

PLATFORM

M + R

STATION

B E N C H M A R K S

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We've arrived, once more, at one of our favorite destinations: another edition of the annual M+R Benchmarks Study. We're so glad you're here.

The world of nonprofit digital programs is large and complex, with swiftly shifting boundaries and vast new terrains to discover and explore. An accurate, updated roadmap is essential — and an experienced guide can mean the difference between reaching your destination on time or wandering aimlessly in the wilderness.

After reviewing the impact of 5,875,566,206 email messages, over \$119 million in digital ad spending, millions of social media interactions, and nearly 27 million donations totaling over \$1 billion, we've been able to pack this year's Benchmarks with all the data, analysis, and insights you need to help chart the course ahead.

Here's what you will find:

- Comprehensive data covering 2021 results including fundraising, advocacy, and marketing.
- Year-over-year comparisons to track where we've been and shine a light on where we are heading.
- Many, many beautiful charts breaking out all that data by nonprofit size and issue area.

- An in-depth look at the most important digital channels: advertising, web traffic, email, and social media.
- Analysis and insights exploring the headwinds facing nonprofits, well-worn paths to success, and new trails being blazed.
- Some jokes hidden in the glossary.

None of this is possible without the generosity and kindness of the 187 participants who climbed aboard for this year's Benchmarks voyage. They contributed data, answered questions, and shared their perspectives. The most important part of a journey isn't the destination, it's the people you meet along the way... and these people are truly the best. We're glad we met you.

We are confident that this Benchmarks Study is the best, most accurate, most complete, most up-to-date trail map to the nonprofit digital world in the world. So! Stow your bags, lock your tray table, and make sure your seat is in the full upright position because... away we go!



Meet the Crew ↓

Data Analysis: Theresa Bugeaud and Sammy Stewart

Writing: Will Valverde

Design: Emily Giorgione, Melissa Hines,
Laura Klavon, Olivia Moore

Web Development: Bobby Burch and Tom Giordano

Participant Management: Lucy Midelfort

Project Management: Bobby Goldstein

Data QA: Nick Blake, Jeff Gang, Laurin
Gonzalez, Julia Leyrer,
Anne Paschkopić

Executive Sponsor: Madeline Stanionis

We are M+R

We are communicators, marketers, fundraisers, and campaigners who help causes that 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.



More resources, advice, and tools for nonprofits can be found at mrs.com.

Find out more about working at M+R and join our crew at mrs.com/careers.

DEPARTURES

NOW ARRIVING

3:00

DEPARTURE POINTS

6:00

MESSAGING

16:00

DIGITAL ADS

26:00

SOCIAL MEDIA

36:00

FUNDRAISING

48:00

MEMBERSHIP AND TICKETS

58:00

WEBSITE PERFORMANCE

64:00

GLOSSARY

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PARTICIPANTS

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INFOGRAPHIC

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📍

MAP

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4



DEPARTURE POINTS

POINTS OF INTEREST



Total online revenue grew by 3% in 2021.

Monthly giving increased by 24%, and accounted for 22% of all online revenue in 2021.



Digital advertising investment by nonprofits increased by 19%.

Return on ad spend was highest for search ads (\$3.72). Return on ad spend for display and social media were \$0.59 and \$0.57, respectively.



Email list sizes increased by 7%.

For every 1,000 email addresses, nonprofits had an average of **736 Facebook fans, 229 Twitter followers, and 141 Instagram followers.**



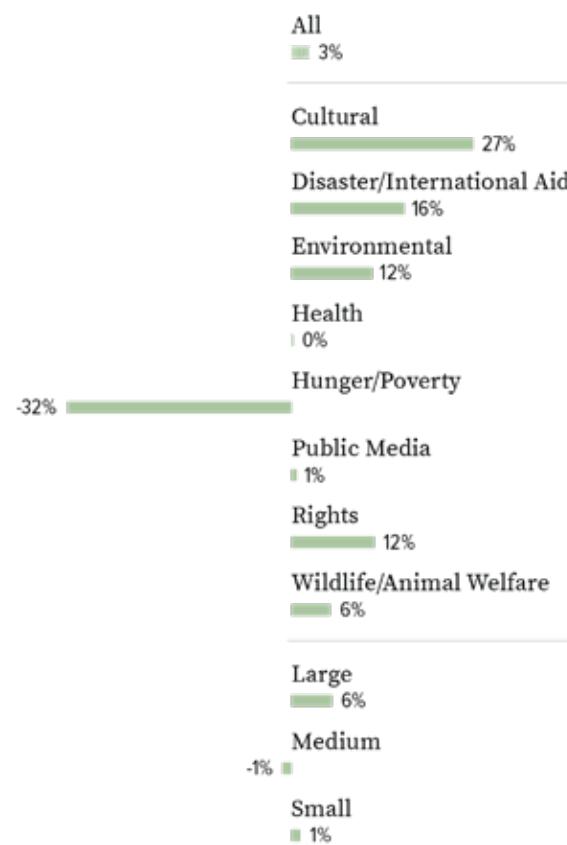
Knowing where you are is, unquestionably, very important. But sometimes it matters just as much to understand how you got there.

Here's how things looked at the end of 2021: **Overall online revenue increased by an average of 3% over 2020 totals.**

(Note: throughout Benchmarks, we will refer to averages. Unless otherwise noted, we mean the median figure among all participants who reported data for a given metric. For more guidance on how to read the charts, see page 14.)

As we break out the total revenue figure by sector, it's hard not to notice the outliers.

Change in online revenue 2020 to 2021



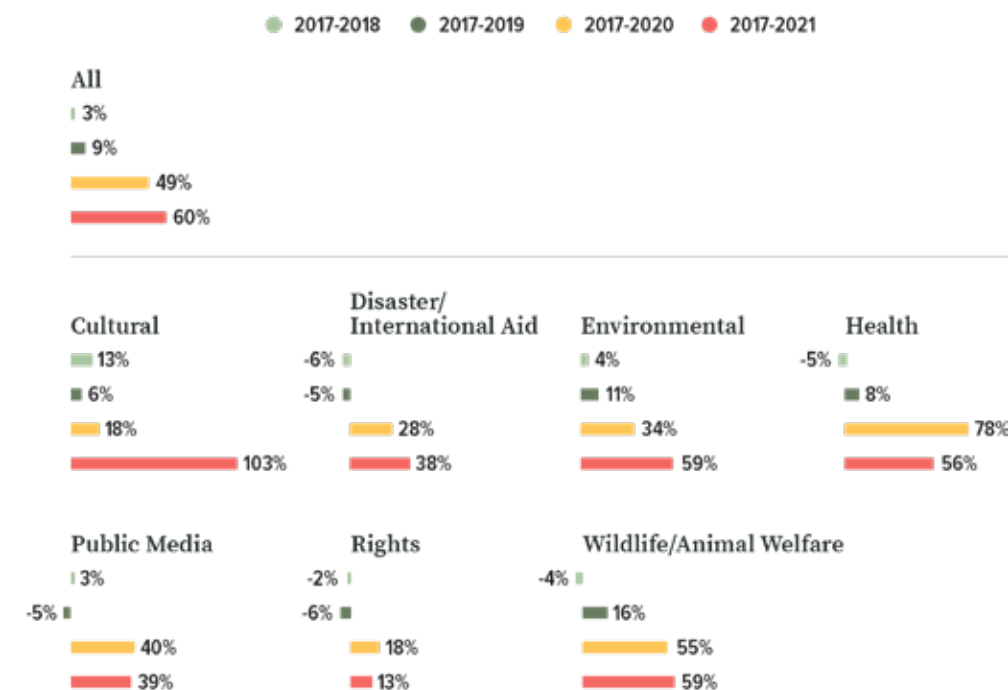
Includes revenue from Facebook for 2020 and 2021 where groups provided that information

At the high end, Cultural nonprofits saw an average revenue increase of 27%, while revenue *declined* by 32% for the Hunger/Poverty sector. In isolation, that may be a startling result — and so it pays to consider how we arrived here.

Let's take a step back and review online revenue growth over the past few years, using 2017 revenue totals as the baseline. Here, we

see that the relatively modest 3% increase in 2021 was building on runaway growth in the previous year. Seen from this perspective, we can interpret last year's online revenue as essentially consolidating the big spike in giving that nonprofits experienced during the first year of the pandemic.

Online revenue change since 2017





And what about our outliers? Well, it looks like Cultural nonprofits largely missed out on the big 2020 increase. While nonprofits as a whole saw revenue 49% above 2017 levels that year, Cultural nonprofits (many of which experienced closures, attendance restrictions, reduced tourism, and other COVID-caused burdens) reported revenue only 18% higher than in 2017. The extraordinary revenue growth for this sector in 2021 can be seen at least in part as a correction to that lag.

You won't find the Hunger/Poverty sector in that chart on the preceding page. That's because nonprofits in this sector have traveled such a unique path over the course of the pandemic that their results overwhelmed the scale of our chart. Let's take another look, this time including the Hunger and Poverty sector:

So in 2020, as the pandemic began, revenue for food banks and other nonprofits in the Hunger/Poverty sector rocketed to a 428% higher total than our 2017 baseline. In 2021, the year-over-year decline in revenue still left this sector with 273% higher revenue than that baseline.

Even as nonprofits across the board have seen significant, and in many cases similar, long-term growth in online revenue, they have experienced a wide array of paths, detours, and delays along the way.

For more (like, a lot more), see our section on fundraising on page 48.

Keeping an eye on that rear-view mirror can help clarify what we're likely to find on the road ahead. For example:

→ **Email list sizes increased in 2021 at an average rate of 7%**, building on 4% and 2% growth rates in the previous two years. That list growth was largely balanced against lower response rates, so that **email accounted for 15% of all online revenue**, down slightly from the year before.

There was some striking volatility in individual email metrics, which we'll explore at length on page 16.

→ On average, nonprofits **increased digital advertising budgets by 19%** in 2021. This continues a long-term trend of

expanding digital ads programs as nonprofits seek to reach new and existing audiences.

The balance of digital ad spending shifted toward those existing audiences. In 2020, nonprofits spent \$0.79 to reach prospects for every dollar spent on retargeting. Last year, that ratio dropped to \$0.72 on prospects per dollar of retargeting. This shift may reflect a more conservative approach to ad spending, or stepped-up efforts to retain the large number of donors who gave for the first time in 2020.

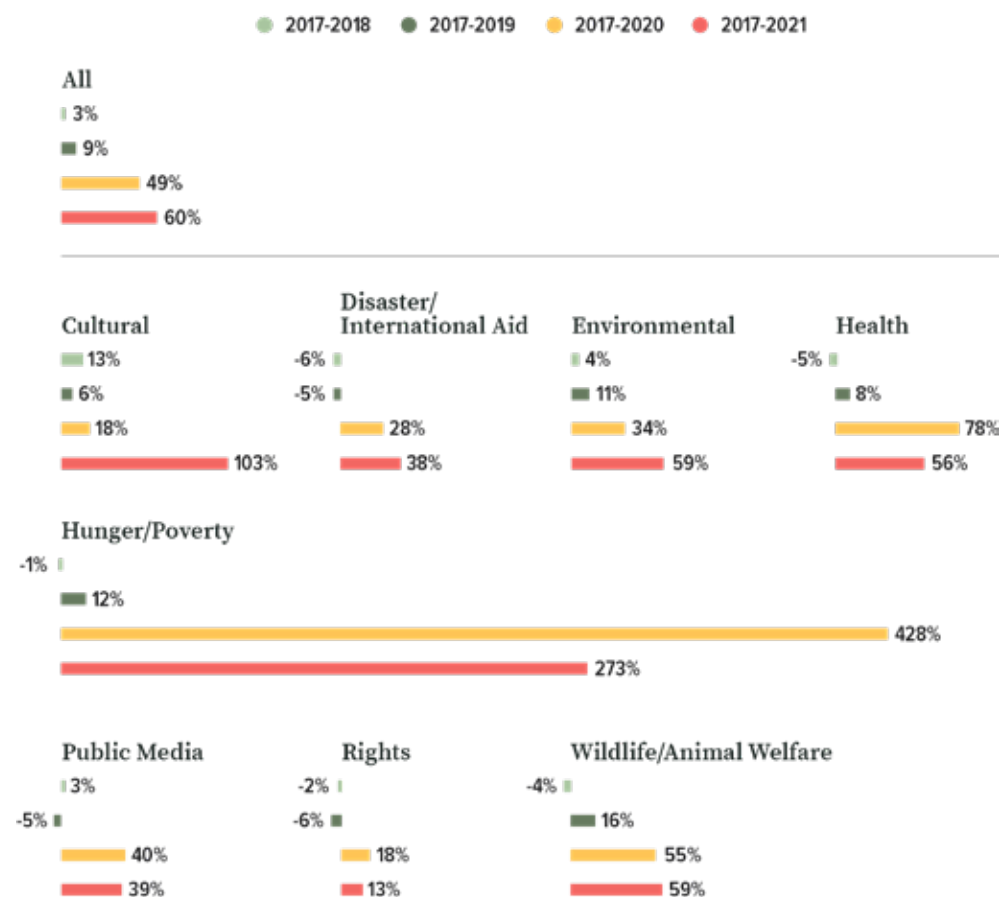
See page 26 for more on digital advertising spending and performance.

→ While Facebook continues to be the most prominent social media platform for nonprofits, the outlook is shifting. **In 2021, nonprofit Facebook audience size was essentially flat** — just a 1% increase from the previous year. On the other side of Meta, Instagram followers increased by 25%.

And then there's this: nearly 1 in 4 nonprofits reported being active on TikTok, which may be a sign of how marketers are finding new roads to reach new audiences. More in-depth social media metrics can be found on page 36.

→ While we have been noting the increasing importance of optimization for

Online revenue change since 2017





mobile users for several years, **this is the first time we can report that a majority of nonprofit website traffic came from users browsing on a mobile device.** Mobile devices (including cell phones, tablets, and phablets if anyone is still using the word “phablet”) accounted for 54% of nonprofit website traffic in 2021, with desktop computers making up the rest.

This shift might seem unremarkable — technology changes, as do user preferences, and that’s out of our hands. But mobile users also give at lower rates, with lower average gifts, and so web traffic changes may indicate some turbulence ahead for nonprofits. More on that on page 64.

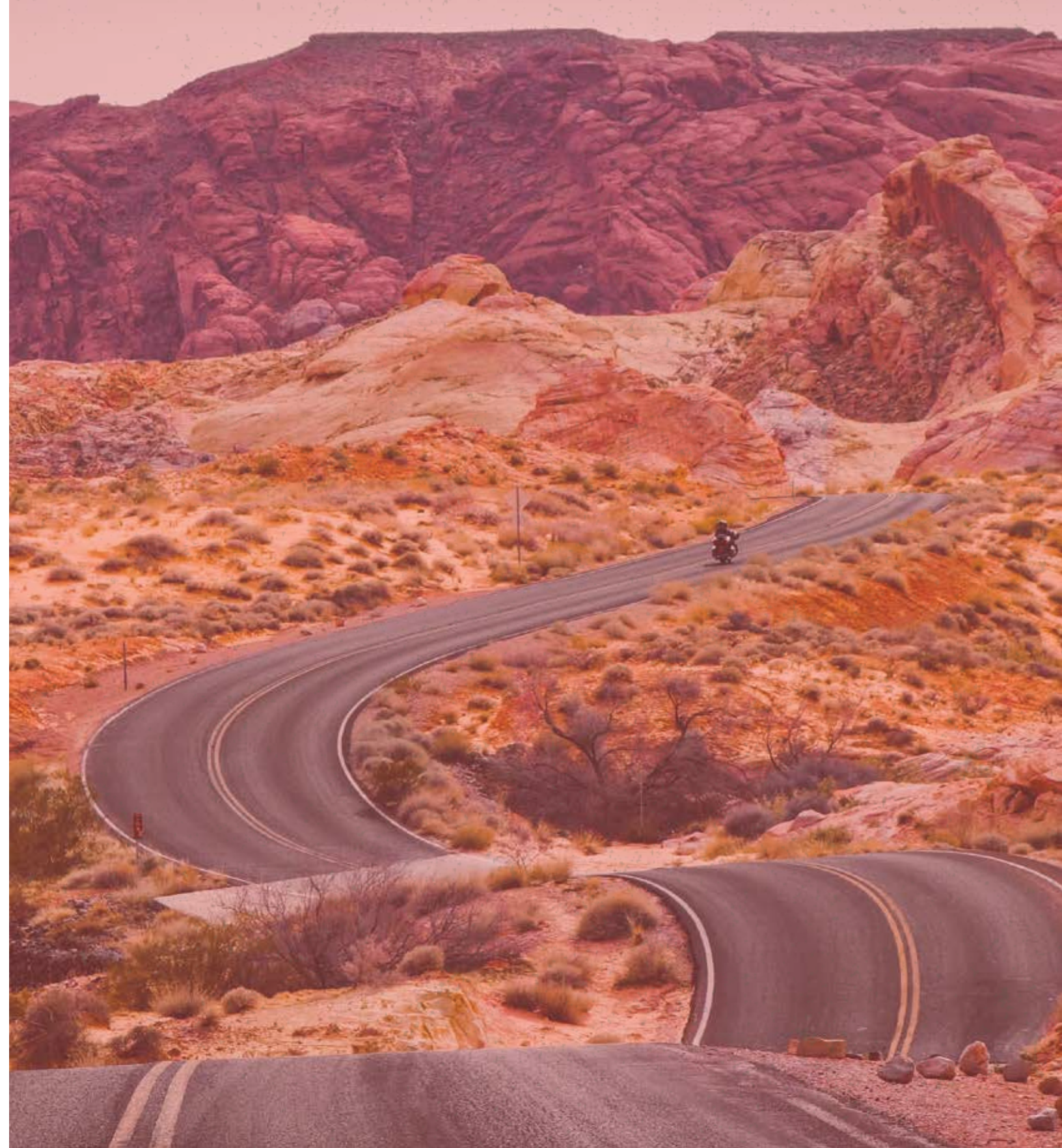
By now, you’ve got a basic sense of the lay of the land. The essential topography, the traffic patterns, maybe a few flashing warning signs. It’s a good place to start from — but there’s so much more to see on this journey.

We know that many readers will want to travel directly to the sections that are most relevant to your day-to-day work and study the metrics you are most focused on. And hey, we don’t blame you — that’s why we’ve done our best to keep that information as easy to find as possible.

But we encourage you to take the scenic route, to follow the twists and turns, and travel down some less-familiar paths.

If you’re primarily an email marketer, take a tour of the digital advertising space. If you take the express train to the social media section, linger a bit on the web traffic data. After all, it’s not about the destination, it’s about the journey.

Wait. No. It’s definitely also about the destination. But you might as well see the sights on your way — we promise you’ll discover something fascinating.



