

# Blackbaud Luminate Online® Benchmark Report 2022

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A Guide to Evaluating Your Organization's  
Performance for the Year Ahead



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## Introduction to the 2022 Luminate Online Benchmark Report

### Welcome to Our 16th Annual Benchmark Report

If we could give 2022 a name, we would call it the Year of the Sustainer. When looking at online benchmarks and digital revenue, we saw that any growth or held ground was due to increases in sustainer metrics. Those increases may have compensated for or otherwise influenced corresponding decreases in the total number of one-time gifts.

Whether nonprofits were converting one-time givers into sustainers, or the first gift from new donors was a sustaining gift instead of a one-time gift, this is welcome news. It's okay if one-time givers decline as long as sustaining givers increase correspondingly. In fact, it's better! The annual and lifetime value of a sustainer is usually higher than the average one-time giver because new one-time givers are only retained at around 20%, according to Giving USA.

Measurement of email performance and efficacy continues to evolve. For the first time, we are not including open rates in our benchmark report. Machine opens make it impossible to measure the true rate of opens, and have so vastly inflated open rates year-over-year that this data is essentially meaningless. We evaluated click rates as a leading indicator of email performance.

These are the verticals we cover:

- |   |                                   |    |                              |
|---|-----------------------------------|----|------------------------------|
| 1 | Animal Welfare                    | 7  | Health Services and Research |
| 2 | Arts and Culture                  | 8  | Higher Education             |
| 3 | Disaster and International Relief | 9  | Hospital Foundations         |
| 4 | Environment and Wildlife          | 10 | Human & Social Services      |
| 5 | Faith Communities                 | 11 | Public Broadcasting Station  |
| 6 | Food Bank                         | 12 | Public/Society Benefit       |

## What's New this Year

### First: Revenue from Sustainers is on the rise

Total median online revenue from both one-time and sustaining gifts is essentially flat (increased by 0.11%). The median revenue for one-time donations declined by 3.15%, while sustainer revenue increased by 10.82%. That means a decline in one-time revenue was offset by an increase in sustaining revenue.

And it was more sustaining gifts overall driving this growth, not just bigger gifts. In terms of total number of donations, one-time donations dropped by 8%, but sustainer donations grew by 9%. 2022 Sustainer revenue as a percent of total revenue is 14.28%, an increase from the previous year's median percentage of 11.15% (+14.64%).

When you consider that the median one-time donation amount was \$120.24 in 2022 and the median sustainer gift was \$40.22 per month (\$482.64 per year) that means the annual value of a sustainer is 4x greater than a one-time donor.

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The annual value of a sustainer is 4x greater than a one-time donor

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Sustainer benchmarks are up in all categories for all verticals in:

- numbers of sustainers
- revenue from sustainers
- percentage of total revenue from sustainers

### Second: Measuring email performance has changed

In September 2021, Apple significantly changed how it tracked email engagement on its devices. The impact of this change was evident in 2022. Open rates have become so over-inflated due to machine opens that they are no longer a metric we can include. Click rates are still worth tracking, although click rates can also be inflated due to security devices that pre-click all links to see if they pass security checks. The only completely reliable metric to measure email performance is conversion rate.

### Third: Email lists are growing both in total and usable housefile sizes

Despite the challenges of acquiring new emails and keeping them engaged, organizations' email lists actually grew in size, as well as usable email size. Unsubscribe rates did not change much and actually declined a bit (meaning fewer people unsubscribed compared to the previous year).



Key Findings

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Sustainer revenue grew **10.7%** at the median

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All verticals showed **growth** in sustainer metrics

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Revenue and transactions from **one-time** gifts declined

*which is not necessarily bad, considering revenue from sustainers grew*

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Email lists **grew!**

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Click rates **declined** across the board

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# Industry Overview

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# Industry Overview

## Online Giving Trends

When we analyze the data for this edition it is important to keep in mind what was happening in 2021 and 2022. In 2020, Covid-19 forced many aspects of peoples' lives online, and as a result many nonprofits pivoted their strategies to digital-first and in some cases digital-only. However, with vaccine availability and adoption in early to mid-2021 it cleared the way for nonprofits to begin to return to normal operations.

Did that forced shift to digital continue to impact email results and online fundraising in 2021 and 2022? Were people who gave as a result of pandemic related needs in 2021 no longer giving to those organizations in 2022? Did a return to in-person events impact online giving?

Also in 2022, many nonprofits struggled during the uncertain economic times and needed to both reduce staff sizes and pause certain investments and programs. Did this impact online giving as a result?

Online giving is often impacted by major news events as people are emotionally motivated to give. In 2022: Russia invaded Ukraine, there were numerous mass shootings in the United States, the Supreme Court overturned Roe vs. Wade, there were numerous climate disasters including Hurricane Ian and massive droughts, and there was a midterm election...to name a few.

In addition to outside events, did organizations prioritize their digital strategy efforts into sustainer giving, and did their efforts have an effect on one-time gifts?

Finally, it is important to note that click-through rates are now a leading metric to evaluate engagement of nonprofits' email programs, with conversion rates being the only metric that is still unaffected by email privacy and security features. We can no longer rely on open rates as a reliable metric.

The following tables track total revenue from both one-time and sustaining gifts and are expressed in medians.

<b>Total Amount per Usable Email</b>	<b>2021</b>	<b>2022</b>
	\$15.25	\$13.58
<b>Gift Amount</b>	<b>2021</b>	<b>2022</b>
	\$125.54	\$120.14
<b>Transaction Count</b>	<b>2021</b>	<b>2022</b>
	8,114	7,839
<b>Revenue</b>	<b>2021</b>	<b>2022</b>
	\$990,644	\$960,256



In 2022, the median transaction count was less than 2021, but the median revenue remained similar to that of 2021. Even if fewer people are giving, if they give at a higher amount or through sustaining gifts, it will help retain and ultimately increase revenue year over year.

## Giving Trends by Year-over-Year Change

	Median	YOY Change
<b>Total One-Time Giving Revenue</b>	\$801,360	-3.15%
<b>Total One-Time Gift Transactions</b>	3,953	-8.07%
<b>Total Revenue from Fundraising Emails</b>	\$354,667	-11.38%
<b>Percent of Email List that Donates</b>	14.37%	+2.51%
<b>Average Revenue per Usable Email</b>	\$13.55	-10.20%

Revenue and gifts from one-time gifts declined from 2021 levels.

Total revenue from fundraising emails is down 11.38% year over year, but the percent of the email list that donates is up 2.51% year over year. People are likely giving through other online channels versus directly via email such as the website. Additionally, many organizations may suppress their sustainers from most fundraising appeals.

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

<b>First-Time Online Donations</b>	-12.33%
<b>Repeat Online Donations*</b>	+4.06%
<b>One-time Online Donation</b>	-3.15%
<b>Sustainer Online Donations</b>	+10.82%

*\*Repeat Online Donations includes sustaining donations.*

First time online donations decreased by 12.33%, while sustainer donations and repeat online donations (inclusive of sustaining donations) are up.



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

<b>One-Time Online Donations</b>	\$192.90	+3.18%
<b>Sustainer Online Donations</b>	\$40.22	+1.47%
<b>First-time Online Donations</b>	\$151.23	+8.4%
<b>Repeat Online Donations*</b>	\$120.61	-1.38%

\*Repeat Online Donations includes sustaining donations.

Despite first time donations decreasing year-over-year, their average gift size improved by 8.4% or a median of \$151.23.



