



Blackbaud Luminate Online Benchmark Report 2021

A Guide to Evaluating Your Organization's Performance

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Welcome to Our 15th Annual Report

In our 2020 Blackbaud Luminate Online Benchmark Report, we saw the significant impact of the COVID-19 pandemic on online giving. As with prior emergencies, online giving increased. But unlike other events, 2020 forced nonprofits to pivot quickly to new digital strategies as other revenue streams were curtailed. We were curious: in 2021, with restrictions being lifted and in-person events restarting, would the digital growth and trends we saw in 2020 remain or return to previous levels?

Additionally, in September 2021, Apple significantly changed how it tracked email engagement on its devices, including iPhones, iPads, and MacBooks. This report will look at how that change impacted email marketing results for the nonprofit sector.

Despite the Apple changes and the move toward more balanced fundraising channels instead of majority digital in 2021, the trends in this edition of the Blackbaud Luminate Online Benchmark Report demonstrate that online giving continues to increase. This data offers insights into your organization's performance one year into pivoting many fundraising strategies to digital due to the pandemic and provides an opportunity to compare your online fundraising results to peers of similar verticals and size.

What's New This Year?

1. **Sustainer growth as a share of total revenue increased.**
2. Online giving is still growing, albeit at a more modest rate than in 2020.
3. Email metrics were affected by Apple's Mail Privacy Protection feature, indicating that organizations should rely on clicks and conversions as measures of success.
4. Food banks experienced significant growth in 2020. In 2021, food banks shifted their focus from one-time donors to sustainers and, as a result, experienced a 71% growth in sustainer revenue year-over-year.

Key Findings



Open rates increased when Apple launched its Mail Privacy Protection feature. Any open rate statistics measured after September 2021 are artificially inflated.



Online fundraising revenue increased by 5.17%, even on top of the surge in online giving in 2020.



Until 2020, the number of online transactions had steadily declined. While we anticipated that there would be growth in online transactions in 2020, it was interesting to see that trend continue through 2021. In 2021, online transaction counts increased slightly by 2.5% and by 4.23% when food banks were removed from the data.



Emergency giving and channel disruption drove up email metrics and donations in 2020. That trend did not continue in 2021. Overall, all email engagement metrics—except open rates, which can no longer be viewed as accurate—are down as they returned to pre-pandemic levels.



For the 10th report in a row, sustained giving revenue and donors making recurring gifts have increased for every sector included in the study.



Industry Overview

Industry Overview

Online Giving Trends

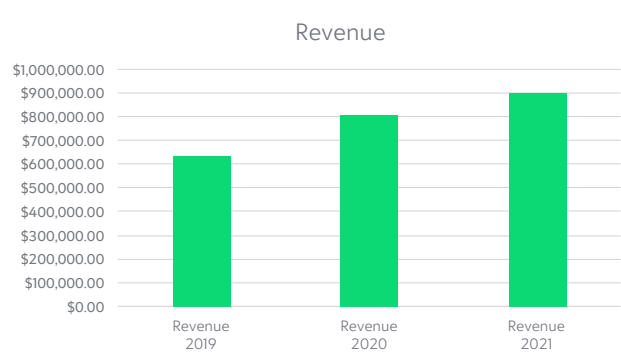
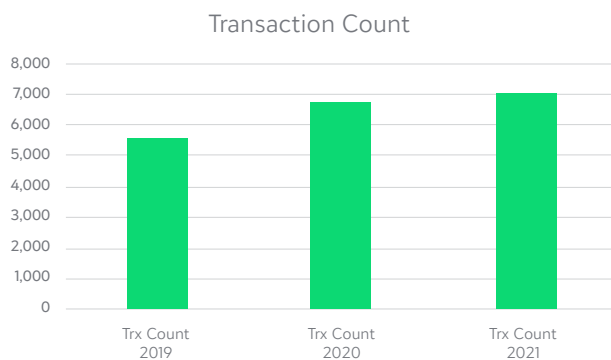
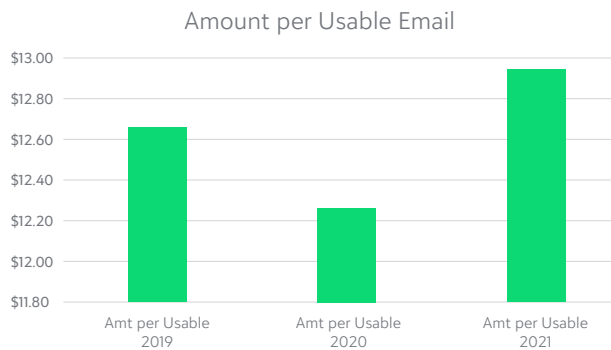
In 2020, COVID-19 forced many aspects of people's lives online, and as a result, the nonprofit space pivoted many of its fundraising strategies to digital-first and, in some cases, digital-only. With the availability of vaccines and social restrictions lifted, many in-person events restarted in 2021, but online giving remained an essential channel for nonprofit organizations. According to the [Blackbaud Institute's 2021 Charitable Giving Report](#), online giving increased by 42% between 2019 and 2021. In 2021, 12% of all fundraising came from online giving. The significance of online marketing is only growing regardless of vertical or organizational size.

- Online fundraising revenue grew in 2021 by 5.17%, or 7.04% with food banks removed.
- Online gifts increased in number by 2.5% across all sectors and 4.23% with food banks removed.
- Revenue from fundraising emails decreased by 14.52%—but don't be alarmed. Read the Email Engagement section for more context.
- The percentage of usable emails that donate is a median of 14.19%—an increase of 4.39%—so even though supporters donated to fundraising emails at a lower rate, they still contributed in other ways online.
- Organizations sent 5.97% fewer emails in 2021.
- The Environment and Wildlife vertical saw a significant increase (15.37%) in online revenue compared to the rest of the industry (5.17%). This vertical also had a 15.13% increase in online gifts compared to the industry increase of 2.50%.
- Food banks were down in both revenue (-39.03%) and transactions (-20.79%) but up 180.66% in sustainer revenue as a percentage of the total year-over-year.

Notably, the count of first-time online donors decreased by 15.05%, but their average online gift increased by 7.89% or a median of \$146.33. In 2020, many “emergency” gifts were made to organizations that didn't necessarily have the same sense of urgency in 2021. **However, organizations did see a 10% increase in repeat donations and a 21.10% increase in the number of sustainer donations, with a corresponding 21.05% increase in sustainer revenue.** This demonstrates that organizations—particularly food banks—have done an excellent job of maintaining the support of those emergency givers and converting them to sustainers.

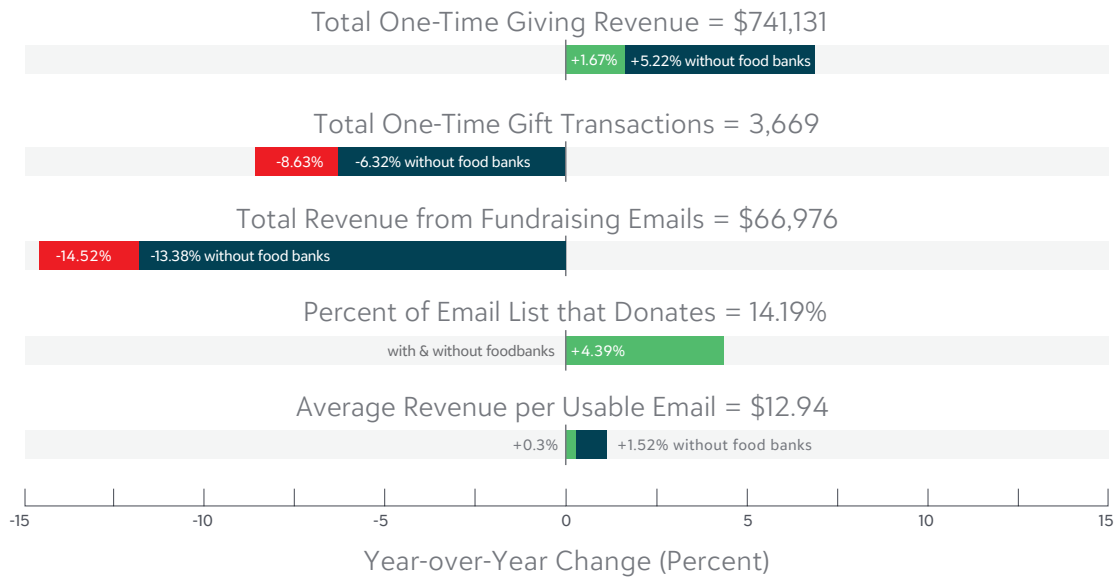
2021 Online Giving in Context

Let's look at online giving from 2019 to 2021. It is striking that we see online giving statistics remain strong. Much of the growth in 2021—especially in transaction count and total revenue—is driven by the increase in sustaining donors. An increase in sustaining donors usually is accompanied by a decrease in the average gift amount since sustaining donors' gifts are typically monthly and less than one-time gifts. The increased amount raised per usable email is also driven by the decrease in nonprofits' usable house files since many emergency subscribers in 2020 did not remain engaged in 2021.



* All values are expressed as medians.

