

2018

Blackbaud Luminate Online[®] Benchmark Report

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

blackbaud[®]



Overview /

We're happy to bring you the *Blackbaud Luminate Online Benchmark Report* for the 12th straight year. We do this work to help detect and surface trends within nonprofit fundraising and engagement programs. These email list (housefile), engagement, and fundraising benchmarks can help you evaluate the health of your program and discover potential areas for growth.

We include insight into performance metrics from over 900 nonprofits to help organizations gauge how they're performing relative to their peers.

Ultimately the best benchmarks are your own. We hope this information inspires you to benchmark your organization's year-over-year performance and use this information to grow support for your mission.

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About this Study /

This report includes aggregate data from July 1, 2015–June 30, 2018, from 937 mature Blackbaud Luminate Online customers—all with at least three years of consecutive usage data. Collectively over the last fiscal year, these organizations raised over \$1.54 billion, handled almost 23 million online transactions, and sent over 3.6 billion emails.

This large data sample comes directly from our Blackbaud Luminate Online cloud-based platform, giving us a unique view of online engagement across the nonprofit industry.

We base each year-over-year measurement on a consistent set of clients 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 we include some commentary with the statistics, we prefer to primarily cover “what is” rather than “why.” We try to spotlight the trends and where things are moving.

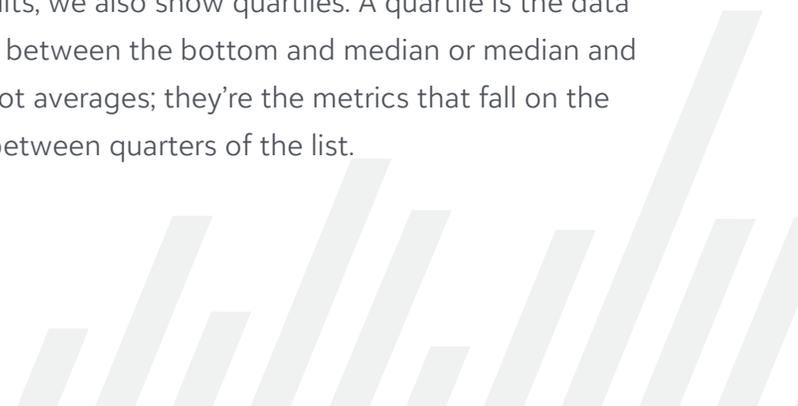
Organization Classification

We use self-classified National Taxonomy of Exempt Entity (NTEE) verticals as our categorization guideline. Canadian organizations have been included directly in the mix with their U.S. counterparts. Organizations that raise 90% or more of their reported funds through peer-to-peer events using Blackbaud TeamRaiser® have been excluded from this study. This data will likely appear in the *Peer-to-Peer Fundraising Study*.

Medians and Quartiles

All values in this report are expressed as medians. We use medians instead of averages 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 are less likely to be influenced by extremely high or low results for some organizations.

For some results, we also show quartiles. A quartile is the data point halfway between the bottom and median or median and top. They're not averages; they're the metrics that fall on the dividing line between quarters of the list.



Key Findings /

1 Is “churn and burn” dead?

The rate of growth in email sending slowed in 2018. Email lists grew at 7.1%, roughly the same rate as the number of emails sent (7.6%), a positive sign for deliverability.

2 Nonprofits inspired 18.4% of their email lists to donate.

Some verticals got even more financial backing from their lists. Health Services and Research saw a full 60% of their housefiles donating. Food Banks and Hospital Foundations secured gifts from 28% and 24% of their lists, respectively.

3 Fundraising email open rates declined 7.06%, while click rates increased by 4.35% and conversion rates remained steady.

This continues a trend we saw last year: While fewer people open fundraising emails, those who do are more inclined to engage.

4 You focused on sustainer programs and won. Sustainer revenue grew by 18.4%, compared to 7.4% growth for non-sustainer gifts.

5 When viewing the sources of online revenue as one great big pie, more of that pie—9.64% more of total giving—came from sustainer gifts.

6 Strong sustainer revenue growth correlated with the healthiest overall revenue growth

Organizations that focus on growing monthly giving create a revenue base to build upon year after year.

