%
Wildlife/Animal Welfare	-2.3%
Large	0.3%
Medium	-2.6%
Small	-3.6%
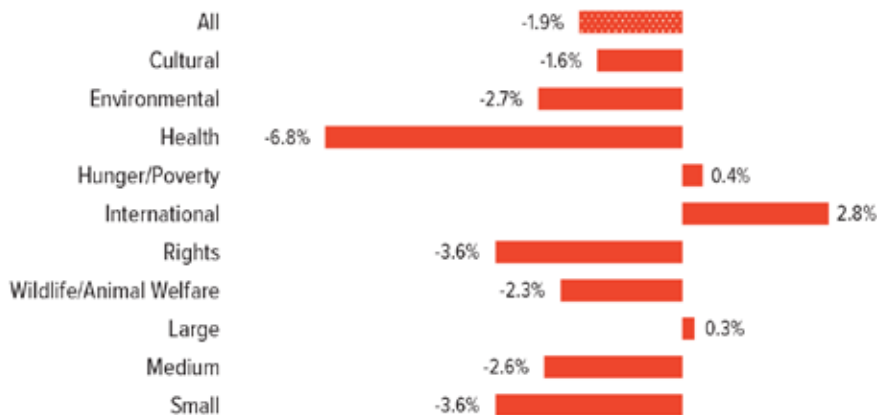
Share of online revenue from email

Category	Value
All	13%
Cultural	9%
Environmental	21%
Health	9%
Hunger/Poverty	8%
International	20%
Rights	9%
Wildlife/Animal Welfare	17%
Large	12%
Medium	14%
Small	14%

Email revenue per 1,000 fundraising emails sent

Category	Revenue
All	$45
Cultural	$70
Environmental	$45
Health	$48
Hunger/Poverty	$70
International	$69
Rights	$38
Wildlife/Animal Welfare	$26
Large	$49
Medium	$37
Small	$58
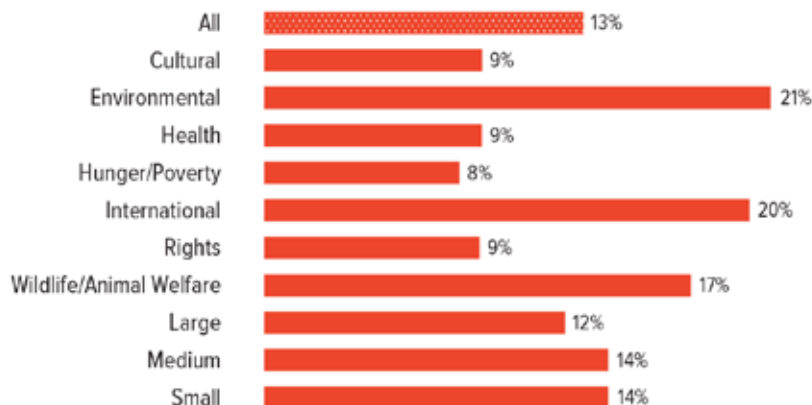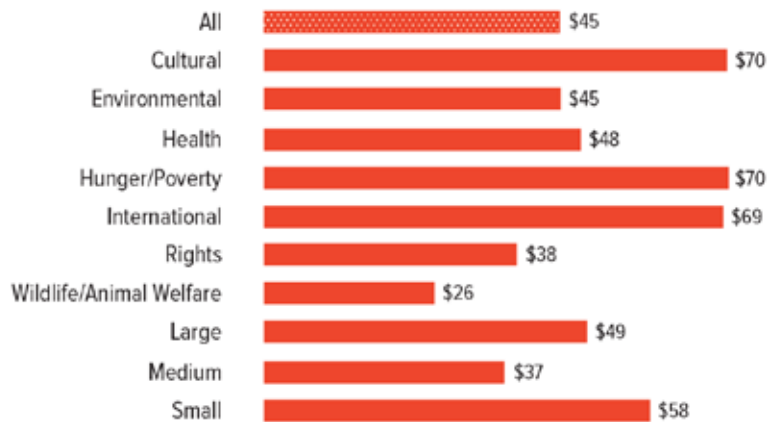
Change in email revenue per 1,000 fundraising emails sent 2017 to 2018

Category	Change
All	-15%
Cultural	-47%
Environmental	-24%
Health	11%
Hunger/Poverty	-7%
International	-16%
Rights	-27%
Wildlife/Animal Welfare	-11%
Large	-24%
Medium	-24%
Small	-14%

Revenue per donor per year

Year	Revenue
2014	$166
2015	$158
2016	$166
2017	$158
2018	$167

Gifts per donor per year

Year	Gifts
2014	1.7
2015	1.8
2016	1.7
2017	1.8
2018	2.0

Online revenue change since 2014

● 2015　● 2016　● 2017　● 2018

All
- 2015: 13%
- 2016: 34%
- 2017: 69%
- 2018: 77%

Cultural
- 2015: 21%
- 2016: 68%
- 2017: 128%
- 2018: 129%

Environmental
- 2015: 11%
- 2016: 49%
- 2017: 88%
- 2018: 91%

Health
- 2015: 9%
- 2016: 18%
- 2017: 16%
- 2018: 13%

Hunger/Poverty
- 2015: 36%
- 2016: 3%
- 2017: 139%
- 2018: 141%

International
- 2015: 30%
- 2016: 35%
- 2017: 54%
- 2018: 38%

Rights
- 2015: 25%
- 2016: 54%
- 2017: 103%
- 2018: 98%

Wildlife/Animal Welfare
- 2015: 22%
- 2016: 28%
- 2017: 48%
- 2018: 67%

Membership as a percentage of total online revenue

- 2017: 67%
- 2018: 77%

Change in membership revenue

- 2016-17: 21%
- 2017-18: 5%

Tickets as a percentage of total online revenue

- 2017: 27%
- 2018: 29%

Change in ticket revenue

- 2016-17: 32%
- 2017-18: 52%

Online donor retention

● Overall ● New donors ● Prior donors

Category	Overall	New donors	Prior donors
All	37%	25%	59%
Cultural	21%	14%	48%
Environmental	40%	26%	58%
Health	20%	12%	49%
Hunger/Poverty	40%	27%	64%
International	40%	25%	63%
Rights	32%	23%	55%
Wildlife/Animal Welfare	37%	22%	62%

Change in online donor retention 2017 to 2018

● Overall ● New donors ● Prior donors

Category	Overall	New donors	Prior donors
All	-3.0%	-13.6%	-5.3%
Environmental	-0.9%	-8.7%	-6.8%
Health	-3.0%	-11.2%	-5.5%
Hunger/Poverty	-5.7%	-14.1%	-1.6%
International	-2.1%	-9.8%	-1.8%
Rights	-8.4%	-20.6%	-7.4%
Wildlife/Animal Welfare	-1.3%	-7.1%	-2.3%

Online donor retention by donor level

	$1-24	$25-49	$50-99	$100-249	$250-499	$500-999	$1,000-4,999
Retention 2015-16	14%	22%	29%	43%	58%	46%	53%
2016-17	11%	23%	33%	45%	56%	49%	50%
2017-18	10%	18%	29%	42%	54%	43%	49%

Distribution of donors & revenue by donor level

Percent of donors

	$1,000 - 4,999	$500-999	$250-499	$100-249	$50-99	$25-49	$1-24
2016	4%	4%	8%	27%	22%	20%	15%
2017	4%	4%	8%	27%	22%	20%	15%
2018	3%	5%	9%	27%	22%	18%	16%

Percent of revenue

	$1,000 - 4,999	$500-999	$250-499	$100-249	$50-99	$25-49	$1-24
2016	28%	15%	15%	25%	10%	5%	2%
2017	29%	14%	15%	25%	10%	5%	2%
2018	27%	15%	15%	25%	10%	5%	3%

Retention for groups with membership programs

Donation retention for all groups	37%
Membership retention among groups with membership programs	33%
Donation retention among groups with membership programs	17%

Bird's eye view

+ **Email list size increased by 5% in 2018.** This is somewhat slower growth than in previous years — email list size increased by 8% in 2016, and 9% in 2017. Health nonprofits reported a significant spike in email list size, with 74% growth in 2018. Hunger/Poverty and Wildlife/Animal Welfare nonprofits both reported declines in email list size.

+ **Nonprofits sent an average of 59 email messages per subscriber in 2018.** This marked an 8% increase in volume from 2017. The largest category of email messages was fundraising (25 emails per year per subscriber). International nonprofits sent the highest volume of email, with 104 messages per year per subscriber; 50 of those were fundraising messages.

+ **Advocacy email response rate declined by 15% in 2018, to 1.8%.** Drops were reported for open rate (down 5% to 15%), click-through rate (down 16% to 2.4%), and page completion rate (down 7%, to 72%). The unsubscribe rate fell to 0.12%, which is 2% lower than in the previous year.

+ **Fundraising email response rate declined by 13% in 2018, to 0.06%.** Open rate declined by 2%, to 14%, and page completion rate dropped by 18% to 14%. However, click-through rates improved somewhat, up 4% to 0.44%. The unsubscribe rate for fundraising messages fell to 0.16%, 10% lower than in the previous year.