How to read the charts

You can always tell the tourists and the first-time visitors. They are the ones staring intently at the station map, crinkling their brows as they try to make sense of the lines, transfers, intersections, directions, and timetables.

If that's you as you encounter the mountain of data, charts, and analysis in Benchmarks: welcome! We're glad you're here, and we will do our best to get you where you want to be as smoothly and quickly as possible.

Most of our charts include a topline metric labeled "All." This number represents the median figure for a given metric for all participants who reported data. We use median rather than mean for several reasons. Most importantly, we strive to ensure that a particular participant with unusual results does not skew our overall findings.

Wherever possible, we have broken out the findings by sector. Each of our participants self-identified the appropriate sector (or, in some cases, fell outside of our defined sectors and selected "Other"). If you are not sure which sector represents your peer group, review the **full list of participants on page 78** to find where you belong.

We also sort our participants by size. For our study, "Small" refers to nonprofits with annual online revenue in 2021 below \$500,000; "Medium" is those nonprofits with annual online revenue between \$500,000 and \$3,000,000; and "Large" covers all those with annual online revenue greater than \$3,000,000.

Not all participants were able to provide data for every metric. If 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.

Some of the most useful and interesting data in Benchmarks relies on year-over-year comparisons. Wherever we include this type of finding, we are including long-term data from this year's participants. We do not compare this year's findings to what was reported in previous editions of Benchmarks, because the participant pool changes from year to year.

Finally, you should know that we do not use pie charts, either within Benchmarks or in our personal lives. We find them misleading and uncouth.

That's it! That's all you need to know to read and understand the charts. No longer a tourist, you are now ready to move about the charts in comfort and confidence. Go forth and explore!





POINTS OF INTEREST

Email list sizes increased by 7% in 2021, building on 4% and 2% growth in the previous two years.

Nonprofits sent an average of 63 email messages per subscriber in 2021, a 1% decline in volume from the previous year.

For every 1,000 fundraising messages sent, nonprofits raised \$78. This marks a 3% decrease from 2020.

The average response rate for advocacy email was 1.8%, a 4% increase over the previous year.

The average response rate for fundraising email was 0.08%, an 11% decrease from 2020.

The average open rate across all email messaging was 22%, a 16% jump from the previous year.

MESSAGING



The purpose of any direct response email journey is to take as many passengers as possible to the end of the line. The precise destination depends on the ask — it might be completed donations, petition signatures, or anything else. But no matter what the endpoint, there are a bunch of intervening stops where people can choose to disembark.

Readers can trash an unread message straight from the inbox, or read the email but not click any links. They can make it to the donation page, fill out all their payment information, then get distracted and navigate away before completing their gift (in which case — time to start serving some retargeting ads!). At every point along the process, the audience gets smaller, and smaller, and smaller.

That’s what email strategy and creative are all about: keeping folks engaged so they stick

around all the way to our chosen destination. It’s why we measure clicks and conversions, so we can see how many people are hopping off the train at each stop. But — and thank you for sticking with us throughout this extended metaphor — changes from Apple and other tech companies are making it harder and harder to know exactly how many people climbed aboard in the first place.

Let’s look at some numbers:

Email messaging rates

	Open Rate		Click-through Rate		Page Completion Rate		Response Rate		Unsubscribe Rate	
All	22%	(+16%)						0.18%	(+1%)	
Advocacy	19%	(+8%)	2.4%	(-9%)	69%	(+2%)	1.8%	(+4%)	0.15%	(+17%)
Fundraising	23%	(+26%)	0.7%	(-7%)	16%	(-3%)	0.08%	(-11%)	0.19%	(-1%)
Newsletter	23%	(+10%)	1.5%	(-1%)					0.17%	(+4%)

Specifically, let’s look at those fundraising email numbers. Our intended destination is completed donations, which is measured by response rate. The average fundraising message response rate in 2021 was 0.08%. **That means that a nonprofit would need to send emails to 1,250 recipients in order to generate one donation.**

(Before we go on, let us take a moment to acknowledge that this is kind of a bummer. We work so hard to send timely, engaging, lovingly crafted emails, and then 1,249 out of 1,250 recipients won’t even do the thing. At least not at that moment!)

That 0.08% response rate was 11% lower than in the previous year. That’s not a huge surprise — most years, we report small declines in response rate in Benchmarks, and many nonprofits saw particularly strong results setting a high baseline in 2020. There was also a slight drop (3%) in page completion rate, to an average of 16%. (Again, smart and dedicated nonprofit staff optimized these donation pages, and 84% of the people who landed on them didn’t actually complete their gift. Rude!)

Here’s the thing about these metrics: the data is generated by platforms that nonprofits can directly control and measure. Your CRM knows the source code for each email user who clicks through to the donation page, and can accurately track how many of them

make a donation. Those transparent, reliable metrics were a bit lower in 2021 than in the previous year.

And then there are open rates.

Open rates, which can vary widely from email provider to email provider. Open rates, which are measured by software downloading a pixel rather than direct user behavior. Open rates, which unlike the rest of our fundraising metrics did not decline, or even hold steady. Instead, they took off in the opposite direction — open rates went up by 26% in 2021!

If a much larger portion of the audience opened fundraising emails in 2021, why did a substantially smaller portion actually complete gifts? Don’t ask us — ask Apple.

In late 2021, Apple rolled out new privacy protections for people using iOS devices like iPhones. Default settings changed so that email messages automatically downloaded images, including the images used to track opens. For users who downloaded this update, an email would be counted as “opened” whether or not anyone ever looked past the subject line. Of course, these false opens don’t lead to clicks or donations.

It’s difficult to pinpoint exactly how much changes like this impact the metrics we report. For one thing, nonprofits typically don’t



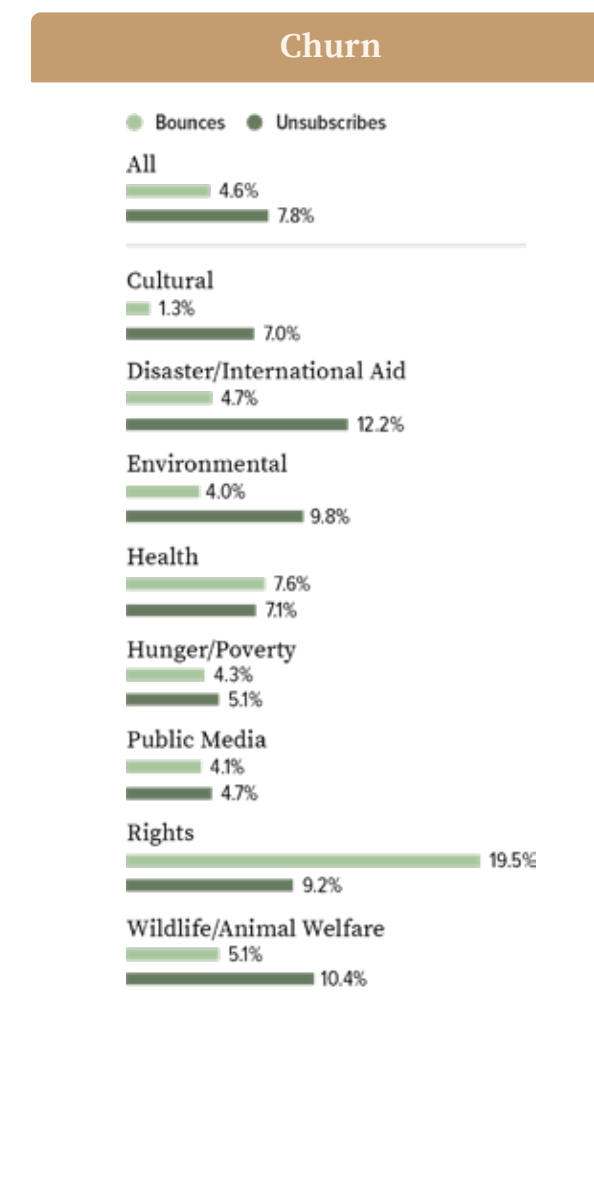
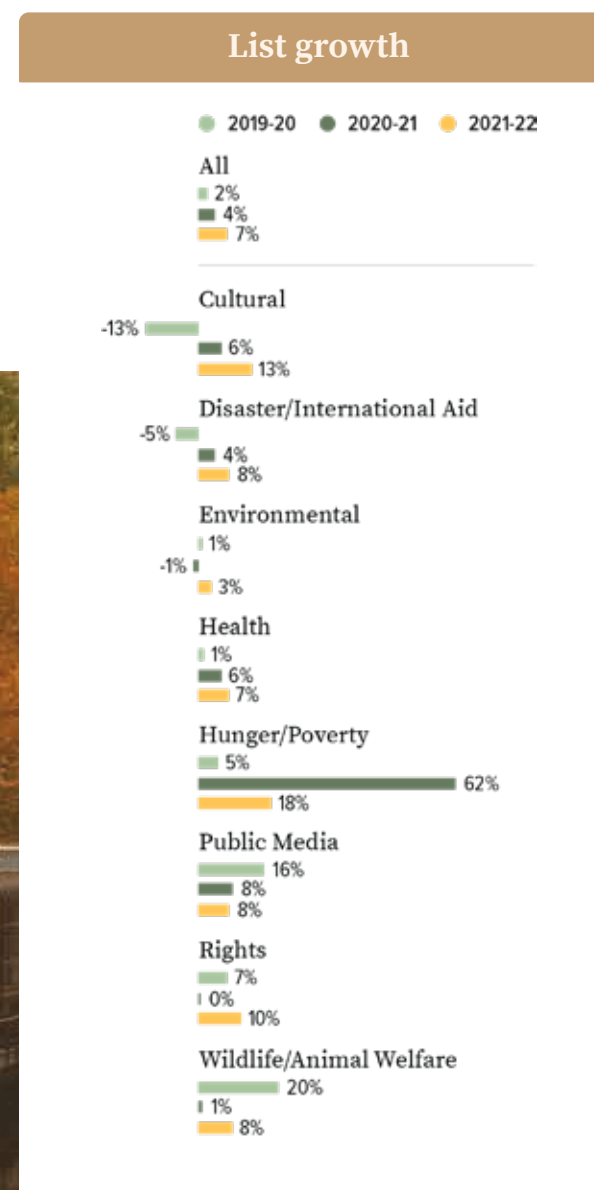
track how much of their audience is viewing their content on Apple devices (though we do know that the majority of website visits in 2021 came from mobile users — more on that on page 66). And, as anyone who has ever ignored repeated prompts to update software can understand, users moved to the new iOS settings at different times.

In the face of this, we strive to track metrics as accurately as possible, and to understand the context in which they are reported. And above all, to continue to grow audiences and deliver the best, most relevant, most irresistible messaging possible — even when only 1 in 1,250 passengers stick with us to the end of the line.

One way we can try to gain a better understanding is by looking more closely at the period of time when the iOS changes were rolled out. Apple released iOS 15 on September 20, 2021. From September to November 2021, fundraising open rates climbed by 17%.

Notably, response rates did not follow this trajectory — they remained basically flat over the same period. And if we look at 2020 for comparison (in case it's something about November that influences the numbers, maybe a Giving Tuesday effect), we do not see a corresponding spike in open rates.

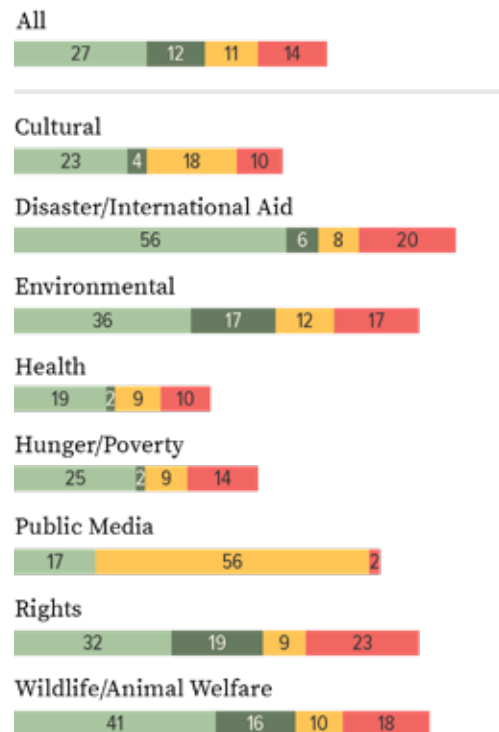
This is not conclusive evidence that the increase in open rates in 2021 was illusory. And there certainly could be other factors in addition to the changes implemented by Apple. But it's an indication that relying on open rates may not be an effective way to drive email strategy. And it's an important reminder that results can be influenced by outside factors, including decisions made by unaccountable tech giants like Apple and Facebook Meta, in addition to the choices being made by nonprofits and their supporters.



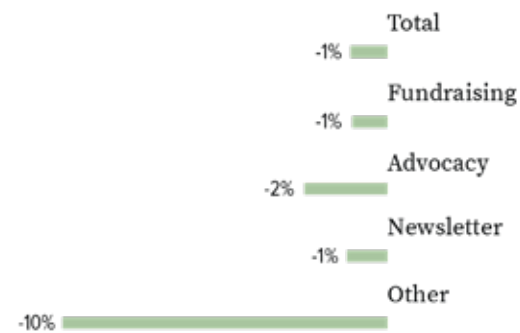


Messages per year per subscriber

● Fundraising ● Advocacy ● Newsletter ● Other

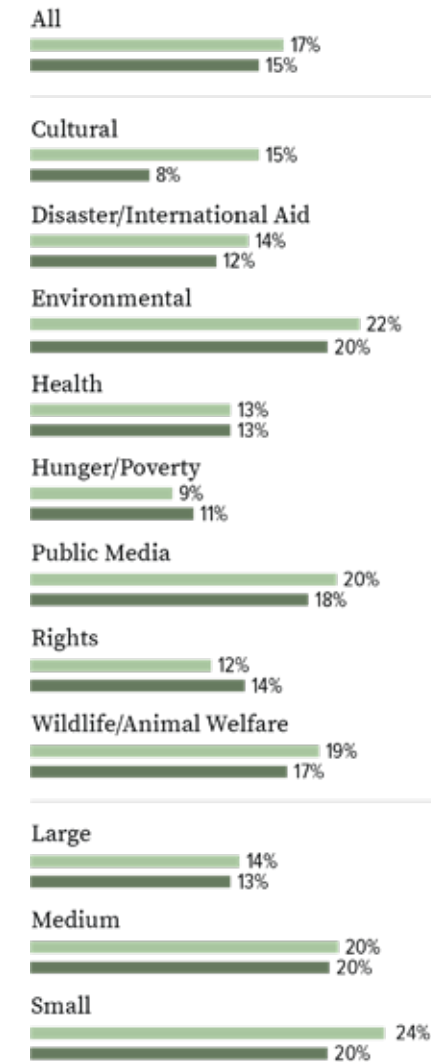


Change in messages per year 2020–21

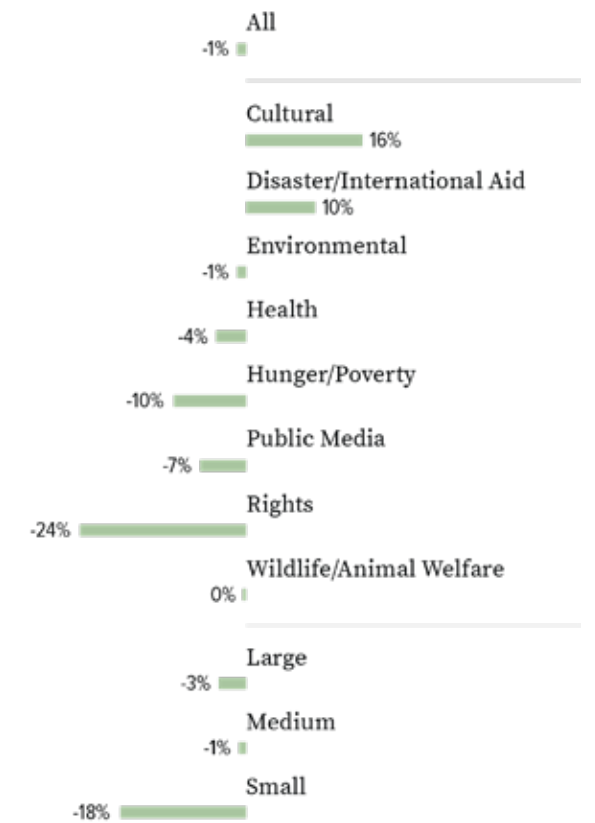


Share of online revenue from email

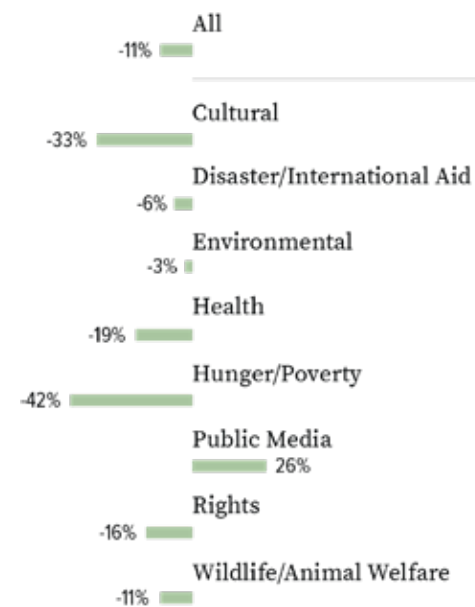
● 2020 ● 2021



Change in email revenue 2020–21



Change in fundraising response rate 2020–21



Peer-to-peer text messaging metrics

Response rate (% of messages sent that receive a text message back)	10%
Change in response rate 2020–2021	-10%

Text messaging metrics

Mobile list growth	5%
Mobile subscribers per 1,000 email subscribers	159



Email messaging rates by type and sector

		Sector								
		All	Cultural	Disaster/ International Aid	Environmental	Health	Hunger/ Poverty	Public Media	Rights	Wildlife/ Animal Welfare
Open Rate	All	22%	29%	18%	21%	21%	23%	24%	24%	21%
	Fundraising	23%	33%	19%	22%	22%	24%	24%	24%	22%
	Advocacy	19%	27%	17%	19%	16%	24%	-	21%	18%
Click-through Rate	All	0.7%	0.4%	0.6%	0.6%	0.7%	0.8%	0.6%	0.5%	0.8%
	Fundraising	2.4%	1.7%	1.4%	3.1%	1.3%	2.1%	-	2.4%	4.7%
	Advocacy	1.5%	1.0%	0.9%	2.2%	1.3%	1.3%	1.9%	1.1%	1.6%
Page Completion Rate	All	16%	8%	16%	16%	15%	33%	26%	15%	13%
	Fundraising	69%	-	61%	72%	44%	-	-	75%	80%
Response Rate	All	0.08%	0.04%	0.07%	0.09%	0.07%	0.22%	0.10%	0.05%	0.12%
	Fundraising	1.8%	-	1.0%	2.4%	0.4%	-	-	1.1%	3.7%
Unsubscribe Rate	All	0.18%	0.17%	0.18%	0.18%	0.20%	0.23%	0.17%	0.16%	0.15%
	Fundraising	0.19%	0.19%	0.15%	0.18%	0.21%	0.19%	0.21%	0.25%	0.16%
	Advocacy	0.15%	0.23%	0.17%	0.16%	0.12%	0.20%	-	0.19%	0.12%
	Newsletter	0.17%	0.11%	0.17%	0.16%	0.17%	0.24%	0.12%	0.25%	0.16%