7 We saw strong growth in retention this year with “repeat” online revenue increasing by 13.8%.

Repeat revenue comes from existing donors who give once or more in the current year.

8 Each usable email on your list was worth \$14.23 in annual revenue.

This stat can help justify investments in organically growing your list and programs to nurture and grow relationships with existing supporters.

9 With retention going strong (powered by sustainers), first-time giving is experiencing the inverse. First-time giving as a proportion of total online giving is down at a median rate of -6.25%, managing to grow a modest 1.5% in revenue year over year in spite of fewer transactions.

Vertical Highlights

Verticals that showed strong sustainer revenue growth tended to have the healthiest overall rate of revenue growth.

In the Vertical Trends section, we look only at the year-over-year (YOY) movement in important benchmarks. We line up performance of one vertical (a group of similar nonprofits) next to results for the overall nonprofit industry.

How to Use this Information /

- **“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%.
- **Giving Trends** calls out growth in a few key financial metrics for this vertical compared to nonprofits as a whole.
- We selected the stats for **Email Engagement Trends** to highlight possible relationships between email list (house-file) growth, changes in number of emails sent, and the response of supporters to these emails (in terms of opens, clicks, and conversions).

Additional Vertical Benchmarks represent the actual figures (not a percent change). We included some we thought were most useful. You can see more vertical measurements in the benchmark tables throughout the rest of this report.

- **Revenue per Usable Email** shows the value of each valid email address in your list. This stat can help justify investments in organically growing your list and programs to nurture and grow relationships with existing supporters.
- **Percent of Housefile that Donates** measures the proportion of people on your email list who donated in the last year. It’s one indication of how engaged your email list is.
- Similarly, **Sustainer Revenue as a Percent of Total** measures what proportion of your total revenue comes from monthly sustainer gifts. This is a nice steady revenue stream.

Animal Welfare

Organizations in the Animal Welfare vertical generally focus on the protection and well-being of companion animals. Many organizations saw a strong online revenue growth in response to the catastrophic hurricanes and wildfires that occurred during the period of this study.

Organizations received 24.17% of their total fundraising revenue from sustainer gifts.



Animal Welfare

Giving Trends

Animal Welfare organizations' email files grew by 10.34% in 2018, the third highest rate of growth among verticals in this study.

Approximately 18.5% of the people in Animal Welfare email lists donated last year, on trend with the industry median.

Repeat and sustaining giving continue to be strong in this vertical. Organizations received 24.17% of their total fundraising revenue from sustainer gifts, ranking third largest of our data set (compared to 10.87% for the industry overall).

Sustainer revenue grew by 15.7% in fiscal year (FY) 2018.

Email Engagement Trends

Revenue per email address is below the median (\$11.82 vs. \$14.23). However, we see more of a focus in this vertical on building a strong, loyal supporter base that gives more often, if smaller, gifts. This is reflected in the strong sustainer performance.

Animal Welfare organizations sent 10.70% more emails and saw a dramatic decrease in open and click rates; however, email conversion rates remained unchanged. Organizations within this sector tend to send a lot of email; thoughtful strategy to create more differentiated content aimed at specific audience segments could help with engagement rates.

REVENUE

	This Vertical	Industry
Total Online Revenue (YOY% Change)	7.44%	9.10%
Revenue per Usable Email	\$11.82	\$14.23
Percent of Housefile that Donates	18.47%	18.42%

SUSTAINERS

Sustainer Revenue (YOY% Change)	15.70%	18.37%
Sustainer Revenue as a % of Total	24.17%	10.87%

EMAIL ENGAGEMENT TRENDS (YOY% Change)

Email Housefile	10.34%	7.11%
Number of Emails Sent	10.70%	4.45%
Number of Fundraising Emails Sent	-0.58%	4.45%
Fundraising Email Open Rate	-14.03%	-7.06%
Fundraising Email Click Rate	-10.96%	4.35%
Fundraising Email Conversion Rate	0%	0%

Arts, Culture, and Humanities

In this vertical, we find foundations to support museums, libraries, centers for the arts, historical preservation societies, zoos, parks, and gardens. Larger arts and cultural organizations have a broader, often national fundraising footprint. Smaller organizations draw on the local or regional community for their support.