List growth

● 2016 ● 2017 ● 2018

Category	2016	2017	2018
All	8%	9%	5%
Environmental	9%	8%	5%
Health	-1%	0%	74%
Hunger/Poverty	30%	37%	-13%
International	4%	11%	7%
Rights	9%	-4%	10%
Wildlife/Animal Welfare	2%	13%	-18%

Churn

● Bounces ● Unsubscribes

Category	Bounces	Unsubscribes
All	5.7%	8.3%
Environmental	7.0%	8.2%
Health	9.8%	4.2%
Hunger/Poverty	7.2%	12.4%
International	5.6%	10.8%
Public Media	4.1%	6.6%
Wildlife/Animal Welfare	5.6%	9.4%

Email rates by message type

	Open rate		Click-through rate		Page completion rate		Response rate		Unsubscribe rate	
All	15%	(-4%)							0.15%	(-2%)
Fundraising	14%	(-2%)	0.44%	(+4%)	14%	(-18%)	0.06%	(-13%)	0.16%	(-10%)
Advocacy	15%	(-5%)	2.4%	(-16%)	72%	(-7%)	1.8%	(-15%)	0.12%	(-2%)
Newsletter	16%	(-6%)	1.3%	(+0%)					0.14%	(-4%)

The numbers in parentheses represent the percentage change in rate since 2017.

Messages per year per subscriber

● Other ● Newsletter ● Advocacy ● Fundraising

Category	Fundraising	Advocacy	Newsletter	Other
All	25	10	11	13
Cultural	15	1	18	20
Environmental	20	19	11	13
Health	27	11	13	18
International	50	16	12	26
Public Media	19		54	5
Wildlife/Animal Welfare	18	10	6	10
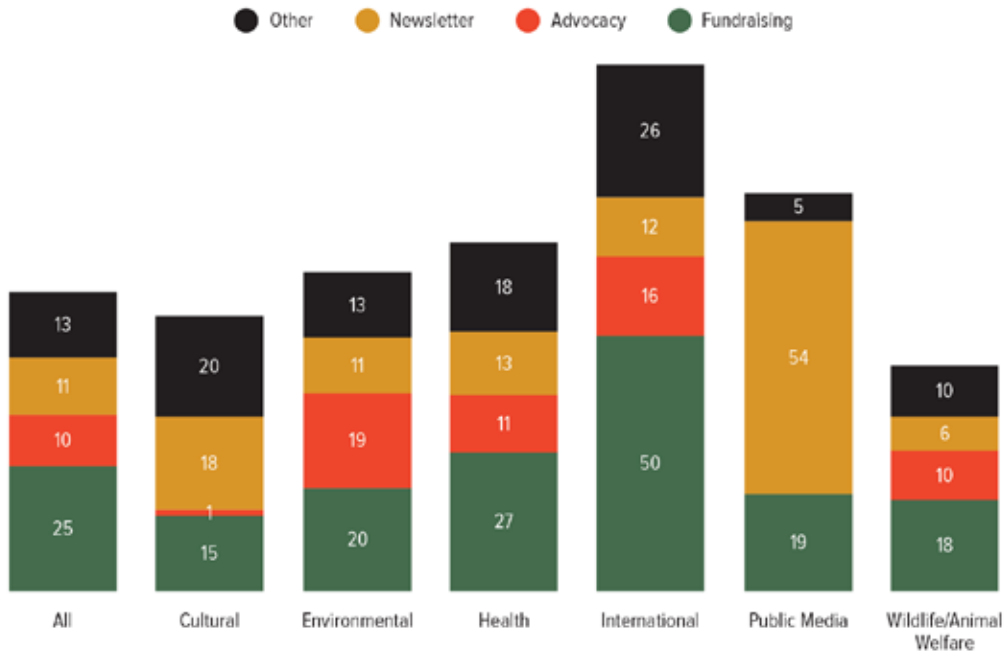
Messages per month per subscriber

All	6.5
Environmental	7.0
Health	4.7
International	9.4
Public Media	7.2
Wildlife/Animal Welfare	3.9
Large	6.7
Medium	8.2
Small	3.1
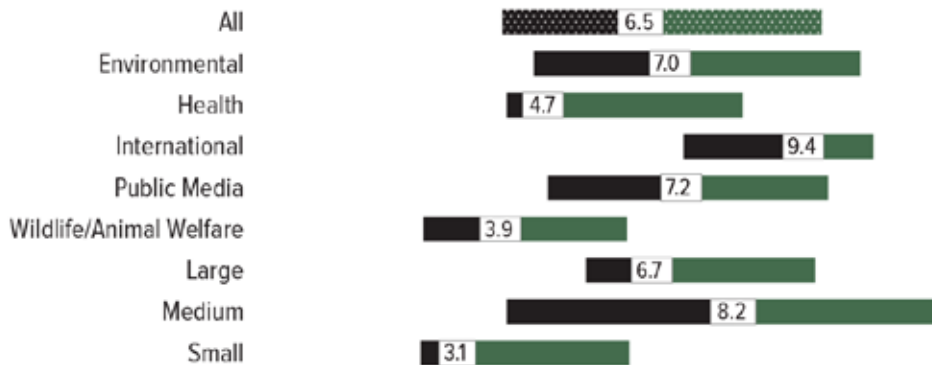
Change in messages per year per subscriber 2017-2018

All	8%
Fundraising	4%
Advocacy	-14%
Newsletter	4%
Other	6%

Email message rates by type and sector

		All	Cultural	Environmental	Health	Hunger/Poverty	International	Public Media	Rights	Wildlife/Animal Welfare
Open rate	All	15%	17%	17%	14%	20%	11%	14%	13%	12%
	Fundraising	14%	19%	15%	13%	21%	11%	12%	12%	13%
	Advocacy	15%	—	16%	12%	18%	11%	—	15%	13%
	Newsletter	16%	18%	17%	15%	21%	12%	16%	12%	14%
Click-through rate	Fundraising	0.44%	0.51%	0.46%	0.47%	0.36%	0.33%	0.23%	0.44%	0.53%
	Advocacy	2.4%	—	3.5%	0.7%	2.7%	1.7%	—	2.1%	2.9%
	Newsletter	1.3%	1.3%	1.7%	0.9%	2.3%	0.6%	1.8%	0.7%	2.1%
Page completion rate	Fundraising	14%	8%	14%	10%	35%	16%	18%	14%	11%
	Advocacy	72%	—	72%	53%	—	—	—	73%	73%
Response rate	Fundraising	0.06%	0.05%	0.07%	0.04%	0.10%	0.05%	0.06%	0.06%	0.06%
	Advocacy	1.8%	—	2.2%	0.4%	1.9%	—	—	2.5%	2.2%
Unsubscribe rate	All	0.15%	0.16%	0.14%	0.29%	0.24%	0.14%	0.09%	0.15%	0.12%
	Fundraising	0.16%	0.16%	0.16%	0.29%	0.25%	0.14%	0.12%	0.16%	0.13%
	Advocacy	0.12%	—	0.11%	0.22%	0.31%	0.17%	—	0.14%	0.12%
	Newsletter	0.14%	0.20%	0.16%	0.27%	0.15%	0.13%	0.07%	0.11%	0.12%

Change in fundraising response rate 2017 to 2018

Sector	Change
All	-13.0%
Cultural	-42.5%
Environmental	-17.7%
Health	-19.9%
Hunger/Poverty	-13.8%
International	-5.9%
Rights	-38.3%
Wildlife/Animal Welfare	-2.7%
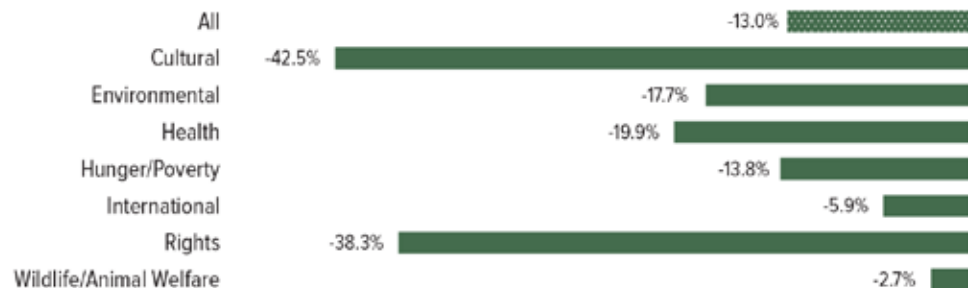
Membership email message rates

Open rate		Click-through rate		Page completion rate		Response rate		Unsubscribe rate	
23%	(+7%)	1.5%	(+57%)	6.1%	(-33%)	0.07%	(+6%)	0.23%	(+5%)

The numbers in parentheses represent the percentage change in rate since 2017.

Percent of file who took online advocacy actions in 2018

● Percent of file who took one or more online actions   ● Percent of file who took 3+ online actions

All
- 20%
- 5%

Environmental
- 27%
- 9%

Health
- 5%
- 0%

Hunger/Poverty
- 5%
- 1%

Rights
- 64%
- 6%

Wildlife/Animal Welfare
- 12%
- 3%

Large
- 16%
- 5%

Medium
- 47%
- 7%

Small
- 17%
- 4%
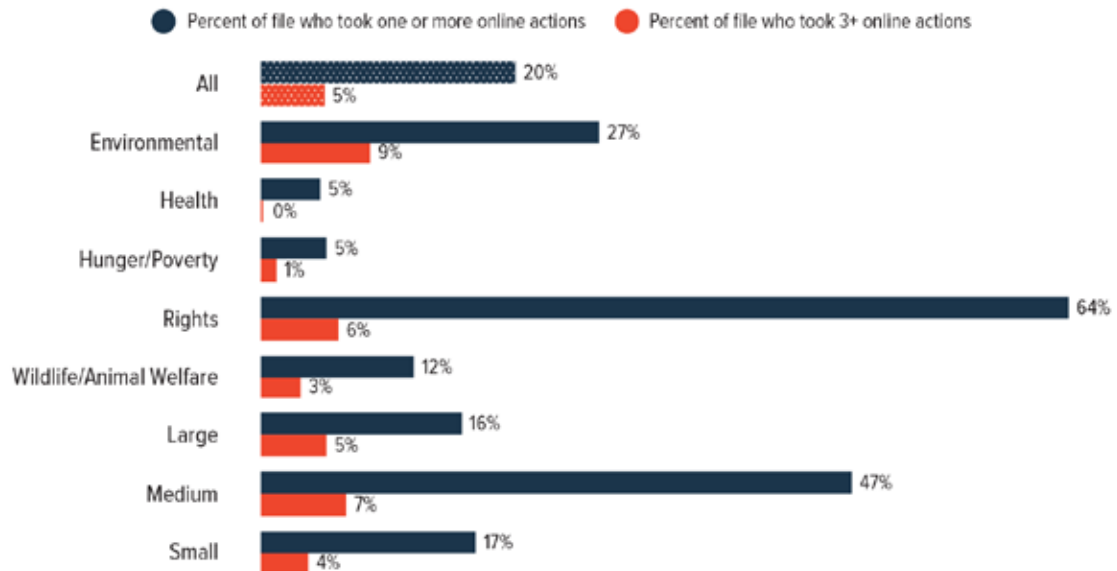
Bird's eye view

+ **Nonprofits raised $0.83 per website visitor in 2018.** International nonprofits raised the most, $1.82 per visitor, while the Health sector had the lowest revenue per visitor at $0.59. **Overall, 1.0% of website visitors made a donation.**

+ **The majority of nonprofit website traffic came from users on mobile and tablet devices.** Mobile accounted for 48% of all traffic, tablets for 8%, and desktop users made up 44% of traffic.