Online Giving Trends by Year-over-Year Change



Online Fundraising Revenue Growth by Transaction Type (Total Online Transaction Revenue Year-over-Year Change)

First-Time Online Donations	-5.44%
Repeat Online Donations	+10%
One-time Online Donation	+1.67%
Sustainer Online Donations	+21.10%

Average Online Gift Amount (Online Transaction Revenue/Count of Online Transactions)

One-time Online Donation	\$188.75	+9.88%
Sustainer Online Donations	\$39.79	+1.39%
First-time Online Donations	\$146.33	+7.89%
Repeat Online Donations	\$120.56	-0.57%

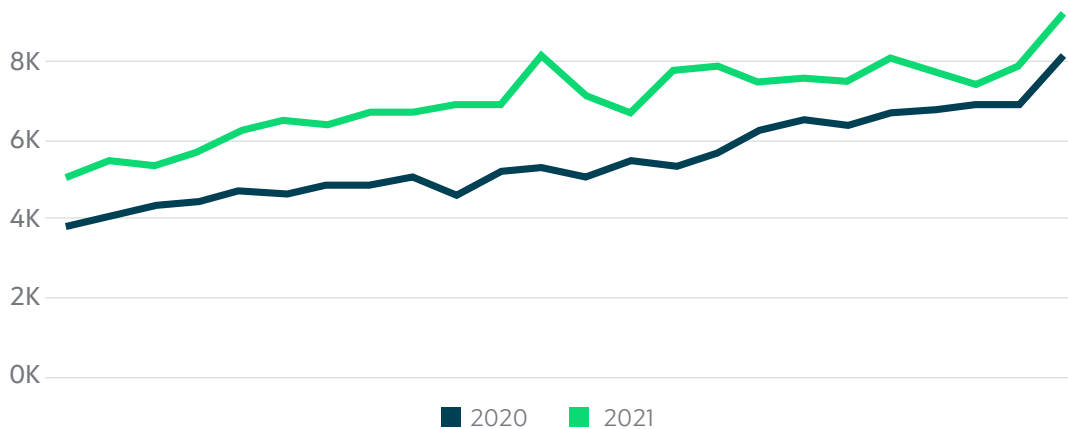
Sustaining Donor Trends

Sustaining donor counts continued to grow in 2021 across all sectors.

- Revenue from sustaining gifts increased at the median by 21.1%, rising to \$94,107.
- Sustaining gift counts increased at the median by over 21%.
- The median number of sustaining donors in 2020 was 331, up by more than 11% year-over-year.
- The median share of all online donors making a sustaining gift declined in 2021 from 2.6% to 2.4%, likely related to increased emergency giving of one-time gifts.

Strong and steady growth in sustained giving revenue each month characterized much of 2021. Median monthly revenue rose from nearly \$5,000 to approximately \$9,000 over those 12 months. This was on the heels of month-after-month growth in 2020. This data suggests that sustainer giving is a critical strategic component for donor file health and growth for a broad range of organizations.

Median Sustainer Revenue Month-by-Month 2020-2021



An ongoing trend for Blackbaud Luminate Online Benchmark Report participants is the very high and growing average gift for sustainers. In 2021, the median average donation for sustainers was \$39, up by two dollars from the 2020 median average sustainer gift for this data set. [Blackbaud donorCentrics Benchmarking](#) across organizations with strong sustainer programs reports a median average sustainer gift of \$22 in 2021. Organizations may be able to test ask strings to find a balance between donor value and donor volume.

For the 10th Blackbaud Luminate Online Benchmark Report in a row, sustained giving revenue and donors making recurring gifts have increased for every sector included in the study. However, though sustaining donor counts, value, and revenue increased in 2021, the median share of sustaining donors declined by a modest -1.45%. This is not surprising, as emergency giving sparked by disasters—such as the pandemic—is often a one-time donation, changing the donor composition during tumultuous periods.

On the other hand, sustaining revenue increased as a share of all online revenue, rising from 9% to 12%. This indicates the high value of these ongoing, stable donors compared to one-time emergency gifts.

Notable Trends by Sector

Among the most notable trends by sector for 2021 was the increase in the share of recurring gifts for the Food Bank sector, rising from 8% to 23%. Revenue from recurring giving increased from 2020 to 2021 by 71% for food banks. This shift in file composition will serve this sector well moving forward as these emergency-acquired recurring donors are likely to be loyal donors for years to come.

Six sectors had greater than 20% sustaining revenue as a share of all online revenue in 2021:



Animal Welfare: 24%



Environmental: 21%



Faith: 28%



Food Banks: 23%



International Relief: 25%



Public Broadcasting: 55%

Though most sectors saw a decline in the share of recurring donors among all online donors, three sectors saw an increase:



Environmental: 0.5% increase



Food Banks: 5.6% increase



**Health Services and Research:
0.7% increase**

The Blackbaud donorCentrics Index of Direct Marketing Fundraising reported overall donor and new donor declines through the first half of 2022 compared to the same period of 2021, indicating that fundraising trends impacted by the COVID-19 pandemic have subsided. Organizations that approached new donor acquisition during the pandemic with an eye toward building their sustainer file should be positioned well for stronger retention and long-term file growth.

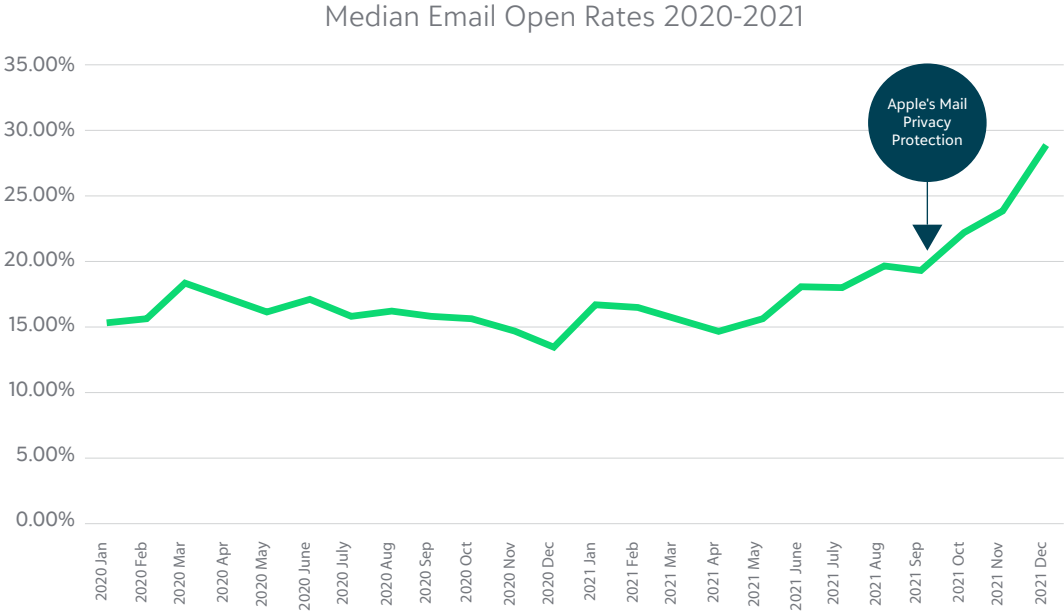
Email Engagement Trends

You might be concerned if you looked at this year’s email engagement benchmark numbers in a vacuum. Across the board, engagement metrics, audience size, and conversion rates have declined from 2020 to 2021. You might be even more perplexed to see that overall open rates increased from 2020 to 2021 in the face of declining clicks and conversions. More people opened emails but did less in response? What gives?

Don’t panic! What the trends show us makes sense when you view them in context.

To properly understand email engagement trends in 2021, we need to consider what was happening in the United States over the course of the year. After much of the country spent most of 2020 in some form of lockdown, remote work, virtual school, and social distancing, by early 2021, there was a loosening of restrictions due to widespread vaccine availability. Many people who had previously been homebound—and had been paying more attention to their email and opportunities to support their local communities—resumed travel, in-person school, office work, and socializing.

Also, in 2021, a significant change to email engagement measurement appeared on the scene. Apple’s Mail Privacy Protection (MPP) feature was launched on September 20, 2021, along with iOS 15. For Apple customers who use the built-in Mail app on their iPhones, iPads, or MacBooks, MPP preloads all the email content—including the tracking pixels email programs use to record opens. Even if you don’t open the email, Apple Mail now “says” that you did. Estimates are that half of all email is read via Apple Mail, meaning nonprofits across the board saw their open rates spike in the last quarter of 2021.



With Apple's Mail Privacy Protection skewing open rates artificially higher, we recommend viewing open rates as trends over time instead of using any individual email's open rate as a Key Performance Indicator of success or effectiveness.

Email inbox priority continued to be given to senders whose recipients consistently engaged with their emails, as demonstrated by opens and clicks. Segmenting sends to audiences most likely to engage with the message, performing opt-in acquisition, and being diligent about email list hygiene are all best practices that reward nonprofit senders.