Compared to some of the other segments represented in this report, Arts, Culture, and Humanities organizations are relatively new to complex digital engagement strategies. Given this stature as relative newcomers, this vertical posted a solid performance.

Arts, Culture, and Humanities showed the most rapid growth in online fundraising—19.26% over last year, outpacing the industry median of 9.10%.



Arts, Culture, and Humanities /

Giving Trends

Across the study, Arts, Culture, and Humanities showed the most rapid growth in online fundraising—19.26% over last year, outpacing the industry median of 9.10%.

While “give monthly” hasn’t been a traditional call to action for this sector, it’s gaining traction—rapidly. Sustainer donations represent 15.42% of annual fundraising revenue for Arts, Culture, and Humanities organizations, compared to 10.87% of revenue for the industry.

Sustainer giving showed strong gains, with 22.91% revenue growth this past year compared to the industry median of 18.37%.

Email Engagement Trends

Email messaging seemed on point in 2018. Organizations sent a whopping 42.03% more fundraising emails last year, yet saw click rates grow and conversion rates remain steady.

Email lists grew at a rate of 8.29%, slightly faster than the industry average of 7.11%.

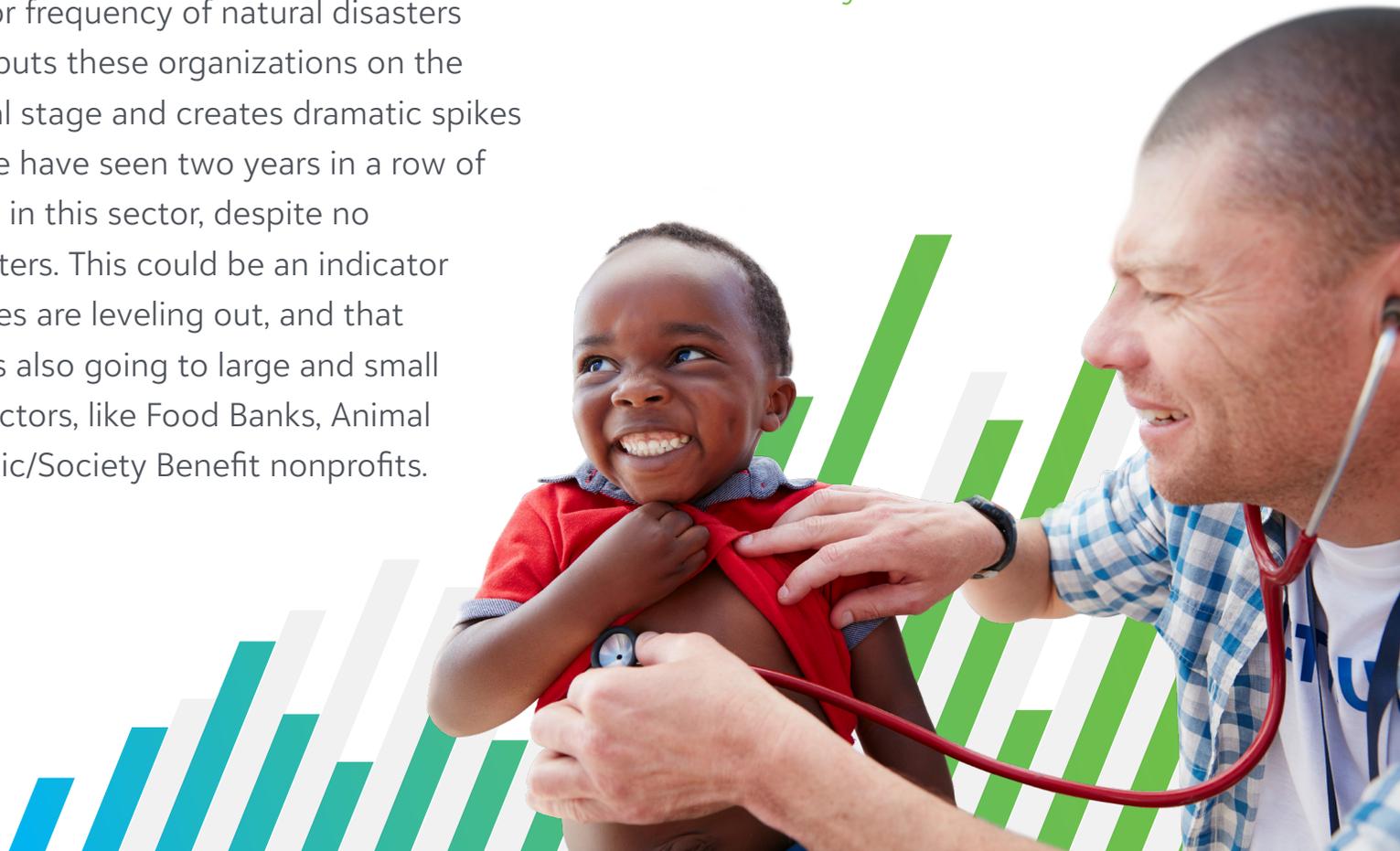
Arts, Culture, and Humanities organizations have room to grow when it comes to members of their housefile who donate, with 10.04% of lists donating, compared to an industry median of 18.42%.