+ **Desktop users accounted for the majority of donation transactions and revenue.** While just 44% of traffic, desktop users made 63% of all donations and contributed 71% of revenue. Mobile accounted for 21% of all revenue, a 15% increase from 2017.

+ **Nonprofit homepages took an average of 2.36 seconds to load on desktop machines, while donation pages took 2.34 seconds to load.**

Website share by device

● Desktop ● Mobile ● Tablet

	Desktop	Mobile	Tablet
Traffic	44% (no change from 2017)	48% (+2%)	8% (-9%)
Transactions	63% (-7%)	30% (+20%)	7% (-1%)
Revenue	71% (-2%)	21% (+15%)	8% (-9%)
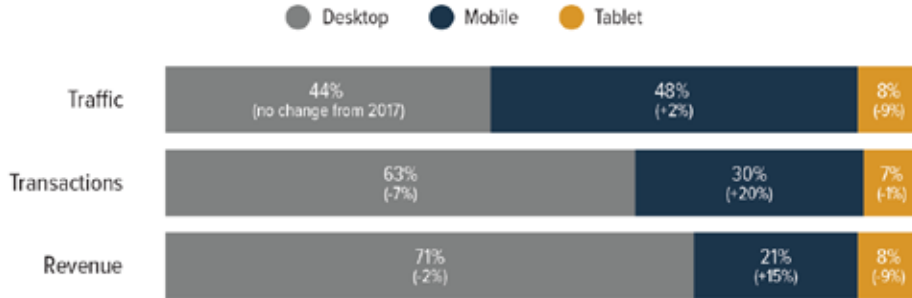
The numbers in parentheses represent the percentage change in rate since 2017.

Percent of website visitors who make a donation

All	1.0%
Cultural	0.5%
Environmental	0.7%
Health	0.6%
International	2.4%
Public Media	4.5%
Rights	0.4%
Wildlife/Animal Welfare	1.5%
Large	1.8%
Medium	1.5%
Small	0.5%

Calculated from the number of donations to a participant's main website, including donations from all traffic sources (email, paid ads, organic, search, etc), divided by the number of unique website visitors.

Website revenue per visitor
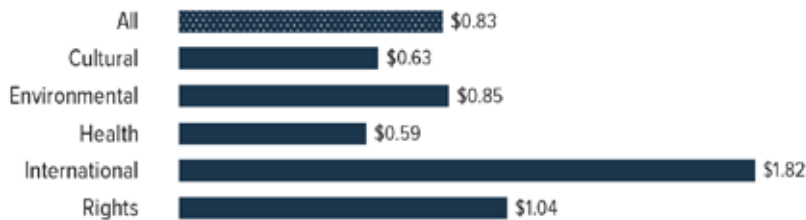
All	$0.83
Cultural	$0.63
Environmental	$0.85
Health	$0.59
International	$1.82
Rights	$1.04

Calculated as the total revenue from one-time online gifts, plus the value of initial monthly gifts, divided by the total number of website visitors for the year. Depending on retention, the long-term value of monthly gifts may be substantially higher.

Website main donation page conversion rate
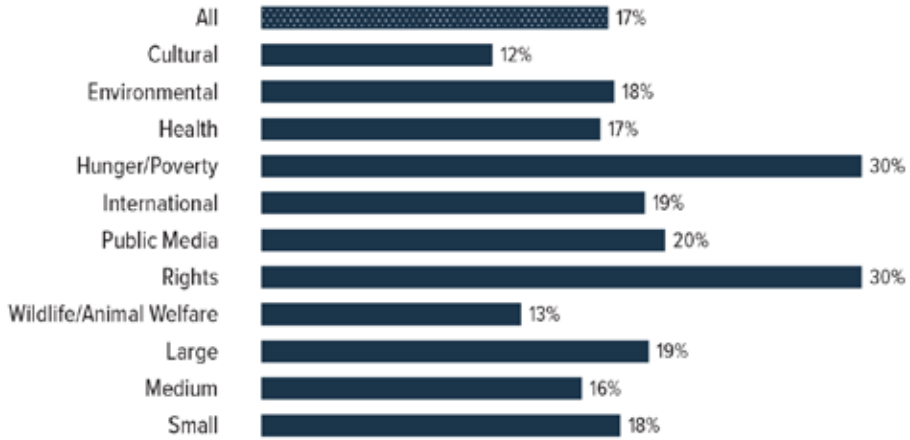
All	17%
Cultural	12%
Environmental	18%
Health	17%
Hunger/Poverty	30%
International	19%
Public Media	20%
Rights	30%
Wildlife/Animal Welfare	13%
Large	19%
Medium	16%
Small	18%

Main donation page conversion rate

21%
Desktop

9%
Mobile

16%
Tablet

Average gift

$133
Desktop

$80
Mobile

$105
Tablet

Homepage load time (seconds)

Desktop ● Mobile

	Desktop	Mobile
All	2.62	2.67
Cultural	2.58	2.63
Environmental	2.37	2.50
Health	2.95	2.78
Hunger/Poverty	4.29	3.69
International	3.94	3.56
Public Media	2.16	1.82
Rights	2.53	3.15
Wildlife/Animal Welfare	2.66	2.76
Large	3.67	3.72
Medium	2.48	2.50
Small	2.54	2.53
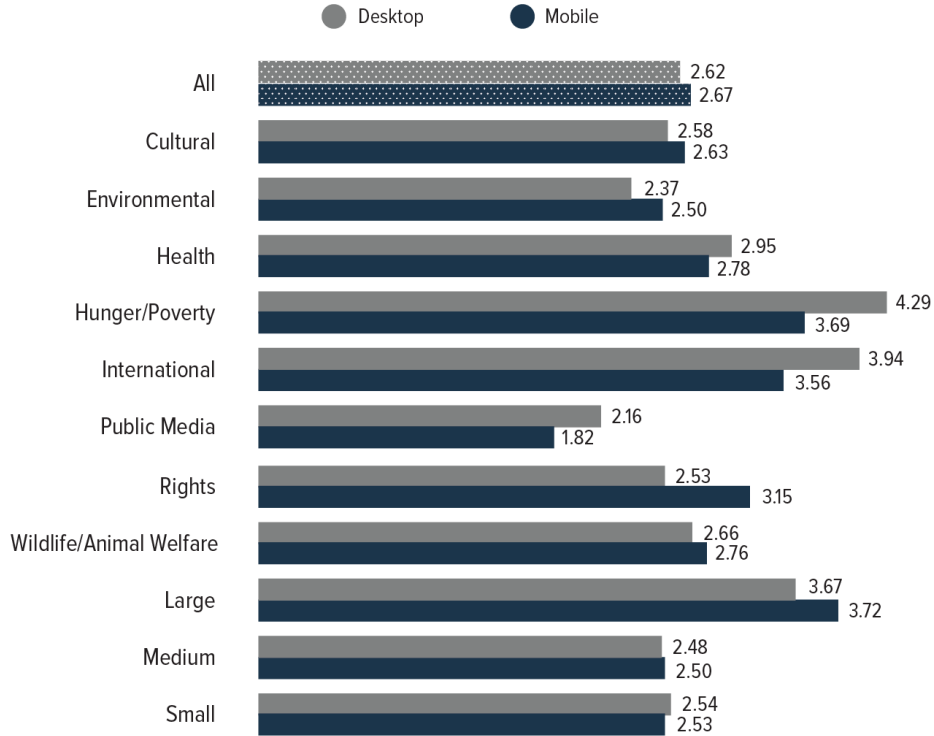
Donation page load time (seconds)