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- ✓ *Organizations sent fewer emails in 2021 than 2020, decreasing by 5.97%.*
 - ✓ *The open rate in 2021 was 19.1% compared to 15.84% in 2020, but Apple's Mail Privacy Protection Program may have driven this increase.*
 - ✓ *Fundraising email revenue decreased by 14.52%, and organizations sent 3.06% fewer fundraising emails in 2021.*
 - ✓ *However, total revenue was up by 5.17%, primarily driven by a 21.2% increase in revenue from sustainers. Many organizations omit sustainers from repeated email appeals.*
 - ✓ *14.19% of usable email lists were donors, up 4.39% from 2020.*
-

These trends indicate that nonprofits sent fewer overall emails and fewer fundraising emails in 2021 compared to 2020. The people who received the emails donated at a lower rate, down 42.91% compared to 2020. Considering the context, in which more people were returning to activities that curtailed their time and attention available to read emails, this is not a cause for alarm but instead shows a pattern consistent with emergency and disaster giving and how donors' day-to-day lives were changing in 2021.

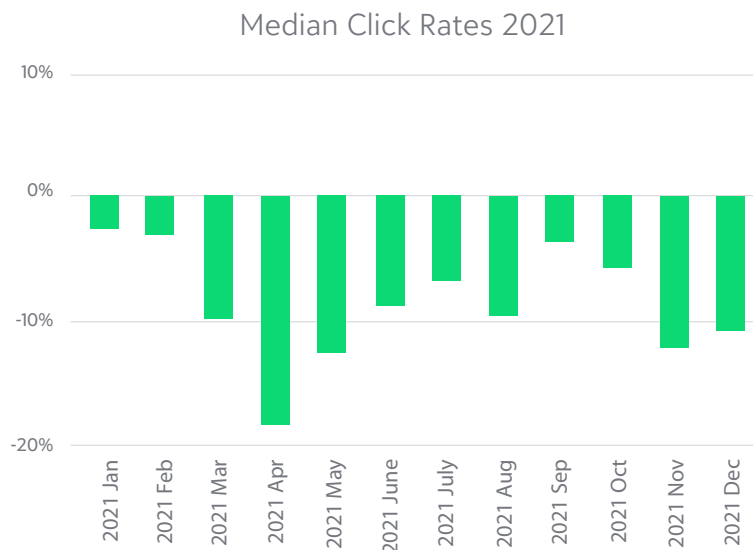
A great deal of 2020 fundraising in response to COVID relief efforts is analogous to disaster relief fundraising. People who might not regularly give to nonprofits can be motivated by a particularly urgent need or emergency. Those emergency donors are more difficult for nonprofits to retain and may not stay engaged with ongoing emails from organizations. Any disaster relief nonprofit organization will confirm this.

A better measure of individual email success and effectiveness is clicks and conversions. As clicks and conversions are always lower than opens, these cannot be the only criteria for segmentation, however. Opens will continue to play a role in selecting an engaged audience to give your message the best chance of reaching the inbox.

Each year, donors also have more channels to see messages and respond with donations. While overall email fundraising was down, the percentage of the usable email list that donates was up 4.39% to 14.20%. The rising competency of nonprofits in omnichannel fundraising means that an email subscriber may see a message through various channels beyond email, such as social media, online advertising, text messages, in-person events, direct mail, and more.

Our benchmark report tracks email fundraising as donations made by a donor who clicks a link in an email and completes the donation transaction immediately. Suppose a donor receives an email and goes to the website separately to initiate a donation. In that case, the gift will not be tracked back to that email fundraising message, even though the email message played a role in motivating the donor.

Knowing that many organizations had an influx of new subscribers in 2020 whose attention waned in 2021 also puts into context another trend: a declining overall click rate for email, down by 7.83%. Fewer people were clicking links during 2021. As organizations continue to practice good list hygiene and segment out non-engaged users, they should see a less precipitous drop-off in 2022.



Email Engagement Year-over-Year Change

Email Engagement	2021	YoY Change
Total Emails Sent	N/A	-5.97%
Open Rate	19.11%	19.03%
Click Rate	1.24%	-7.83%
Unsubscribe Rate	0.17%	9.37%

Fundraising Email Engagement	2020	YoY Change
Total Emails Sent	N/A	-3.06%
Open Rate	20.65%	31.54%
Click Rate	0.88%	-9.33%
Unsubscribe Rate	0.17%	10.94%
Conversion Rate	0.20%	-42.91%

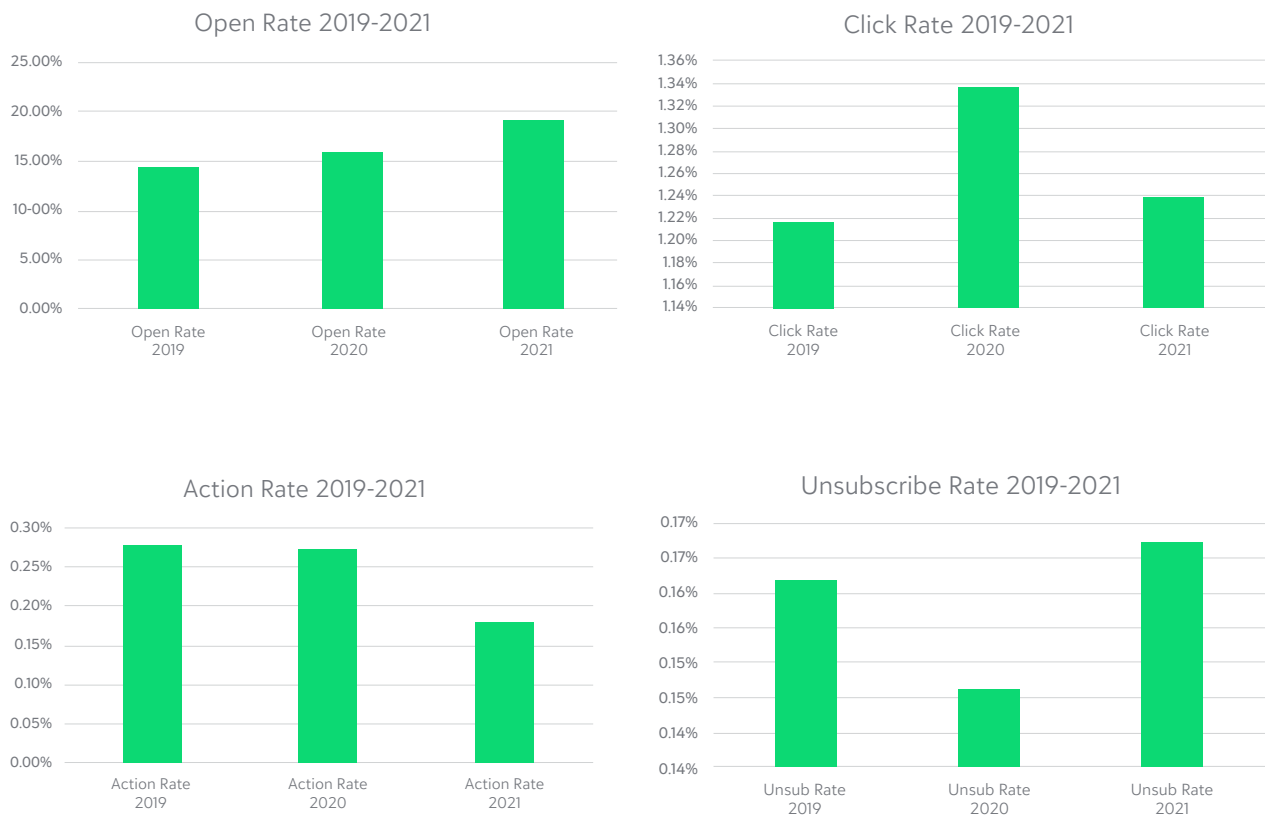
Organizations' email lists grew by 6.20%, but usable house files—constituents to whom organizations can send emails—decreased by 1.44%. The email unsubscribe rate changed from 0.15% in 2020 to 0.17% in 2021, so unsubscribes are not wholly responsible for this change. Indeed, it is more likely that organizations are doing a better job segmenting their audiences and removing inactive users who have not been engaging with email. The influx of new subscribers and donors in 2020 who did not remain engaged with email might have accounted for the drop-off in usable house files.



2021 Email Trends in Context

When we look at total clicks and actions, we see a decrease year-over-year, consistent with a decline in general online activity in 2021. Total opens were up, but this number is artificially inflated due to Apple's MPP. However, rather than viewing this as a drop-off, as it appears when viewing data only from 2020-2021, it is instead a return to previous levels when considering what email engagement looked like in 2019. We understand that 2020 was a unique year due to the pandemic's lockdowns, emergency giving, and focus on digital channels.

The following charts illustrate that 2020 showed spikes in email metrics and that 2021 is not simply a drop-off from 2020 but a return to 2019 email engagement levels in many respects.



* All values are expressed as medians.



Benchmark Against
Organizations in
Your Sector

Benchmark Against Organizations in Your Sector

2021 Benchmark Vertical Summary

How to Use this Information

The Vertical Trends section examines year-over-year change in essential benchmarks. We provide performance data of one vertical—a group of similar nonprofits—next to results for the overall nonprofit industry.

Given the historical year for food banks in 2020—which significantly outperformed all other verticals—this year’s highlights provide an overall industry benchmark and an overall industry benchmark minus data from food banks. Nonprofits are grouped using the organization’s selected NTEE classification submitted to the IRS.