Fundraising email messaging rates by audience

	Open Rate		Click-through Rate		Page Completion Rate		Response Rate		Unsubscribe Rate	
	Rate	Change	Rate	Change	Rate	Change	Rate	Change	Rate	Change
Donor audience	26%	(+16%)	1.0%	(+0%)	31%	(-6%)	0.25%	(-15%)	0.19%	(+11%)
Prospect audience	21%	(+20%)	0.5%	(-11%)	10%	(+6%)	0.04%	(-8%)	0.19%	(+9%)

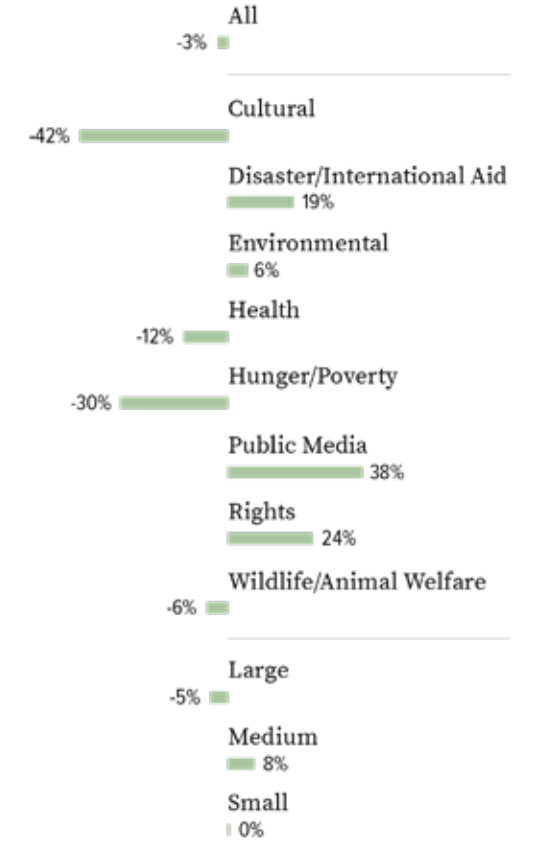
Messages per subscriber per month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
All	3.7	4.7	4.7	5.1	5.1	5.2	4.1	4.6	5.0	4.6	7.2	8.0
Cultural	3.8	3.7	5.3	6.2	5.5	5.7	4.1	3.8	5.4	5.4	5.7	6.6
Disaster/International Aid	5.0	5.8	7.5	6.2	6.0	8.3	4.1	6.0	5.9	5.4	8.8	15.3
Environmental	4.1	5.5	6.7	8.7	7.4	6.2	6.0	5.8	5.6	6.1	7.2	7.2
Health	1.9	2.1	3.0	2.5	2.8	2.4	2.3	3.4	3.1	2.3	3.7	4.0
Hunger/Poverty	1.9	2.1	2.6	2.9	3.3	3.5	2.5	3.7	4.3	3.4	6.3	7.0
Public Media	7.9	8.0	7.5	8.7	8.2	9.2	5.4	7.3	8.4	10.4	6.9	9.6
Rights	4.9	6.6	7.5	5.1	5.3	7.4	5.8	5.4	6.7	5.6	8.0	10.1
Wildlife/Animal Welfare	4.4	5.8	5.9	6.6	6.8	6.9	5.5	5.1	7.2	7.3	10.2	12.3

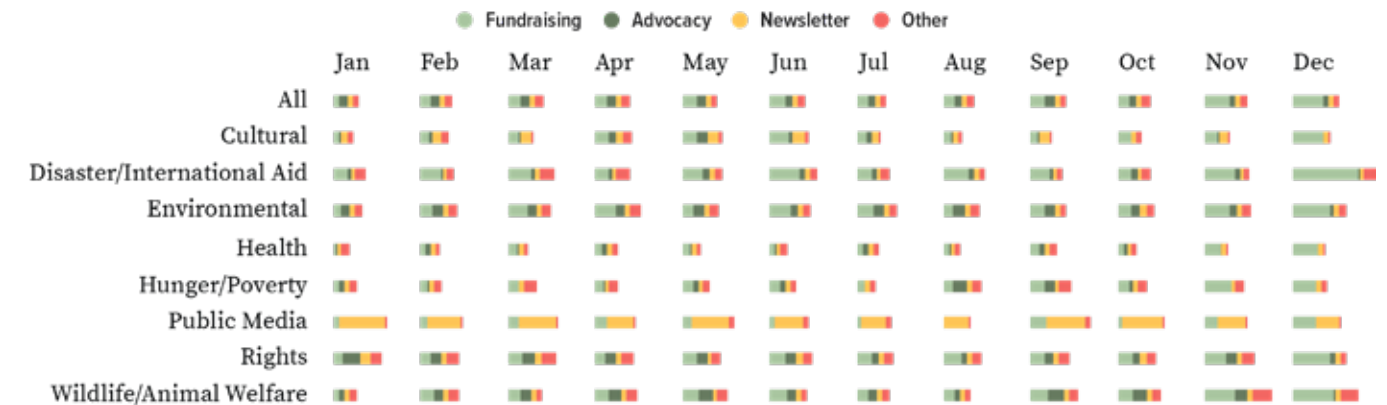
Email revenue per 1,000 fundraising emails sent

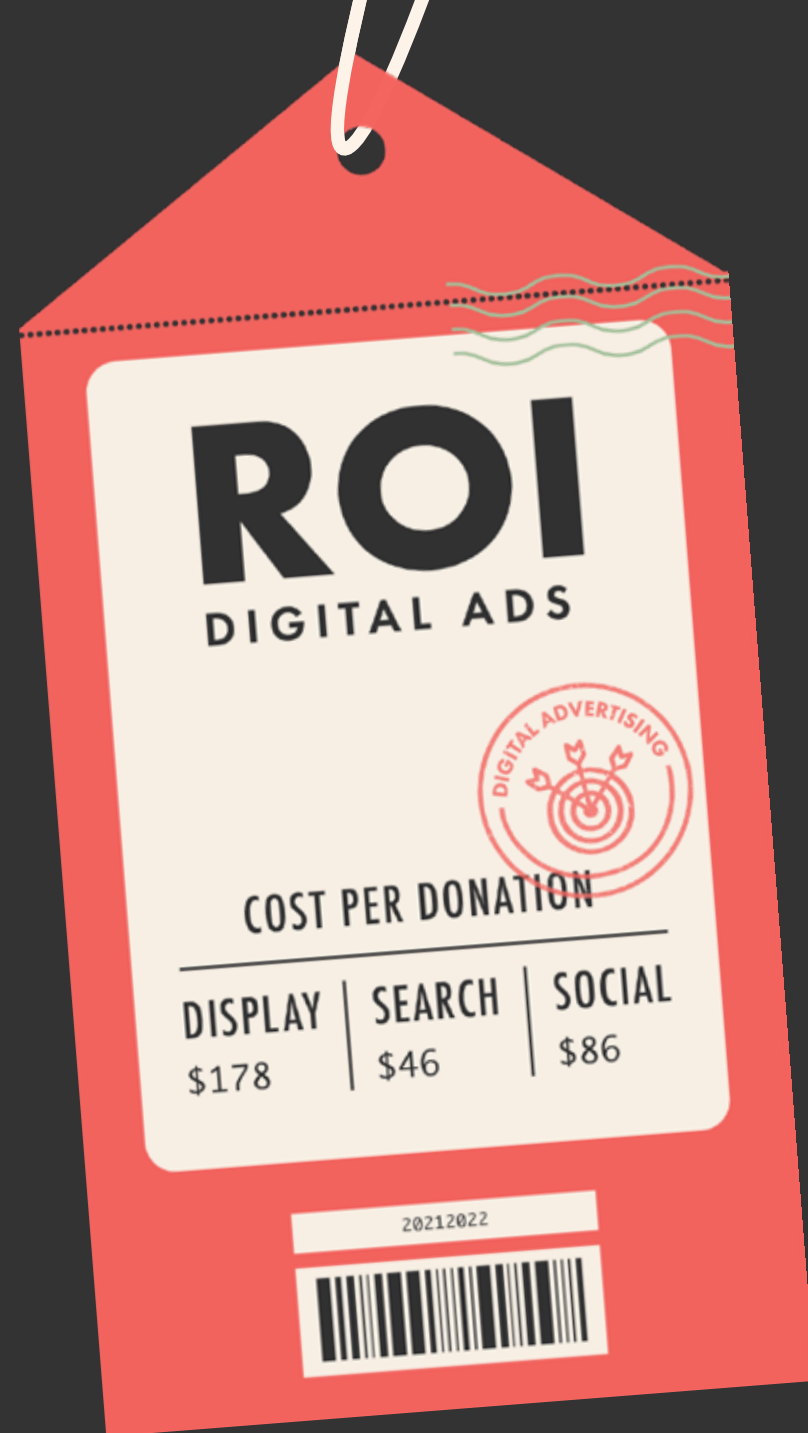


Change in email revenue per 1,000 fundraising emails sent 2020-21



Messages per subscriber per month by type





POINTS OF INTEREST

- **Nonprofit spending on digital ads increased by 19%** in 2021, with nonprofits spending an average of \$0.06 for every dollar raised in online revenue. (This is a measure of the level of spending relative to total budget, not a direct measure of return on investment. More on return on ad spend ahead.)

- **Large nonprofits (those with annual online revenue over \$3MM) spent 52%** of total advertising budgets on direct fundraising.
- **Small nonprofits (those with annual online revenue under \$500k), devoted 74%** of budgets to direct fundraising ads.
- The average cost per click across advertising types fell into a fairly narrow range. From a low of **\$2.99 for social media ads, up to \$3.68 for video and \$3.72 for search advertising.**
- **Return on ad spend (ROAS) was highest for search ads (\$3.72).** Display and social media ROAS were \$0.59 and \$0.57, respectively. And video advertising had the lowest ROAS at \$0.16.
- **View-through revenue** (revenue from donors who made a donation from seeing, but not clicking on, an ad) **accounted for 35% of all giving sourced to digital ads.**



DIGITAL ADS

Successfully managing a nonprofit digital ads program is like planning a solo trip around the world — difficult, complex, and subject to constant revisions and course corrections. (Also quite fun and rewarding, if you ask us.) There are changing technologies to adopt and adapt to, rough weather to avoid, and constant budgeting challenges.

Let's break it down with a hypothetical nonprofit trying to navigate its way to a successful program. Before deciding which audiences to target, which channels to pursue, or just about anything else, we need to decide the overall budget. On average, nonprofits invested \$0.06 in digital ads for every dollar raised in online revenue.

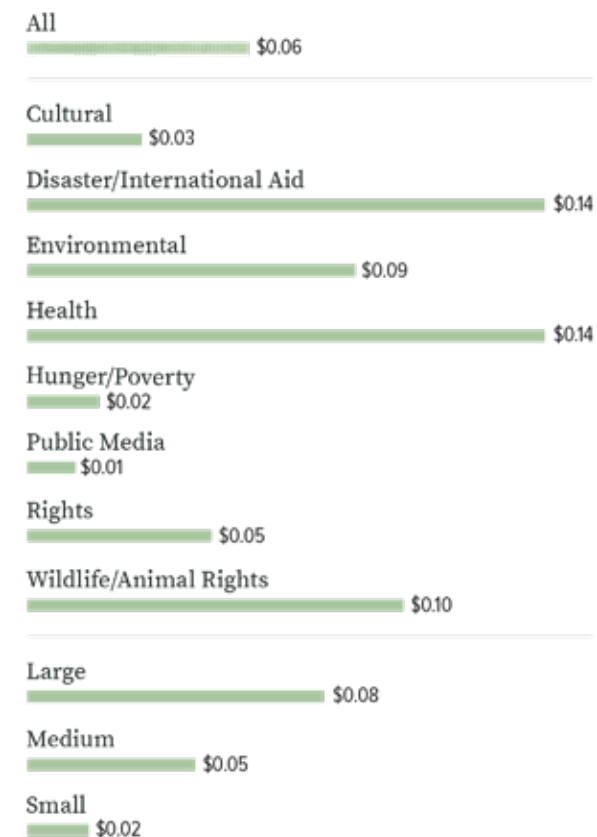
This does not mean that spending 6 cents yields a \$1 return (if only!). Instead, it is a measure of the relative size of advertising budgets. If our hypothetical nonprofit raises \$1 million online annually, in 2021 it would have set a digital ads budget of \$60,000.

Even at this most fundamental level, there are striking differences between Small nonprofits (those with annual online revenue below \$500,000) and Large nonprofits (those with annual online revenue over \$3MM).

Small nonprofits invested just \$0.02 per dollar of online revenue; for Large nonprofits, it was \$0.08 per dollar. **Nonprofits that receive more online revenue didn't just invest more in digital ads than smaller groups; they invested four times more relative to their total online revenue.**

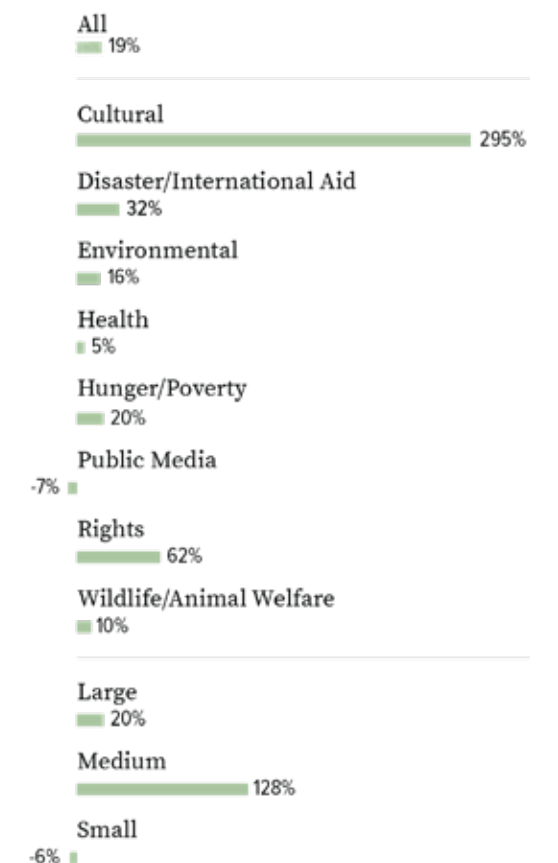
This divergence applied not only to the amount of investment in 2021, but to year-over-year changes as well. Overall, nonprofits increased their digital advertising budgets by 19%. While that's aligned with the 20% increase for Large nonprofits, Small nonprofits actually reported a 6% decline in budgets. We also saw sharp differences between sectors, with Cultural nonprofits increasing ad budgets by an average of 295% year over year.

Investment in digital advertising divided by total online revenue



For a nonprofit who saw online revenue of \$1m, they spent an average of \$60,000 in digital advertising

Change in investment in digital advertising 2020-21



Of course, setting an overall budget is only a first step. There are a few different ways to break things down. **We can take a look at how nonprofits prioritized spending...**

...by advertising goal:

The majority of digital advertising spending was devoted to direct fundraising asks — overall, fundraising accounted for 52% of all budgets. Branding, awareness, or education advertising made up 32% of budgets, with lead generation at 15%.

Share of digital advertising budget by investment type

	All	Large	Medium	Small
Percent of Digital Advertising Budget by Goal				
Branding, Awareness, or Education	32%	33%	24%	14%
Direct Fundraising	52%	52%	17%	74%
Lead Generation	15%	14%	53%	11%
Other	1%	1%	7%	—

Once again, we see a clear divergence in approach depending on nonprofit size. Large nonprofits fell relatively close to those overall numbers, but the breakdown was different for nonprofits with smaller budgets. Small nonprofits invested even more heavily in direct fundraising advertising (74%), and less so in branding and awareness (14%).

...by advertising channel:

Search advertising accounted for 23% of Large nonprofit budgets, and 22% of Medium nonprofit budgets. For Small nonprofits, the share of budgets devoted to Search was more than twice as large: 53% of all spending.

The differences between budget breakdowns by nonprofit size continue when we look at spending...

Share of digital advertising budget by investment type

	All	Large	Medium	Small
Percent of Direct Fundraising Budget by Channel				
Display	32%	32%	38%	28%
Search	24%	23%	22%	53%
Social Media	36%	37%	35%	20%
Video	6%	6%	3%	—
Other	2%	2%	1%	—

This tendency to spend a higher proportion of ad dollars on Search may indicate differences in strategy. As we just saw, Small nonprofits were less likely to invest in branding and awareness advertising, which may reduce the need for highly visual channels like Display and Video.

But the primary factor here may be simpler: As we have seen, small nonprofits tend to have smaller budgets not just overall, but even relative to their size, and the most impactful use of a small budget is in Search. We'll explore the details in a moment, but Search advertising is typically less expensive to produce, and generates higher return on ad spend.

For a nonprofit with a limited budget, it makes sense to invest as much as possible in channels that reliably produce higher returns. But there are limits to Search advertising — there are only so many search terms that are relevant to your nonprofit or cause, and only so many people searching for them. Once a nonprofit has developed a robust Search program, there comes a time when it starts to run out of road.

Large and Medium nonprofits may be more likely to hit that limit, and diversify into other channels with significant investments in Display, Social Media, and Video. Working with smaller budgets, Small nonprofits may be able to devote a higher percentage of overall spending to Search. As those programs mature and budgets expand, they will also tend to explore other channels as well.

Finally, we can look at the binary choice facing nonprofits when making budgetary decisions...

...by advertising audience:

Regardless of channel or goal, potential audiences can be divided into two groups: retargeting audiences and prospect audiences.

Retargeting audiences are made up of people who are served an ad because of a specific status or previous action taken by that specific user. For example, a person who clicked on a fundraising email but did not make a gift might be served ads urging them to complete their donation. Or, a donor who hadn't made a gift in more than a year might be enticed to give again with an irresistible video. Prospect audiences are, basically, everyone else. They might be served ads based on demographics or simply by visiting a targeted publisher.