Desktop ● Mobile

	Desktop	Mobile
All	2.34	2.36
Cultural	2.22	2.16
Environmental	2.54	2.55
Health	2.54	2.68
Hunger/Poverty	3.54	3.23
International	2.17	2.23
Public Media	1.48	1.37
Rights	2.25	1.56
Wildlife/Animal Welfare	1.73	1.55
Large	2.77	2.60
Medium	2.18	2.06
Small	2.34	2.28
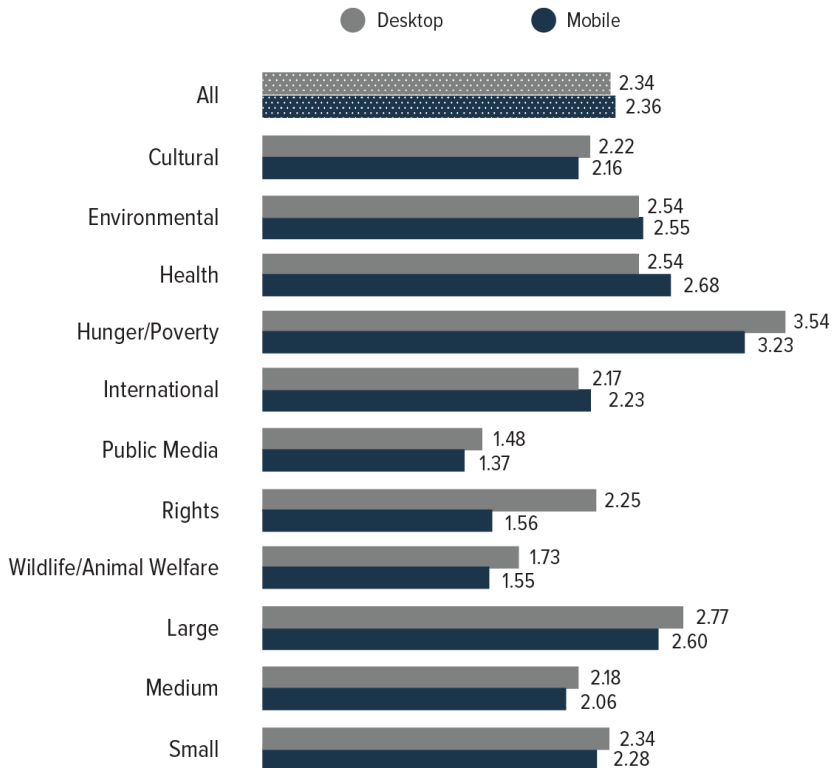
Bird's eye view

+ **For every 1,000 email addresses, nonprofits had an average of 806 Facebook fans, 286 Twitter followers, and 101 Instagram followers.**

+ **Instagram was the fasted-growing of the three social media platforms we tracked,** with a 34% increase in the number of followers. The number of Twitter followers increased by 26%, while Facebook pages grew by just 6%.

+ **For every $100 in direct online revenue, nonprofits raised $1.77 through Facebook fundraising tools.** Nearly all of this revenue came from Facebook Fundraisers, the peer-to-peer platform. See page 13 for more on Facebook fundraising.

+ **Each Facebook post only reached 4% of a nonprofit page's fans.** Meanwhile, 29% of the audience reached by a given post was not already following the nonprofit.

+ **The Engagement Score (engaged users divided by total page fans) for an average Facebook post was 0.31%.** Video posts had the highest Engagement Score at 0.33%.

For every 1,000 email subscribers, groups have...

● Facebook fans ● Twitter followers ● Instagram followers

All
- 806
- 286
- 101

Cultural
- 3,008
- 823
- 1,041

Environmental
- 720
- 212
- 202

Health
- 1,133
- 258
- 83

Hunger/Poverty
- 985
- 974
- 122

International
- 1,193
- 558
- 102

Rights
- 671
- 112
- 73

Wildlife/Animal Welfare
- 1,041
- 331
- 137
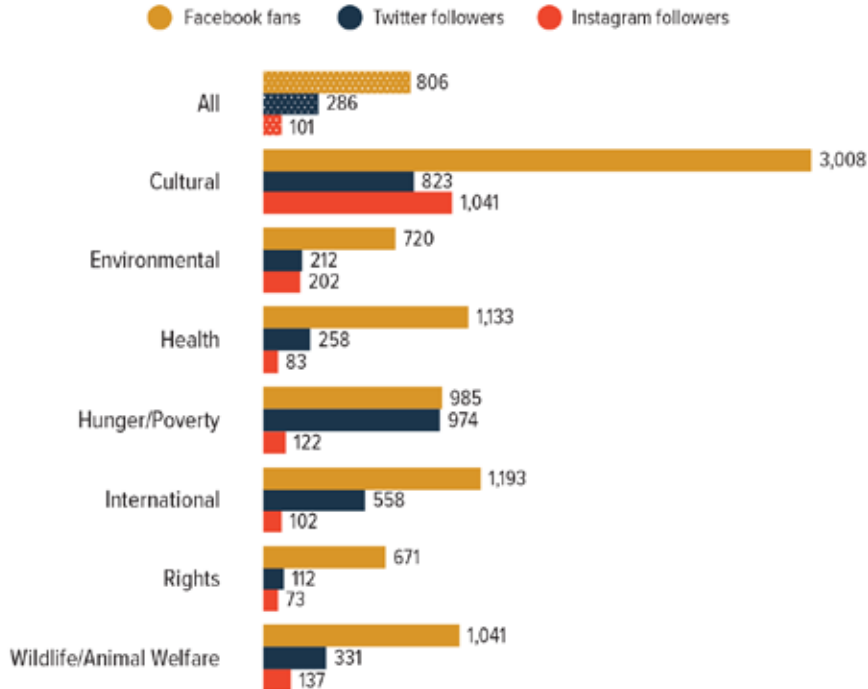
Change in number of fans/ followers 2017 to 2018
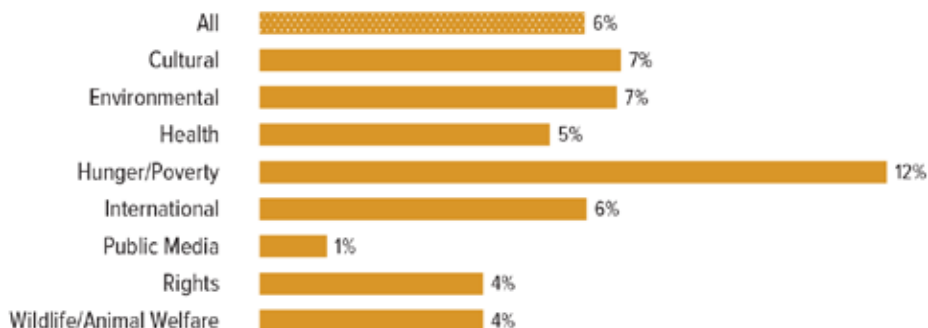
6%
Facebook
page growth

26%
Twitter
follower growth

34%
Instagram
follower growth

Change in Facebook fans 2017 to 2018

Group	Change
All	6%
Cultural	7%
Environmental	7%
Health	5%
Hunger/Poverty	12%
International	6%
Public Media	1%
Rights	4%
Wildlife/Animal Welfare	4%

Change in Instagram followers 2017 to 2018

All	34%
Cultural	43%
Environmental	30%
Health	32%
International	59%
Rights	71%
Wildlife/Animal Welfare	27%
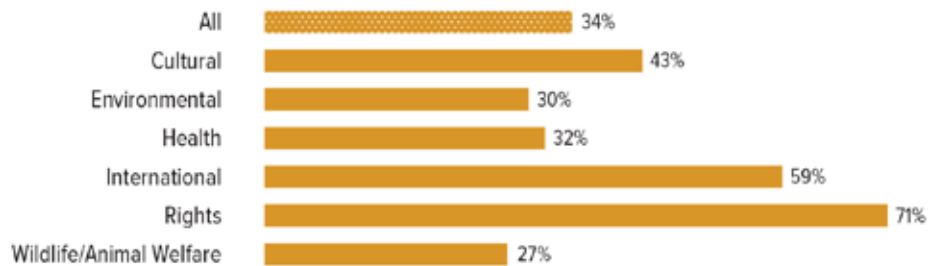
Change in Twitter followers 2017 to 2018

All	26%
Cultural	24%
Environmental	26%
Health	19%
International	30%
Rights	44%
Wildlife/Animal Welfare	38%

Posts per day

	Facebook	Twitter
All	1.4	3.2
Cultural	1.6	4.0
Environmental	1.8	3.9
Health	1.0	2.2
Hunger/Poverty	1.0	2.2
International	1.1	3.6
Public Media	3.8	5.9
Rights	1.8	2.7
Wildlife/Animal Welfare	1.6	3.2
Large	1.4	4.9
Medium	2.5	5.6
Small	1.2	1.9
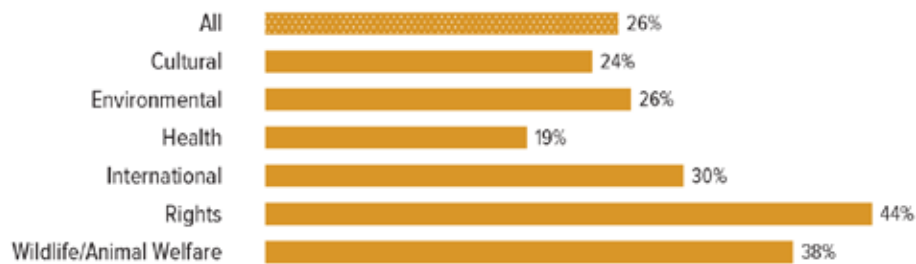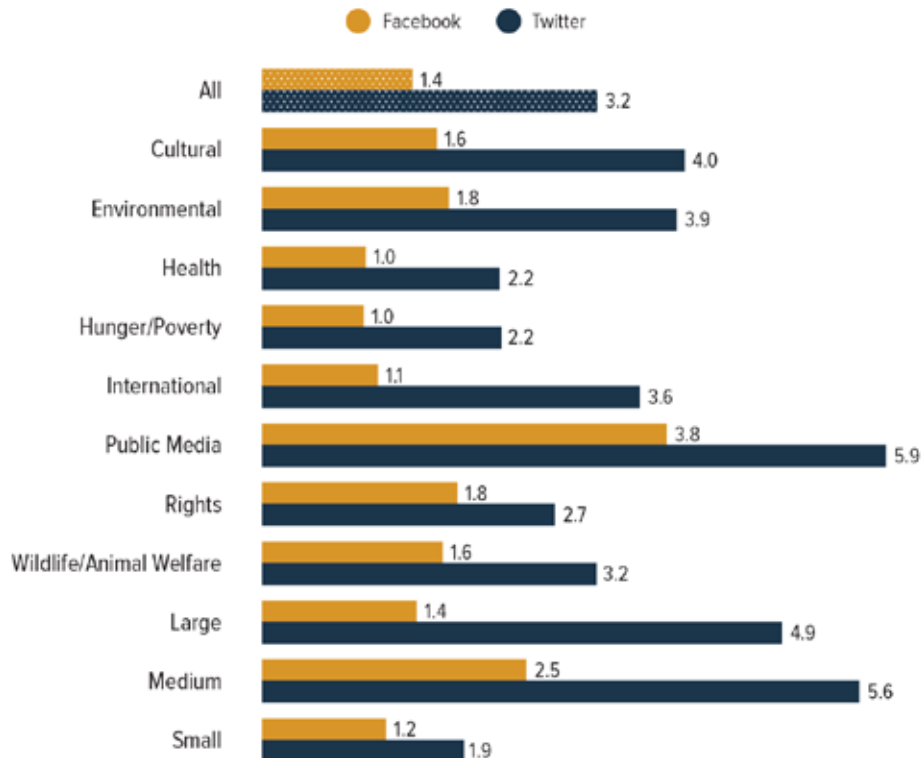
Facebook percent of posts that had paid reach