- **“Directional” information—year-over-year percent change—often proves more useful to organizations than absolute numbers.** While one organization might grow online fundraising from \$100,000 to \$120,000 and another from \$1,000,000 to \$1,200,000, the gain for both represents 20%.
- **The Giving Trends and Sustainer Trends** sections highlight growth in a few key financial metrics for this vertical compared to nonprofits overall.
- **Email Engagement Trends** highlight possible relationships between email list growth, changes in the number of emails sent, and supporter response to these emails.

Additional Vertical Benchmarks represent the actual figures, not a percent change. While statistics are available for each vertical elsewhere in the report, we included some in this section that we thought were most useful.

- **Percent of Email List that Donates** measures the proportion of people on your email list who donated in the last year. It is one measure of how engaged your email list is.
- **Sustainer Revenue as a Percent of Total** measures what proportion of your total revenue comes from monthly sustainer gifts. A higher percentage indicates greater long-term stability in revenue.
- **Fundraising Email Conversion Rate** measures the percentage of constituents who received your email and donated. It indicates how compelling your messages are to get constituents to open and click and how effective your landing pages are in securing a donation.





Animal Welfare

Animal Welfare features rescues, shelters, advocacy groups, and others working to give every animal a loving home.

The upward trend of shelter adoptions in 2020 continued in early 2021 before waning in the latter half of the year. As shelters began to reopen in 2021 to pre-pandemic operations, the number of animals entering shelters grew, creating additional pressures on this industry.

Animal Welfare Trends

Online Giving & Sustainers

- Sustainer revenue as a percentage of total revenue increased to 24.4%.
- The average sustaining gift is \$30.14, the third lowest in all verticals.
- The average first-time gift of \$92.56 is the second lowest in all verticals.

Email Engagement

- Fundraising Email Conversion rates (0.4%) are twice the median (0.2%).
- Animal Welfare organizations have the smallest usable house file of all verticals (52%).
- Email Unsubscribe Rates are amongst the lowest of all verticals.

Animal Welfare

Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	4.49%	5.17%	7.04%
Transaction Count (YoY Change)	5.04%	2.50%	4.23%
Revenue per Usable Email	\$15.03	\$12.94	\$11.95
Percent of Email List that Donates	18.79%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$92.56	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$62.66	\$120.56	\$123.37

Sustainer Trends

Sustainer Revenue (YoY Change)	13.29%	21.10%	19.04%
Sustainer Revenue as a % of Total	24.44%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	13.94%	14.15%	11.48%
Average Online Transaction - Sustainer	\$30.14	\$39.79	\$38.13

Email Engagement Trends

Usable Email List Growth (YoY Change)	4.33%	3.18%	3.17%
Usable Email List	51.95%	63.62%	63.80%
Number of Emails Sent (YoY Change)	-11.11%	-5.97%	-5.90%
Email Open Rate	18.54%	19.11%	19.23%
Email Click Rate	1.12%	1.24%	1.24%
Email Action Rate	0.32%	0.18%	0.17%
Email Unsubscribe Rate	0.12%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-3.06%	-3.06%	-3.06%
Fundraising Email Open Rate	20.10%	20.65%	20.60%
Fundraising Email Click Rate	0.77%	0.88%	0.86%
Fundraising Email Conversion Rate	0.39%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	-6.51%	-14.52%	-13.38%



Arts, Culture, and Humanities

The Arts, Culture, and Humanities vertical includes cultural organizations such as museums, zoos, public gardens, and aquariums, in addition to performing arts organizations like symphonies, operas, ballets, and theaters, as well as foundations that support the arts. These places inspire life-long learning and discovery of what makes us human.

Larger arts and cultural organizations have a broader—often national—fundraising footprint. Smaller organizations draw from the local or regional community for their support. Both types of organizations were severely impacted by COVID-19 and struggled to return to normal operations in 2021.

Arts, Culture, and Humanities Trends

Online Giving & Sustainers

- Revenue solicited by email dropped 17%, the second largest drop of all verticals.
- Online transactions increased by 12.5%, the second-highest increase of all verticals.

Email Engagement

- As museums opened again, there was tremendous growth in usable email (6.1%).
- Arts and Cultural organizations succeeded in driving the highest number of email clicks (1.9%) compared with the industry median of 1.2%.
- Fundraising Click Rates (1.3%) were only eclipsed by Food Banks.

Arts, Culture, and Humanities

Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	4.32%	5.17%	7.04%
Transaction Count (YoY Change)	12.51%	2.50%	4.23%
Revenue per Usable Email	\$6.00	\$12.94	\$11.95
Percent of Email List that Donates	6.03%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$135.01	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$151.79	\$120.56	\$123.37
Sustainer Trends			
Sustainer Revenue (YoY Change)	7.79%	21.10%	19.04%
Sustainer Revenue as a % of Total	6.87%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	11.21%	14.15%	11.48%
Average Online Transaction - Sustainer	\$45.49	\$39.79	\$38.13
Email Engagement Trends			
Usable Email List Growth (YoY Change)	6.10%	3.18%	3.17%
Usable Email List	68.62%	63.62%	63.80%
Number of Emails Sent (YoY Change)	-5.21%	-5.97%	-5.90%
Email Open Rate	20.74%	19.11%	19.23%
Email Click Rate	1.92%	1.24%	1.24%
Email Action Rate	0.12%	0.18%	0.17%
Email Unsubscribe Rate	0.13%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-6.18%	-3.06%	-3.06%
Fundraising Email Open Rate	24.11%	20.65%	20.60%
Fundraising Email Click Rate	1.28%	0.88%	0.86%
Fundraising Email Conversion Rate	0.19%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	-17.02%	-14.52%	-13.38%



Disaster and International Aid

This sector comprises organizations that provide domestic and international humanitarian relief and development assistance.

Historically, Disaster and International Aid organizations have experienced large swings in online revenue and engagement depending on the scale of need each year. However, the growing frequency of natural disasters is normalizing these historic swings.

Disaster and International Aid Trends

Online Giving & Sustainers

- Organizations in this vertical reported the highest increase in average First Time Donor transaction amount (23%) – almost twice the median of the next highest group.
- **This group continues robust sustainer growth (10%), with 25.2% of revenue provided by sustainers.**
- Revenue per usable email dropped by 5% but remained an industry leader at \$19.03.

Email Engagement

- This sector had the most significant increase in the number of Fundraising Emails sent (22.2%).
- One of the lowest Fundraising Email Click Rates in the industry (0.6%) but nearly tied for the highest Fundraising Conversion Rate (0.4%).
- This group was one of the few that experienced growth in Revenue Solicited by Email (1.4%).

Disaster and International Aid

Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	5.27%	5.17%	7.04%
Transaction Count (YoY Change)	3.16%	2.50%	4.23%
Revenue per Usable Email	\$19.03	\$12.94	\$11.95
Percent of Email List that Donates	12.47%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$133.14	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$83.44	\$120.56	\$123.37
Sustainer Trends			
Sustainer Revenue (YoY Change)	17.70%	25.19%	19.04%
Sustainer Revenue as a % of Total	25.19%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	10.80%	14.15%	11.48%
Average Online Transaction - Sustainer	\$38.94	\$39.79	\$38.13
Email Engagement Trends			
Usable Email List Growth (YoY Change)	3.91%	3.18%	3.17%
Usable Email List	55.05%	63.62%	63.80%
Number of Emails Sent (YoY Change)	-11.66%	-5.97%	-5.90%
Email Open Rate	17.56%	19.11%	19.23%
Email Click Rate	1.01%	1.24%	1.24%
Email Action Rate	0.32%	0.18%	0.17%
Email Unsubscribe Rate	0.17%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	22.22%	-3.06%	-3.06%
Fundraising Email Open Rate	17.66%	20.65%	20.60%
Fundraising Email Click Rate	0.60%	0.88%	0.86%
Fundraising Email Conversion Rate	0.43%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	1.41%	-14.52%	-13.38%



Environment and Wildlife

The Environment and Wildlife sector encompasses globally- and locally-focused organizations working to preserve and protect nature, wildlife, parks, and reserves and address urgent environmental challenges.

Charitable giving to organizations focusing on the environment and wildlife increased strongly in 2021. Growth was driven by the massive scale of the climate challenge, coupled with the recognition that mitigation efforts must address equity and justice issues. Environmental issues joined the national stage in late 2021 with the proposed investments through the “Build Back Better” legislation, fueling environmental messaging and fundraising.

Environment and Wildlife Trends

Online Giving & Sustainers

- Environmental and Wildlife organizations experienced the most significant increase in revenue of all verticals at 15.4%.
- Revenue increased due to a corresponding increase in transactions (15%).
- Revenue Solicited by Email increased by the most significant amount of all industries (5.6%).

Email Engagement

- Email Click Rates (1.8%) and conversion rates (0.6%) were the strongest of all industries.
- These organizations were the only ones that didn't experience negative growth in their usable house file.