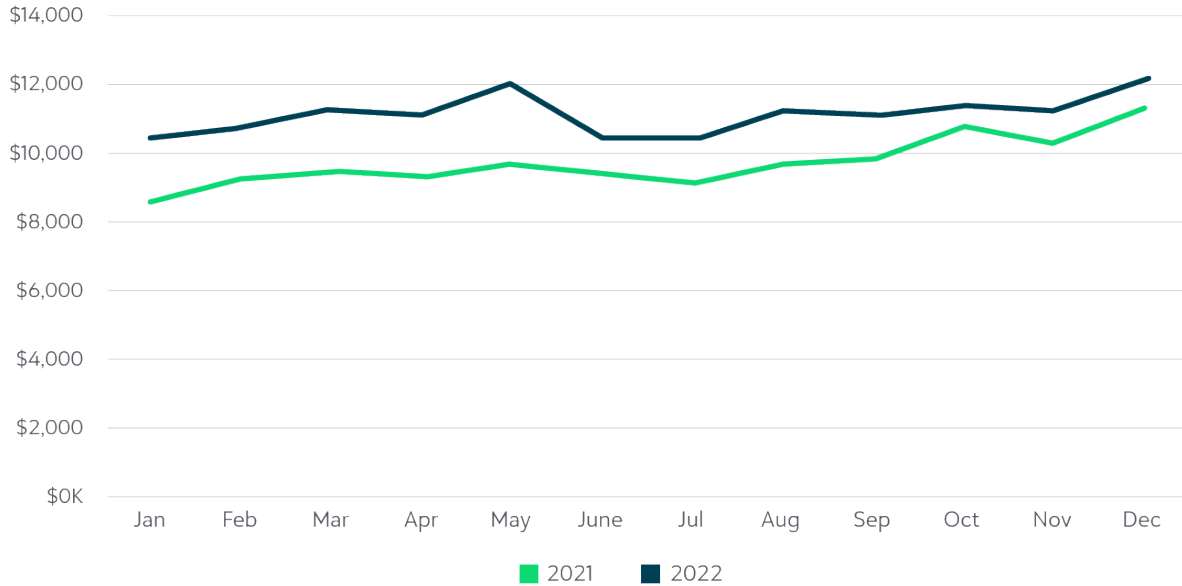
# Sustainer Giving Trends

Sustainer gifts and revenue increased during 2022 for the industry, and strikingly, increased across all verticals.

<b>Revenue increase at median</b>	+10.70%
<b>Gift counts increase</b>	+8.77%
<b>Average median sustainer gift revenue</b>	\$40.22, up 1.47%
<b>Median number of sustainers</b>	+5.87%
<b>Sustainers as percent of revenue</b>	+14.64%

Sustained giving revenue started off higher in 2022 and grew steadily each month, although at a slower pace compared to 2021. For the 11th year in a row the total median sustainer revenue has increased. It has also increasingly become a larger piece of the total revenue pie.

## Sustainer Revenue Comparison: 2021 and 2022



Across all verticals, the number of sustaining gifts rose in 2022 by 8.85%, and the number of sustainers also rose by 5.87%. Sustaining revenue as a share of all online revenue grew by 14.64%





## Notable Trends by Sector

All twelve sectors showed growth in the share of recurring donors among all online donors. Seven sectors are raising between 20-29% of their total revenue from sustaining revenue. Public Broadcasting continues to be the leader in this area, clocking in at 61%.

Seven sectors had greater than 20% sustaining revenue as a share of all online revenue in 2022:

 **Animal Welfare 25%**

 **Food Banks 29%**

 **Disaster and International Aid 27%**

 **Public Broadcasting 61%**













 **Environment 23%**

 **Public Society Benefit 20%**













 **Faith 23%**

All twelve sectors saw an increase in both the number of sustainers AND the revenue percentage of all online revenue coming from sustaining gifts.

### Number of Sustainers Increase Year-Over-Year

 <b>Animal Welfare 6.1%</b>	 <b>Health Services and Research 4.19%</b>
 <b>Arts and Culture 8.13%</b>	 <b>Higher Education 7.95%</b>
 <b>Disaster and International Relief 9.8%</b>	 <b>Hospital Foundations 12%</b>
 <b>Environment and Wildlife 7.67%</b>	 <b>Human &amp; Social Services 5.76%</b>
 <b>Faith Communities 9.24%</b>	 <b>Public Broadcasting Station 3.56%</b>
 <b>Food Bank 3.89%</b>	 <b>Public/Society Benefit 4.43%</b>

### Revenue Percentage Increase Year-Over-Year from Sustainers

 <b>Animal Welfare 8.18%</b>	 <b>Health Services and Research 9.86%</b>
 <b>Arts and Culture 10.38%</b>	 <b>Higher Education 14.16%</b>
 <b>Disaster and International Relief 15.11%</b>	 <b>Hospital Foundations 21.97%</b>
 <b>Environment and Wildlife 17.52%</b>	 <b>Human &amp; Social Services 11.90%</b>
 <b>Faith Communities 10.86%</b>	 <b>Public Broadcasting Station 6.35%</b>
 <b>Food Bank 6.62%</b>	 <b>Public/Society Benefit 9.04%</b>



# Email Engagement Trends

Email marketing is a constant, rapidly evolving and growing industry. 2022 email trends certainly demonstrated just how rapid change is for this digital marketing channel.

In this report we dropped open rates as a reliable benchmarking metric. This is a significant change not only for this report, but the industry as a whole.

Click rates are a better metric than open rates to evaluate the engagement of your emails. Although click rates are no longer totally reliable, since some email security software pre-clicks all links to ensure they are safe, many email service providers still use clicks over time to determine whether messages should be delivered to the inbox.

Conversion rates are now the only true metric to use as a key performance indicator for email engagement. With conversion rates, we have the opposite problem from open and click rates, though: conversion rates are usually lower than the true number of conversions that can be attributed to an email. This can happen when people disable cookies or other tracking for links. It can also happen when an email motivates a supporter to visit a website and make a donation: although the donation was spurred by the email, the donation is not tracked as a conversion.

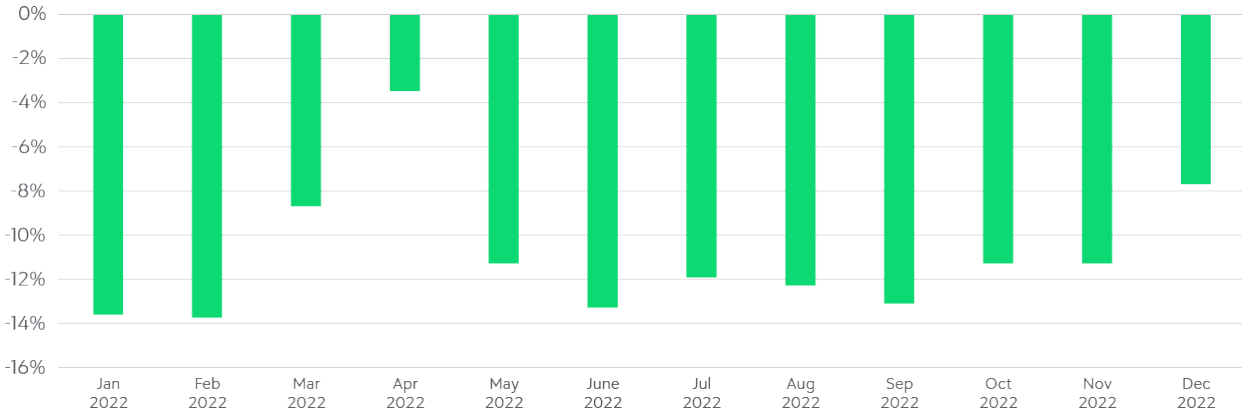
The other challenge for nonprofits is acquiring new names. This is due to cost, changes in online advertising, and oversaturation of email.

Let's look at email performance results in 2022.