All	2.4%
Cultural	1.4%
Environmental	1.7%
Health	4.8%
Hunger/Poverty	5.7%
International	6.9%
Public Media	0.9%
Rights	3.1%
Wildlife/Animal Welfare	4.7%

Types of Facebook posts

● Other ● Video ● Photo ● Link

	All	Cultural	Environmental	Health	Hunger/Poverty	International	Public Media	Rights	Wildlife/Animal Welfare
Other	13%	14%	10%	24%	15%	16%	10%	8%	18%
Video	13%	9%	12%	6%	6%	12%	20%	13%	31%
Photo	28%	46%	19%	39%	31%	41%	19%	24%	30%
Link	46%	31%	60%	32%	48%	31%	51%	54%	21%
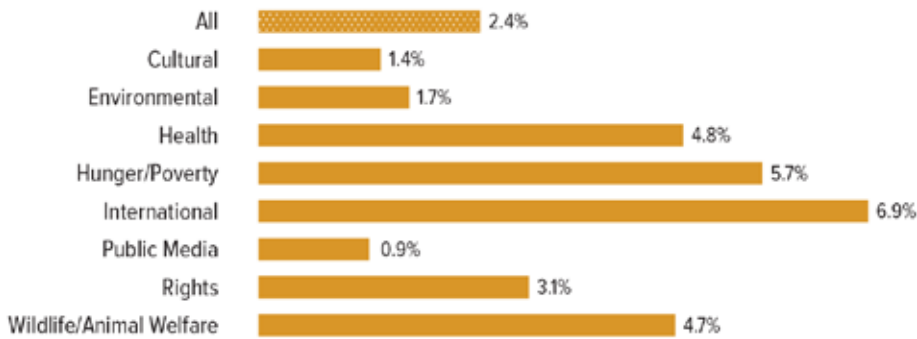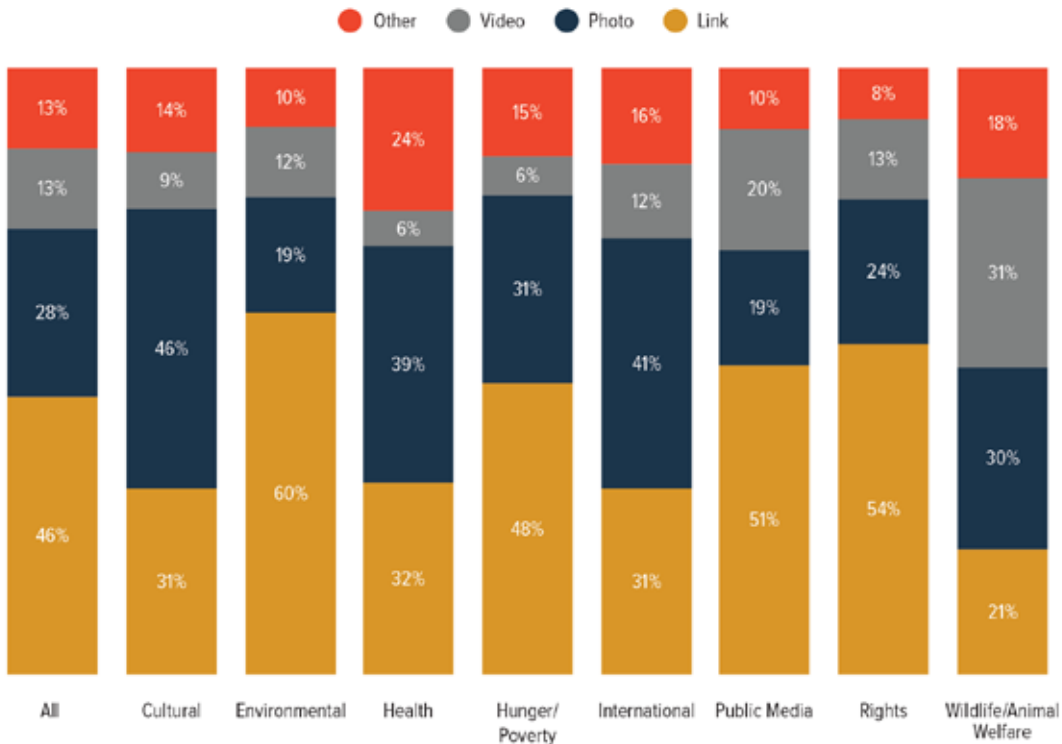
Facebook engagement score by day of week

Sunday	0.25%
Monday	0.30%
Tuesday	0.29%
Wednesday	0.26%
Thursday	0.26%
Friday	0.29%
Saturday	0.21%

67

Facebook engagement score

Category	Score
All	0.31%
Cultural	0.20%
Environmental	0.34%
Health	0.39%
Hunger/Poverty	0.50%
International	0.13%
Public Media	0.30%
Rights	0.52%
Wildlife/Animal Welfare	0.27%
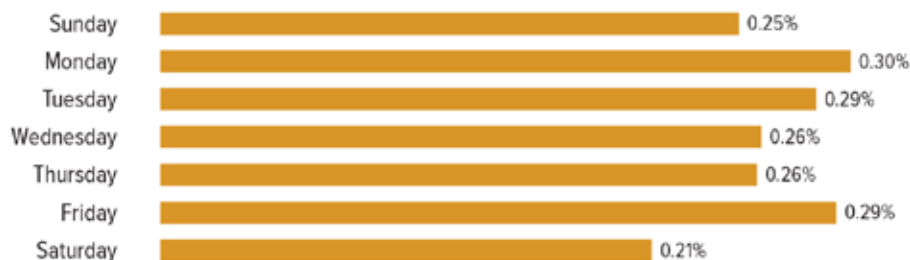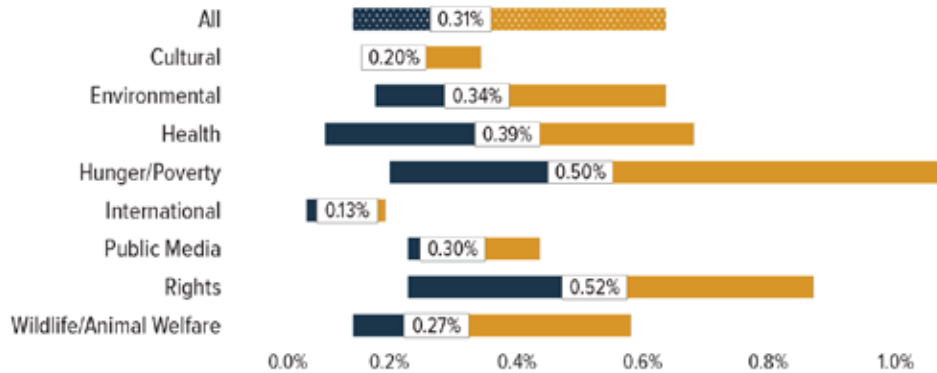
Twitter engagement score

Category	Score
All	1.5%
Cultural	1.5%
Environmental	1.4%
Health	1.7%
Hunger/Poverty	1.4%
International	1.1%
Public Media	1.3%
Rights	1.6%
Wildlife/Animal Welfare	2.1%

Earned reach average (ERA)