Environment and Wildlife

Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	15.37%	5.17%	7.04%
Transaction Count (YoY Change)	15.13%	2.50%	4.23%
Revenue per Usable Email	\$8.23	\$12.94	\$11.95
Percent of Email List that Donates	9.82%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$96.01	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$56.77	\$120.56	\$123.37

Sustainer Trends

Sustainer Revenue (YoY Change)	20.94%	21.10%	19.04%
Sustainer Revenue as a % of Total	20.72%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	6.53%	14.15%	11.48%
Average Online Transaction - Sustainer	\$21.49	\$39.79	\$38.13

Email Engagement Trends

Usable Email List Growth (YoY Change)	5.94%	3.18%	3.17%
Usable Email List	61.36%	63.62%	63.80%
Number of Emails Sent (YoY Change)	-6.38%	-5.97%	-5.90%
Email Open Rate	21.82%	19.11%	19.23%
Email Click Rate	1.52%	1.24%	1.24%
Email Action Rate	0.59%	0.18%	0.17%
Email Unsubscribe Rate	0.15%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	0.11%	-3.06%	-3.06%
Fundraising Email Open Rate	24.23%	20.65%	20.60%
Fundraising Email Click Rate	0.67%	0.88%	0.86%
Fundraising Email Conversion Rate	0.34%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	5.58%	-14.52%	-13.38%



Faith Communities

The Faith Communities sector includes nonprofit organizations with missions arising from their faith and religious identity. Catholic dioceses, parishes, and protestant churches also make up a part of this group. While Faith Communities encompass a wide variety of religious beliefs, they all seek to deepen and grow a vibrant community of faith that serves the world.

Like the Food Bank sector, Faith Communities saw tremendous growth in 2020 and returned to more historical levels in 2021.

Faith Community Trends

Online Giving & Sustainers

- Revenue from online giving significantly exceeded the benchmark at 9%.
- Faith Communities remain second only to Public Broadcasting in the percentage of giving coming from sustaining donors (28%).
- Average online sustainer gift amounts led all verticals (\$58.82).

Email Engagement

- In 2021, many sectors reduced the number of fundraising emails sent, but none as much as Faith Communities (-27%).
- The percentage of fundraising emails dropped almost at the same rate as revenue generated by email (-23%).
- Donors as a percentage of the house file are relatively low (15.2%) but experienced the highest year-over-year increase (11.3%).

Faith Communities

Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	9.00%	5.17%	7.04%
Transaction Count (YoY Change)	8.90%	2.50%	4.23%
Revenue per Usable Email	\$18.55	\$12.94	\$11.95
Percent of Email List that Donates	15.17%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$168.41	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$87.05	\$120.56	\$123.37

Sustainer Trends

Sustainer Revenue (YoY Change)	12.69%	21.10%	19.04%
Sustainer Revenue as a % of Total	28.25%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	2.85%	14.15%	11.48%
Average Online Transaction - Sustainer	\$58.82	\$39.79	\$38.13

Email Engagement Trends

Usable Email List Growth (YoY Change)	3.11%	3.18%	3.17%
Usable Email List	62.05%	63.62%	63.80%
Number of Emails Sent (YoY Change)	-1.59%	-5.97%	-5.90%
Email Open Rate	22.37%	19.11%	19.23%
Email Click Rate	1.34%	1.24%	1.24%
Email Action Rate	0.18%	0.18%	0.17%
Email Unsubscribe Rate	0.11%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-27.27%	-3.06%	-3.06%
Fundraising Email Open Rate	23.18%	20.65%	20.60%
Fundraising Email Click Rate	0.87%	0.88%	0.86%
Fundraising Email Conversion Rate	0.15%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	-22.96%	-14.52%	-13.38%



Food Banks

This category is comprised of food banks and food distribution centers. Food Banks empower communities through education, workforce development, and hunger relief. Larger food bank organizations have a broader, often national, fundraising footprint. Smaller organizations draw on the local or regional community for their support.

Food Banks met a great need during the beginning of the COVID crisis in 2020 and massively outperformed the industry. This trend continued in 2021 but shifted from acquisition fundraising to retention fundraising.

Food Bank Trends

Online Giving & Sustainers

- Total online revenue dropped 39%. This was the only vertical with a revenue decrease.
- Food Banks increased sustainer revenue by 71%, and sustainer revenue as a percentage of all online revenue increased by 180%.
- Repeat donors gave smaller gifts—a 20% decrease in average gift amount—but drove a significant increase as a percentage of total revenue (45%).

Email Engagement

- Percent of Email List that Donates remains the highest in the industry, an increase of nearly 1.4% year-over-year. This demonstrates that donors remain committed to supporting their food banks beyond the pandemic.
- Even with conversion rates dropping by 53% year-over-year, Food Banks have the second-highest conversion rate of 0.5%.
- Revenue solicited by email saw the most significant decrease in the industry (-27%).

Food Banks

Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	-39.03%	5.17%	7.04%
Transaction Count (YoY Change)	-20.79%	2.50%	4.23%
Revenue per Usable Email	\$62.85	\$12.94	\$11.95
Percent of Email List that Donates	31.99%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$165.63	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$111.93	\$120.56	\$123.37

Sustainer Trends

Sustainer Revenue (YoY Change)	70.98%	21.10%	19.04%
Sustainer Revenue as a % of Total	22.97%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	180.66%	14.15%	11.48%
Average Online Transaction - Sustainer	\$49.00	\$39.79	\$38.13

Email Engagement Trends

Usable Email List Growth (YoY Change)	4.70%	3.18%	3.17%
Usable Email List	56.20%	63.62%	63.80%
Number of Emails Sent (YoY Change)	-8.49%	-5.97%	-5.90%
Email Open Rate	18.57%	19.11%	19.23%
Email Click Rate	1.28%	1.24%	1.24%
Email Action Rate	0.52%	0.18%	0.17%
Email Unsubscribe Rate	0.19%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-7.19%	-3.06%	-3.06%
Fundraising Email Open Rate	21.32%	20.65%	20.60%
Fundraising Email Click Rate	1.34%	0.88%	0.86%
Fundraising Email Conversion Rate	0.44%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	-26.99%	-14.52%	-13.38%



Health Services and Research

These organizations are dedicated to medical research, patient care and assistance, and political advocacy for various diseases and disorders.

With growing focus and awareness for health equity and the need for more robust mental health resources, this industry was one of the few verticals that experienced an increase in revenue solicited via email in 2021.

Health Services and Research Trends

Online Giving & Sustainers

- Health Services is the lowest in the industry for sustainer revenue as a percent of total revenue (4.2%).
- With relatively flat transaction growth, revenue growth was driven by an increase in average gift amounts (6.5%).

Email Engagement

- Notably, while having some of the lowest sustainer revenue, this vertical has one of the most significant Percent of Email List that Donates (22.8%) in the study.
- This vertical was one of the few that saw an increase in Revenue Solicited by Email (2.29%).
- While Revenue per Usable Email is the lowest in the industry, the increase in Revenue Per Usable Email led all verticals (6.8%).

Health Services and Research

Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	6.83%	5.17%	7.04%
Transaction Count (YoY Change)	0.77%	2.50%	4.23%
Revenue per Usable Email	\$8.98	\$12.94	\$11.95
Percent of Email List that Donates	22.82%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$108.17	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$121.28	\$120.56	\$123.37

Sustainer Trends

Sustainer Revenue (YoY Change)	11.95%	21.10%	19.04%
Sustainer Revenue as a % of Total	4.22%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	6.61%	14.15%	11.48%
Average Online Transaction - Sustainer	\$34.72	\$39.79	\$38.13

Email Engagement Trends

Usable Email List Growth (YoY Change)	1.05%	3.18%	3.17%
Usable Email List	55.65%	63.62%	63.80%
Number of Emails Sent (YoY Change)	-2.48%	-5.97%	-5.90%
Email Open Rate	16.08%	19.11%	19.23%
Email Click Rate	1.03%	1.24%	1.24%
Email Action Rate	0.14%	0.18%	0.17%
Email Unsubscribe Rate	0.18%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	0.00%	-3.06%	-3.06%
Fundraising Email Open Rate	19.30%	20.65%	20.60%
Fundraising Email Click Rate	0.91%	0.88%	0.86%
Fundraising Email Conversion Rate	0.11%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	2.29%	-14.52%	-13.38%



Higher Education

The Higher Education sector comprises public and private colleges and universities throughout the United States and Canada, including their associated foundations, alumni associations, and athletic organizations. It also includes scholarship-granting organizations and foundations.

Higher Education is generally less focused on sustainers and more on constituent engagement in the form of event participation, volunteerism, and involvement in campus initiatives. Email list acquisition is also less of a concern for Higher Education institutions, as these organizations organically grow their constituent lists with each incoming and graduating class.

Higher Education Trends

Online Giving & Sustainers

- In 2021, the average online transaction was \$243.74—almost \$20 more than the next closest group.
- The average gift amount for repeat givers increased by 5.2%—the highest of all verticals.
- Sustainer revenue as a percentage of overall revenue is the lowest of all verticals (4.2%).

Email Engagement

- Notably, while having some of the lowest sustainer revenue, this vertical has one of the most significant Percent of Email List that Donates (22.8%) in the study.
- Higher Education was one of two verticals that increased email year-over-year (4.74%) and had the second-highest increase in revenue solicited by email (5.2%).
- While email click rates met industry averages, conversion rates lagged.