## Click Rates

The click rate in 2022 was 1.11%, compared to 1.23% in 2021. For an email sent to a million people, that means 1,200 fewer people clicked on a link. The total click rate is down 10.76% year-over-year, and also down month-by-month. This overall decline in click rates will translate to fewer conversions and fewer donations.

## Email Engagement Year-over-Year Change



# Email List Stats (Total)

To measure email engagement, we wanted to first look at what happened with organizations' email lists. Email lists grew overall in 2022, with usable, total, and organic email addresses increasing. While usable emails as a percentage of total decreased, this was due to greater growth in total list size, not a reduction in usable emails.

You can see further breakdown of email engagement trends in the sections that analyze organizations by list size and by vertical.

Email List	YOY Change
Total email list	+5.35%
Usable email list	+2.47%
Usable email list as percent of total housefile	-1.20%

**The bottom line:**

Email lists grew in size, as did usable emails.  
Organizations had bigger lists to work with.

Now, let's see how well organizations did keeping those subscribers engaged.

Organizations sent more total emails in 2022 compared to 2021, though they sent fewer distinct emails. Fewer people unsubscribed (a negative unsubscribe rate means less total unsubscribes). However, the click rate for all emails was less than 2021 by almost 11%.

Fewer clicks on emails means that over time, fewer people are engaging with emails and may drop out of the usable housefile pool in the future. So far, though, usable email list sizes actually grew in 2022. This metric will be one to watch for organizations that focus on improving their email engagement.

Email engagement	2022	YOY Change
Total emails sent	N/A	1.18%
Click rate	1.11%	-10.76%
Conversion rate	0.10%	-53.47%
Unsubscribe rate	0.17%	-1.48%

Let's take a look at how fundraising emails in particular performed.

Organizations sent fewer fundraising emails year-over-year in 2022. The unsubscribe rate also declined, meaning fewer people unsubscribed from fundraising emails. We also observed a lesser click rate in 2022 on fundraising emails.

When we take this data alongside the increase in sustainers that all verticals saw, one possibility for this decline in particular could be that when a donor becomes a sustainer, organizations may stop sending them fundraising emails. Organizations who are interested in evaluating the click rate for their fundraising emails should also take into account whether they suppress sustainers from future fundraising emails.

<b>Fundraising email engagement</b>	<b>2022</b>	<b>YOY Change</b>
Total emails sent	N/A	-0.55%
Click rate	0.78%	-9.85%
Conversion rate	0.13%	-51.65%
Unsubscribe rate	0.17%	-5.88%

Overall, email list sizes increased while clicks decreased. As click rate is an important engagement metric, organizations should monitor their click rate closely for all types of emails, and focus on producing content that is clickable, interesting, timely, and actionable.







Benchmark against  
organizations in Sectors

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# Benchmark Against Organizations in Sectors

## How to Use this Information

**In the Vertical Trends section,** we examine year-over-year (YOY) change in important benchmarks. We provide performance 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 and the significant changes in the industry in 2021 and 2022, this year's highlights continue to 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 (YOY percent change) often proves more useful to organizations than the 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 highlights growth in a few key financial metrics for a vertical compared to nonprofits overall.
- **Email Engagement Trends** statistics highlight possible relationships between email list growth, changes in number of emails sent, and the response of supporters 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 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.
- The **Fundraising Email Conversion Rate** measures the percentage of constituents who received your email and donated. It is an indicator of how compelling your messages are to get constituents to open and click, and how effective your landing pages are in securing a donation.

**Email Statistics no longer include Open Rates.** As noted, the implementation of Apple's Mail Privacy Protection skewed open rates in late 2021. This trend accelerated in 2022 as Apple email client share continued to rise and as security hardware that checks email links became more widespread. We observed a median open rate of 35.37% this year, a 73.5% increase from 2021, driving our conclusion that this metric is no longer reliable. In last year's report, we added action and conversion rates as a better business analysis measurement and continue doing so this year.



## Animal Welfare

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

The increase in shelter adoptions in 2020 and early 2021 flattened in 2022, resulting in a focus on keeping pets in their homes. Animal welfare groups saw an increase in the number of donors but experienced lower average donation amounts, the reverse of the industry trends.

### Animal Welfare Trends

#### Online Giving & Sustainers

- The average first time gift of \$75.22 is the lowest of all verticals and experienced the largest drop of -11.38%
- Revenue from first time givers increased by 8.2%, the highest of all verticals
- The number of transactions increased by 6.08%, the second highest of all verticals

#### Email Engagement

- Fundraising Email Conversion rates dropped 57.2% year-over-year
- Donors comprise 18.58% of email lists
- Animal Welfare groups have the lowest percentage of usable email addresses in their houseflies (52%)

<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	1.22%	0.11%	1.63%
Transaction Count (YOY Change)	6.08%	1.08%	1.93%
Revenue per Usable Email	\$13.48	\$13.58	\$10.86
Percent of Email List that Donates	18.58%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$75.22	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$60.52	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	8.18%	10.82%	11.52%
Sustainer Revenue as a % of Total	25.04%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	3.65%	14.64%	11.68%
Average Online Transaction - Sustainer	\$31.09	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	3.09%	2.47%	2.51%
Usable Email List	51.95%	63.64%	63.93%
Number of Emails Sent (YoY Change)	-3.21%	-3.98%	-3.98%
Email Click Rate	0.80%	1.11%	1.10%
Email Action Rate	0.13%	0.10%	0.09%
Email Unsubscribe Rate	0.13%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-1.83%	-5.00%	-6.16%
Fundraising Email Open Rate	35.16%	35.16%	35.21%
Fundraising Email Click Rate	0.62%	0.77%	0.75%
Fundraising Email Conversion Rate	0.16%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-5.81%	-11.60%	-10.91%



## Arts, Culture, and Humanities

The arts, culture, and humanities include 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 are the places that 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.

### Arts, Culture, and Humanities Trends

#### Online Giving & Sustainers

- The average amount for the first gift increased by 14.83%, the highest of all verticals
- The number of repeat givers increased by 7.68%
- Sustainer benchmarks lag behind other industries, remaining an area of opportunity

#### Email Engagement

- The industry experienced tremendous growth in usable email (6.38%), the highest of all verticals
- Arts and Cultural organizations succeeded again in driving the highest number of email clicks (1.43%) compared with the industry median of 1.11%
- The number of fundraising emails remained flat whereas the industry saw a decline. However, revenue solicited by email only dropped by -1.87%, much lower than the industry median of -11.6



<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	1.91%	0.11%	1.63%
Transaction Count (YOY Change)	1.69%	1.08%	1.93%
Revenue per Usable Email	\$7.17	\$13.58	\$10.86
Percent of Email List that Donates	5.67%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$159.45	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$138.51	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	10.38%	10.82%	11.52%
Sustainer Revenue as a % of Total	8.11%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	8.35%	14.64%	11.68%
Average Online Transaction - Sustainer	\$33.43	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	6.38%	2.47%	2.51%
Usable Email List	70.12%	63.64%	63.93%
Number of Emails Sent (YoY Change)	0.00%	-3.98%	-3.98%
Email Click Rate	1.43%	1.11%	1.10%
Email Action Rate	0.05%	0.10%	0.09%
Email Unsubscribe Rate	0.13%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	0.00%	-5.00%	-6.16%
Fundraising Email Open Rate	35.31%	35.16%	35.21%
Fundraising Email Click Rate	0.73%	0.77%	0.75%
Fundraising Email Conversion Rate	0.10%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-1.87%	-11.60%	-10.91%



## Disaster and International Aid

This sector is comprised of 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

- This group continues robust sustainer growth (15.11%) with 27.25% of revenue provided by sustainers
- Revenue from email solicitations dropped most of all verticals, -33.09%
- Revenue increased year-over-year due to a small increase in median gift amount and transaction counts