On average, nonprofits spent more on retargeting than on prospect audiences. For every dollar a nonprofit spent on retargeting in 2021, they invested just \$0.72 on prospect advertising. This was a higher retargeting-to-prospecting budget ratio than in the previous year, when nonprofits spent \$0.79 on prospects for every dollar in retargeting.

This may reflect a more conservative strategic approach by nonprofits, higher relative costs for retargeting, or some other combination of factors.

So far, we've focused on the decisions that nonprofits make: how much to spend, for what purpose, on what channels, to which audiences. But once those insertion orders are signed and creative starts showing up on newsfeeds and search result pages, what matters most is how audiences respond.

For lead generation, a key metric is cost per lead — how much it costs to recruit one new subscriber. Overall, cost per lead was \$3.31, and while Small nonprofits did report higher costs than Large nonprofits, the most obvious differences were by sector.

Hunger/Poverty nonprofits reported an average cost per lead of \$31.22, an order of magnitude higher than the overall average. One way to interpret this result is to assume that something went wrong — everything else being equal, a lower cost per lead is preferable to a higher one.

But everything else is not equal, especially during a pandemic, especially for nonprofits in the Hunger/Poverty sector. If these nonprofits found that they could convert new leads at a high enough rate that even a cost per lead over \$31 yielded a positive return... that's an environment in which it's worth investing heavily in growth.

For fundraising advertising, there are two key metrics that are closely linked: cost per donation and return on ad spend.

Cost per donation is the simpler measure: how much does a nonprofit have to spend

to generate a single gift. The results here depend greatly on channel. Search had the lowest cost per donation at \$46 (again, nonprofits spent \$46 on search advertising to generate one donation).

For social media, the cost per donation was \$86, and for display \$178. It's worth looking back at the advertising budget data — when the cost per donation for display is so high, it may not be a surprise that nonprofits with bigger budgets are most willing (or able) to invest in that channel.

Cost per digital advertising lead



Cost per donation

	Display	Search	Social Media	Video
All	\$178	\$46	\$86	\$358
Disaster/International Aid	\$204	\$47	\$130	—
Environmental	\$151	\$44	\$82	\$348
Health	\$137	\$47	\$170	—
Hunger/Poverty	\$87	\$37	\$123	—
Rights	\$154	\$50	\$68	\$1,295
Wildlife/Animal Welfare	\$155	\$34	\$41	\$53
Large	\$151	\$45	\$92	\$320
Medium	\$183	\$57	\$137	—
Small	—	—	\$45	—

Return on ad spend (ROAS) has a reciprocal relationship with cost per donation — the lower the cost to convert a donor, the higher the return on spending tends to be. We see that relationship most clearly with search,

which had the lowest cost per donation of any channel, and the highest ROAS. For every dollar nonprofits spent on search in 2021, they saw a return of \$3.72.

Return on ad spend

	Display	Search	Social Media	Video
All	\$0.59	\$3.72	\$0.57	\$0.16
Disaster/International Aid	\$0.67	\$3.02	\$0.71	—
Environmental	\$0.49	\$2.56	\$0.41	\$0.09
Health	\$1.01	\$3.66	\$0.53	—
Hunger/Poverty	\$2.97	\$12.60	\$1.33	—
Rights	\$0.95	\$3.76	\$0.62	\$0.01
Wildlife/Animal Welfare	\$0.25	\$3.18	\$0.72	\$0.55
Large	\$0.54	\$3.72	\$0.60	\$0.20
Medium	\$0.69	\$3.75	\$0.47	—
Small	—	—	\$0.31	—

Display and social media advertising were comparable to each other in terms of ROAS: \$0.59 and \$0.57, respectively. This held true despite the significantly higher cost per donation for display advertising. This could result in part from a higher average gift for display advertising, which lift ROAS even with a higher cost per donation.

As with the cost per lead, the Hunger/Poverty sector was an outlier in terms of ROAS, with significantly higher returns than any other sector across all channels. As the pandemic dragged on through a second year, donors continued to give generously to nonprofits providing immediate community support.

The extraordinary response to fundraising ads from Hunger/Poverty nonprofits reflects the importance of the context in which this work happens. As we write this analysis, the invasion of Ukraine continues to dominate headlines and capture global outrage and compassion. We may well see the Disaster/International Aid sector report elevated metrics in next year's Benchmarks.

Nonprofits develop detailed strategies covering budgets, goals, channels, creative, and more. Audiences respond to the content and messaging that is meaningful and relevant. And all of this happens in a global context that is outside of our control. That's why running a successful digital advertising program is so challenging — and, yes, rewarding.

Cost per thousand impressions (CPM) by channel



Cost per click (CPC) by channel



For every dollar a group spends on retargeting, they spent

\$0.79

to reach prospects in 2020

For every dollar a group spends on retargeting, they spent

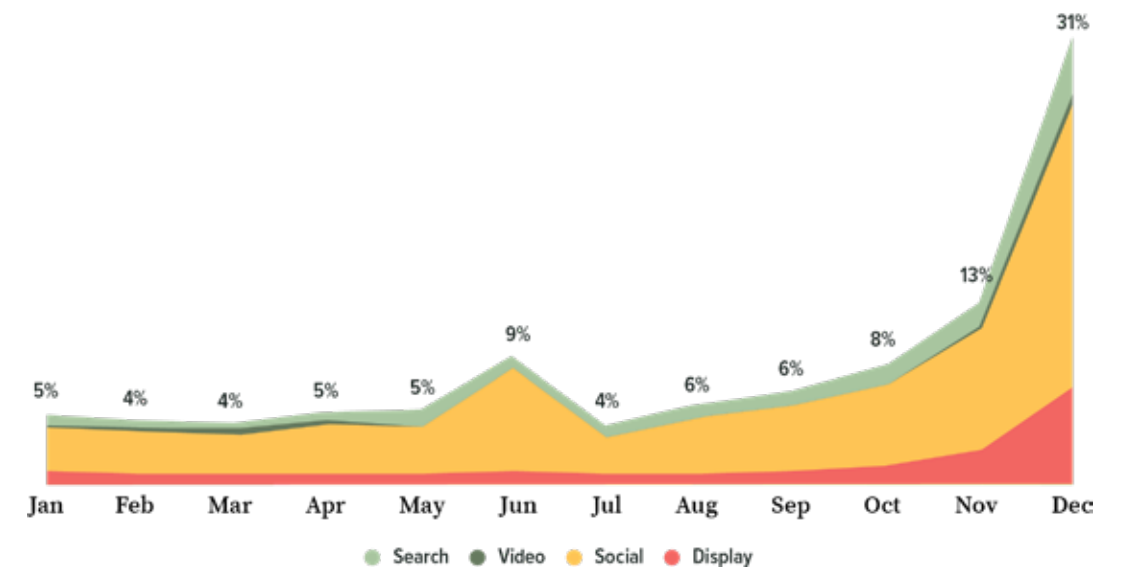
\$0.72

to reach prospects in 2021

33%

Share of digital ads revenue from view-through revenue

Percent of budget spent in each month



POINTS OF INTEREST



For every 1,000 email addresses, nonprofits had an average of **736 Facebook fans, 229 Twitter followers, and 141 Instagram followers.**

All or nearly all nonprofits reported an active presence on Instagram, Twitter, and Facebook. YouTube and LinkedIn were used by 75% of nonprofits, and 23% reported being on TikTok. No other social media platform reached 10% participation.

Public Media nonprofits were the most active on Facebook, with 3.7 posts per day. The average for all nonprofits was 1.0 posts per day.

While revenue from Facebook Fundraisers declined by 20% from the previous year, **Facebook Fundraisers still accounted for 1.1% of all online revenue in 2021.**

The average Facebook Fundraiser generated 5 gifts, with an average gift of \$35.

Each organic Facebook post only reached 4% of a nonprofit page's fans. Meanwhile, 30% of the audience reached by a given post was not already following the nonprofit.

SOCIAL MEDIA



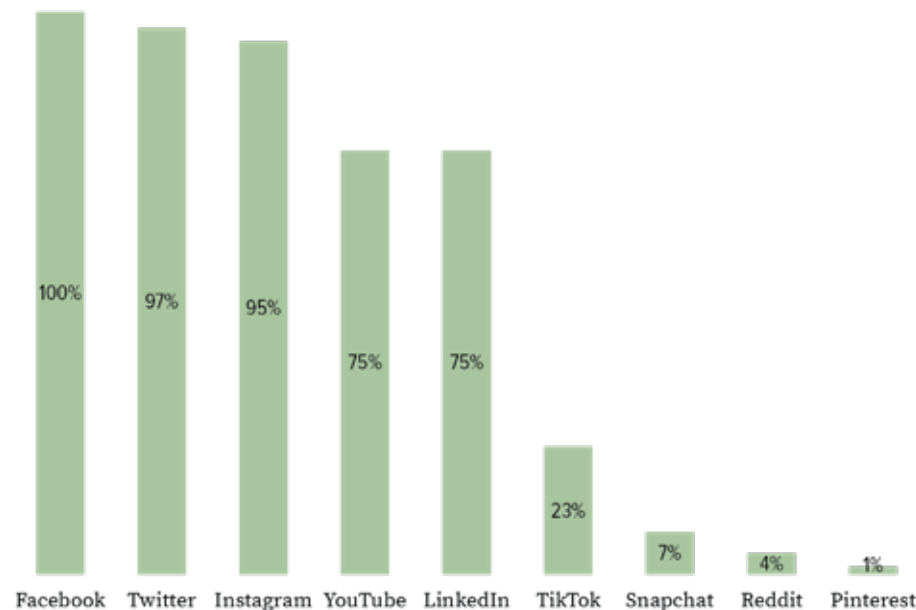
There was a time when travel abroad meant hour after hour of downtime, and travelers would occupy those hours writing long letters home by hand filled with verbose descriptions of the day’s sights, sounds, and new experiences.

As times and tastes changed, picture post-cards became more common, and those long flowery messages morphed into: “Greetings from [PlaceName], wish you were here!” And now, today, you go somewhere new and you upload photos of your meals to Facebook, share videos from the beach on TikTok, and

send complaints about flight delays @JetBlue on Twitter.

The technology changes, but the desire — and in the case of nonprofits, need — to share does not. This is how nonprofits kept up in 2021. First, the platforms:

Percentage of nonprofits using social media platforms



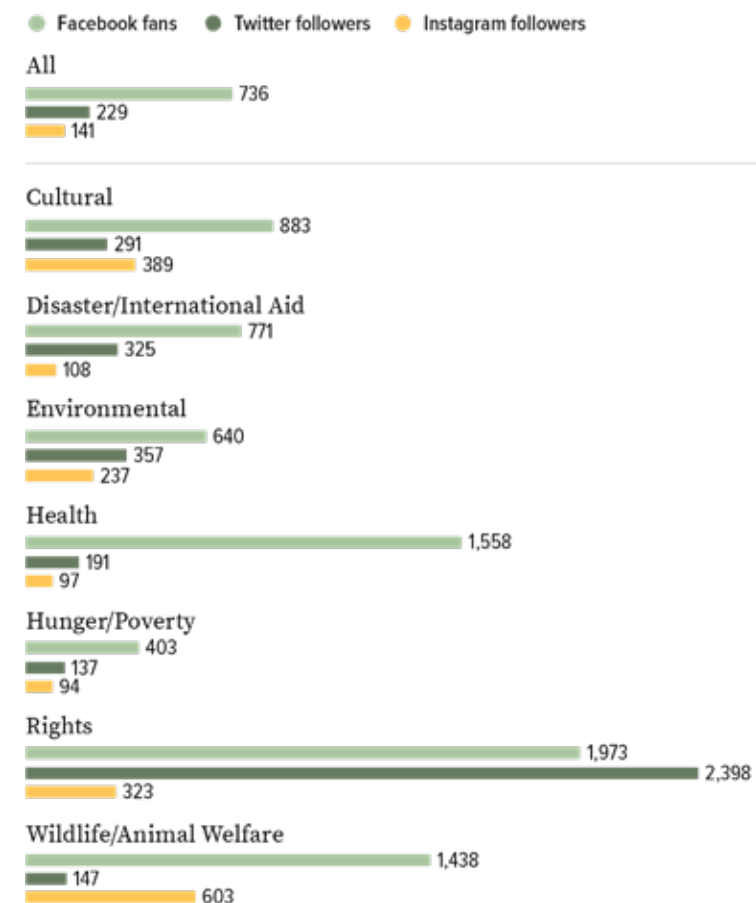
Every single participant in this year’s Benchmarks reported being active on Facebook in 2021, with Twitter (97%) and Instagram (95%) close behind. Both YouTube and LinkedIn had a 75% participation rate. These are long-established platforms with vast user bases, and nonprofits have relied on them for many years.

TikTok, despite its shorter track record, is now an active platform for 23% of nonprofits. This is an indication of the rapid rise of

TikTok, and of nonprofit efforts to reach new, younger, more diverse (and better dancing) audiences. No other social media platform was used by more than 10% of nonprofits, and just one Benchmark participant reported being active on each of: Gab, Medium, Parler, Rumble, Spotify, Tumblr, Twitch, Vimeo.

Given all that, it may be no surprise that nonprofits reported the largest social media following on Facebook. For every 1,000 email subscribers, nonprofits had 736 Facebook fans, 229 Twitter followers, and 141 Instagram followers.

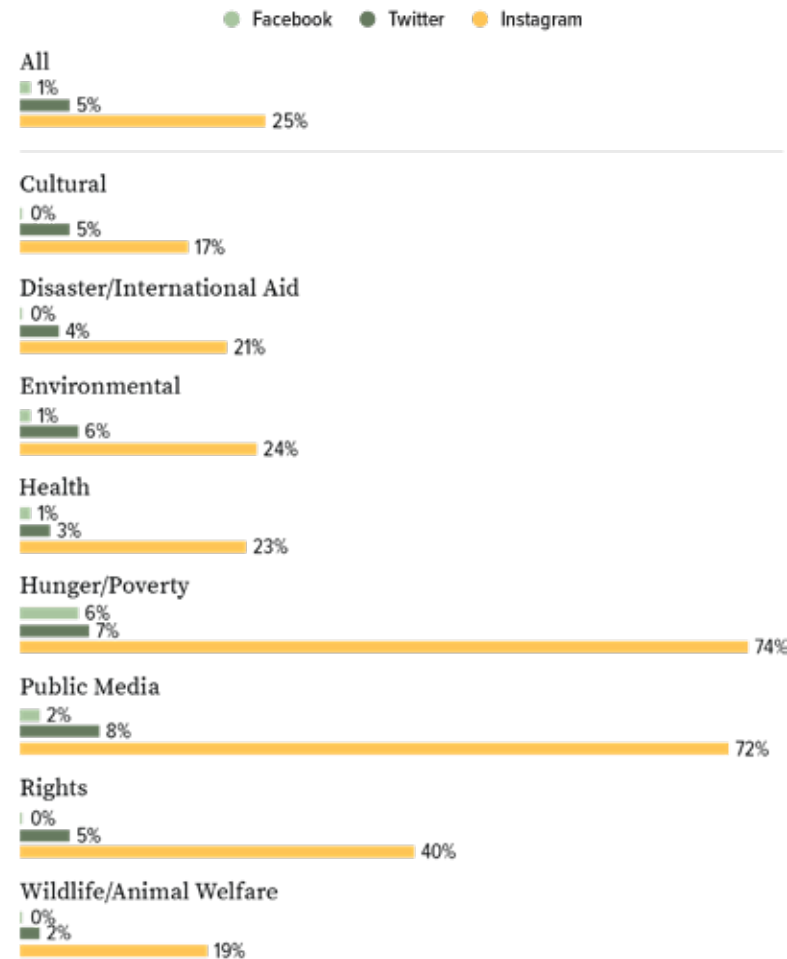
For every 1,000 email subscribers, groups have...



Relative audience sizes varied widely between sectors. Cultural nonprofits had more Instagram followers than Twitter fans, and Rights nonprofits reported 2,398 Twitter followers for every 1,000 email subscribers.

While Facebook continued to enjoy the largest audiences, those audience sizes were essentially flat. Overall, the number of nonprofit Facebook followers increased by 1%, while Instagram audiences increased by an average of 25%. This is consistent with findings from recent years, with Facebook audiences increasing at much slower rates than other platforms.

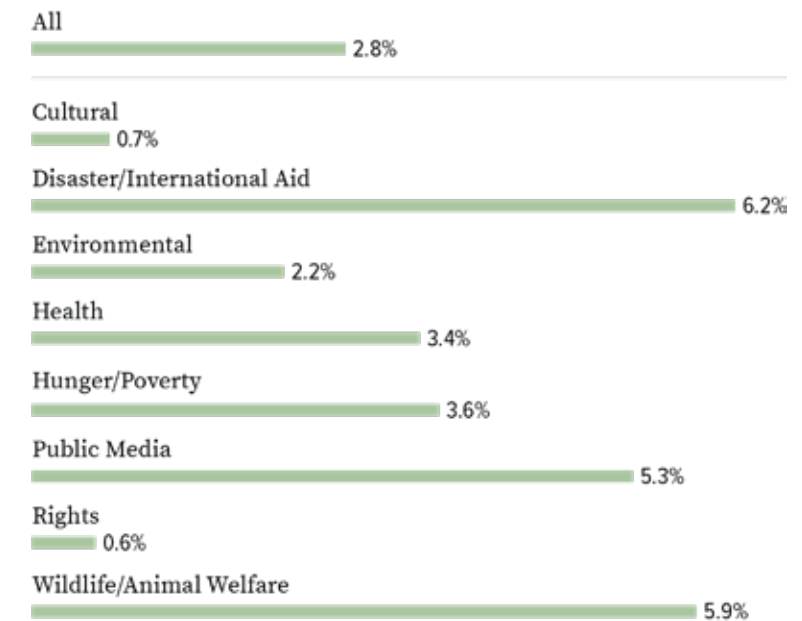
Change in fans/followers 2020–21



The rest of the charts in this section report data only from Facebook. And we want to be clear: this is not because we believe that other platforms are not important or impactful. It's not because we are secretly in love with Mark Zuckerberg. It's not even because more nonprofits use Facebook than any other social media platform. It is only this: Facebook makes more data available than Twitter or TikTok or even its own Instagram.

So! The average organic post (that is, a post without paid promotion) by a nonprofit reached just 4% of its fans in 2021. Any time a nonprofit posts content, there are vast Facebook follower forests filled with falling trees, and nobody there to hear. This is one reason why nonprofits often post multiple times on the same topic, and why nonprofits paid to promote 2.8% of all posts in 2021. Of those users who were served a given post, 30% were not already followers.