Higher Education

Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	7.57%	5.17%	7.04%
Transaction Count (YoY Change)	-1.52%	2.50%	4.23%
Revenue per Usable Email	\$9.18	\$12.94	\$11.95
Percent of Email List that Donates	9.02%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$206.50	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$257.51	\$120.56	\$123.37

Sustainer Trends

Sustainer Revenue (YoY Change)	15.95%	21.10%	19.04%
Sustainer Revenue as a % of Total	8.60%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	1.78%	14.15%	11.48%
Average Online Transaction - Sustainer	\$52.73	\$39.79	\$38.13

Email Engagement Trends

Usable Email List Growth (YoY Change)	5.40%	3.18%	3.17%
Usable Email List	81.85%	63.62%	63.80%
Number of Emails Sent (YoY Change)	4.74%	-5.97%	-5.90%
Email Open Rate	21.35%	19.11%	19.23%
Email Click Rate	1.30%	1.24%	1.24%
Email Action Rate	0.08%	0.18%	0.17%
Email Unsubscribe Rate	0.12%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	0.00%	-3.06%	-3.06%
Fundraising Email Open Rate	23.40%	20.65%	20.60%
Fundraising Email Click Rate	0.60%	0.88%	0.86%
Fundraising Email Conversion Rate	0.16%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	5.17%	-14.52%	-13.38%



Hospital Foundations and Hospitals

Within Hospital Foundations and Hospitals, we find organizations that range from children's hospitals and general medical centers to specialized cancer centers.

Hospital Foundations and Hospitals generally leverage various fundraising strategies, including principal giving, grateful patients and families, and events. This vertical focuses on cultivating a culture of philanthropy for board members, hospital team members, and volunteers. With the return of many in-person engagements in 2021, some healthcare organizations have faced stricter guidelines in facilitating in-person activities.

Foundations and Hospital Trends

Online Giving & Sustainers

- Hospital Foundations and Hospitals saw the report's second-highest increase in revenue year-over-year (11.6%). This is notable as they experienced a significant decrease in the number of transactions (-2.5%).
- These organizations outperformed the industry benchmark for first-time and repeat gift amounts.
- Sustainer revenue is the second lowest in the industry (4.7%) as a percentage of total revenue.

Email Engagement

- This vertical was one of only two that increased the number of emails sent year-over-year (4.2%).
- Despite increasing the number of fundraising emails sent (9%), revenue from email was significantly lower than the benchmark, dropping 17.5% year-over-year.
- Hospital Foundations and Hospitals maintain a very high Usable Email List (74%).

Foundations and Hospitals

Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	11.55%	5.17%	7.04%
Transaction Count (YoY Change)	-2.54%	2.50%	4.23%
Revenue per Usable Email	\$9.81	\$12.94	\$11.95
Percent of Email List that Donates	13.87%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$182.06	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$165.87	\$120.56	\$123.37

Sustainer Trends

Sustainer Revenue (YoY Change)	21.17%	21.10%	19.04%
Sustainer Revenue as a % of Total	4.72%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	19.92%	14.15%	11.48%
Average Online Transaction - Sustainer	\$39.62	\$39.79	\$38.13

Email Engagement Trends

Usable Email List Growth (YoY Change)	6.27%	3.18%	3.17%
Usable Email List	74.37%	63.62%	63.80%
Number of Emails Sent (YoY Change)	4.17%	-5.97%	-5.90%
Email Open Rate	21.19%	19.11%	19.23%
Email Click Rate	1.13%	1.24%	1.24%
Email Action Rate	0.13%	0.18%	0.17%
Email Unsubscribe Rate	0.19%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	9.17%	-3.06%	-3.06%
Fundraising Email Open Rate	20.68%	20.65%	20.60%
Fundraising Email Click Rate	0.88%	0.88%	0.86%
Fundraising Email Conversion Rate	0.17%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	-17.46%	-14.52%	-13.38%



Human and Social Services

Organizations in the Human and Social Services category focus on supporting and empowering the communities they serve. These organizations work each day to support children, families, the elderly, and those with disabilities. Many address immediate and tangible needs, such as homelessness, affordable housing, and child welfare.

In 2020, demand for services was high, and organizations experienced the highest revenue increase other than food banks but did not keep that momentum in 2021.

Human and Social Services Trends

Online Giving & Sustainers

- Sustainer revenue growth led all others except Food Banks by 26%.
- Total online revenue (3%) grew at a rate under the industry median (5%) and experienced a steep drop over the previous year (-31%).
- This group experienced the most significant drop in online transactions (-3.4%).

Email Engagement

- Most email metrics fell in line with industry averages.
- Revenue Solicited by Email saw one of the most significant industry drops at -27%.
- The Email Unsubscribe rate increased by over 20%, the most significant increase in the industry.

Human & Social Services			
Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	3.07%	5.17%	7.04%
Transaction Count (YoY Change)	-3.42%	2.50%	4.23%
Revenue per Usable Email	\$15.66	\$12.94	\$11.95
Percent of Email List that Donates	12.22%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$213.02	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$159.98	\$120.56	\$123.37
Sustainer Trends			
Sustainer Revenue (YoY Change)	26.54%	21.10%	19.04%
Sustainer Revenue as a % of Total	10.70%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	22.78%	14.15%	11.48%
Average Online Transaction - Sustainer	\$46.84	\$39.79	\$38.13
Email Engagement Trends			
Usable Email List Growth (YoY Change)	2.34%	3.18%	3.17%
Usable Email List	64.28%	63.62%	63.80%
Number of Emails Sent (YoY Change)	-12.36%	-5.97%	-5.90%
Email Open Rate	18.55%	19.11%	19.23%
Email Click Rate	1.30%	1.24%	1.24%
Email Action Rate	0.18%	0.18%	0.17%
Email Unsubscribe Rate	0.19%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-9.50%	-3.06%	-3.06%
Fundraising Email Open Rate	17.34%	20.65%	20.60%
Fundraising Email Click Rate	1.07%	0.88%	0.86%
Fundraising Email Conversion Rate	0.20%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	-27.10%	-14.52%	-13.38%



Public Broadcasting Stations

This sector comprises publicly supported television and radio stations in the United States. Although public perception can be that Public Broadcasting Stations are mostly government-funded, the reality is that the government-funded percentage of a station's budget varies based on the station's size.

Public Broadcasting Stations are more likely than their counterparts to engage donors with various methods, frequently using email, direct mail, on-air fundraising drives, and door-to-door canvassing. Most Public Broadcasting Stations have industry-leading sustainer programs with added membership benefits that keep donors engaged. This continues to be a critical component of their strong sustainer retention, evidenced in their above-average email open rates.

Public Broadcasting Trends

Online Giving & Sustainers

- Public Broadcasting Stations received 54.5% of their online revenue from sustainer gifts (compared to an industry median of 12.3%).
- Revenue per usable email (\$31.58) was the highest of all industries other than Food Banks (\$62.85). The industry median is \$12.94.
- The Percent of Email List that Donates was 36.3%, well ahead of the industry median of 14.2% and the highest of all industries.

Email Engagement

- Email unsubscribe rates were 0.12%, below the industry average of 0.17%.
- This group has a strong fundraising email conversion rate of 0.24%.
- The number of emails sent decreased most significantly of any vertical (-22.0%). This vertical also experienced the most significant decrease in revenue solicited by email (-29.5%).

Public Broadcasting

Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	8.96%	5.17%	7.04%
Transaction Count (YoY Change)	11.19%	2.50%	4.23%
Revenue per Usable Email	\$31.58	\$12.94	\$11.95
Percent of Email List that Donates	36.27%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$85.82	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$19.37	\$120.56	\$123.37

Sustainer Trends

Sustainer Revenue (YoY Change)	24.17%	21.10%	19.04%
Sustainer Revenue as a % of Total	54.46%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	11.93%	14.15%	11.48%
Average Online Transaction - Sustainer	\$12.97	\$39.79	\$38.13

Email Engagement Trends

Usable Email List Growth (YoY Change)	2.75%	3.18%	3.17%
Usable Email List	70.02%	63.62%	63.80%
Number of Emails Sent (YoY Change)	-22.00%	-5.97%	-5.90%
Email Open Rate	23.04%	19.11%	19.23%
Email Click Rate	1.40%	1.24%	1.24%
Email Action Rate	0.13%	0.18%	0.17%
Email Unsubscribe Rate	0.12%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	5.00%	-3.06%	-3.06%
Fundraising Email Open Rate	23.75%	20.65%	20.60%
Fundraising Email Click Rate	0.54%	0.88%	0.86%
Fundraising Email Conversion Rate	0.24%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	-29.47%	-14.52%	-13.38%



Public/Society Benefit

Within Public/Society Benefit, we find a wide variety of organizations with the primary goal of influencing laws, regulations, and social norms within their mission area.

Typically, these organizations experience cyclical fundraising depending on election cycles. 2021 was off-cycle for Presidential and most Congressional elections, and while revenue reflected this, the focus on increasing gift amounts from donors is a bright spot.

Public/Society Benefit Trends

Online Giving & Sustainers

- Public/Society Benefit organizations experienced the slowest year-over-year revenue growth (2.2%) other than Food Banks.
- The average gift amount for these groups increased the most in all industries (9.5%).
- Revenue per usable email (\$8.06) and percent of email list that donates (5.8%) were the lowest in the industry.

Email Engagement

- No vertical other than Food Banks reduced the number of fundraising emails more (-19%).
- Fundraising email click rates (0.6%) were beneath the industry median.
- Fundraising email conversion rates (0.1%) were tied for the lowest rate of all verticals.