#### Email Engagement

- Usable email lists are the largest of all verticals and continue to see strong growth (6.19%)
- This was the only vertical that experienced an increase in the number of emails sent (0.74%)
- This was also the only vertical that saw email fundraising click rates increase and had a conversion rate significantly higher than industry average

<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	2.19%	0.11%	1.63%
Transaction Count (YOY Change)	3.10%	1.08%	1.93%
Revenue per Usable Email	\$29.50	\$13.58	\$10.86
Percent of Email List that Donates	12.89%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$164.14	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$86.31	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	15.11%	10.82%	11.52%
Sustainer Revenue as a % of Total	27.25%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	1.92%	14.64%	11.68%
Average Online Transaction - Sustainer	\$40.16	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	6.19%	2.47%	2.51%
Usable Email List	54.70%	63.64%	63.93%
Number of Emails Sent (YoY Change)	0.74%	-3.98%	-3.98%
Email Click Rate	0.70%	1.11%	1.10%
Email Action Rate	0.15%	0.10%	0.09%
Email Unsubscribe Rate	0.17%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-3.77%	-5.00%	-6.16%
Fundraising Email Open Rate	28.73%	35.16%	35.21%
Fundraising Email Click Rate	0.65%	0.77%	0.75%
Fundraising Email Conversion Rate	0.21%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-33.09%	-11.60%	-10.91%





## Environment and Wildlife

The environment and wildlife sector encompasses globally and locally focused organizations that are working to preserve and protect nature, wildlife, parks, and reserves and to address urgent environmental challenges.

In 2022, there were global disasters Hurricane Ian and Nicole, flooding in Pakistan and a massive heat wave in Europe. And there were some important victories with new legislation passed in the United States and new commitments at COP27.

### Environment and Wildlife Trends

#### Online Giving & Sustainers

- Amount per usable email dropped 7.23%, the second largest decrease in all verticals
- Revenue was down by 3.02%, the third largest decrease in all verticals
- The average sustaining gift of \$24.52 is the second lowest across all verticals

#### Email Engagement

- Email conversion rates are among the highest of all verticals
- These organizations had the lowest growth in usable emails list at 1.04%

<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	-3.02%	0.11%	1.63%
Transaction Count (YOY Change)	-1.44%	1.08%	1.93%
Revenue per Usable Email	\$9.63	\$13.58	\$10.86
Percent of Email List that Donates	9.67%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$112.38	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$56.76	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	17.52%	10.82%	11.52%
Sustainer Revenue as a % of Total	22.92%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	13.41%	14.64%	11.68%
Average Online Transaction - Sustainer	\$24.52	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	1.04%	2.47%	2.51%
Usable Email List	62.98%	63.64%	63.93%
Number of Emails Sent (YoY Change)	-2.83%	-3.98%	-3.98%
Email Click Rate	1.11%	1.11%	1.10%
Email Action Rate	0.25%	0.10%	0.09%
Email Unsubscribe Rate	1.30%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	2.78%	-5.00%	-6.16%
Fundraising Email Open Rate	35.12%	35.16%	35.21%
Fundraising Email Click Rate	0.59%	0.77%	0.75%
Fundraising Email Conversion Rate	0.17%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-16.22%	-11.60%	-10.91%



## Faith Communities

The faith communities sector includes mission-based non-profit organizations with missions arising out of their faith and religious identity. Catholic dioceses, parishes, and protestant churches also make up a part of this group. While faith communities encompass a broad variety of religious beliefs, they all seek to deepen and grow a vibrant community of faith that serves the world.

Faith communities saw tremendous growth in 2020 and returned to more historical levels in 2021. In 2022, they experienced growth in online revenue, transaction counts and continued strong growth in sustainer revenue that suggests a strong post-COVID recovery.

### Faith Trends

#### Online Giving & Sustainers

- Revenue from online giving significantly exceeds the benchmark at 3%
- Repeat gift amounts increased by 1.6%, one of the few verticals to see growth
- The average sustaining gift amount (\$51.44) is the highest of all verticals
- First gift amounts are in line with industry averages but second gift amounts are below the benchmark

#### Email Engagement

- Continuing the previous year trend, faith communities continue to reduce the number of fundraising emails sent, -9.51%
- The percentage of fundraising emails dropped almost at the same rate as revenue generated by email -7.28%
- Unsubscribe rates are the lowest of all verticals at 0.11%



<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	3.02%	0.11%	1.63%
Transaction Count (YOY Change)	0.41%	1.08%	1.93%
Revenue per Usable Email	\$15.55	\$13.58	\$10.86
Percent of Email List that Donates	13.78%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$168.47	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$101.25	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	10.86%	10.82%	11.52%
Sustainer Revenue as a % of Total	23.43%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	6.53%	14.64%	11.68%
Average Online Transaction - Sustainer	\$50.80	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	2.39%	2.47%	2.51%
Usable Email List	61.48%	63.64%	63.93%
Number of Emails Sent (YoY Change)	-0.24%	-3.98%	-3.98%
Email Click Rate	1.16%	1.11%	1.10%
Email Action Rate	0.10%	0.10%	0.09%
Email Unsubscribe Rate	0.09%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-9.51%	-5.00%	-6.16%
Fundraising Email Open Rate	38.34%	35.16%	35.21%
Fundraising Email Click Rate	0.80%	0.77%	0.75%
Fundraising Email Conversion Rate	0.14%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-7.28%	-11.60%	-10.91%



## 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 an incredible need during the beginning of the COVID crisis in 2020 and massively outperformed the industry. Donor retention is a primary focus for food banks as giving levels decrease following the pandemic. Food banks continue to perform in ways that skew the overall benchmarks and this study continues to measure the industry with and without food banks.

### Food Bank Trends

#### Online Giving & Sustainers

- Total online revenue dropped 18% and was the only vertical with a double-digit revenue decrease
- Food banks generate 28.93% of all revenue from sustaining gifts, second only to public broadcasting
- Repeat donors gave smaller gifts (9.7% decrease in average gift amount) but drive overall performance as they make up 85% of total revenue
- Revenue per usable email was \$46.20 – almost \$20 more than the next highest vertical

#### Email Engagement

- Food banks lead all verticals in email conversion and action rates by a wide margin
- Donors comprise 32.4% of food bank's email lists
- Food banks experienced a large drop in unsolicited revenue (non-email sourced) of -18%

<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	-18.31%	0.11%	1.63%
Transaction Count (YOY Change)	-7.09%	1.08%	1.93%
Revenue per Usable Email	\$46.20	\$13.58	\$10.86
Percent of Email List that Donates	32.37%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$163.42	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$105.94	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	6.62%	10.82%	11.52%
Sustainer Revenue as a % of Total	28.93%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	28.84%	14.64%	11.68%
Average Online Transaction - Sustainer	\$50.16	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	1.44%	2.47%	2.51%
Usable Email List	54.63%	63.64%	63.93%
Number of Emails Sent (YoY Change)	-3.33%	-3.98%	-3.98%
Email Click Rate	1.17%	1.11%	1.10%
Email Action Rate	0.25%	0.10%	0.09%
Email Unsubscribe Rate	0.18%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	0.00%	-5.00%	-6.16%
Fundraising Email Open Rate	35.12%	35.16%	35.21%
Fundraising Email Click Rate	1.13%	0.77%	0.75%
Fundraising Email Conversion Rate	0.25%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-19.81%	-11.60%	-10.91%





## Health Services and Research

These organizations are dedicated to medical research, patient care and assistance, and political advocacy for a broad spectrum of diseases and disorders.

A continued drive for health equity and the need for stronger mental health resources resulted in continued revenue growth. Following the COVID-19 pandemic, the use of telehealth to provide care to patients persists. Many healthcare providers have adopted a hybrid model for virtual care as well as in-person.