REVENUE	This Vertical	Industry
Total Online Revenue (YOY% Change)	19.26%	9.10%
Revenue per Usable Email	\$9.63	\$14.23
Percent of Housefile that Donates	10.04%	18.42%
SUSTAINERS		
Sustainer Revenue (YOY% Change)	22.91%	18.37%
Sustainer Revenue as a % of Total	15.42%	10.87%
EMAIL ENGAGEMENT TRENDS (YOY% Change)		
Email Housefile	8.29%	7.11%
Number of Fundraising Emails Sent	42.03%	4.45%
Fundraising Email Open Rate	-7.39%	-7.06%
Fundraising Email Click Rate	9.80%	4.35%
Fundraising Email Conversion Rate	0%	0%

Disaster and International Aid

This vertical, comprised of organizations that provide domestic and international humanitarian relief and development assistance, can run hot and cold. Some years, the intensity and/or frequency of natural disasters and humanitarian crises puts these organizations on the national and international stage and creates dramatic spikes in fundraising activity. We have seen two years in a row of relatively modest growth in this sector, despite no shortage of natural disasters. This could be an indicator that boom and bust cycles are leveling out, and that crisis donation revenue is also going to large and small organizations in other sectors, like Food Banks, Animal Welfare groups, and Public/Society Benefit nonprofits.

Organizations in this vertical have built robust sustainer programs, with almost 20% of total fundraising coming from monthly gifts—nearly double the industry median.



Disaster and International Aid /

Giving Trends

Total online revenue grew by a modest 8.96%.

Organizations in this vertical have built robust sustainer programs, with almost 20% of total fundraising coming from monthly gifts—nearly double the industry median.

This group has a higher-than-average value email list, with each usable email address worth \$17.13 (vs. the median of \$14.23).

Email Engagement Trends

Email lists (housefiles) grew at 7.11%, exactly the industry median.

One indication that this was a less intense year for this sector is that the percent of the housefile that donates is 15.57%, which is below the industry median of 18.42%.

This group sent 38.13% more fundraising emails this year. Interestingly, while open rates declined, click through rates increased nearly 4%—those who do open these emails are engaging more with the content.

REVENUE

	This Vertical	Industry
Total Online Revenue (YOY% Change)	8.96%	9.10%
Revenue per Usable Email	\$17.13	\$14.23
Percent of Housefile that Donates	15.57%	18.42%

SUSTAINERS

Sustainer Revenue as a % of Total	19.75%	10.87%
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EMAIL ENGAGEMENT TRENDS (YOY% Change)

Email Housefile	7.11%	7.11%
Number of Emails Sent	6.52%	7.62%
Number of Fundraising Emails Sent	38.13%	4.45%
Fundraising Email Open Rate	-7.08%	-7.06%
Fundraising Email Click Rate	3.63%	4.35%
Fundraising Email Conversion Rate	0%	0%

Environment and Wildlife

Sustainer revenue grew an impressive 31.34%, significantly higher than the 18.37% industry growth rate.