Public/Society Benefit			
Giving Trends	This Vertical	Industry	Industry without Foodbanks
Total Online Revenue (YoY Change)	2.24%	5.17%	7.04%
Transaction Count (YoY Change)	-1.10%	2.50%	4.23%
Revenue per Usable Email	\$8.06	\$12.94	\$11.95
Percent of Email List that Donates	5.76%	14.19%	13.39%
Average Online Transaction - First-Time Donor	\$176.73	\$146.33	\$143.05
Average Online Transaction - Repeat Donor	\$129.50	\$120.56	\$123.37
Sustainer Trends			
Sustainer Revenue (YoY Change)	17.45%	21.10%	19.04%
Sustainer Revenue as a % of Total	14.43%	12.33%	10.64%
Sustainer Revenue as a % of Total (YoY Change)	7.35%	14.15%	11.48%
Average Online Transaction - Sustainer	\$38.56	\$39.79	\$38.13
Email Engagement Trends			
Usable Email List Growth (YoY Change)	1.08%	3.18%	3.17%
Usable Email List	58.51%	63.62%	63.80%
Number of Emails Sent (YoY Change)	-11.96%	-5.97%	-5.90%
Email Open Rate	18.17%	19.11%	19.23%
Email Click Rate	1.19%	1.24%	1.24%
Email Action Rate	0.15%	0.18%	0.17%
Email Unsubscribe Rate	0.12%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-18.99%	-3.06%	-3.06%
Fundraising Email Open Rate	17.34%	20.65%	20.60%
Fundraising Email Click Rate	0.61%	0.88%	0.86%
Fundraising Email Conversion Rate	0.11%	0.20%	0.20%
Increase in Revenue Solicited by Email (YoY Change)	-2.18%	-14.52%	-13.38%



Canada

Online giving in Canada showed continued growth in 2021, with notable increases in key areas like sustainer metrics, email engagement metrics, and the percentage of email list that donates. Canada stood out in retaining and engaging social good generosity that spiked during the COVID-19 crisis of 2020.

The Blackbaud 2021 Charitable Giving Report shows that overall charitable giving in Canada grew by 4.0% year-over-year, with online giving increasing by 6.0%. 12.7% of total fundraising came from online giving in 2021 for Canadian charities, up from 10.7% in 2020. This indicates that online giving is here to stay and grows more important every year.

The average online transaction for a first-time donor within Canada was \$129.76, which was lower than the industry median of \$142.67. In 2020, the average online transaction was \$154.27. Although this is a decline, 2021's average first-time donation within Canada was higher than 2019's average of \$120.54, which still shows growth when viewed in the context of 2020's unusual circumstances.

While the average online gifts from both first-time and repeat donors slightly decreased, online giving continued to accelerate. Total online giving revenue showed a 3.43% year-over-year increase compared to 2020.

2021 revealed unanticipated new giving trends in Canada. Overall, Canadians have donated more since the pandemic announcement in March 2020, which put a spotlight on the need to support charities. But another reason was the social justice movement highlighting the need to support inequality initiatives, racial justice issues, and Indigenous and marginalized communities. Canadians are supporting smaller local charities and social causes. They remain sensitive and aware of their community and neighbors' needs and come together during times of uncertainty and unrest.

“The top causes for younger Canadians relate to social justice. To appeal to younger donors, charities need to be aware of these issues, and many will need to shape new narratives to better resonate with these Canadians.”

- Canada Helps Giving Report

Canada Trends

Online Giving & Sustainers

- Sustainer revenue year-over-year was up 42%, almost double the industry median.
- Sustainer revenue as a percentage of total revenue was 47.19%. Nearly half of Canadian online giving came as recurring revenue.
- The percentage of email list that donates was 27.10%. More than a quarter of emails on Canadian lists donated. This exceeds the industry benchmark by almost 12%.

Email Engagement

- Fundraising Email Open Rates outpaced the industry benchmark at 28.10%, compared to 21.38%.
- Fundraising Email Click and Conversion rates—1.29% and 0.38%, respectively—exceed the industry medians of 0.93% and 0.21%.
- Like the industry, Canada sent fewer emails in 2021, down by 2.50%.

Canada

Giving Trends	Canadian Blackbaud Luminate Online Customers	All Blackbaud Luminate Online Customers
Total Online Revenue (YoY Change)	3.43%	4.45%
Revenue per Usable Email	\$22.44	\$13.27
Percent of Email List that Donates	27.10%	15.49%
Average Online Transaction - First-Time Donor	\$129.76	\$142.67
Average Online Transaction - Repeat Donor	\$112.25	\$118.81
Sustainer Trends		
Sustainer Revenue (YoY Change)	42.07%	22.92%
Sustainer Revenue as a % of Total	7.75%	11.13%
Sustainer Revenue as a % of Total (YoY Change)	47.19%	18.46%
Average Online Transaction - Sustainer	\$32.92	\$38.16
Email Engagement Trends		
Email List Growth (YoY Change)	6.16%	3.63%
Usable Email List	59.59%	62.56%
Number of Emails Sent (YoY Change)	-2.50%	-5.26%
Email Open Rate	26.94%	19.86%
Email Click Rate	1.77%	1.30%
Email Action Rate	0.23%	0.18%
Email Unsubscribe Rate	0.26%	0.17%
Number of Fundraising Emails Sent (YoY Change)	0.00%	-2.47%
Fundraising Email Open Rate	28.10%	21.38%
Fundraising Email Click Rate	1.29%	0.93%
Fundraising Email Conversion Rate	0.38%	0.21%
Increase in Revenue Solicited by Email (YoY Change)	-18.17%	-15.25%



Benchmark Against
Organizations of
Similar Size

Benchmark Against Organizations of Similar Size

In the Benchmark Against Organizations of Similar Size section, performance is examined by email list size compared to the overall nonprofit industry results. In some cases, comparing yourself against like-size organizations is more beneficial than comparisons based on sector.

Email list size <10,000: This is the only list size not to see an increase in revenue. These organizations also saw a significant decrease in revenue solicited by email (-36.56%), despite sending more emails year-over-year (+17.65%) compared to the industry, which sent fewer emails (-3.06%). Smaller organizations may have felt the economic impact of the pandemic and economic fluctuations more severely than larger organizations with more resources.

List Size <10,000

Giving Trends	Total	YoY Change
Fundraising Revenue by Email List Size	\$156,944	-5.77
Increase in Revenue Solicited by Email	N/A	-32.66%
Percent of Usabel Email List that Donates	19.35%	3.59%
Annual Revenue Per Usable Email Address	\$25.40	-0.83%
Average Online Transaction - First-Time Donor	\$215.31	4.53%
Average Online Transaction - Repeat Donor	\$157.44	-8.77%

Sustainer Trends

Sustainer Revenue	\$12,890	18.00%
Sustainer Revenue as a % of Total	10.62%	29.37%
Average Online Transaction - Sustainer	\$55.26	-5.74%

Email Engagement Trends

Email List Growth	N/A	5.41%
Usable Email List Growth	N/A	1.95%
Number of Emails Sent: Median Percent Change	-5.10%	N/A
Number of Fundraising Emails Sent	N/A	14.38%

10,000-49,999: These organizations had less revenue from email (-25.90%) and sent fewer fundraising emails (-12.79% vs. 3.06% for the industry as a whole) but had growth in their usable email lists (3.18% vs. -13.8%).

List Size 10,000-49,999

Giving Trends	Total	YoY Change
Fundraising Revenue by Email List Size	\$400,944	4.12%
Increase in Revenue Solicited by Email	N/A	-25.43%
Percent of Usabel Email List that Donates	14.88%	4.82%
Annual Revenue Per Usable Email Address	\$16.17	0.36%
Average Online Transaction - First-Time Donor	\$159.06	7.70%
Average Online Transaction - Repeat Donor	\$137.87	-2.00%

Sustainer Trends

Sustainer Revenue	\$33,485	19.63%
Sustainer Revenue as a % of Total	12.44%	12.51%
Average Online Transaction - Sustainer	\$44.49	2.52%

Email Engagement Trends

Email List Growth	N/A	5.77%
Usable Email List Growth	N/A	2.92%
Number of Emails Sent: Median Percent Change	-11.43%	N/A
Number of Fundraising Emails Sent	N/A	-12.07%

50,000-99,999: These organizations had an increase in revenue per email address (1.08%) and usable email list growth (2.82%).

List Size 50k-99,999

Giving Trends	Total	YoY Change
Fundraising Revenue by Email List Size	\$954,108	5.78%
Increase in Revenue Solicited by Email	N/A	1.89%
Percent of Usable Email List that Donates	15.71%	5.08%
Annual Revenue Per Usable Email Address	\$15.25	1.08%
Average Online Transaction - First-Time Donor	\$142.46	6.22%
Average Online Transaction - Repeat Donor	\$118.30	0.04%

Sustainer Trends

Sustainer Revenue	\$101,625	26.44%
Sustainer Revenue as a % of Total	12.37%	21.64%
Average Online Transaction - Sustainer	\$38.62	1.45%

Email Engagement Trends

Email List Growth	N/A	6.95%
Usable Email List Growth	N/A	2.81%
Number of Emails Sent: Median Percent Change	-5.24%	N/A
Number of Fundraising Emails Sent	N/A	-4.47%

100,000-249,999: These did not see fundraising growth year-over-year (-0.58% vs. 5.17%); however, their usable email list increased by 3.9%.