### Health Services and Research Trends

#### Online Giving & Sustainers

- A 7.8% increase in transactions (highest of all verticals), drove the revenue increase
- Health services is the lowest in the industry for sustainer revenue as a percent of total revenue (4.2%)
- Repeat givers only drove 55.7% of revenue, the lowest of all verticals

#### Email Engagement

- Conversion rates from email solicitations were the second lowest in the industry, 0.06%
- Usable email list growth was modest (1.7%), underperforming against the benchmark
- The low-growth, coupled with churn resulted in the second-lowest usable email list rate, 55.75%

<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	6.59%	0.11%	1.63%
Transaction Count (YOY Change)	7.81%	1.08%	1.93%
Revenue per Usable Email	\$10.84	\$13.58	\$10.86
Percent of Email List that Donates	20.71%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$105.95	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$124.62	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	9.86%	10.82%	11.52%
Sustainer Revenue as a % of Total	4.21%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	10.03%	14.64%	11.68%
Average Online Transaction - Sustainer	\$40.62	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	1.68%	2.47%	2.51%
Usable Email List	55.75%	63.64%	63.93%
Number of Emails Sent (YoY Change)	-5.59%	-3.98%	-3.98%
Email Click Rate	1.04%	1.11%	1.10%
Email Action Rate	0.08%	0.10%	0.09%
Email Unsubscribe Rate	0.17%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-16.13%	-5.00%	-6.16%
Fundraising Email Open Rate	37.63%	35.16%	35.21%
Fundraising Email Click Rate	0.83%	0.77%	0.75%
Fundraising Email Conversion Rate	0.06%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-13.01%	-11.60%	-10.91%



## Higher Education

The higher education sector is comprised of 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 2022, the average online transaction was \$234.41, \$60 more than the next closest group
- The average sustaining gift amount of \$50.89 was the second highest in all verticals
- Revenue from email solicitations dropped over 50%, the largest decrease of all verticals

#### Email Engagement

- Higher education groups increased the number of email messages sent by 12.5%, the second highest increase in this year's study. But the increase in messaging did not result in higher revenue
- Email action and conversion rates were in line with the industry without foodbanks
- Email lists lead all industries with the highest percentage of usable emails, 78%



<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	-2.14%	0.11%	1.63%
Transaction Count (YOY Change)	1.48%	1.08%	1.93%
Revenue per Usable Email	\$11.48	\$13.58	\$10.86
Percent of Email List that Donates	9.28%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$212.84	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$225.75	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	14.16%	10.82%	11.52%
Sustainer Revenue as a % of Total	9.21%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	15.87%	14.64%	11.68%
Average Online Transaction - Sustainer	\$57.94	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	5.32%	2.47%	2.51%
Usable Email List	78.44%	63.64%	63.93%
Number of Emails Sent (YoY Change)	0.00%	-3.98%	-3.98%
Email Click Rate	0.84%	1.11%	1.10%
Email Action Rate	0.06%	0.10%	0.09%
Email Unsubscribe Rate	0.17%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	12.50%	-5.00%	-6.16%
Fundraising Email Open Rate	35.69%	35.16%	35.21%
Fundraising Email Click Rate	0.72%	0.77%	0.75%
Fundraising Email Conversion Rate	0.11%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-50.65%	-11.60%	-10.91%



## Hospital Foundations and Hospitals

Hospital foundations and hospitals comprise organizations that range from children's hospitals and general medical centers to specialized cancer centers in the United States and Canada.

Hospital foundations and hospitals generally leverage a wide range of 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.

### Health Foundations and Hospital Trends

#### Online Giving & Sustainers

- Hospital foundations and hospitals experienced the highest increase in revenue year-over-year (8.9%)
- Sustainer revenue increased by 22%, the highest of all verticals
- However, sustainer revenue as a percentage of all revenue is near the bottom at 4.62%

#### Email Engagement

- This was the only vertical in the study that experienced an increase in revenue solicited from email, 7.31%
- Email unsubscribe rates reached 0.24%, the highest of all verticals
- Hospital Foundations and Hospitals maintain a very high Usable Email List (74%)

<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	8.93%	0.11%	1.63%
Transaction Count (YOY Change)	4.65%	1.08%	1.93%
Revenue per Usable Email	\$10.27	\$13.58	\$10.86
Percent of Email List that Donates	13.11%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$178.57	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$180.71	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	21.97%	10.82%	11.52%
Sustainer Revenue as a % of Total	4.62%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	17.50%	14.64%	11.68%
Average Online Transaction - Sustainer	\$39.44	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	4.82%	2.47%	2.51%
Usable Email List	73.61%	63.64%	63.93%
Number of Emails Sent (YoY Change)	0.00%	-3.98%	-3.98%
Email Click Rate	1.15%	1.11%	1.10%
Email Action Rate	0.09%	0.10%	0.09%
Email Unsubscribe Rate	0.24%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	1.79%	-5.00%	-6.16%
Fundraising Email Open Rate	38.65%	35.16%	35.21%
Fundraising Email Click Rate	0.91%	0.77%	0.75%
Fundraising Email Conversion Rate	0.10%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	7.31%	-11.60%	-10.91%





## Human and Social Services

Organizations in the human and social services category focus on supporting and empowering the communities they serve. These organizations work tirelessly each day to support children, families, the elderly, and those who are disabled. Many of these organizations address immediate and tangible needs, such as homelessness, affordable housing, and child welfare.

At a time where focusing on community needs should be higher than ever, this vertical saw substantial decreases in revenue even while constituents continued to engage via email. Donor generosity was strong with high average one-time and sustaining gifts.

### Human and Social Services Trends

#### Online Giving & Sustainers

- This group experienced the second largest drop in revenue (-4.8%) and transaction counts (-4.3%)
- The average first gift amount dropped by 4.7%, the largest decrease of all verticals
- However, average first and second gift amounts are well above the industry benchmarks

#### Email Engagement

- 10% fewer fundraising emails were sent, and email fundraising revenue dropped 19.5%
- Email click and conversion rates are largely in line with the benchmarks

<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	-4.76%	0.11%	1.63%
Transaction Count (YOY Change)	-4.35%	1.08%	1.93%
Revenue per Usable Email	\$14.80	\$13.58	\$10.86
Percent of Email List that Donates	12.33%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$186.69	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$163.77	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	11.90%	10.82%	11.52%
Sustainer Revenue as a % of Total	14.39%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	21.81%	14.64%	11.68%
Average Online Transaction - Sustainer	\$45.81	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	1.73%	2.47%	2.51%
Usable Email List	66.11%	63.64%	63.93%
Number of Emails Sent (YoY Change)	-9.00%	-3.98%	-3.98%
Email Click Rate	1.17%	1.11%	1.10%
Email Action Rate	0.09%	0.10%	0.09%
Email Unsubscribe Rate	0.19%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-10.00%	-5.00%	-6.16%
Fundraising Email Open Rate	32.65%	35.16%	35.21%
Fundraising Email Click Rate	1.07%	0.77%	0.75%
Fundraising Email Conversion Rate	0.16%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-19.45%	-11.60%	-10.91%



## Public Broadcasting Stations

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

Most public broadcasting stations have industry-leading sustainer programs with added membership benefits that keep donors engaged, which continues to be a critical component of their strong sustainer retention.