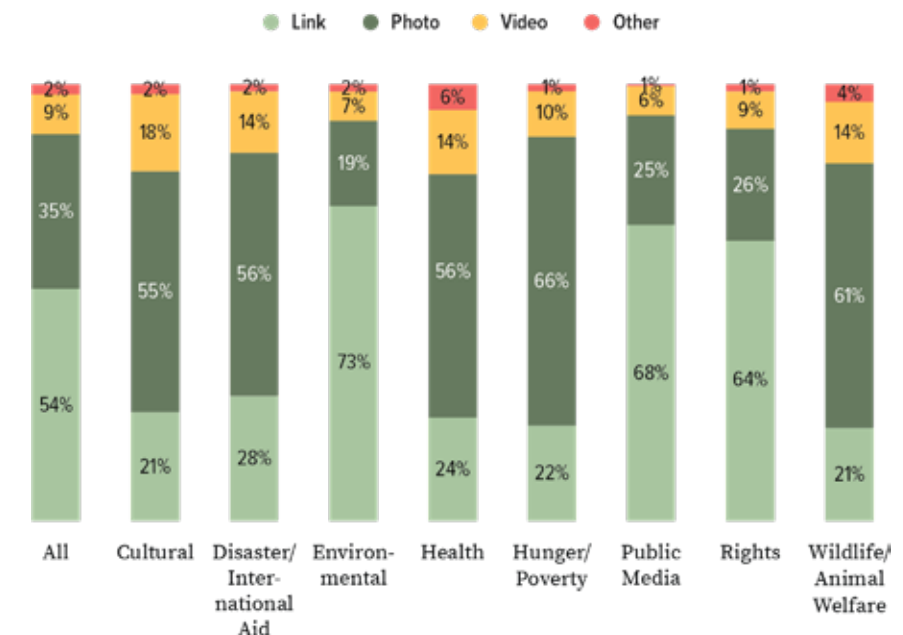
Facebook percent of posts that had paid reach



Overall, 35% of nonprofit Facebook posts included photo content, with Hunger/Poverty groups using photos in 66% of all posts.

Link posts (with text promoting a URL, but no photo or video) made up 54% of posts, and 9% of posts included video content.

Types of Facebook posts



There are many reasons why a nonprofit might choose one format over another. Video might be the most effective way to communicate the reality of a situation or elevate the visibility of a particular spokesperson. In a rapid response moment, a text-only link might be the most efficient way to reach supporters. Photo posts are extremely good for sharing photos of kittens and puppies.

But in the end, social media is largely about engagement — nonprofits want their followers to click, comment, and share. And while link posts might require fewer resources to produce, they also tended to have lower engagement: just a 0.23% engagement score, compared to 0.31% for photo and 0.32% for video.

Facebook post engagement score by type of media



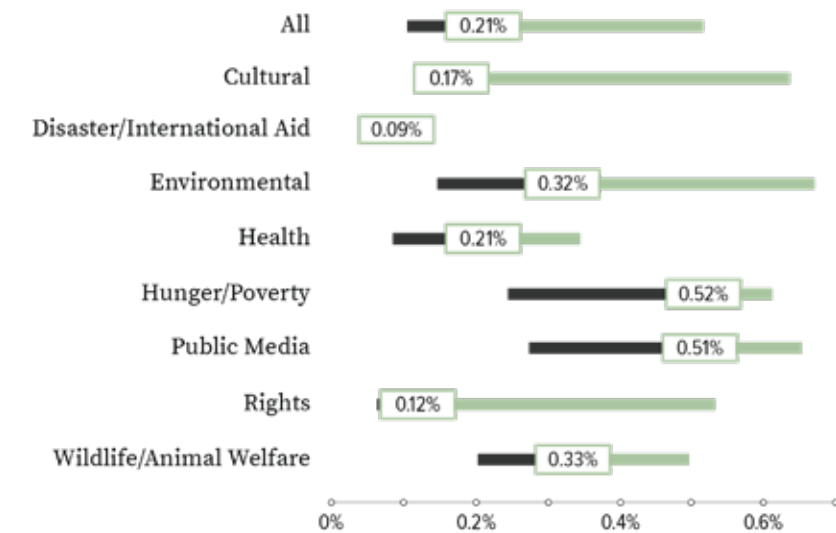
FACEBOOK ENGAGEMENT SCORE: The total number of users who engage with a social media post (by liking, clicking, sharing, etc.) divided by the total number of page fans on the day the content was posted.

“Engagement score” is our Benchmarks way of conveying the success of a given post. Facebook’s algorithm has an overwhelming impact on post reach — Facebook decides who sees your content, and if a particular post is granted massive reach, that can inflate engagement. This makes it difficult to rely on Facebook’s reported engagement rates.

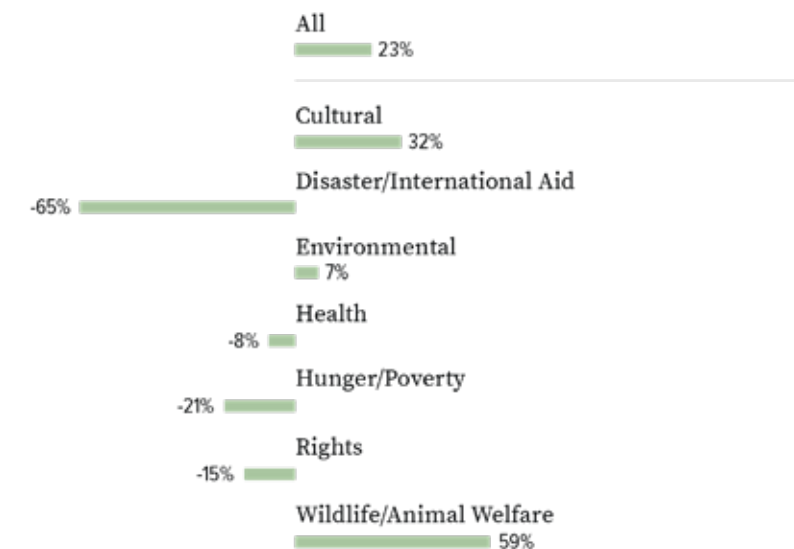
The engagement score we report here is not based on a post’s (algorithmically-determined) reach. Instead, it measures the number of users who interacted with a post as a percentage of page fans when the content was posted.

The average Facebook engagement score was 0.21%. This means that if a nonprofit had 1,000,000 fans and posted a piece of content, that post would receive 2,100 likes, clicks, and shares on average. This marks a 23% increase in engagement score over the previous year.

Facebook engagement score



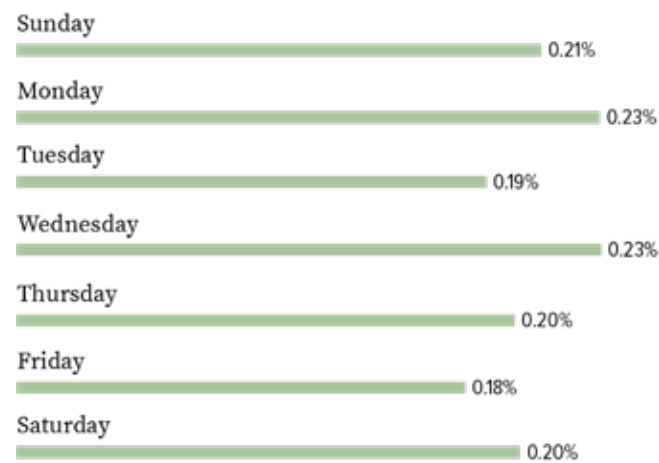
Change in Facebook engagement score 2020–21



In addition to the type of content, engagement score is also influenced by when that content was posted. Facebook engagement

scores tended to be the lowest on Fridays (0.18%), with Monday and Wednesday content reaching an engagement score of 0.23%.

Facebook engagement score by day of week

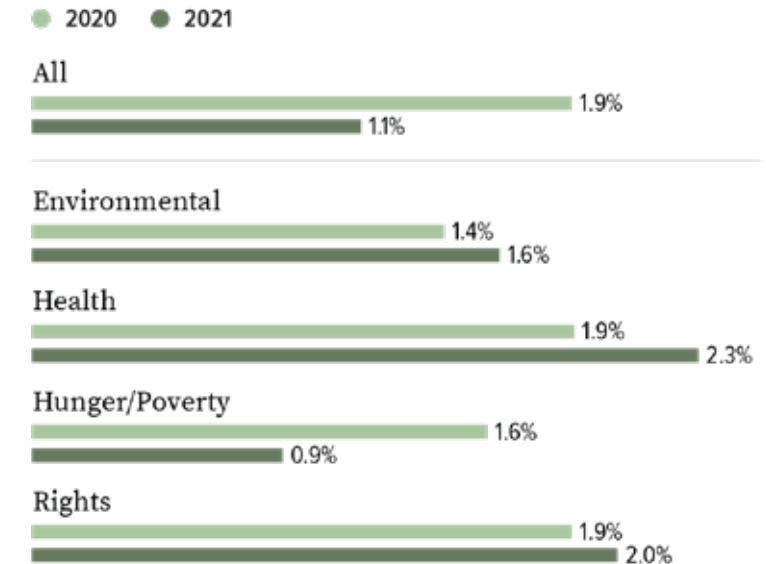


Now, let's turn our attention from general engagement to a very specific outcome of Facebook content: \$\$\$.

accounted for 1.1% of all online revenue in 2021. Nearly all of this revenue was generated by user-driven, crowd-funded Facebook Fundraisers.

The amount of revenue processed directly on Facebook declined by 20% in 2021, and

Share of online revenue from Facebook

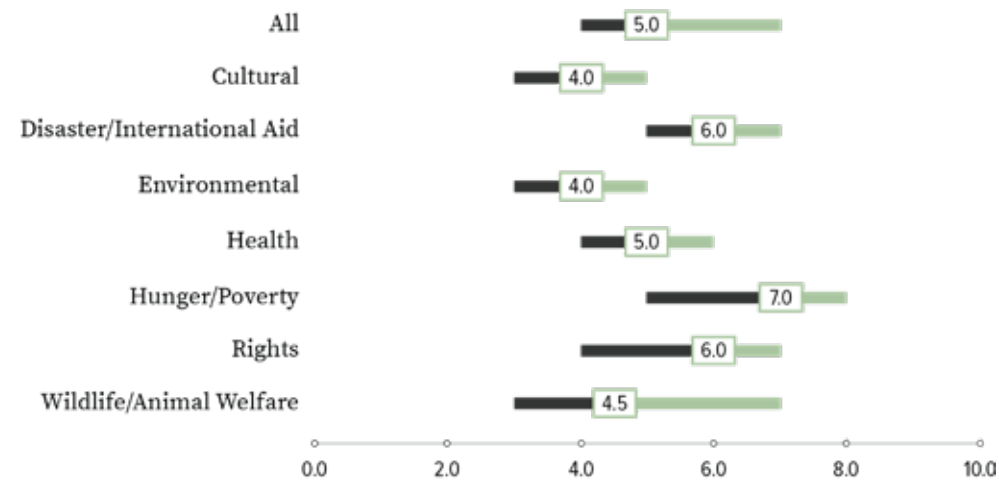


For nonprofits in the Health sector, 2.3% of all online revenue was generated on Facebook; for the Hunger/Poverty sector, it was 0.9%. And remember, our reported averages represent the median figure — which means that half of Health nonprofits generated *more* than 2.3% of all online revenue on Facebook.

these sectors were more successful than others. The average Facebook Fundraiser generated 5 gifts, with an average gift level of \$35. Differences from sector to sector are relatively small. A key factor for nonprofits seeking to drive Facebook revenue is inspiring a greater number of supporters to start Fundraisers, rather than motivating more or larger gifts per Fundraiser.

This does not mean that Facebook Fundraisers created in support of nonprofits in

Average number of gifts to a Facebook Fundraiser



Facebook Fundraisers average gift



That's easier said than done, of course. And, like everything else on Facebook, the effectiveness of nonprofit efforts depend in part on Facebook itself. Overall, the most important month for Facebook revenue

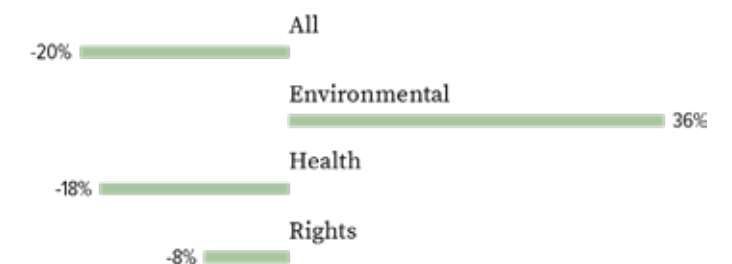
was November, the month where Facebook prioritizes Fundraisers content as part of Giving Tuesday.

Percent of Facebook revenue raised in each month

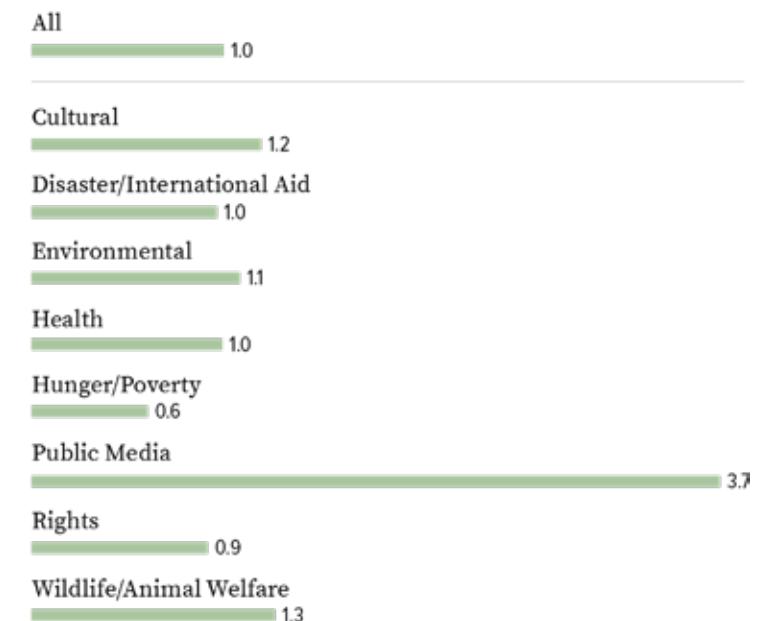
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
All	5%	5%	7%	9%	7%	6%	4%	6%	4%	5%	12%	5%
Disaster/International Aid	2%	8%	12%	10%	10%	7%	3%	11%	1%	4%	6%	6%
Environmental	3%	6%	7%	9%	3%	3%	3%	7%	3%	4%	13%	5%
Health	2%	3%	4%	5%	10%	4%	3%	4%	7%	4%	16%	3%
Hunger/Poverty	11%	14%	7%	6%	6%	6%	5%	1%	7%	5%	12%	10%
Rights	5%	8%	11%	7%	7%	11%	7%	14%	3%	5%	9%	5%

This is not to say that Facebook's influence completely determines revenue on the platform. The choices being made by nonprofits, and especially by supporters, matter a great deal. Disaster/International Aid nonprofits reported Facebook revenue spikes in the spring and in August. For Public Media, September was the single most successful month in terms of Facebook revenue, generating 22% of the year's total. Real-world events, from breaking news to a well-publicized pledge drive, can motivate supporters to start more Fundraisers and drive more revenue.

Change in amount raised on Facebook

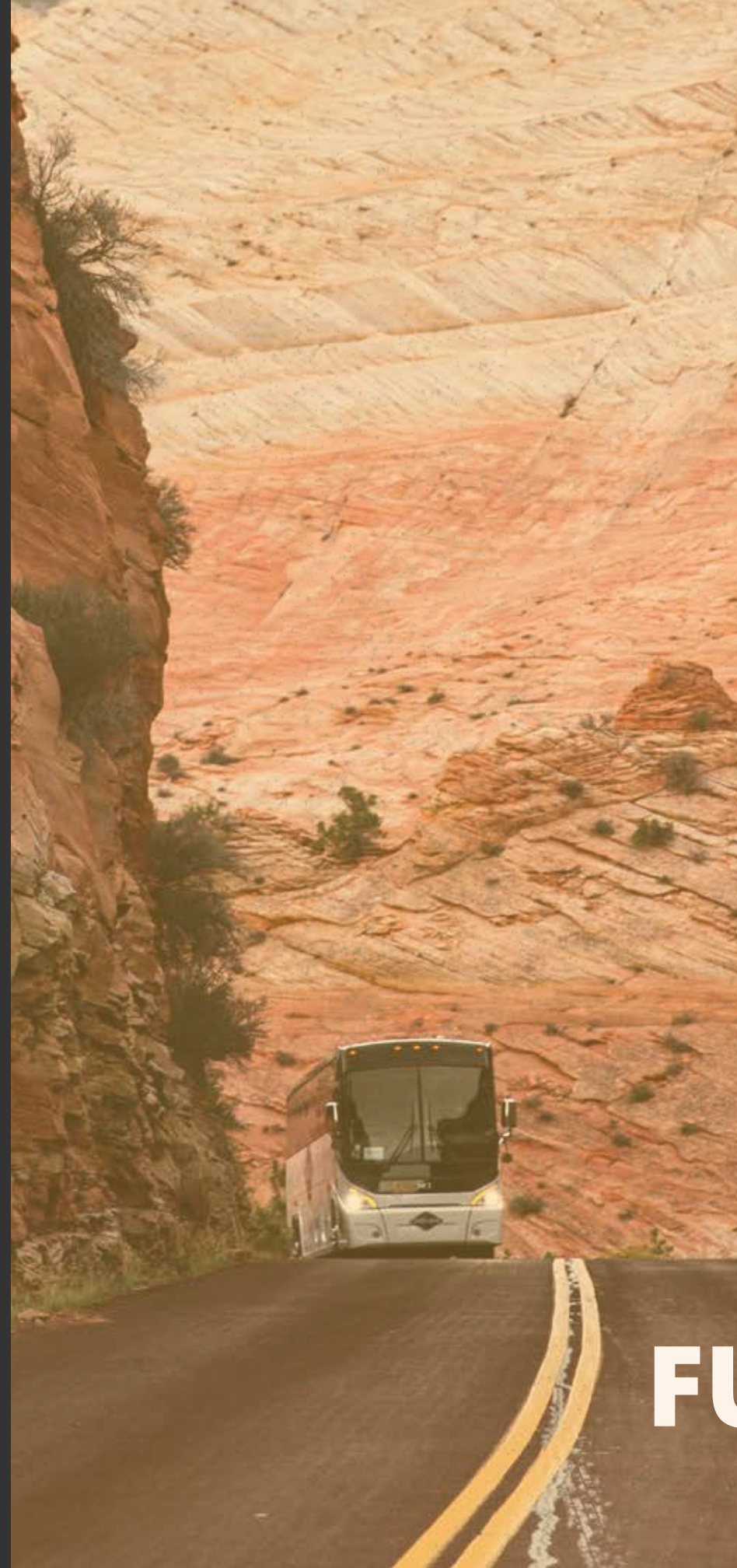


Facebook posts per day



POINTS OF INTEREST

- **Total online revenue grew by 3% in 2021**, while the number of gifts increased by 5%. These relatively modest figures came after extraordinary revenue growth in the first year of the pandemic.
- **Monthly giving increased by 24%, while one-time revenue declined by 1%**. Monthly giving accounted for 22% of all online revenue in 2021.
- **The average one-time gift was \$125**, up from \$111 the previous year. The average monthly gift was \$25, up from \$24.
- **Overall online donor retention was 36%**. For donors who made their first gift in 2020, retention was 23%. For previous repeat donors, retention was 60%.