List Size 100k-249,999

Giving Trends	Total	YoY Change
Fundraising Revenue by Email List Size	\$1,556,773	-0.58%
Increase in Revenue Solicited by Email	N/A	-14.77%
Percent of Usable Email List that Donates	12.93%	3.03%
Annual Revenue Per Usable Email Address	\$9.75	-5.27%
Average Online Transaction - First-Time Donor	\$137.94	10.16%
Average Online Transaction - Repeat Donor	\$97.36	-1.35%

Sustainer Trends

Sustainer Revenue	\$185,362	23.03%
Sustainer Revenue as a % of Total	14.26%	16.63%
Average Online Transaction - Sustainer	\$38.11	1.96%

Email Engagement Trends

Email List Growth	N/A	6.24%
Usable Email List Growth	N/A	3.82%
Number of Emails Sent: Median Percent Change	-3.03%	N/A
Number of Fundraising Emails Sent	N/A	-11.11%

250,000-499,999: These had the most significant increase in revenue year-over-year (14.89%). They also had an increase in revenue raised by email (8.74%). Additionally, their usable email list and number of emails sent increased.

List Size 250k-499,999

Giving Trends	Total	YoY Change
Fundraising Revenue by Email List Size	\$3,016,300	12.65%
Increase in Revenue Solicited by Email	N/A	8.66%
Percent of Usabel Email List that Donates	10.26%	3.06%
Annual Revenue Per Usable Email Address	\$7.81	4.68%
Average Online Transaction - First-Time Donor	\$144.14	6.83%
Average Online Transaction - Repeat Donor	\$114.84	4.99%

Sustainer Trends

Sustainer Revenue	\$356,603	13.81%
Sustainer Revenue as a % of Total	10.39%	0.23%
Average Online Transaction - Sustainer	\$31.24	0.23%

Email Engagement Trends

Email List Growth	N/A	8.00%
Usable Email List Growth	N/A	7.24%
Number of Emails Sent: Median Percent Change	-3.03%	N/A
Number of Fundraising Emails Sent	N/A	9.09%

500,000-999,999: These saw slightly lower revenue growth compared to the industry, but their usable email list grew as well as the number of emails sent and revenue by email.

List Size 500k-999,999

Giving Trends	Total	YoY Change
Fundraising Revenue by Email List Size	\$2,774,996	8.38%
Increase in Revenue Solicited by Email	N/A	2.86%
Percent of Usabel Email List that Donates	8.80%	-0.06%
Annual Revenue Per Usable Email Address	\$4.80	-11.11%
Average Online Transaction - First-Time Donor	\$122.25	8.85%
Average Online Transaction - Repeat Donor	\$125.04	-0.29%

Sustainer Trends

Sustainer Revenue	\$327,037	13.06%
Sustainer Revenue as a % of Total	10.63%	11.21%
Average Online Transaction - Sustainer	\$36.53	0.54%

Email Engagement Trends

Email List Growth	N/A	8.65%
Usable Email List Growth	N/A	5.45%
Number of Emails Sent: Median Percent Change	-4.75%	N/A
Number of Fundraising Emails Sent	N/A	13.07%

1,000,000+: These large organizations saw usable email list growth but sent fewer fundraising emails (-11.2%).

List Size 1M+

Giving Trends	Total	YoY Change
Fundraising Revenue by Email List Size	\$11,564,041	2.04%
Increase in Revenue Solicited by Email	N/A	-10.10%
Percent of Usabel Email List that Donates	16.89%	0.82%
Annual Revenue Per Usable Email Address	\$6.48	-3.29%
Average Online Transaction - First-Time Donor	\$96.14	15.76%
Average Online Transaction - Repeat Donor	\$88.55	-0.22%

Sustainer Trends

Sustainer Revenue	\$1,127,430	22.28%
Sustainer Revenue as a % of Total	8.30%	19.97%
Average Online Transaction - Sustainer	\$26.88	1.21%

Email Engagement Trends

Email List Growth	N/A	5.54%
Usable Email List Growth	N/A	3.69%
Number of Emails Sent: Median Percent Change	-12.34%	N/A
Number of Fundraising Emails Sent	N/A	-11.21%



Conclusion

Conclusion

The digital channel continues to increase in importance for nonprofit organizations, but traditional ways of soliciting donations through fundraising emails are shifting. While email fundraising is still a critical piece of online marketing, organizations can't rely on it for their entire digital fundraising program as responsiveness declines and barriers to inbox delivery increase.

The COVID-19 pandemic caused a surge in online activity that seems to have staying power, which mirrors the operations of many nonprofit organizations. Events shifted to virtual for a while, and many have retained a hybrid approach even as in-person gatherings returned. Working remotely in many types of organizations and jobs that allow for it has been normalized, so nonprofits need to continue to invest in the digital space to meet people where they are.

Looking back at 15 years of the Luminate Online Benchmark Report, we see that online fundraising has inched up each year. Concurrent with this growth is the continual expansion of channels nonprofits can use to interact with their supporters. There are more and more ways to get the word out, and it takes more innovation to be heard above the noise. Keep investing in ways to make it easy for your supporters to donate online, and keep being thoughtful about how you connect with them. We hope you can use the data in this report as inspiration and guidance to grow your program in the coming years!

Definitions

✓ *Total Fundraising: Every online financial transaction*

✓ *First-Time Online Donations: Donations flagged as a person's first online transaction with the respective organization*

✓ *Repeat Online Donations: Donations not flagged as a person's first online transaction with the respective organization*

✓ *Total Email List: Total sum of all records in the house file, including those that have hard bounced and opted-out*

✓ *Total Usable Email List: Total sum of records in house file, NOT including those that have hard-bounced or opted-out*

✓ *Sustainer Donations: Monthly recurring transactions*

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About this Report

Study Participants

This Report includes aggregate data from January 1, 2020, to December 31, 2021, from 773 mature Blackbaud Luminate Online® customers—all with at least three years of consecutive usage. Over the last calendar year, these organizations collectively raised over \$1.8 billion online, handled over 23 million transactions, and sent more than 3.3 billion emails. This large data sample comes directly from the Blackbaud Luminate Online cloud-based platform, offering a direct and unique view of online engagement across the nonprofit industry. Data from other Blackbaud online fundraising tools were not included in this analysis. Year-over-year measurement is based on a consistent set of organizations in each metric. Metrics found in this Report cannot be compared with the same metrics found in prior Reports as the specific organizations included will differ. Although some commentary is included with the statistics, it is generally “what is” rather than “why” to spotlight the trends and direction.

Organization Classification

Organizations with at least 36 full months of data—ending December 31, 2021—in Blackbaud Luminate Online were combined into groups believed to be similar based on a shared organizational mission or sector. The categorization guideline is the self-classified National Taxonomy of Exempt Entity (NTEE) verticals. In the NTEE verticals, similar cohorts are combined with other organizations believed to perform similarly. In other cases, the mission was so narrow that the resulting sample was too small to be statistically significant. Sectors that did not have at least ten similar organizations with a shared mission were excluded from this study. Unless otherwise specified, all data is from U.S. organizations.

Organizations that raise 90% or more of their reported funds through peer-to-peer events using Blackbaud TeamRaiser® have been excluded from this study but are likely included in the annual Blackbaud Peer-to-Peer Fundraising Study.

Medians

All values in this Report are expressed as medians. Medians instead of averages provide a more accurate view of the benchmarks. This method helps de-emphasize outliers. Medians represent the middle value between the largest and smallest in a set of numbers, so they are less likely to be influenced by extremely high or low results for some organizations.

The Luminate Online Benchmark Report includes all revenue received through Luminate Online. No reclassifications have been applied to major gifts, employee/workplace giving, or cause marketing. Many organizations using Luminate Online, especially those in the higher email volume cohorts, receive major gifts, employee/workplace giving, and other special donations through the Luminate Online web forms. Major gifts impact the metrics—such as year-over-year growth—for all organizations in these cohorts. This is a primary reason that the benchmark study observes industry medians instead of averages that would be skewed by major gift activity.

Methodology

Using the email list and transaction data directly from nonprofit organizations using Blackbaud Luminate Online avoids two significant sources of research bias common in many studies:

- The first, called referral bias, occurs when groups that volunteer to participate in a study often perform differently than non-volunteers.
- The second, called measurement bias, occurs from comparing organizations' results from different sources and measuring them differently. This commonly occurs when organizations selectively include or exclude various sources of online fundraising data, such as e-commerce, ticket sales, event registration fees, and donation form giving, when defining their online revenue.

The objective of the report is to provide the best and most accurate insight into how the industry fared in the calendar year 2021. As such, organizations that did not have at least 36 months of data in Blackbaud Luminate Online are excluded, as organizations migrating to a new solution tend to perform differently than those with an established program. Because of this exclusion, the number and composition of organizations in the report will vary slightly from year to year, depending on when they join Blackbaud and when they deploy additional modules.

About Blackbaud

Blackbaud (NASDAQ: BLKB) is the world's leading cloud software company powering social good. Serving the entire social good community—nonprofits, higher education institutions, K-12 schools, healthcare organizations, faith communities, arts and cultural organizations, foundations, companies, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through cloud software, services, data intelligence, and expertise. Learn more at www.blackbaud.com.



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