## Public Broadcasting Trends

### Online Giving & Sustainers

- Public broadcasting stations received 61.0% of their online revenue from sustainer gifts
- Revenue per usable email (\$27.60) was the highest of all industries, other than food banks
- The percent of email list that donates was 34.05%, well ahead of the industry average of 14.2% and the highest of all industries

### Email Engagement

- Public broadcasting stations increased the number of fundraising emails by 21.6%, the highest of all verticals but also saw the second highest drop in email fundraising revenue, -28.6%
- Non-fundraising specific email volume dropped by 16.67, the largest drop of all verticals
- Email solicitations are a weak driver of revenue, accounting for 1.6% of all online revenue



<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	1.54%	0.11%	1.63%
Transaction Count (YOY Change)	3.16%	1.08%	1.93%
Revenue per Usable Email	\$27.60	\$13.58	\$10.86
Percent of Email List that Donates	34.05%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$80.16	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$20.84	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	6.35%	10.82%	11.52%
Sustainer Revenue as a % of Total	61.00%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	2.93%	14.64%	11.68%
Average Online Transaction - Sustainer	\$13.35	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	1.60%	2.47%	2.51%
Usable Email List	67.06%	63.64%	63.93%
Number of Emails Sent (YoY Change)	-16.67%	-3.98%	-3.98%
Email Click Rate	1.37%	1.11%	1.10%
Email Action Rate	0.05%	0.10%	0.09%
Email Unsubscribe Rate	0.14%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	21.58%	-5.00%	-6.16%
Fundraising Email Open Rate	40.37%	35.16%	35.21%
Fundraising Email Click Rate	0.55%	0.77%	0.75%
Fundraising Email Conversion Rate	0.03%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-28.60%	-11.60%	-10.91%



## 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, though the 2022 elections did not appear to cause any major shifts even with hot button issues making national headlines.

### Public/Society Trends

#### Online Giving & Sustainers

- Unsolicited (non-email) revenue grew the largest of all verticals at 9.7%
- Public/society benefit organizations experienced modest growth in online revenue and transaction counts
- First time giver amounts are generous, significantly outperforming the benchmark but repeat giver amounts fall below the industry

#### Email Engagement

- Usable email addresses are 55.4% of all addresses, the lowest in the industry
- Count of email messages sent dropped by 14.1%, the second highest rate in the study
- Unsubscribe rates are the lowest in the study at .13%

<b>Giving Trends</b>	<b>This Vertical</b>	<b>Industry</b>	<b>Industry without Foodbanks</b>
Total Online Revenue (YOY Change)	0.86%	0.11%	1.63%
Transaction Count (YOY Change)	2.08%	1.08%	1.93%
Revenue per Usable Email	\$10.86	\$13.58	\$10.86
Percent of Email List that Donates	6.99%	14.64%	13.64%
Average Online Transaction - First-Time Donor	\$198.36	\$151.23	\$146.48
Average Online Transaction - Repeat Donor	\$110.72	\$115.81	\$122.45

### **Sustainer Trends**

Sustainer Revenue (YOY Change)	9.04%	10.82%	11.52%
Sustainer Revenue as a % of Total	20.26%	14.28%	13.41%
Sustainer Revenue as a % of Total (YOY Change)	17.12%	14.64%	11.68%
Average Online Transaction - Sustainer	\$38.00	\$40.22	\$38.75

### **Email Engagement Trends**

Usable Email List Growth (YoY Change)	2.04%	2.47%	2.51%
Usable Email List	55.40%	63.64%	63.93%
Number of Emails Sent (YoY Change)	-14.06%	-3.98%	-3.98%
Email Click Rate	0.92%	1.11%	1.10%
Email Action Rate	0.13%	0.10%	0.09%
Email Unsubscribe Rate	0.12%	0.17%	0.16%
Number of Fundraising Emails Sent (YoY Change)	-6.45%	-5.00%	-6.16%
Fundraising Email Open Rate	25.23%	35.16%	35.21%
Fundraising Email Click Rate	0.59%	0.77%	0.75%
Fundraising Email Conversion Rate	0.13%	0.13%	0.11%
Increase in Revenue Solicited by Email (YoY Change)	-7.91%	-11.60%	-10.91%





## Canada Analysis

Oh Canada! 2022 was a year of turbulence as supporters, donors and fundraisers navigated a world of uncertainty and inflationary pressure. Gone are the days when a bag of Ketchup chips cost a couple of loonies. You'd be lucky to find the 2 for \$8 deal once 2022 rolled in and dropped the mic. Yet despite the prolonged pandemic impact, Canadians still found ways to exude social good generosity.

Online giving in Canada remained healthy and strong, particularly in the areas of giving trends where we saw an average transaction for first time donors jump from \$129.76 in 2021 to \$140.47 in 2022, and where we witnessed sustainer giving revenue skyrocket with a 23.47% year-over-year change when compared to last year. This percentage outpaced the industry benchmark by two-fold, which sat at 12.29%.

Total online giving revenue showed a 1.5% year-over-year increase compared to 2021, exceeding the industry median of 0.38%. Let's stop to make note of this statistic as it is an important trend to acknowledge. In January of 2021 at the peak of the pandemic, through to the remainder of the year, Canadians exhibited philanthropic behavior by reaching deep into their pockets to support their local

charities and organizations near and dear to them. During this prolonged pandemic state, we saw an incredible increase of 6.26% in total online revenue.

Fast forward to 2022 when economic uncertainty came hand in hand with heightened awareness of the rise in cost of living, Canadians once again revealed their generosity with a 1.5% increase from the previous year's 6.26% increase of total online revenue. The compassionate reputation of Canadians which is embedded in their culture, speaks volumes here. They continued to show support toward choice charities, the Ukraine Crisis, causes that support social justice, and other meaningful programs that inspired and created a movement. These metrics have revealed unanticipated new giving trends in Canada, trends that have been rooted in Canadian culture and are here to stay.

More on giving trends, the revenue generated per usable email was \$22.54, surpassing the industry median of \$14.06. Equally impressive is the percent of email lists that donate. At 26.10%, more than a quarter of emails on Canadian lists donated. This exceeds the industry benchmark by over 10%. While Canadian charities sent fewer emails and fundraising emails (down by 1.41% and 14.55% respectively), it is certain that there is a conscious effort to focus and engage with those constituents who are interacting with the organization and who are taking action.

The data is showing that this targeted email strategy is in fact, paying off. The email list growth year-over-year has jumped by 5.37%, a tremendous percentage doubling that of the industry benchmark which revealed a 2.68% year-over-year increase. Organizations must remain vigilant, meticulous, and very thoughtful in their approach to targeting supporters. From an engagement perspective, it's important to be mindful of the potential gap that could grow if Canadian charities are not responding to the new giving trends, the obvious trend surging from the youth generation.

As discussed in last year's Luminare Online Benchmark Report, it is the younger generation that must be captivated. They need to be spoken to using the tools that resonate with them today. And they needed it yesterday. With a large majority of Millennials and Gen Z leveraging social media platforms, charities have experienced an increase in the sharing of their content, commenting, influencing, and following of their feeds. There is tremendous opportunity here to ensure fundraising momentum is not lost on younger supporters. Implementing a powerful and alluring strategy to specifically engage younger Canadians will be of utmost importance.