FUNDRAISING



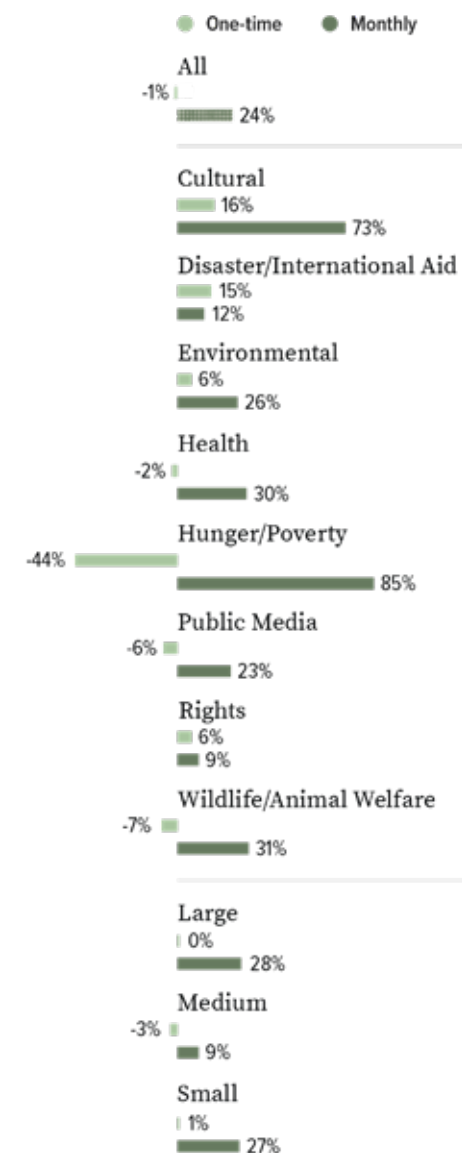
Last year's Benchmarks findings were heavily dominated by the effects of the pandemic. As the global crisis unfolded, people responded with extraordinary generosity, and online revenue increased at a truly astounding rate.

Over the course of 2021, that overwhelmingly powerful effect softened somewhat. Mask mandates were scaled back or eliminated, most people got vaccinated, museums and other cultural institutions began to reopen their doors, some travel resumed — a new understanding of “kinda normal, I guess?” developed. And that is reflected in the online fundraising numbers.

Online revenue increased by 3% over the previous year. This may not seem like a number to write home about, but it's worth keeping two things in mind. First, this followed the stunning increases recorded in 2020 — it's not unusual to see a slowing in momentum after a large spike in giving. Second, there was significant variation between different nonprofit sectors. For Cultural nonprofits, revenue increased by 27%, while Hunger/Poverty nonprofits saw revenue decline by 32%.

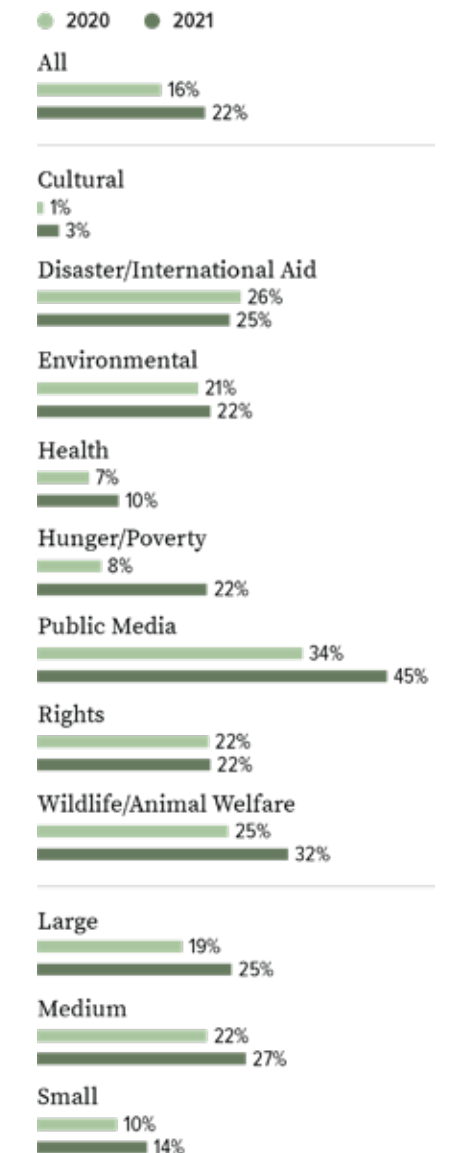
Revenue from monthly giving increased by 24% in 2021, while one-time revenue declined by 1%. Of course, there were individual nonprofits that were able to grow one-time giving — for Cultural nonprofits, one-time giving increased by an average of 16%. And the Disaster/International Aid sector actually saw more growth in one-time revenue (15%) than monthly revenue (12%).

Change in online revenue by type 2020–21



Still, the overall trend is clear: monthly giving growth significantly outpaced one-time giving.

Monthly giving as a percentage of online revenue



As a result, **monthly giving increased from 16% of overall online revenue in 2020 to 22% in 2021.**



The overall fundraising numbers have been volatile over the past couple of years, and it can be difficult to disentangle the impact of global events including the pandemic, presidential election, rising movements for racial and social justice, and more. Taking a closer look at the per-gift and per-donor levels might help.

Before we get to that, a word about how we calculate “per-donor” monthly giving. The thing about monthly giving is, it happens every month. When calculating the revenue impact of a monthly donor, it matters a lot

whether they started their gift in January and made 12 regular gifts, or made their first donation in December and only counted one donation in the calendar year. Or maybe they made a monthly pledge in April, and canceled for whatever reason four months later.

And, of course, online giving is not evenly distributed throughout the year. **A full quarter of all 2021 online revenue was received in December.**

Percent of revenue raised in each month

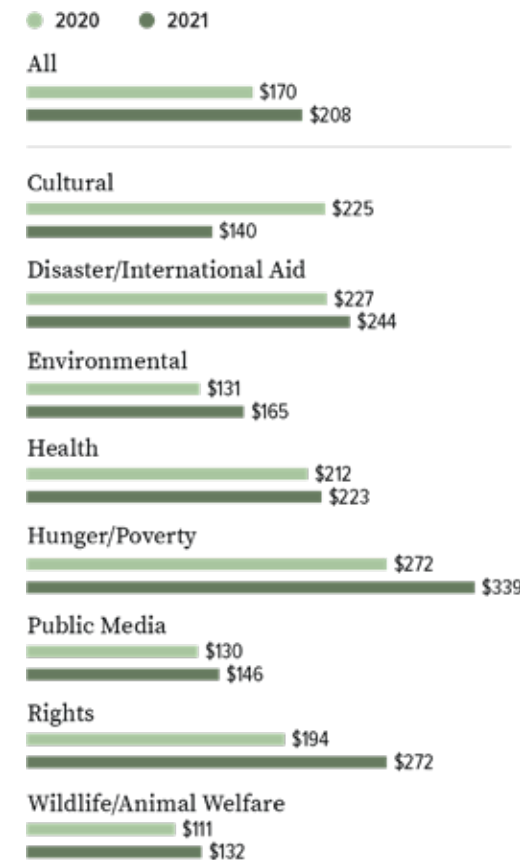
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
All	5%	5%	7%	6%	6%	5%	5%	5%	6%	6%	11%	25%
Cultural	4%	6%	6%	5%	7%	11%	9%	5%	6%	6%	10%	23%
Disaster/International Aid	4%	5%	6%	6%	6%	5%	5%	8%	5%	5%	8%	23%
Environmental	5%	5%	6%	7%	5%	5%	5%	6%	6%	6%	11%	31%
Health	5%	4%	5%	6%	7%	5%	4%	5%	6%	6%	13%	30%
Hunger/Poverty	8%	6%	8%	6%	5%	5%	4%	5%	5%	6%	15%	23%
Public Media	7%	7%	10%	8%	6%	8%	5%	4%	5%	6%	9%	17%
Rights	5%	4%	6%	5%	7%	6%	6%	6%	6%	6%	10%	24%
Wildlife/Animal Welfare	5%	6%	6%	6%	6%	6%	6%	7%	7%	7%	12%	18%

Different nonprofits will adopt different ways of measuring the annualized or monthly impact of monthly donors. To apply some consistency, we have chosen to include only the first monthly gift within the year for the following data — that way, we can compare giving across all monthly donors, whether they completed one gift or twelve over the course of the year. This will tend to underes-

timate the revenue and number of gifts per monthly donor.

Okay, with allllllll that out of the way: the average revenue per donor per year in 2021 was \$208, a notable increase from \$170 the previous year. Donors gave at particularly high levels to Hunger/Poverty nonprofits — an average of \$339 per donor per year.

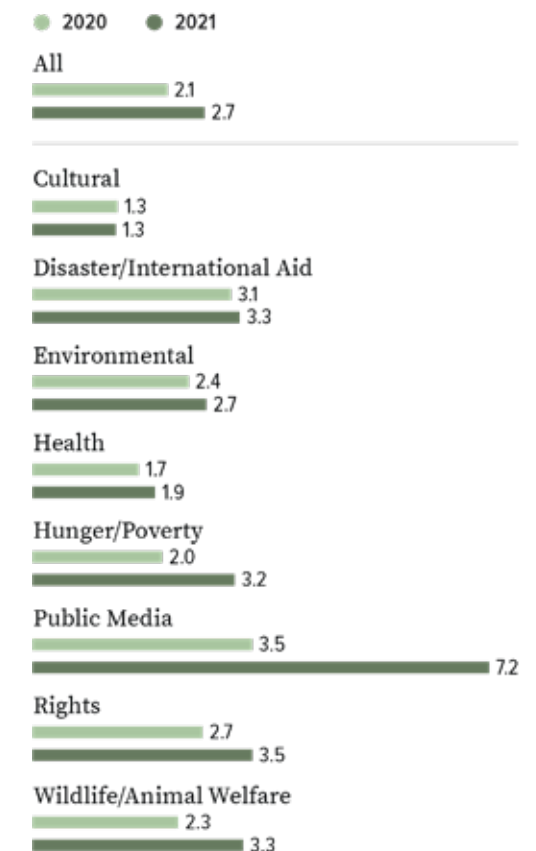
Revenue per donor per year: all donors



Includes all gifts and donors with one-time gifts and first monthly gifts within the year

Part of this increased revenue per donor was driven by higher average gifts, which we'll get to in about four sentences. But it's also due to donors being more likely to make multiple gifts. The average number of gifts per donor

Gifts per donor per year



Includes all gifts and donors with one-time gifts and first monthly gifts within the year

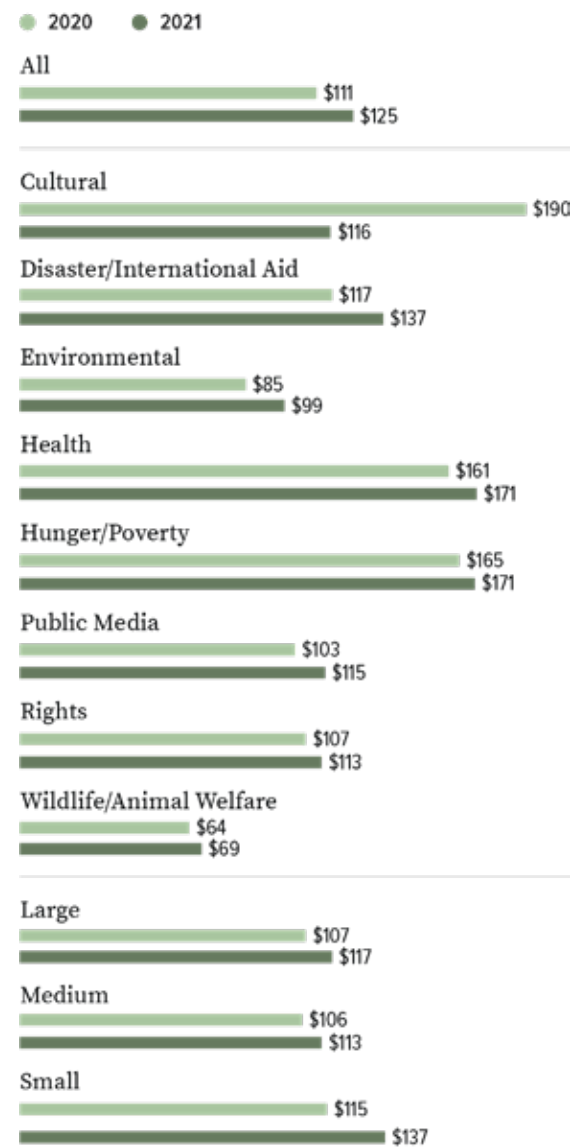
in 2021 was 2.7, up from 2.1. And remember, this counts only the first monthly gift for recurring donations.



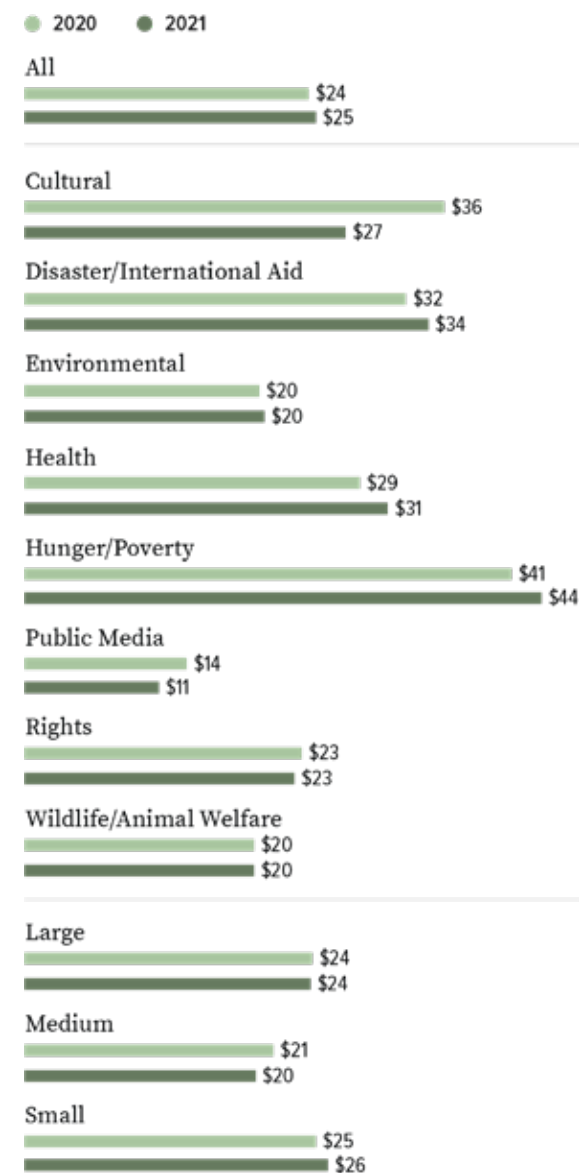
Average gift amounts did increase in 2021. For one-time donations, average gift

increased from \$111 to \$125; the average monthly gift increased from \$24 to \$25.

Average one-time gift



Average monthly gift



The upshot is that the average donor gave more times in 2021 than in 2020, and those gifts were on average worth more. However, this does not mean that there were more donors total. Even if each donor gives more generously, creating ongoing growth requires nonprofits to pay attention to retention as well.

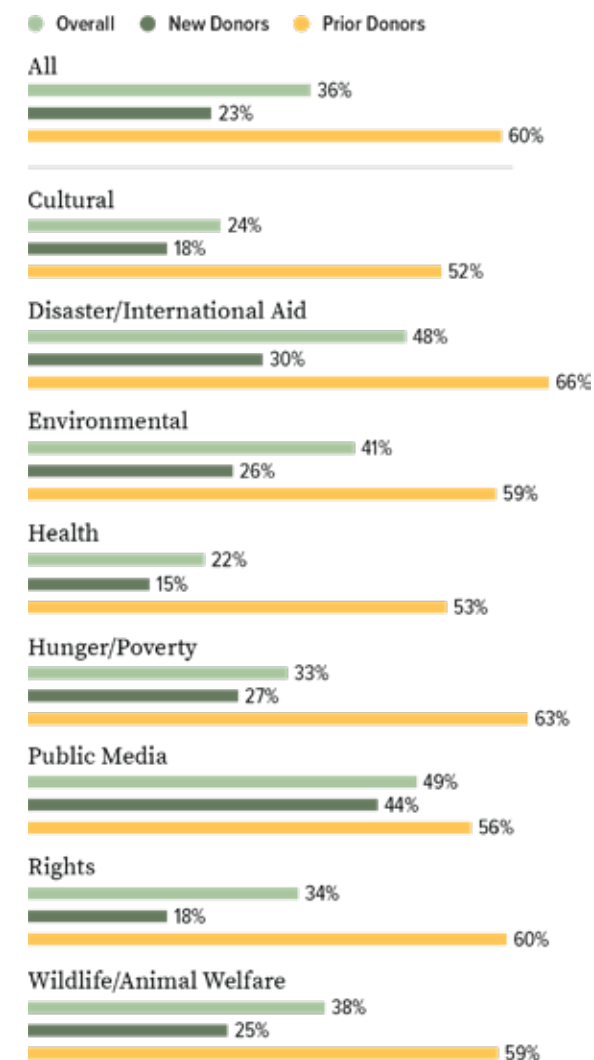
Overall, 36% of 2020 online donors gave again online in 2021. To be clear, this is strictly online-to-online retention — we are not able to measure the percentage of donors who may have been retained through channels like direct mail or telemarketing.

Retention was much higher for donors with a history of repeated donations than for new donors. Donors who made their first online gift in 2020 were retained at a rate of 23%. For prior donors — defined as those who had given at least once before 2020, and again in 2020 — the retention rate was 60%.

While the specific retention levels varied a bit from sector to sector, the basic structure was consistent. Getting a second gift from a donor is challenging — but once the habit of giving is established, ongoing retention levels are much higher.