Environmental and Wildlife organizations range from global to local with missions to preserve and protect natural places, parks and reserves, and wildlife. While online revenue increased at a rate just above the industry median, this represented a bit of a decline from the massive growth in FY 2017. Organizations in this vertical ramped up activity in the aftermath of the 2016 elections to combat deregulation and legislative rollbacks. In FY 2018, we see this vertical settling in for the long haul, converting a lot of the 2017 momentum into sustainer giving growth.



Environment and Wildlife /

Giving Trends

Sustainer revenue grew an impressive 31.34%, significantly higher than the 18.37% industry rate of growth.

Revenue per usable email address was a low \$6.41; this may reflect activism-driven acquisition that doesn't yield a gift while growing the email list, and also a preference in this vertical to encourage sustainers to join at any level (even \$5/month), creating a relationship that can be cultivated toward greater lifetime value.

Email Engagement Trends

Housefiles grew by 11.07%, a good bit faster than the industry rate of 7.11%.

The number of fundraising emails sent grew by 5.29%, while the open rate declined at nearly the same rate: 5.27%.

As a way to navigate the ever-changing and increasingly challenging world of email delivery, forward-looking organizations are crafting strategies around list hygiene. Some organizations within this vertical report they can raise more money by sending fewer total emails.

REVENUE	This Vertical	Industry
Total Online Revenue (YOY% Change)	10.00%	9.10%
Revenue per Usable Email	\$6.41	\$14.23

SUSTAINERS	This Vertical	Industry
Sustainer Revenue (YOY% Change)	31.34%	18.37%
Sustainer Revenue as a % of Total	15.26%	10.87%

EMAIL ENGAGEMENT TRENDS (YOY% Change)	This Vertical	Industry
Email Housefile	11.07%	7.11%
Number of Emails Sent	11.34%	7.82%
Number of Fundraising Emails Sent	5.29%	4.45%
Fundraising Email Open Rate	-5.27%	-7.06%
Fundraising Email Click Rate	1.10%	4.35%
Fundraising Email Conversion Rate	0%	0%

Faith Communities

Within the Faith Communities vertical, we include organizations with missions arising from their faith and religious identity. Most fall within a spectrum of social benefit organizations and communities of faith.

Organizations in the Faith Communities vertical received a robust \$26.66 in annual revenue for each usable email, one of the highest returns of any vertical.



Faith Communities /

Giving Trends

Organizations in the Faith Communities vertical received a robust \$26.66 in annual revenue for each usable email, one of the highest returns of any vertical.

Sustainer revenue represents a massive 28.59% of all online fundraising revenue. Many faith communities have a strong tradition of giving a portion of ones' income to the church, to missions, or to support social benefit programs. This aligns well with the concept of monthly giving.

Online giving grew by a healthy 11.04%, well above the industry growth rate of 9.1%.

Email Engagement Trends

Email lists (housefiles) grew by 8.83%, slightly more than the industry growth rate of 7.11%.

Organizations in this vertical sent 15.11% more fundraising solicitations in 2018, a substantial increase. We saw significant drops in email engagement rates, as measured by open, click, and conversion rates. Some organizations within this vertical are relatively new to complex digital engagement strategies; we expect to see this performance even out as they connect with the pulse of their online audience.

REVENUE

	This Vertical	Industry
Total Online Revenue (YOY% Change)	11.04%	9.10%
Revenue per Usable Email	\$26.66	\$14.23

SUSTAINERS

Sustainer Revenue (YOY% Change)	16.23%	18.37%
Sustainer Revenue as a % of Total	28.59%	10.87%

EMAIL ENGAGEMENT TRENDS (YOY% Change)

Email Housefile	8.83%	7.11%
Number of Emails Sent	8.29%	7.62%
Number of Fundraising Emails Sent	15.11%	4.45%
Fundraising Email Open Rate	-5.29%	-7.06%
Fundraising Email Click Rate	-5.66%	4.35%
Fundraising Email Conversion Rate	-32.55%	0%

Food Banks

This vertical is comprised of food banks and food distribution centers throughout the United States and Canada. Supporters can develop close relationships with food banks as volunteers and advocates in addition to financial contributions. With federal 2019 budget proposals calling for deep cuts to food assistance, outreach strategies for this vertical have shifted to focus on advocacy as well as fundraising.