	<b>Canadian Blackbaud Luminate Online Customers</b>	<b>All Blackbaud Luminate Online Customers</b>
<b>Giving Trends</b>		
Total Online Revenue (YOY Change)	1.5%	0.38%
Revenue per Usable Email	\$22.54	\$14.06
Percent of Email List that Donates	26.10%	15.71%
Average Online Transaction - First Time Donor	\$140.47	\$148.37
Average Online Transaction - Repeat Donor	\$104.77	\$114.25
<b>Sustainer Trends</b>		
Sustainer Revenue (YOY Change)	23.47%	12.29%
Sustainer Revenue as a % of Total	8.61%	12.70%
Sustainer Revenue as a % of Total (YOY Change)	22.02%	16.04%
Average Online Transaction - Sustainer	\$33.43	\$40.22
<b>Email Engagement Trends</b>		
Email List Growth (YOY Change)	5.37%	2.68%
Usable Email List	58.63%	62.97%
Number of Emails Sent (YOY Change)	-1.41%	-3.95%
Email Click Rate	1.62%	1.15%
Email Action Rate	0.13%	0.10%
Email Unsubscribe Rate	0.26%	0.17%
Number of Fundraising Emails Sent	-14.55%	-6.16%
Fundraising Email Click Rate	1.05%	0.83%
Fundraising Email Conversion Rate	0.21%	0.14%
Increase in Revenue Solicited by Email (YOY Change)	-3.25%	-10.98%

*\*Note: In the chart above, the dollar amounts are expressed in US Dollars for the sake of consistency with the rest of the report.*



## Canada Trends

### Online Giving & Sustainers

- Total online revenue year-over-year was up by 1.5%, almost 4x the industry median of 0.38%
- Percentage of email list that donates was 26.10%. More than a quarter of emails on Canadian lists donated. This exceeds the industry benchmark by more than 10%
- Average online transaction for first time donors showed as \$140.47, approximately \$8 less than the industry benchmark. Similar figures emerged for Average online transaction for repeat donors where Canada was poised at \$104.77, just behind the industry benchmark with an average of \$114.25
- Sustainer revenue year-over-year was up 23.47%, more than double the industry median
- Sustainer revenue as a percentage of total revenue was 22%. Nearly a quarter of Canadian online giving came as recurring revenue

### Email Engagement

- Fundraising email click and conversion rates of 1.05% and 0.21%, respectively, exceeding the industry medians of 0.83% and 0.14%
- Like the industry, Canada sent fewer emails in 2021, down by 1.41%







Benchmark against  
organizations of similar size

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## Benchmark Against Organizations of Similar Size

### Email List Size <10,000

This sector had modest growth in most areas in 2022 with the exception of a 21.64% decrease in fundraising emails sent which corresponded with a 20.44% decrease in revenue solicited by email.

While there was only a slight increase in most metrics including email list growth and revenue by email, the percentage of sustainer revenue and sustainer revenue as a total was notably higher.

<b>Giving Trends</b>	<b>Total</b>	<b>YoY Change</b>
Fundraising Revenue by Email List Size	\$166,040	1.72%
Increase in Revenue Solicited by Email	NA	-20.44%
Percent of Usable Email List that Donates	17.71%	2.57%
Annual Revenue Per Usable Email Address	\$26.20	0.00%
Average Online Transaction - First-Time Donor	\$191.02	3.26%
Average Online Transaction - Repeat Donor	\$159.57	-3.22%

### **Sustainer Trends**

Sustainer Revenue	\$12,028	9.12%
Sustainer Revenue as a % of Total	9.37%	10.67%
Average Online Transaction - Sustainer	\$51.67	2.06%

### **Email Engagement Trends**

Email List Growth	NA	4.81%
Usable Email List Growth	NA	2.73%
Number of Emails Sent	32	-4.48%
Number of Fundraising Emails Sent	10	-21.64%



## Email List Size 10,000-49,999

This list size saw a decrease in revenue solicited by email of 17.22%, a decrease in annual revenue per email address of 4.56%, and number of emails sent by 10.96%.

It, like most sectors, did have an increase in sustainer revenue and sustainer revenue as a total at 16.30% or 18.21% increase year-over-year.

<b>Giving Trends</b>	<b>Total</b>	<b>YoY Change</b>
Fundraising Revenue by Email List Size	\$426,369	-2.51%
Increase in Revenue Solicited by Email	NA	-17.22%
Percent of Usable Email List that Donates	15.23%	2.90%
Annual Revenue Per Usable Email Address	\$16.47	-4.56%
Average Online Transaction - First-Time Donor	\$162.71	-0.38%
Average Online Transaction - Repeat Donor	\$133.36	-1.00%

## **Sustainer Trends**

Sustainer Revenue	\$40,358	10.89%
Sustainer Revenue as a % of Total	16.30%	18.21%
Average Online Transaction - Sustainer	\$45.70	1.34%

## **Email Engagement Trends**

Email List Growth	NA	4.66%
Usable Email List Growth	NA	1.92%
Number of Emails Sent	66	-10.96%
Number of Fundraising Emails Sent	22	-3.74%



## Email List Size **50,000-99,999**

This sector experienced a decrease year-over-year in giving trends with the exception of the percent of the email list that donates. It's notable that this number increased even though revenue solicited by email declined significantly year over year (-14.32%).

<b>Giving Trends</b>	<b>Total</b>	<b>YoY Change</b>
Fundraising Revenue by Email List Size	\$997,535	-1.10%
Increase in Revenue Solicited by Email	NA	-14.32%
Percent of Usable Email List that Donates	15.74%	3.65%
Annual Revenue Per Usable Email Address	\$15.02	-5.44%
Average Online Transaction - First-Time Donor	\$152.26	-1.26%
Average Online Transaction - Repeat Donor	\$125.02	-0.83%

<b>Sustainer Trends</b>		
Sustainer Revenue	\$140,285	11.25%
Sustainer Revenue as a % of Total	12.77%	17.82%
Average Online Transaction - Sustainer	\$39.76	2.00%

<b>Email Engagement Trends</b>		
Email List Growth	NA	6.28%
Usable Email List Growth	NA	3.09%
Number of Emails Sent	121	-3.36
Number of Fundraising Emails Sent	31	-3.13%

## Email List Size 100,000-249,999

Organizations in this list size band sent 9% fewer fundraising emails and had a corresponding decline in revenue solicited by email. Their email list grew though along with their usable email list. Revenue solicited by email declined by 9%. Most strikingly, the sustainer revenue grew by 9%. The number of sustainers grew year-over-year by 6.24%, likely a driver of the increased sustainer revenue.

Average online transaction size was higher for first-time donors compared to repeat donors. Since repeat donors included sustaining gifts, which are usually smaller than one-time donations, this is not surprising.

<b>Giving Trends</b>	<b>Total</b>	<b>YoY Change</b>
Fundraising Revenue by Email List Size	\$1,714,734	0.94%
Increase in Revenue Solicited by Email	NA	-9.10%
Percent of Usable Email List that Donates	13.18%	1.91%
Annual Revenue Per Usable Email Address	\$11.40	-4.73%
Average Online Transaction - First-Time Donor	\$144.48	1.72%
Average Online Transaction - Repeat Donor	\$95.58	-3.25%

<b>Sustainer Trends</b>		
Sustainer Revenue	\$271,463	9.18%
Sustainer Revenue as a % of Total	16.18%	15.21%
Average Online Transaction - Sustainer	\$39.14	0.90%

<b>Email Engagement Trends</b>		
Email List Growth	NA	5.36%
Usable Email List Growth	NA	1.89%
Number of Emails Sent	187	-2.65%
Number of Fundraising Emails Sent	38	-9.18%



## Email List Size 250,000-499,999

This list size followed the general trend of an increase in fundraising revenue by email list size, but a decline in revenue solicited by email. Those numbers were accompanied by commensurate growth in sustainer revenue (up by 15%) and a modest 1% increase in average online transaction size for sustainers.

Organizations in this size grew their lists and sent fewer total emails, but more fundraising emails. Correspondingly, although they had a negative increase in revenue solicited by email, it was a smaller decrease than the 100,000-249,999 group. Sending more fundraising emails corresponds to raising more money by email.