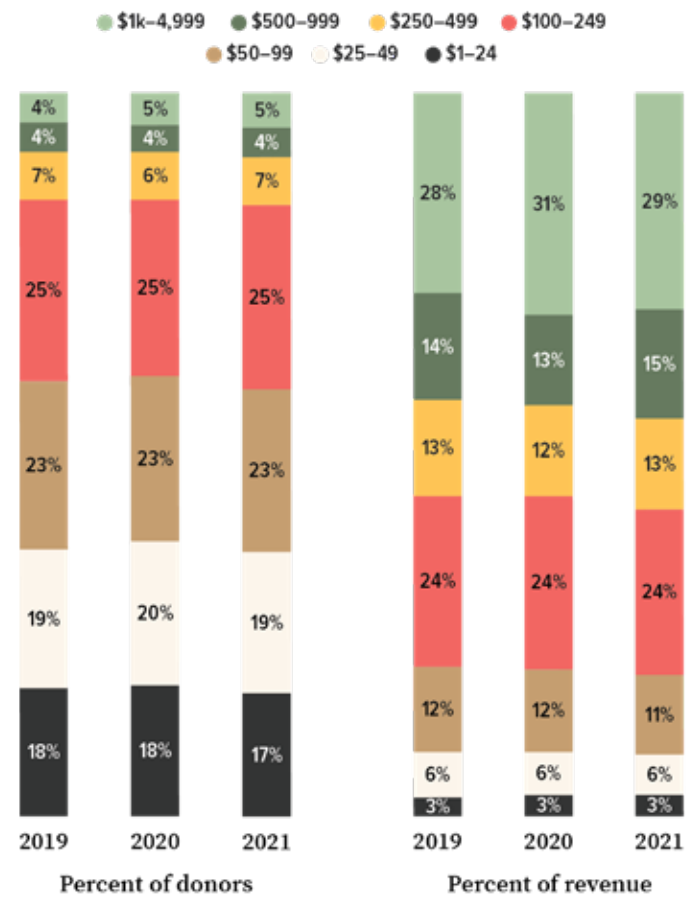
As the more dire human and social impacts of the pandemic continue to (hopefully) stabilize, reliable sources of revenue will gain increased importance. In this context, the move toward more monthly giving, higher level of per-donor giving, and a commitment to retention will be key elements for non-profit programs.

Online donor retention

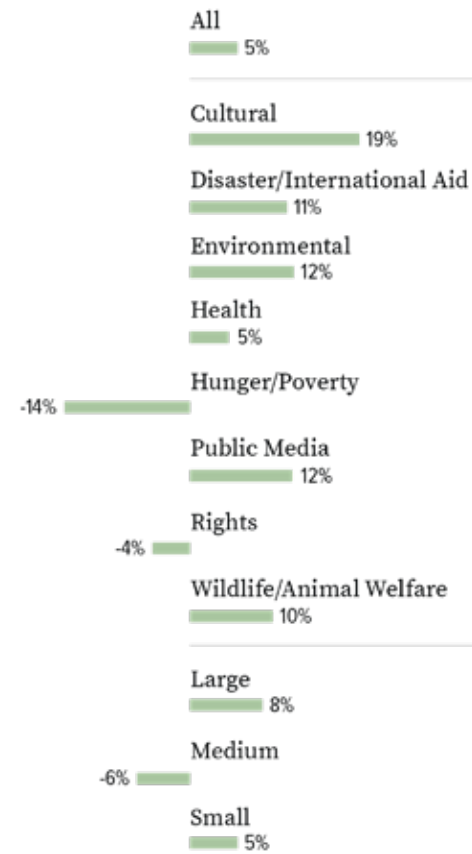




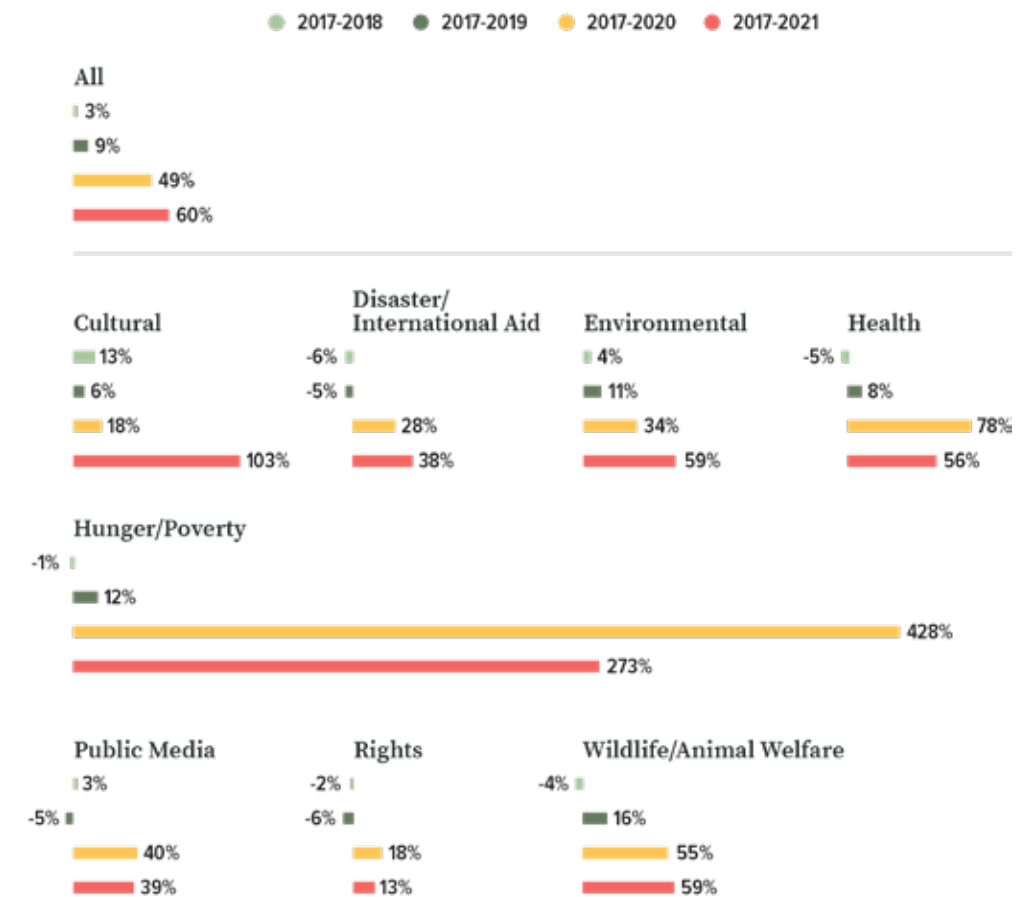
Percent of donors and revenue in each gift cohort: one-time gifts



Change in number of online gifts 2020-2021



Online revenue change since 2017





MEMBERSHIP & TICKET SALES

VIP



★ ADMIT ONE ★
2020-2021

MEMBERSHIP
& TICKET SALES

TICKET EMAIL RATES

OPEN	22%
CLICK-THROUGH	1.3%
RESPONSE	0.08%

GENERAL ADMISSION



POINTS OF INTEREST

- Revenue from membership programs with defined, tangible benefits **increased by 6% in 2021.**
- Membership accounted for 53% of online revenue for Cultural nonprofits, and 100% of revenue for Public Media.**

- Ticket sales increased from 5.5% of total online revenue in 2020, to 11.8% of total online revenue in 2021.** (This includes only those nonprofits that report ticket sales.)
- Revenue from online ticket sales increased by 13% in 2021,** rebounding from a 62% decline the previous year.

- Membership messaging had higher email metrics than fundraising messaging.** The average response rate for a membership email was 0.21%, compared to a 0.06% response rate for fundraising email.

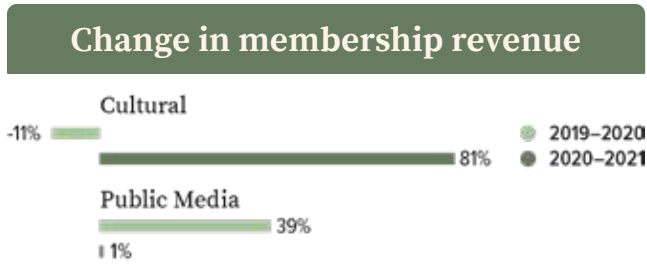


Pretty much everything you need for a quick overnight trip — tote bag, extra shirt, umbrella, water bottle, a three-disc set of Rick Steves' most exciting adventures — can be had simply by becoming a member of your local public media stations, cultural institutions, or other membership-driven nonprofits.

Membership, for our purposes, is the type of donation that comes with tangible benefits — year-long admittance to a museum for your whole family, a branded tote bag, a t-shirt that will hopefully still fit you after you wash it but otherwise will end up being pajamas for your children, just as a hypothetical example. **While many nonprofits use “members” to refer to all donors or supporters, we are excluding those types of programs for our analysis here.**

The membership-driven nonprofits among our participants mostly fall into two sectors: Public Media and Cultural. Public Media nonprofits reported all online revenue as membership giving. For Cultural nonprofits, membership as a percentage of total online revenue changed very little from year to year — 53% in 2020, 52% in 2021.

This consistency indicates that membership giving closely tracked overall giving. Cultural nonprofits saw membership revenue decline in 2020, as the pandemic forced many public spaces to close and attendance to drop. In 2021, membership revenue rebounded powerfully, with an 81% year-over-year increase. Public Media membership took a very different path — a 39% increase in 2020, followed by a 1% increase in 2021.



The differences between these two sectors is another demonstration of the profound impact of the pandemic, especially for nonprofits that provide in-person experiences. This impact is even more obvious when we look at online ticket revenue. (For our purposes here, we are looking at tickets to attend an institution or regular event, like a museum visit. We do not include tickets to special events like an annual gala.)

In last year's Benchmarks study, we took note of a sharp decline in online ticket sales

in 2020. With so many venues forced to close or limit attendance, revenue from ticket sales plummeted — but there were some hopeful signs of a potential turnaround. We said:

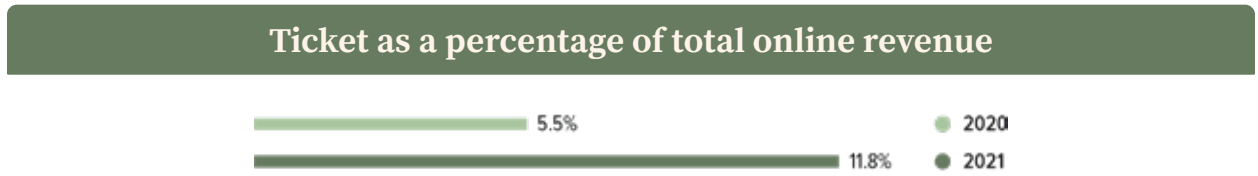
As vaccine distribution allows attendance to more safely rise, we expect online ticket sales to rebound. It remains to be seen how long it will take for them to return to pre-pandemic levels.

Now, a year later, let's see how that cautious optimism held up.



After declining by 62% in 2020, revenue from online ticket sales grew by 13% in 2021. This does seem to indicate a slow recovery as more people grew comfortable with a safe

return to public spaces, but nonprofits were still reporting online ticket revenue below pre-pandemic levels.





As we've explored the data on membership and ticket sales, we've been using a lot of passive voice — treating these metrics and year-over-year changes as something that happened to nonprofits. And to an extent, that makes sense. External conditions have a major influence on supporter behavior, and it's impossible to separate something like ticket sales from the effects of the pandemic.

But that's only part of the story. Successful nonprofit programs are active endeavors, constantly seeking out audiences, engaging

with supporters, and experimenting with different offers. Email promotion is a critical part of that effort, and there are striking differences between membership, ticket, and standard fundraising messaging.

For nonprofits that send both membership offers and non-member fundraising email, membership messaging performed better across every single metric we track.

Membership and fundraising message rates (among groups who send membership messages)

	Open Rate		Click-through Rate		Page Completion Rate		Response Rate		Unsubscribe Rate	
Fundraising	23%	(+24%)	0.7%	(-25%)	9%	(-1%)	0.06%	(-20%)	0.18%	(+27%)
Membership	28%	(+5%)	1.3%	(+6%)	15%	(+100%)	0.21%	(+84%)	0.14%	(+5%)

Recipients of membership email were more than twice as likely to click than those who received fundraising messages (1.3% compared to 0.7%). Those who landed on a membership page completed their contribution 15% of the time, compared to 9% of those who landed on a fundraising page. The response rate for membership email was 0.21%, while the response rate for fundraising messaging was 0.06%. Even the unsubscribe numbers look better for membership!

Not only was membership email more successful than fundraising messaging, the trend over time was far more positive. While the average response rate for fundraising messaging declined by 20% from 2020, the average membership response rate went up by 84%.

Membership and ticket message rates

	Open Rate		Click-through Rate		Page Completion Rate		Response Rate		Unsubscribe Rate	
Membership	28%	(+5.1%)	1.5%	(+6.1%)	14%	(+99%)	0.17%	(+89%)	0.14%	(+12%)
Ticket	22%	(+7.5%)	1.3%	(-22%)	5.2%	(+1.6%)	0.08%	(+100%)	0.15%	(-6%)

Before you go ahead and scrap all fundraising messaging in favor of membership email, there are two important things to keep in mind. First, membership giving often carries a cost to the nonprofit — premium fulfillment, member services, and more. Second, the audiences for these messages may not be the same. Some nonprofits target member offers at audiences that are more likely to be responsive, which can help lift performance.

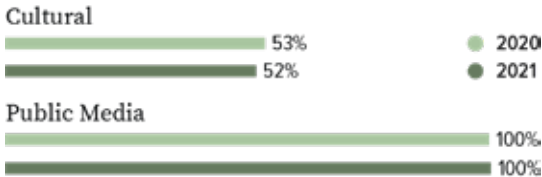
cycles, and of course major events like the pandemic. But every nonprofit makes plans, plots a course, and adapts as best they can. They decide to prioritize one offer over another, pursue a particular audience, invest in a new channel, or take a fresh creative approach. Even if we're all traveling on the same path, what you choose to pack matters.

The results we report are greatly affected by circumstances and context — tech companies changing privacy protections, electoral

Change in membership revenue in all sectors



Membership as a percentage of total online revenue



Membership as a percentage of total online revenue in all sectors





SEO
WEBSITE
ENGAGEMENT

WEBSITE ENGAGEMENT

AVERAGE GIFT BY DEVICE

MOBILE	DESKTOP
\$46	\$75

20212022

WEBSITE PERFORMANCE

POINTS OF INTEREST

The majority of nonprofit website traffic came from users on mobile devices — 54%, with 46% of traffic from users on desktop devices.

Users on desktop devices made up the majority of donation transactions (65%) and revenue (76%).

The average gift made on a desktop device was \$75; for mobile users, the average gift was \$46.

Organic traffic (website traffic generated by unpaid search results) comprised 41% of all nonprofit website visits in 2021.

Overall, 0.11% of organic website visitors made a donation, generating an average of \$0.15 per visitor.



No matter how straight and flat the road seems to be, no matter how unchanging the landscape appears... if you travel long enough, you're bound to see something weird.

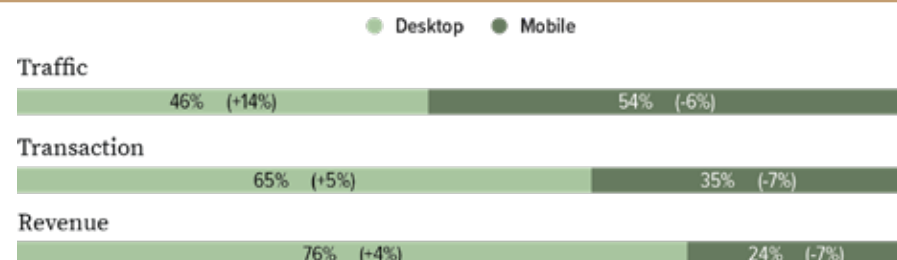
For years now, we've been reporting a consistent trend: over time, nonprofit web traffic has increasingly shifted away from desktop devices and toward mobile. Year after year, rolling down the road, as users became more likely to load webpages on a phone than on a computer with a full keyboard.

Then this year: something weird. Maybe not Area 51 weird — more like “World’s Largest Ball of Twine” weird. **In 2021, the desktop share of nonprofit website traffic increased by 14%, while the mobile share declined by 6%.** The desktop share of donation transactions and revenue increased as well, by 5% and 4%.

Of course, there are surprises in every edition of Benchmarks. After all, if we knew exactly what to expect, we wouldn't need to bother collecting and analyzing all this data (we might do it anyway just for fun, but we wouldn't *need* to). Still, it's unusual to see such a sharp U-turn from long-established trend lines.

Let's take a look at the 2021 data, and try to make sense of things:

Website share by device



While the year-over-year change numbers are surprising, the overall shape of things was quite familiar. More than half of nonprofit website traffic in 2021 (54%) came from users on mobile devices (including phones and tablets). Desktop traffic accounted for 46% of visits, which represented a 14% increase in traffic share from the previous year.

We considered a few possible reasons for that anomalous growth:

1 We messed up the math. As much as we hate making mistakes, this would have been nice because we could have easily corrected things. But no, we checked and re-checked all the data, and the finding holds true: desktop traffic share increased.

2 It was the pandemic. The last couple of years have seen highly variable and volatile results across all sorts of metrics, and it's possible that website traffic was affected as well. One potential factor could be that website visitors were working from home throughout all of 2021, and that this led to a higher percentage of desktop usage. This seems plausible, and if true we would expect to see a decline in desktop traffic share next year as (hopefully) more and more people return to being out and about.

3 It's Apple's fault. Or, more broadly, changes to privacy protections by tech platforms that make it harder to track user data, and which may have led to some mobile traffic being misreported as desktop traffic. (A related concern may have affected email open rate data — see page 16 for more.)

While we need to leave this question unanswered for now, there is plenty that we do know — and here we return to the solid ground of long-term data trends. **Even as desktop users represented less than half of all website visits, they accounted for 65% of all donation transactions and 76% of all revenue.** This is another way of saying that donation page conversion rates were higher for desktop users than for mobile users, and that desktop users had a higher average gift.

The proportions have shifted a bit over the past few years, but the basic story has held true: a visit from a desktop user was more valuable (in terms of direct revenue) than a visit from a user on a mobile device.