Category	Value
All	0.110
Cultural	0.171
Environmental	0.119
Health	0.141
Hunger/Poverty	0.108
International	0.037
Public Media	0.177
Rights	0.115
Wildlife/Animal Welfare	0.055
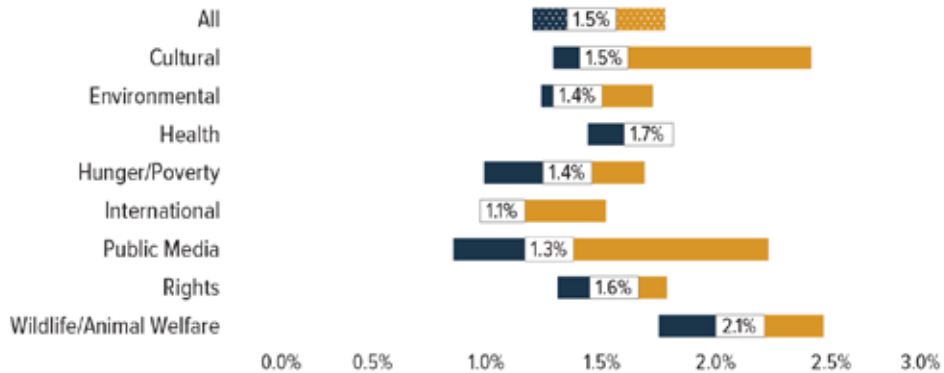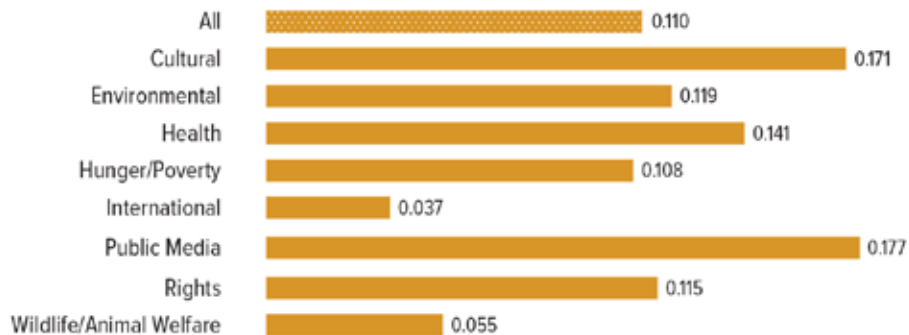
Earned Reach Average: The average number of Facebook users reached by a given post relative to the number of Facebook fans that nonprofit has. Expressed as a ratio per thousand fans (e.g. an ERA of .225 indicates that a nonprofit's average post will reach 225 Facebook users for every 1,000 fans who "like" that nonprofit).

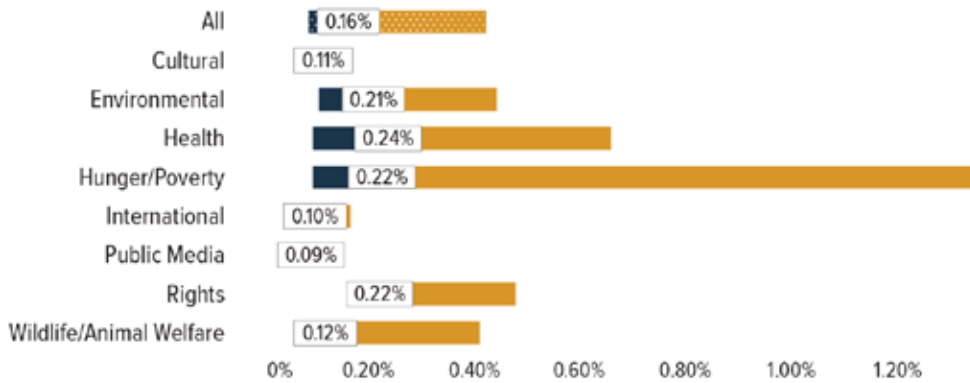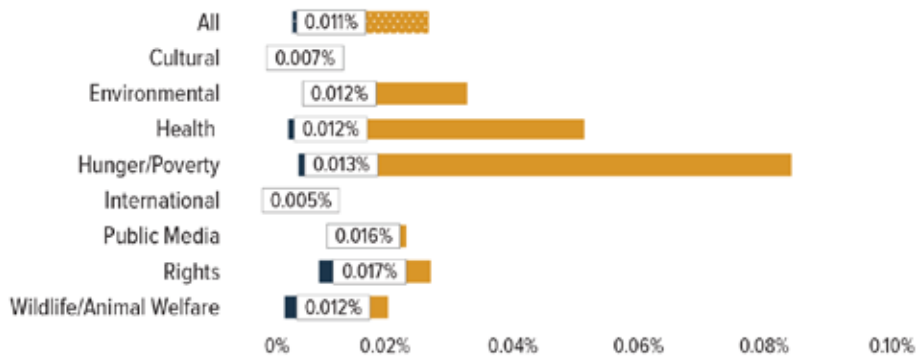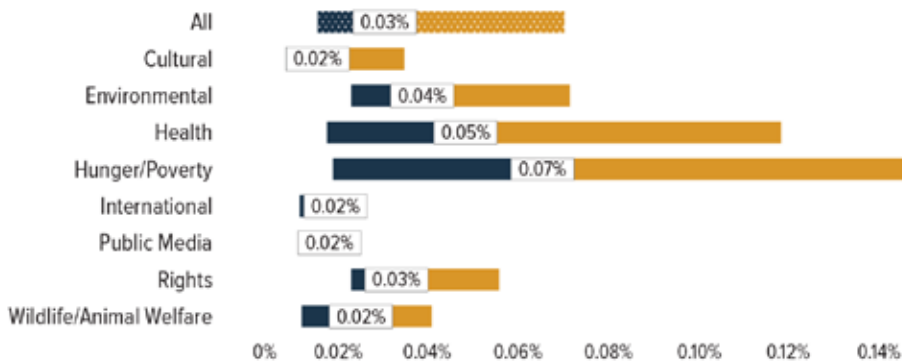## Facebook clap score

All	0.16%
Cultural	0.11%
Environmental	0.21%
Health	0.24%
Hunger/Poverty	0.22%
International	0.10%
Public Media	0.09%
Rights	0.22%
Wildlife/Animal Welfare	0.12%

0%   0.20%   0.40%   0.60%   0.80%   1.00%   1.20%

Clap Score is the number of reactions on a post (Facebook still calls them "Likes") divided by the number of fans a nonprofit's Facebook page had that day.

Facebook talk score

All	0.011%
Cultural	0.007%
Environmental	0.012%
Health	0.012%
Hunger/Poverty	0.013%
International	0.005%
Public Media	0.016%
Rights	0.017%
Wildlife/Animal Welfare	0.012%

0%   0.02%   0.04%   0.06%   0.08%   0.10%

Talk Score is the number of comments on a post divided by the number of fans a nonprofit's Facebook page had that day.

Facebook share score

All	0.03%
Cultural	0.02%
Environmental	0.04%
Health	0.05%
Hunger/Poverty	0.07%
International	0.02%
Public Media	0.02%
Rights	0.03%
Wildlife/Animal Welfare	0.02%

0%   0.02%   0.04%   0.06%   0.08%   0.10%   0.12%   0.14%

Share Score is the number of shares a post received divided by the number of fans a nonprofit's Facebook page had that day.
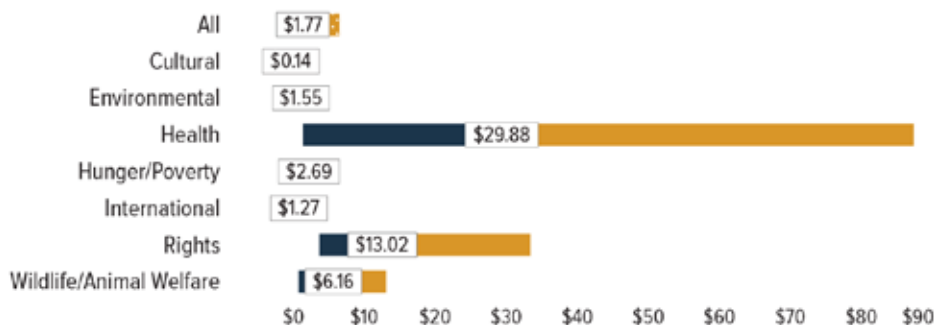
Facebook post engagement score by type of media

Type	Score
Link	0.25%
Photo	0.23%
Video	0.33%

0.0 0.2 0.4 0.6 0.8
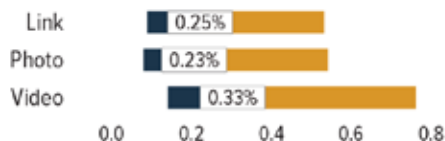
4%
Percent of
Facebook fans
reached with post

29%
Percent of
Facebook reach
not made up of fans

For every $100 an organization raised through other online channels, they raised this in Facebook revenue...

Category	Amount
All	$1.77
Cultural	$0.14
Environmental	$1.55
Health	$29.88
Hunger/Poverty	$2.69
International	$1.27
Rights	$13.02
Wildlife/Animal Welfare	$6.16

$0 $10 $20 $30 $40 $50 $60 $70 $80 $90

Percent of Facebook revenue raised in each month

Month	Percent
Jan	5.17%
Feb	5.37%
Mar	4.87%
Apr	4.99%
May	5.11%
Jun	6.54%
Jul	8.51%
Aug	8.42%
Sep	7.29%
Oct	7.70%
Nov	23.02%
Dec	7.78%

Facebook Fundraiser average gift

Category	Amount
All	$31
Cultural	$28
Environmental	$29
Health	$37
Hunger/Poverty	$32
International	$33
Rights	$31
Wildlife/Animal Welfare	$28

Average number of gifts to a Facebook Fundraiser

Category	Value
All	7.4
Environmental	7.3
Health	7.4
Hunger/Poverty	7.3
International	7.1
Rights	9.5
Wildlife/Animal Welfare	6.4

0.0   2.0   4.0   6.0   8.0   10.0

Number of Facebook Fundraisers per organization

Category	Value
All	56
Environmental	52
Health	690
Hunger/Poverty	103
International	109
Rights	132
Wildlife/Animal Welfare	82

0   500   1,000   1,500

GLOSSARY

ADVOCACY EMAIL
/ad-vuh-kuh-see/ /ee-meyl/
noun

An email that asks recipients to sign an online petition, send a message to a decision-maker, or take a similar online action. For the purposes of this Study, advocacy email does not include higher-bar actions like making a phone call or attending an event, largely because tracking offline response is inconsistent across organizations. Advocacy email rates were calculated from advocacy emails with a simple action sent to either the full file or a random sample of the full file.