<b>Giving Trends</b>	<b>Total</b>	<b>YoY Change</b>
Fundraising Revenue by Email List Size	\$3,645,705	5.09%
Increase in Revenue Solicited by Email	NA	-7.28%
Percent of Usable Email List that Donates	9.58%	2.60%
Annual Revenue Per Usable Email Address	\$10.48	-2.32%
Average Online Transaction - First-Time Donor	\$147.29	1.47%
Average Online Transaction - Repeat Donor	\$126.05	-0.82%

<b>Sustainer Trends</b>		
Sustainer Revenue	\$531,677	15.49%
Sustainer Revenue as a % of Total	9.95%	7.66%
Average Online Transaction - Sustainer	\$34.67	0.94%

<b>Email Engagement Trends</b>		
Email List Growth	NA	6.51%
Usable Email List Growth	NA	5.57%
Number of Emails Sent	270	-0.68%
Number of Fundraising Emails Sent	77	1.52%

## Email List Size 500,000-999,999

Organizations with list sizes of 500,000-999,999 are larger nonprofit organizations, often enterprise, national, or multi-affiliate in scope. Lower giving trends in revenue solicited by email were made up for by an impressive 13% increase in sustainer revenue and a 2.24% increase in average online transaction size for sustaining gifts.

This group saw substantial growth in their total and usable email list sizes. They sent more total emails but fewer fundraising emails compared to last year.

<b>Giving Trends</b>	<b>Total</b>	<b>YoY Change</b>
Fundraising Revenue by Email List Size	\$2,260,135	-0.24%
Increase in Revenue Solicited by Email	NA	-9.96%
Percent of Usable Email List that Donates	5.36%	-0.14%
Annual Revenue Per Usable Email Address	\$3.34	-7.92%
Average Online Transaction - First-Time Donor	\$128.16	-2.06%
Average Online Transaction - Repeat Donor	\$103.16	-1.92%

### **Sustainer Trends**

Sustainer Revenue	\$415,354	13.74%
Sustainer Revenue as a % of Total	15.53%	11.05%
Average Online Transaction - Sustainer	\$35.04	2.24%

### **Email Engagement Trends**

Email List Growth	NA	10.35%
Usable Email List Growth	NA	7.08%
Number of Emails Sent	368	8.86%
Number of Fundraising Emails Sent	107	-4.47%



## Email List Size 1,000,000+

Organizations with the largest list sizes bucked the trends in many areas. They increased fundraising revenue by almost 6%. They sent 7% more fundraising emails year-over-year, whereas many other list sizes sent fewer. Despite those efforts, revenue solicited by email dropped by 10%. A 12% increase in sustainer revenue offset the worry that might have otherwise come with that metric.

Giving Trends	Total	YoY Change
Fundraising Revenue by Email List Size	\$11,820,267	5.89%
Increase in Revenue Solicited by Email	NA	-9.91%
Percent of Usable Email List that Donates	16.79%	1.08%
Annual Revenue Per Usable Email Address	\$6.46	6.18%
Average Online Transaction - First-Time Donor	\$102.97	2.13%
Average Online Transaction - Repeat Donor	\$83.69	0.55%

## Sustainer Trends

Sustainer Revenue	\$1,244,038	11.77%
Sustainer Revenue as a % of Total	11.27%	4.44%
Average Online Transaction - Sustainer	\$28.89	1.10%

## Email Engagement Trends

Email List Growth	NA	3.66%
Usable Email List Growth	NA	1.23%
Number of Emails Sent	944	-2.33%
Number of Fundraising Emails Sent	119	6.96%





# Conclusion

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## Conclusion

One thing that has been true throughout the history of online engagement and fundraising is that the industry has rapidly evolved. Best practices, conventional wisdom, and metrics to measure success have all changed over the years. Technology changes are often the cause: improvements in targeting, delivery, and capabilities. As this channel has proven itself from a raggedy upstart to a reliable source of revenue, competition in the inbox and barriers to delivery have increased commensurately.

Dropping open rate measurements was the most significant change in our benchmarking this year. Protecting privacy is important, and if obscuring true opens helps to protect privacy, then our industry will adjust. Already organizations are pivoting to focus more of their efforts on collecting first-party data via surveys and forms rather than relying on third-party cookies. Focusing on explicit opt-in and consent to use data is a critical piece of the strategy for the personalization that donors expect.

For this report, click rates are a better indicator, and conversion rates are the best measure. The task for nonprofit marketers and fundraisers is clear:

- **Write more engaging emails** that people want to see and are motivated to click on
- **Make your donation pages easy** to complete
- **Get better** in all areas: creativity, usability, design, and authenticity

Amid changes, one thing has stayed the same: the value of sustainers. Sustaining donors are easier to retain, and on average, their lifetime value is higher. As nonprofits increase the proportion of their donor files to sustainers rather than one-time donors, their revenue should grow accordingly.

With an average sustaining gift size of \$40.22, the annual value of a sustainer would come to \$482.64, if the gift is retained for the entire year. Not every sustaining gift lasts forever, but something else to consider when evaluating these values is that it takes just three months for the average sustaining gift to reach the same annual value as a one-time gift. Organizations should calculate the average values of their own sustaining donors and the average one-time gift amount to benchmark against their own data.

It's time to rethink old ideas like acquiring new one-time donors and then gradually moving them up the ladder until one day they are perfectly posed to make a sustaining gift. **Your strategy should be sustainer-first!** Organizations that make sustained giving part of the fabric of their organizational and donor culture will realize more success year over year.

## Top Three Takeaways

1

Sustainer value and growth means you must invest in this. **Sustainer first!**

2

The largest organizations show that **the more fundraising emails you send, the more money you raise**. For this strategy to work, nonprofits need to invest in robust acquisition, which may be prohibitive for smaller organizations.

Conversely, organizations with smaller list sizes sent fewer fundraising emails and saw a decrease in giving trends with the exception of sustainers.

3

Housefile growth helped to drive results in email engagement and fundraising. As advertising changes due to stricter privacy laws, organic growth driven by first-party data collection, and permission-based engagement may prove to be a better strategy.



## Thank You Contributors

This publication would not be possible without many helping hands. We greatly appreciate the team who provided their time and expertise.

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# About this Report

## Study Participants

This report includes aggregate data from January 1, 2021–December 31, 2022, from 653 mature Blackbaud Luminate Online customers—all with at least three years of consecutive usage data. Collectively over the last calendar year, these organizations raised over 1.5 billion dollars online, handled over 20 million transactions, and sent more than 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 was 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” in an effort to spotlight the trends and direction.

## Organization Classification

Organizations with at least 36 complete months of data (ending December 31, 2022) in Blackbaud Luminate Online were combined into groups believed to be similar based on a common organizational mission or sector. The self-classified National Taxonomy of Exempt Entity (NTEE) verticals is the categorization guideline. In the NTEE verticals, similar cohorts are combined with other organizations that are 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 10 similar organizations with a common 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 are used to 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 publication 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 of the 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 major 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 in different ways. This is commonly seen when different 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 calendar year 2022. 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 always vary slightly depending on when they join Blackbaud and when they deploy additional modules.

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### About Blackbaud

Blackbaud (NASDAQ: BLKB) is the leading software provider exclusively dedicated to powering social impact. Serving the nonprofit and education sectors, companies committed to social responsibility, and individual change makers, Blackbaud's essential software is built to accelerate impact in fundraising, nonprofit financial management, digital giving, grantmaking, corporate social responsibility and education management. With millions of users and \$100 billion donated, granted, and invested through its platforms every year, Blackbaud's solutions are unleashing the potential of the people and organizations who change the world. Blackbaud has been named to Newsweek's list of America's Most Responsible Companies, Quartz's list of Best Companies for Remote Workers, and Forbes' list of America's Best Employers. A remote-first company, Blackbaud has operations in the United States, Australia, Canada, Costa Rica and the United Kingdom, supporting users in 100+ countries. Learn more at [blackbaud.com](https://blackbaud.com) or follow us on twitter LinkedIn, Instagram and Facebook.



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