Food Banks received \$30.27 in annual revenue per usable email address, the strongest performance among all verticals and more than double the industry median of \$14.23.



Food Banks /

Giving Trends

Food Banks received \$30.27 in annual revenue per usable email address, the strongest performance among all verticals and more than double the industry median of \$14.23.

Food Banks received 16.19% of online revenue from monthly donations (the industry median is 10.87%). Sustainer revenue grew by a healthy 16.03% in FY 2018.

Online fundraising revenue grew by 10.65%, outpacing the industry median of 9.10%

Email Engagement Trends

Email lists (housefiles) grew by 8.63%, compared to an industry growth rate of 7.11%.

Email lists turned in strong performances, with 28.07% of supporters donating in 2018, placing Food Banks among the top verticals for this metric.

This vertical sent nearly 25% more emails in 2018—more than triple the rate of increase for the industry—however, the increase in fundraising emails was only 4.17%. Food Banks appear to be focusing their communications less on the ask and more on constituent engagement.

REVENUE	This Vertical	Industry
Total Online Revenue (YOY% Change)	10.65%	9.10%
Percent of Housefile that Donates	28.07%	18.42%
Revenue per Usable Email	\$30.27	\$14.23

SUSTAINERS

Sustainer Revenue (YOY% Change)	16.03%	18.37%
Sustainer Revenue as a % of Total	16.19%	10.87%

EMAIL ENGAGEMENT TRENDS (YOY% Change)

Email Housefile	8.63%	7.11%
Number of Emails Sent	24.99%	7.62%
Number of Fundraising Emails Sent	4.17%	4.45%
Fundraising Email Open Rate	-2.96%	-7.06%
Fundraising Email Click Rate	4.66%	4.35%
Fundraising Email Conversion Rate	-25.40%	0%

Health Services and Research

This vertical includes organizations dedicated to medical research, patient care and assistance, and political advocacy for a broad spectrum of diseases and disorders. It's the largest group of nonprofits within this study. We exclude from this study organizations that raise 90% or more of their revenue through peer-to-peer fundraising, yet it's still a big part of fundraising for most of these organizations.

A gigantic 59.89% of people on these email lists donated in 2018. That's over three times the industry average.



Health Services and Research /

Giving Trends

Online revenue in this vertical grew by a scant 0.92%. This may reflect declines in peer-to-peer revenue or diversion of income into independent fundraising channels, like Facebook® Fundraising, outside of Blackbaud Luminate Online. Also, urgent appeals to support social, economic, and political causes may have drawn some support away from Health Services and Research organizations.

Sustainer revenue grew by 12.68% in FY 2018.

While only 2.06% of total annual fundraising comes from monthly gifts compared to the industry average of 10.87%, this sector saw rapid expansion in this area. Sustainer revenue as a percent of total fundraising grew by 17.71%, almost double the industry median growth rate.

Email Engagement Trends

A gigantic 59.89% of people on these email lists donated in 2018. That's over three times the industry average of 18.42% and the highest among the verticals included in this report.

The annual revenue received for each usable email address was \$14.17, on par with the industry average of \$14.23.

Email lists (housefiles) only grew by 1.83% in 2018, and organizations sent fewer emails, too.

Fundraising email open rates dropped by 6.09%, yet people who do open the emails tend to engage more with the content. Click rates increased 11.11%; conversion stayed steady.

REVENUE	This Vertical	Industry
Total Online Revenue (YOY% Change)	0.92%	9.10%
Percent of Housefile that Donates	59.89%	18.42%
Revenue per Usable Email	\$14.17	\$14.23

SUSTAINERS

Sustainer Revenue (YOY% Change)	12.68%	18.37%
Sustainer Revenue as a % of Total (YOY% Change)	17.71%	9.64%
Sustainer Revenue as a % of Total	2.06%	10.87%

EMAIL ENGAGEMENT TRENDS (YOY% Change)

Email Housefile	1.83%	7.11%
Number of Emails Sent	-1.13%	7.62%
Number of Fundraising Emails Sent	0.83%	4.45%
Fundraising Email Open Rate	-6.09%	-7.06%
Fundraising Email Click Rate	11.11%	4.36%
Fundraising Email Conversion Rate	0%	0%

Hospital Foundations and Hospitals

Within the Hospital Foundations and Hospitals vertical, we find organizations that range from children's hospitals and general medical centers to specialized cancer centers in the United States and Canada.