CHER SCORE
/shair/ /skawr/
noun

The total number of sequins on a performer's stage outfit(s), multiplied by the volume of leather fringe. A remarkably accurate proxy measure for overall fabulousness. See also: Share Score.

CLAP SCORE
/klap/ /skawr/
noun

The number of Likes a Facebook post receives, divided by the number of fans a nonprofit's Facebook page has on the day it is posted.

CLICK-THROUGH RATE
/klik-throo/ /reyt/
noun

Calculated as the number of people who clicked on any trackable link in an email message divided by the number of delivered emails. People who clicked multiple times in one email were only counted once. In other words, if a subscriber clicked on every link in a message 10 times, this was counted the same as if the subscriber had clicked once on a single link.

DELIVERABLE EMAILS
/dih-liv-er-uh-buh l/ /ee-meyls/
plural noun

Only the emails that were delivered, not including the emails that are considered inactive or emails that were sent and bounced. "Delivered" email messages may land in a user's inbox, spam folder, promotions tab, or custom folder.

EARNED REACH AVERAGE (ERA)
/urnd/ /reech/ /av-er-ij/
noun

The average number of Facebook users reached by a given post relative to the number of Facebook fans that nonprofit has. Expressed as a ratio per thousand fans (e.g. an ERA of .225 indicates that a nonprofit's average post will reach 225 Facebook users for every 1,000 fans who "like" that nonprofit).

ENGAGEMENT SCORE
/en-geyj-muh nt/ /skawr/
noun

The total number of users who engage with a social media post (by liking, clicking, sharing, etc.), divided by the total number of page fans on the day the content was posted.

FANS, FACEBOOK
/fans/ /feys-boo k/
plural noun

People who "like" a nonprofit's Facebook Fan page.

FOLLOWERS, TWITTER

/fol-oh-ers/ /twit-er/

plural noun

People who subscribe to receive the tweets from a nonprofit's Twitter account.

FOLLOWERS, INSTAGRAM

/fol-oh-ers/ /in-stuh-gram/

plural noun

People who subscribe to see posts from a nonprofit's Instagram account.

FULL FILE

/foo l/ /fahyl/

noun

All of an organization's deliverable email addresses, not including unsubscribed email addresses or email addresses to which an organization no longer sends email messages.

FUNDRAISING EMAIL

/fuhnd-rey-zing/ /ee-meyl/

noun

An email that only asks for a donation, as opposed to an email newsletter, which might ask for a donation and include other links. For the purposes of this Study, fundraising email only includes one-time donation asks; it does not include monthly gift asks. Fundraising email rates were calculated from all fundraising emails, regardless of whether the email went to the full file, a random sample of the file, or a targeted portion of the file.

GLOSSARY

/glos-uh-ree/

noun

An alphabetical list of terms related to a specific subject, with explanations. Example: "This Glossary includes a definition of the word 'Glossary,' which honestly doesn't seem necessary." See also: Metatextuality.

LIST CHURN

/list/ /churn/

noun

Calculated as the number of subscribers who became unreachable in a 12-month period divided by the sum of the number of deliverable email addresses at the end of that period plus the number of subscribers who became unreachable during that period. Study participants were required to track the number of subscribers who became unreachable each month to account for subscribers both joining and leaving an email list during the 12-month period who would otherwise go uncounted.

METATEXTUALITY

/mee-tuh-tekst-choo-al-i-tee/

noun

Did you arrive here from the definition for "Glossary"? That'll probably explain it better. Maybe go look there and then come back? See also: Glossary.

MONTHLY GIFT

/muhnth-lee/ /gift/

noun

A donation where the donor signs up once to donate on a regular schedule, typically by pledging a regular gift amount on a credit card each month. Also known as a sustaining gift.

NEWSLETTERS, EMAIL

/nooz-let-er/ /ee-meyl/

noun

An email with multiple links or asks, which can include fundraising or advocacy asks. Email newsletter rates were calculated from all email newsletters, regardless of whether the newsletter went to the full file, a random sample of the file, or a targeted portion of the file.

OPEN RATE
/oh-puh-n/ /reyt/
noun
Calculated as the number of HTML email messages opened divided by the number of delivered emails. Email messages that bounce are not included.

PAGE COMPLETION RATE
/peyj/ /kuh m-plee-shuh n/ /reyt/
noun
Calculated as the number of people who completed a form divided by the number of people who clicked on the link to get to that form. For the purposes of this Study, it was not always possible to use the number of people who clicked on a link to a specific form, so we used the number of unique clicks in the message.

PERCENTILE
/per-sen-tahyl/
noun
The percentage of observed values below the named data point. 25% of the observations are below the 25th percentile; 75% of the observations are below the 75th percentile. The values between the 25th percentile and the 75th percentile are the middle 50% of the observed values and represent the normal range of values.

PERSPECTIVE
/per-spek-tiv/
noun
This can either mean a particular attitude or way of seeing something, or a technique of rendering three-dimensional objects on a two-dimensional surface. Sort of depends on your point of view.

RESPONSE RATE
/ri-spons/ /reyt/
noun
Calculated as the number of people who took the main action requested by an email message divided by the number of delivered emails. We only calculated response rates in this Study for fundraising emails and for advocacy emails with simple asks, such as signing a petition or sending an email to a decision maker.

ONLINE RETENTION, NEW DONOR
/on-lahyn/ /ri-ten-shuh n/ /noo/ /doh-ner/
noun
Of the donors that made their first-ever online gift in the previous calendar year, the percent that made an online gift in the current calendar year. Note that we count someone as "new" if they have no online donations reported after 2011.

ONLINE RETENTION, PRIOR DONOR
/on-lahyn/ /ri-ten-shuh n/ /prahy-er/ /doh-ner/
noun
Of the donors that made an online gift in the previous calendar year that wasn't their first online gift, the percent that made an online gift in the current calendar year.

SHARE SCORE
/shair/ /skawr/
noun
The number of Shares a Facebook post receives, divided by the number of fans a non-profit's Facebook page has the day it is posted. See also: Cher Score.

TALK SCORE
/tawk/ /skawr/
noun
The number of Comments a Facebook post receives, divided by the number of fans a non-profit's Facebook page has the day it is posted.

UNIQUE CLICKS
/yoo-neek/ /klicks/
plural noun
The number of people who clicked on any trackable link in an email message, as opposed to the number of times the links in an email were clicked. If a subscriber clicked on every link in a message 10 times, this is counted as 1 unique click.

UNSUBSCRIBE RATE
/uhn-suh b-skrahyb/ /reyt/
noun
Calculated as the number of individuals who unsubscribed in response to an email message divided by the number of delivered emails.

WEBSITE PAGE LOAD TIME
/web-sahyt/ /peyj/ /lohd/ /speed/
noun
The number of seconds before a page appears to be visually complete, as measured by the WebPageTest tool at https://webpagetest.org.

WEBSITE VISITORS PER MONTH
/web-sahyt/ /viz-i-ter/ /pur/ /muhnth/
plural noun
The number of monthly unique visitors to a participant's main website.

WEBSITE REVENUE PER VISITOR
/web-sahyt/ /rev-uh n-yoo/ /pur/ /viz-i-ter/
noun
Calculated as the total revenue from one-time online gifts, plus the value of initial monthly gifts, divided by the total number of website visitors for the year. Depending on retention, the long-term value of monthly gifts may be substantially higher.

WEBSITE DONATION CONVERSION RATE
/web-sahyt/ /doh-ney-shuh n/ /kuh n-vur-zhuh n/ /reyt/
noun
Calculated from the number of donations to a participant's main website, including donations from all traffic sources (email, paid ads, organic, search, etc), divided by the number of unique website visitors.

WEBSITE DONATION PAGE CONVERSION RATE
/web-sahyt/ /doh-ney-shuh n/ /peyj/ /kuh n-vur-zhuh n/ /reyt/
noun
Calculated from the number of donations to a participant's main donation page, divided by the number of unique pageviews of that page. We included only unique pageviews for the one-time donation page, if a separate donation page existed for monthly gifts.

AARP Foundation
For a future without senior poverty.

ACTNOW!
Afterschool for Children and Teens

ASH
ACTION ON SMOKING & HEALTH

ALLIANCE for the GREAT LAKES

American Cancer Society

American Friends Service Committee

American Heart Association

AMERICAN LUNG ASSOCIATION

AMERICAN MUSEUM & NATURAL HISTORY

ANA
AMERICAN NURSES ASSOCIATION

American Red Cross

ASSOCIATION OF ZOOS & AQUARIUMS

AUTISM SPEAKS

BCSPCA

Best Friends SAVE THEM ALL

Boston Children's Hospital
Until every child is well

BOYS & GIRLS CLUBS OF AMERICA

Canuck Place
CHILDREN'S HOSPICE

care ACTION!

cmmb
Healthier Lives Worldwide

Center on Budget and Policy Priorities

CENTRAL PARK CONSERVANCY
central to the park

ChangeLab Solutions

children international

Children's Mercy
KANSAS CITY

Children's Hospital LOS ANGELES
We Treat Kids Better

CWA

Connecticut River Conservancy

Conservation Colorado
The future is worth the fight

CONSERVATION INTERNATIONAL

clf
conservation law foundation

DAVID SUZUKI FOUNDATION
One nature.

eARN

EARTHRIGHTS INTERNATIONAL

EARTHWORKS

ecojustice

EDF
ENVIRONMENTAL DEFENSE FUND
Finding the ways that work

EQUAL RIGHTS ADVOCATES

faith in place

FEEDING AMERICA

FINCA

First Book CANADA

food&water watch

FREE the SLAVES

FR1ENDS of the CH1LDREN

Friends of the Earth

GLOBAL GREENGRANTS FUND

Greater Cleveland Food Bank

HUMAN RIGHTS CAMPAIGN

THE HUMANE SOCIETY OF THE UNITED STATES

INNOCENCE PROJECT

ICRW
INTERNATIONAL CENTER FOR RESEARCH ON WOMEN
PASSION PROOF POWER

IFAW
International Fund for Animal Welfare

IJM

International Medical Corps

IWRC
International Wildlife Rehabilitation Council

JUSTICE IN AGING
FIGHTING SENIOR POVERTY THROUGH LAW

88.5 knkx connects

LCV
Our Earth is Worth Fighting For

LEUKEMIA & LYMPHOMA SOCIETY
fighting blood cancers

LOUISVILLE PUBLIC MEDIA

MARCH OF DIMES

MASSCREATIVE
Advocate Creativity.