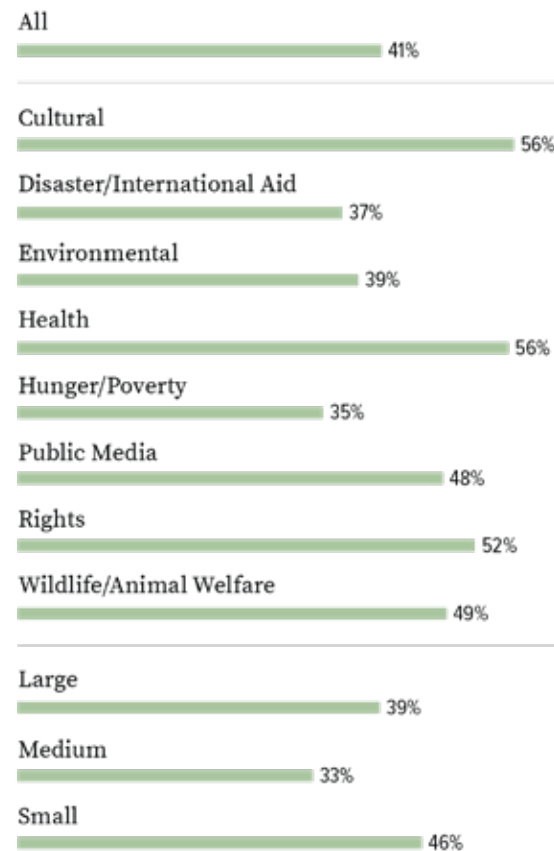
If we ask why, things once again become a bit speculative (Filling out forms is easier on desktops! Older and wealthier users tend to use desktops at higher rates! It's Apple's fault somehow!). In any case, a key task for a nonprofit looking to raise more online revenue is



to find ways to close the gap and increase conversion and average gift rates for mobile users.

Rolling on down to the road, we found that **organic traffic represented 41% of all nonprofit website visits in 2021**. “Organic traffic” in this case means visits from users who searched for a term and clicked on an unpaid result (as opposed to a search ad).

Organic traffic volume as percent of overall traffic



These users had a variety of motivations for visiting a nonprofit website. They may have seen a news story about an issue that piqued their interest. They may have been served an ad, which prompted them to search a nonprofit’s name rather than click through directly. They might be looking for a museum’s opening hours, thinking about applying for a job, or researching for a school paper.

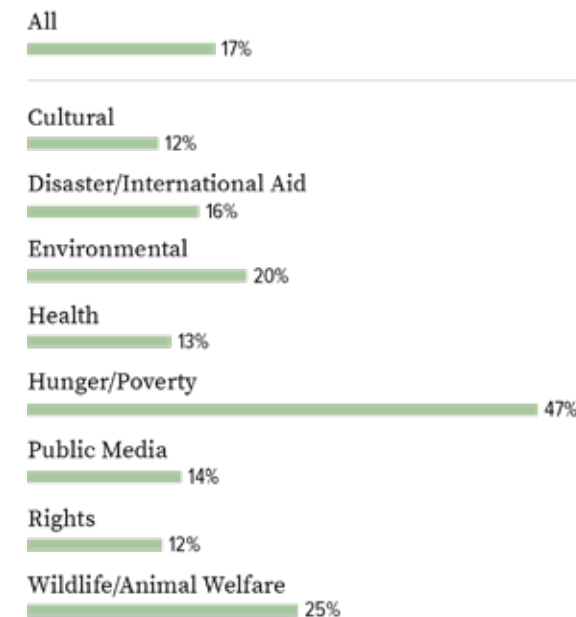
Or, hey, they may be interested in making a donation. **Overall, 0.11% of organic website visitors made a donation in 2021, and nonprofits received \$0.15 per visitor from organic sources.**

These are small numbers, which sometimes has the effect of making them seem unimportant. For most nonprofits, securing a 15-cent donation from a website visitor who arrived via unpaid search is unlikely to be a cause for major celebration. Of course, it’s not a 15-cent donation. It’s no donation for most visitors and *then* a \$100 gift.

But remember, these unexpected visits account for 41% of all nonprofit website traffic. For a nonprofit with a substantial flow of traffic, moving from \$0.15 per visitor to, say, \$0.17 per visitor can mean a substantial increase in overall revenue.

One place to start: making the most of the main website donation page. The average conversion rate for these pages was 17% in 2021 — though some nonprofits, notably the Hunger/Poverty sector, far exceeded this rate.

Main donation page conversion rate



DONATIONS TO YOUR MAIN DONATION PAGE: Include donations to any page that you consider a main page.

UNIQUE PAGEVIEWS OF YOUR MAIN DONATION PAGE: Unique visitors to any page considered a main donation page

Percent of organic website visitors who make a donation



It’s tempting sometimes to focus on the weird. Unexpected outcomes, like the increase in desktop users as a share of all traffic, are intriguing and demand our attention. But in order to build solid, sustainable programs, it’s important to pay attention to the seemingly mundane. The constant flow of organic visitors, and the possibility of increasing their conversion rates and average value, can have a massive impact over time. A successful program can follow a seemingly long, straight road, and find a way to better outcomes over time.

Average gift by device



Website main donation page conversion rate

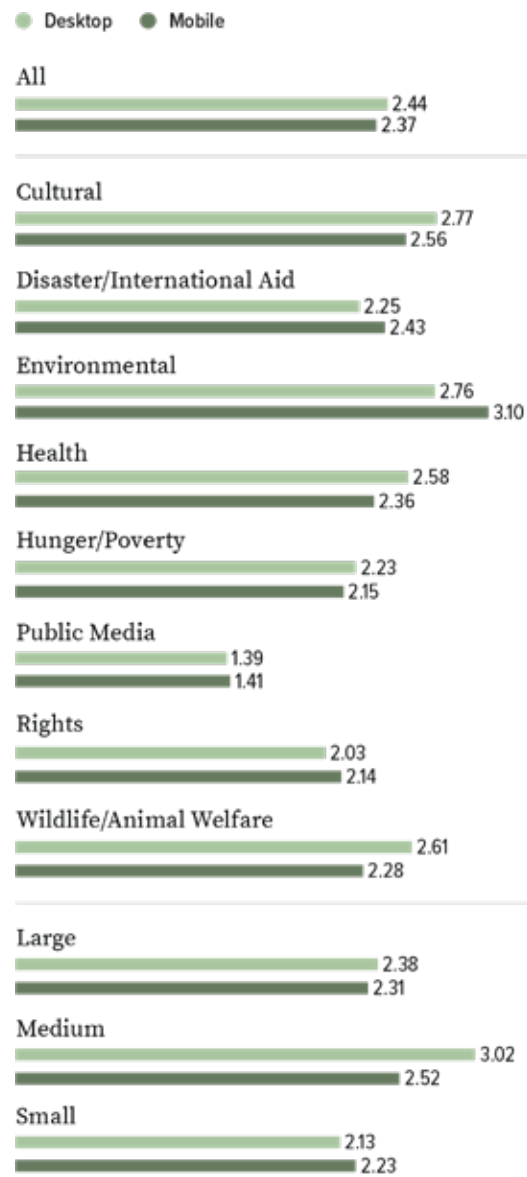


Website revenue per visitor from organic sources

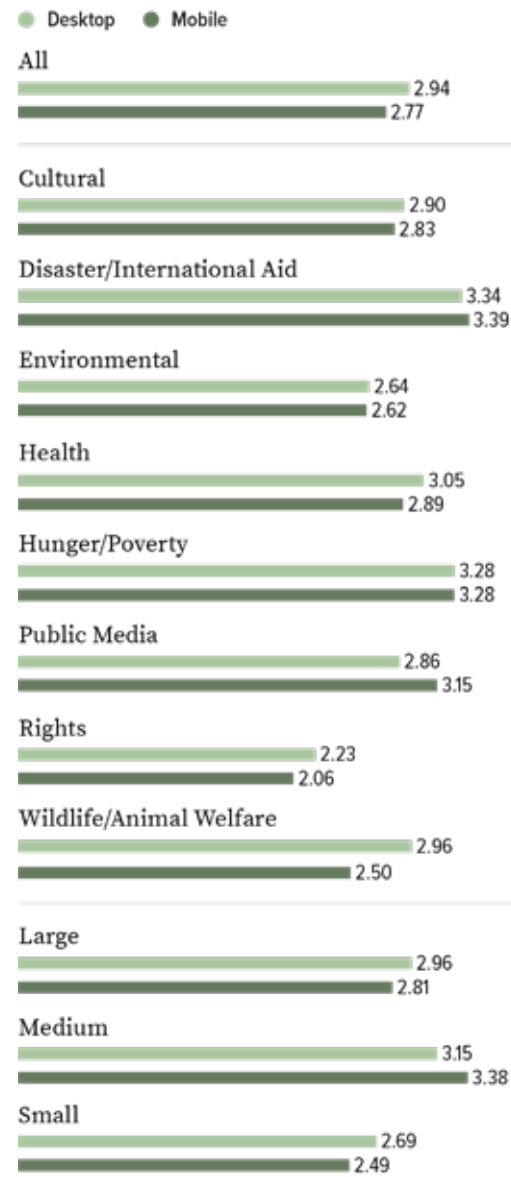




Donation page load time (seconds)



Homepage load time (seconds)



Advocacy Message

An email or SMS message that asks recipients to sign an online petition, send an email 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.

Click-Through Rate

Calculated as the number of people who clicked on any trackable link in an email or text message divided by the number of delivered emails or text messages. 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

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.

Device Type, Desktop

We use the definitions provided by Google Analytics to separate traffic data by device

type. The “desktop” category includes any desktop or laptop computer with a screen larger than 7” in diagonal.

Device Type, Mobile

We use the definitions provided by Google Analytics to separate traffic data by device type. Mobile devices are hand-held devices that include a phone or a tablet.

Facebook Engagement Score

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

People who “like” a nonprofit’s Facebook Fan page.

Followers, Instagram

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

Followers, Twitter

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

Full File

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 Message

An email or SMS message 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

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

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

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

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.

Newsletter, Email

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.

Online Retention, New Donor

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 before 2019.

Online Retention, Prior Donor

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.

Open Rate

Calculated as the number of HTML email messages opened divided by the number of delivered emails. Email messages that bounce are not included.

Organic Traffic

Website visits generated by unpaid search results.

Page Completion Rate

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

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.

Platform

A website or app, like what you use to post or tweet. And where you stand, if you are posting or tweeting while waiting for a train. And what your candidate or organization believes, if you are trying to make your priorities clear while posting or tweeting while waiting for a train. And what you wear, if you are trying to look taller and also fabulous while making your priorities clear while posting or tweeting while waiting for a train. For example:

“As I was traveling to St. Ives, I met six policy wonks in size seven platform shoes standing on the #17 platform posting eight precise platform planks on six assorted social media platforms. Shoes, trains, tweets, planks... how many platforms were there in all?”

Response Rate

Calculated as the number of people who took the main action requested by an email or text message divided by the number of delivered messages.

Twitter Engagement Rate

The total number of users who engage with a post (by liking, clicking, sharing, etc.), divided by post reach.

Unique Clicks

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. It is also counted as 1 strange person.

Unsubscribe Rate

Calculated as the number of individuals who unsubscribed in response to an email message divided by the number of delivered emails.

View-Through Revenue

Revenue from donors who made a donation (typically within 30 days) of seeing, but not clicking on, an ad. For example, a supporter who sees a banner ad and later goes directly to the nonprofit’s website to make a gift.

Website Donation Page Conversion Rate

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.

Website Page Load Time

The number of seconds before a page appears to be visually complete, as measured by the WebPageTest tool at webpagetest.org.

Website Revenue Per Visitor

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 Visitors Per Month

The number of monthly unique visitors to a participant’s main website.



Participants →



187 PARTICIPANTS



Cultural

- American Museum of Natural History
- Arts Alliance Illinois
- California Academy of Sciences
- Central Park Conservancy
- Lyric Stage Company of Boston
- Monterey Bay Aquarium
- National Trust for Historic Preservation
- Shedd Aquarium

Disaster/International Aid

- Action Against Hunger
- ActionAid UK
- American Red Cross
- Anera

- CARE USA
- Children International
- CMMB - Healthier Lives Worldwide
- FINCA International
- HIAS
- International Development Research Centre (IDRC)
- International Medical Corps
- Mercy Corps
- Oxfam America
- Pathfinder International
- Root Capital
- Save the Children
- USA for UNHCR
- Women for Women International US
- World Food Program USA

Environmental

- Alliance for the Great Lakes
- American Rivers
- Appalachian Voices
- Australian Conservation Foundation
- Australian Marine Conservation Society
- Columbia Springs
- Conservation Colorado
- Conservation Law Foundation
- David Suzuki Foundation
- Ecojustice

- Food & Water Watch
- Friends of the Earth
- Greenpeace Canada
- Greenpeace USA
- Izaak Walton League of America
- League of Conservation Voters
- Minnesota Center for Environmental Advocacy
- Mono Lake Committee
- 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
- North Carolina League of Conservation Voters
- NRDC Action Fund
- Oceana
- Overton Park Conservancy
- Rails-to-Trails Conservancy
- Rainforest Trust
- Rare
- Riverkeeper
- San Francisco Baykeeper
- Sierra Club
- The Wilderness Society
- The Wilderness Society Action Fund

- Union of Concerned Scientists
- Washington Trails Association
- Waterkeeper Alliance
- Wildlife Conservation Society
- World Wildlife Fund

Health

- Action on Smoking and Health
- Alzheimer's Association
- American Heart Association
- American Kidney Fund
- American Lung Association
- Atlanta Ronald McDonald House Charities
- BC Cancer Foundation
- Blood:Water
- Boston Children's Hospital Trust
- Canadian Cancer Society
- Children's Hospital Los Angeles
- Children's Mercy Hospital
- Colorectal Cancer Alliance
- Einstein Healthcare Network
- Langley Memorial Hospital Foundation
- March of Dimes
- Muscular Dystrophy Association
- National Kidney Foundation
- POGO - Pediatric Oncology Group of Ontario
- Ronald McDonald House Charities of Chicagoland & Northwest Indiana

- Samaritans
- San Francisco AIDS Foundation
- The Leukemia & Lymphoma Society
- United Way of Greater St. Louis
- Voices for Healthy Kids
- White Ribbon Alliance
- YMCA of Saskatoon

Hunger/Poverty

- Akron-Canton Regional Foodbank
- Alameda County Community Food Bank
- BGC Ottawa
- Center on Budget and Policy Priorities
- Child Poverty Action Group
- Community Food Bank of Central Alabama
- Community Food Bank of New Jersey
- East Texas Food Bank
- Feeding America
- Feeding America Eastern Wisconsin
- Food Bank of Central & Eastern North Carolina
- Garden City Harvest
- God's Pantry Food Bank, Inc.
- Good Shepherd Food Bank
- Greater Chicago Food Depository
- Greater Cleveland Food Bank
- Greater Pittsburgh Community Food Bank

- Houston Food Bank
- Maryland Food Bank
- Share Our Strength
- Three Square Food Bank
- Union Gospel Mission (Vancouver)

Wildlife/Animal Welfare

- Animal Humane Society
- BC SPCA
- Best Friends Animal Society
- Defenders of Wildlife
- Humane Society International
- International Fund for Animal Welfare
- League Against Cruel Sports
- National Wildlife Federation
- Operation Kindness
- People for the Ethical Treatment of Animals
- RedRover
- Rise for Animals
- Ruff Start Rescue
- The Humane League
- The Humane Society of the United States
- The International Wildlife Rehabilitation Council
- World Animal Protection

Public Media

- KAWC
- KQED
- Louisville Public Media
- NET - Nebraska's PBS & NPR Stations
- WETA
- WHYY
- WNET

Rights

- American Civil Liberties Union
- Amnesty International USA
- Children's Defense Fund
- Courage California
- Equality Federation
- Florida Immigrant Coalition
- GLBTQ Legal Advocates & Defenders (GLAD)
- Global Fund for Women
- Kids in Need of Defense (KIND)
- NARAL Pro-Choice America
- National Women's Law Center
- Planned Parenthood Action Fund
- Planned Parenthood Federation of America
- Rainbow Railroad
- Right To Play
- Sojourners
- Women Deliver

Other

- AFL-CIO
- Afterschool for Children and Teens Now (ACT Now) Coalition
- American Friends Service Committee
- Avaaz Foundation
- Boys & Girls Clubs of America
- Communications Workers of America
- Dave Thomas Foundation for Adoption
- Fight for 15
- Gingerbread
- Guide Dogs for the Blind, Inc.
- MoveOn
- National Education Association
- Non-Profit Housing Association of Northern California
- People For the American Way
- Project On Government Oversight
- Rebuilding Together
- Refuge
- Sandy Hook Promise
- SEIU
- SMART Reading
- Special Olympics
- The Council of Canadians
- The Education Trust
- UJA-Federation of New York
- Win Without War
- Youth Challenge

Greetings from EMAIL

we analyzed

5,875,566,206 emails sent | 992,734,201 subscribers

we found

7% email list growth | 12% email list churn

	email fundraising	email advocacy
open rate	23%	19%
click-through rate	0.7%	2.4%
response rate	0.08%	1.8%
change in response rate 2020-2021	-11%	+4%

emails sent per subscriber:

55 cultural	89 disaster/international aid	72 environmental	35 health
43 hunger/poverty	90 public media	54 rights	68 wildlife/animal welfare

159 mobile subscribers for every 1,000 email subscribers

5% mobile list growth

SOCIAL MEDIA

FACEBOOK FUNDRAISERS

117,933 Unique Facebook Fundraisers
 \$35 Average gift to Fundraisers
 -20% Change in amount raised on Facebook

FOR EVERY 1,000 EMAIL SUBSCRIBERS, NONPROFITS HAVE:

736 Facebook fans | 1% Facebook fan growth
 229 Twitter followers | 5% Twitter followers growth
 141 Instagram followers | 25% Instagram followers growth

Fundraising

we analyzed

22,889,857 online gifts | \$1,035,968,996 raised online

we found

↑ 5% increase in # of gifts 2020-2021 | ↑ 3% increase in online revenue 2020-2021

average gift

\$125 one-time | \$25 monthly

\$78 for every 1,000 fundraising messages delivered, nonprofits raised

0.11% website visitors who made a donation

\$150 website revenue per 1,000 visitors

online donor retention

36% overall | 23% new donors | 60% prior donors

DIGITAL ADVERTISING

COST PER DONATION

\$178 Display | \$46 Search | \$86 Social Media | \$358 Video

RETURN PER \$1 OF AD SPEND

\$0.59 Display | \$3.72 Search | \$0.57 Social Media | \$0.16 Video

SHARE OF 2021 DIGITAL ADVERTISING BUDGET BY:

GOAL

Branding, awareness, education 32%
 Lead generation 52%
 Direct fundraising 15%
 Other 1%

FUNDRAISING CHANNELS

Display 32%
 Search 24%
 Social Media 36%
 Video 6%
 Other 2%

We asked: what place on Earth would you most like to visit? ↓



How to Benchmarks Safely



Adjust your seat to the full reclined and most comfy position



Caffeinate yourself before caffeinating others



Let your Benchmarks crew know if we can make your flight more enjoyable