Changes in the healthcare landscape—reduced payments for services, higher deductibles and default rates, and an aging population—have created a need to raise more donated funds to offset declining revenues on the clinical side. Many large health systems that are merging are also looking to become more efficient at prospecting and fundraising, and they see the use of technology as a means of helping them achieve that.

Long focused on “hunting” for very large gifts, this vertical has shifted its approach relatively recently to focus on fundraising strategies that include individual and sustainer giving.

Hospitals and Hospital Foundations saw 40.45% growth in sustainer revenue, more than double the industry growth average for this statistic and the highest among the included verticals.



Hospital Foundations and Hospitals /

Giving Trends

The big story with this vertical is the growth in sustainer revenue. Hospitals and Hospital Foundations saw 40.45% growth in sustainer revenue, more than double the industry growth average for this statistic and the highest among the included verticals.

With only 4.49% of total fundraising revenue coming from sustainer gifts, this vertical has plenty of potential to expand in this area.

Hospitals have a very active donor base, with 24.09% of all constituents donating last year.

Email Engagement Trends

Email lists (housefiles) grew by 16.66%, a good bit faster than the industry rate of 7.11%.

Hospitals received \$23.85 in annual revenue for every usable email address in their housefile.

Donation email open rates dropped by 9.22%, yet people who do open the emails tend to engage more with the content. Click rates increased 9.98%; conversion stayed steady.

REVENUE	This Vertical	Industry
Total Online Revenue (YOY% Change)	9.50%	9.10%
Percent of Housefile that Donates	24.09%	18.42%
Revenue per Usable Email	\$23.85	\$14.23

SUSTAINERS

Sustainer Revenue (YOY% Change)	40.45%	18.37%
Sustainer Revenue as a % of Total (YOY% Change)	26.76%	9.64%
Sustainer Revenue as a % of Total	4.49%	10.87%

EMAIL ENGAGEMENT TRENDS (YOY% Change)

Email Housefile	16.66%	7.11%
Number of Fundraising Emails Sent	12.48%	4.45%
Fundraising Email Open Rate	-9.22%	-7.06%
Fundraising Email Click Rate	9.98%	4.35%
Fundraising Email Conversion Rate	0%	0%

Human and Social Services

In the Human and Social Services vertical, we find social benefit organizations for children, youth, families, the elderly, and the disabled. Also included are home-building programs, homeless shelters, and community centers.

Sustainer revenue performance is a highlight for this vertical. Sustainer revenue grew by 23.79%—a rather exciting increase.



Human and Social Services /

Giving Trends

This sector is doing well in the revenue area. Online transaction revenue grew by 13.72%, substantially more than the overall industry growth rate of 9.10%.

Sustainer revenue performance is a highlight for this vertical. Sustainer revenue grew by 23.79%—a rather exciting increase. We like to see growth in this steady, reliable revenue stream.

With only 5.94% of revenue coming from sustainer giving, this vertical has room to grow. The rapid growth in this area may show that organizations are starting to focus on loyalty and converting one-time donors into sustainers—and it's paying off.

Email Engagement Trends

Email lists (housefiles) grew by 8.1%, and organizations sent 3.42% more emails than the prior year.

Email engagement rates for this sector are very mixed. While organizations sent fewer emails, open and conversion rates decreased substantially. This is different from trends we're seeing for most other types of organizations.

Last year, 13.62% of the housefiles donated, a slight increase from last year.

REVENUE	This Vertical	Industry
Total Online Revenue (YOY% Change)	13.72%	9.10%
Percent of Housefile that Donates	13.62%	18.42%

SUSTAINERS		
Sustainer Revenue (YOY% Change)	23.79%	18.37%
Sustainer Revenue as a % of Total (YOY% Change)	11.32%	9.64%
Sustainer Revenue as a % of Total	5.94%	10.87%

EMAIL ENGAGEMENT TRENDS (YOY% Change)		
Email Housefile	8.10%	7.11%
Number of Emails Sent	3.42%	7.62%
Number of Fundraising Emails Sent	3.42%	4.45%
Fundraising Email Open Rate	-6.29%	-7.06%
Fundraising Email Click Rate	4.72%	4.35%
Fundraising Email Conversion Rate	-2.63%	0%

Public/Society Benefit

In the Public/Society Benefit vertical, we find a wide variety of organizations with the chief aim of influencing laws, regulations, and social norms within their mission area.