MERCY CORPS

MICHIGAN LEAGUE OF CONSERVATION VOTERS

MONO LAKE COMMITTEE

Monterey Bay Aquarium

Mystic River WATERSHED ASSOCIATION

NARAL PRO-CHOICE AMERICA

Nasher Sculpture Center

REALTOR

Audubon

NATIONAL DOMESTIC WORKERS ALLIANCE

NATIONAL GEOGRAPHIC

NATIONAL MUSEUM OF THE AMERICAN INDIAN

NATIONAL PARKS CONSERVATION ASSOCIATION

National Trust for Historic Preservation

National Wildlife Federation

NATIONAL WOMEN'S LAW CENTER

Natural Resources Council of Maine

NRDC

NRDC ACTION FUND

NATURE CONSERVANCY CANADA

The Nature Conservancy

neavs

OCEANA

ONE ACRE FUND

ONE

Operation Smile

OPPORTUNITY ENTERPRISES

ORCHESTRAS CANADA

OVERTON PARK

OXFAM

Pathfinder INTERNATIONAL

POGO — FOR KIDS WITH CANCER FOR NOW, FOR LIFE

PETA

Philadelphia Museum of Art

PLAN INTERNATIONAL

Planned Parenthood Action Fund

Planned Parenthood

POPULATION CONNECTION

POWER SHIFT NETWORK

PROGRESS IOWA

rails-to-trails conservancy

RAINFOREST ALLIANCE

RIVERKEEPER

SAN FRANCISCO BAYKEEPER

SEPSIS ALLIANCE

SFJAZZ

SIERRA CLUB

Smithsonian National Air and Space Museum

St. Baldrick's FOUNDATION

St. Joseph's Indian School

susan G. komen

TAHIRIH JUSTICE CENTER

THE TRUST FOR PUBLIC LAND

UNHCR The UN Refugee Agency

UNION GOSPEL MISSION

Union of Concerned Scientists

UNHCR The UN Refugee Agency

Washington Center for Equitable Growth

WASHINGTON TRAILS ASSOCIATION

WATERKEEPER ALLIANCE

WETA

WGBH

WILDERNESS COMMITTEE

The Wilderness Society

WIN WITHOUT WAR

WNET NEW YORK PUBLIC MEDIA

WOMEN DELIVER

WOMEN for WOMEN International

WREN Women's Rights & Empowerment Network

World Food Program USA

WWF

PARTICIPANTS BY SECTOR

CULTURAL

+ American Museum of Natural History
+ Central Park Conservancy
+ MASSCreative
+ Nasher Sculpture Center
+ National Museum of the American Indian
+ National Trust for Historic Preservation
+ Orchestras Canada
+ Philadelphia Museum of Art
+ SFJAZZ
+ Smithsonian's National Air and Space Museum

ENVIRONMENTAL

+ Alliance for the Great Lakes
+ Connecticut River Conservancy
+ Conservation Colorado
+ Conservation International
+ Conservation Law Foundation
+ David Suzuki Foundation
+ EarthRights International
+ Earthworks
+ Ecojustice
+ Environmental Defense Fund
+ Faith in Place
+ Food & Water Watch
+ Friends of the Earth
+ Global Greengrants Fund
+ League of Conservation Voters
+ Michigan League of Conservation Voters
+ Mono Lake Committee
+ Monterey Bay Aquarium
+ Mystic River Watershed Association
+ National Audubon Society

+ National Geographic Society
+ National Parks Conservation Association
+ Natural Resources Council of Maine
+ Natural Resources Defense Council
+ Nature Conservancy of Canada
+ NRDC Action Fund
+ Oceana
+ Overton Park Conservancy
+ Power Shift Network
+ Rails-to-Trails Conservancy
+ Rainforest Alliance
+ Riverkeeper
+ San Francisco Baykeeper
+ Sierra Club
+ The Nature Conservancy
+ The Trust for Public Land
+ The Wilderness Society
+ Union of Concerned Scientists
+ Washington Trails Association
+ Waterkeeper Alliance
+ Wilderness Committee

HEALTH

+ Action on Smoking and Health
+ American Cancer Society
+ American Heart Association
+ American Lung Association
+ Autism Speaks
+ Boston Children's Hospital
+ Canuck Place Children's Hospice
+ ChangeLab Solutions
+ Children's Hospital Los Angeles
+ Children's Mercy Hospital

Breakdown of participating organizations

10 Cultural	**41** Environmental	**16** Health	**8** Hunger/Poverty	**19** International
5 Public Media	**14** Rights	**10** Wildlife/Animal Welfare	**12** Other	

+ The Leukemia & Lymphoma Society (Advocacy)
+ March of Dimes
+ POGO – Pediatric Oncology Group of Ontario
+ Sepsis Alliance
+ St. Baldrick's Foundation
+ Susan G Komen

HUNGER/POVERTY

+ AARP Foundation
+ Center on Budget and Policy Priorities
+ Feeding America
+ Friends of the Children
+ Greater Cleveland Food Bank
+ Justice in Aging
+ ONE Campaign
+ Union Gospel Mission (Vancouver)

INTERNATIONAL

+ American Red Cross
+ CARE Action
+ Children International
+ CMMB
+ FINCA International
+ International Justice Mission
+ International Medical Corps
+ Mercy Corps
+ One Acre Fund
+ Operation Smile
+ Oxfam America
+ Pathfinder International
+ Plan International USA
+ UNHCR Canada
+ USA for UNHCR
+ Women Deliver
+ Women for Women International
+ World Food Program USA

PUBLIC MEDIA

+ KNKX
+ Louisville Public Media
+ WETA
+ WGBH
+ WNET New York Public Media

RIGHTS

+ Communications Workers of America
+ Equal Rights Advocates
+ Free the Slaves
+ Human Rights Campaign
+ Innocence Project

+ International Center for Research on Women
+ NARAL Pro-Choice America
+ National Domestic Workers Alliance
+ National Women's Law Center
+ Planned Parenthood Action Fund
+ Planned Parenthood Federation of America
+ Population Connection
+ Tahirih Justice Center
+ Women's Rights and Empowerment Network

WILDLIFE/ANIMAL WELFARE
+ Association of Zoos and Aquariums
+ BC SPCA
+ Best Friends Animal Society
+ International Fund for Animal Welfare
+ National Wildlife Federation
+ New England Anti-Vivisection Society (NEAVS)
+ People for the Ethical Treatment of Animals
+ The Humane Society of the United States

+ The International Wildlife Rehabilitation Council
+ World Wildlife Fund

OTHER
+ ACT Now!
+ American Friends Service Committee
+ American Nurses Association
+ Boys & Girls Clubs of America
+ EARN
+ Equitable Growth
+ First Book Canada
+ National Association of REALTORS®
+ Opportunity Enterprises
+ Progress Iowa
+ St. Joseph's Indian School
+ Win Without War

2019 BENCHMARKS AT A GLANCE

Email + Mobile

We analyzed:

4,444,434,836 → **37,586,866**
Emails sent   Subscribers

Here's what we saw:

5% Email list growth   **14**% Email list churn

	Email Fundraising	Email Advocacy
Open rate	14%	15%
Click-through rate	0.44%	2.4%
Response rate	0.06%	1.8%
Drop in response rate 2017–2018	-13%	-15%

Emails sent per month, per subscriber:

7 Environmental   **4.7** Health   **9.4** International

7.2 Public Media   **3.9** Wildlife/Animal Welfare

63
Mobile subscribers for every 1,000 email subscribers

14%
Mobile list growth

1.1
Messages per subscriber per month

Fundraising + Donor Retention

We analyzed:

7,026,485 = **$376,665,608**
Online gifts   Raised online

Here's what we saw:

↑ **5**%
Increase in # of gifts 2017–2018

↑ **1**%
Increase in online revenue 2017–2018

Average gift:

$106 One-time   **$23** Monthly

$45
For every 1,000 fundraising messages delivered, nonprofits raised

1%
Website visitors who made a donation

$0.83
Website revenue per visitor

Online donor retention:

37% Overall

25% New donors

59% Prior donors

Social Media + Ads

We analyzed:

32,898
Unique Facebook Fundraisers

$31
Average gift to Fundraisers

56
Average number of Fundraisers per org

For every 1,000 email subscribers, nonprofits have:

806 Facebook fans   ↑ **6**% Facebook fans growth

286 Twitter followers   ↑ **26**% Twitter followers growth

101 Instagram followers   ↑ **34**% Instagram fan growth

In 2018, here's how nonprofits divvied up their digital ad budgets:

Goals	
Branding, awareness, education	21%
Lead generation	23%
Direct fundraising	55%
Other	1%

Channels	
Display ads	44%
Search ads	16%
Social media ads	35%
Video	5%

Cost per donation:

$359	$33	$67	$279
Display	Search	Social media	Video

Return per $1 of ad spend

$0.36	$4.78	$0.83	$0.30
Display	Search	Social media	Video

III.

I was of three minds,
Like a tree
In which there are three blackbirds.