In FY 2017, we saw record-breaking performance for many organizations with missions involving legislative or policy change in terms of fundraising and list growth. In FY 2018, that rocketing growth leveled off. Organizations in this vertical had the task of retaining and stewarding supporters acquired during the tumultuous period leading up to and for seven months after the presidential elections in 2016.

Revenue from established donors grew by 12.56%—this could represent a shift from donor acquisition to stewardship.



Public/Society Benefit /

Giving Trends

This year we saw a deceleration in acquisition of new donors, coupled with growth in revenue from repeat donors. Revenue from first-time donors decreased from last year by 13.09%, while revenue from established donors grew by 12.56%—this could represent a shift from donor acquisition to stewardship.

While the percentage of the email list that donates grew slightly this past year, it's still relatively low at 3.46%. Public policy supporters often volunteer and advocate; the value of their contributions are not strictly monetary.

Email Engagement Trends

Email lists (housefiles) grew at a slow pace of 3.37%, compared to the industry average of 7.11%—representing one of the lowest performers in the verticals included in this study.

Supporters responded to calls to action they saw as relevant and urgent. While organizations sent fewer emails overall, their click rates increased over last year by 9.62%.

Revenue per usable email address was \$5.04—well below the industry median of \$14.23.

REVENUE	This Vertical	Industry
Total Online Revenue (YOY% Change)	7.24%	9.10%
Revenue from First-Time Donors (YOY% Change)	-13.09%	1.54%
Revenue from Repeat Donors (YOY% Change)	12.56%	13.81%
Revenue per Usable Email	\$5.04	\$14.23
Percent of Housefile that Donates	3.46%	18.42%

SUSTAINERS

Sustainer Revenue (YOY% Change)	11.16%	18.37%
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EMAIL ENGAGEMENT TRENDS (YOY% Change)

Email Housefile	3.37%	7.11%
Number of Fundraising Emails Sent	-12.96%	4.45%
Fundraising Email Open Rate	-7.36%	-7.06%
Fundraising Email Click Rate	9.62%	4.35%
Fundraising Email Conversion Rate	0%	0%

Public Broadcasting Stations

This vertical is comprised of publicly supported television and radio stations in the United States. Most public broadcasting stations have a strong tradition of “membership” development, and as a result, many have industry-leading sustainer programs. There is an art to growing a strong base of recurring revenue; clearly, we might benefit from studying techniques used by these public broadcasting stations for managing and expanding relationships with sustaining donors.

Online giving grew by 13.49%, well ahead of the industry average of 9.1% growth.



Public Broadcasting Stations /

Giving Trends

Online giving grew by 13.49%, well ahead of the industry average of 9.1% growth.

Sustainer revenue was up by 23.88% from the prior year.

Public Broadcasting Stations received 54.3% of their online revenue from sustainer gifts (compared to an industry average of 10.87%).

Email Engagement Trends

Almost 22% of the email list donated in 2017, and each email address was worth \$25.88 annually (the industry average is \$14.23). These are some valuable email lists!

Email list size grew by a modest 6.55% from the prior year.

Number of emails sent grew by 17.86%. With housefile growth at only 6.55%, this means supporters received a lot more emails.

Email engagement showed inconsistencies, with fundraising email open rates decreasing 4.66%, but click-through rates increasing an impressive 29.63%; however, with fundraising email conversion remaining steady, organizations failed to close the deal.

REVENUE	This Vertical	Industry
Total Online Revenue (YOY% Change)	13.49%	9.10%
Revenue per Usable Email	\$25.88	\$14.23
Percent of Housefile that Donates	21.78%	18.42%

SUSTAINERS

Sustainer Revenue (YOY% Change)	23.88%	18.37%
Sustainer Revenue as a % of Total	54.30%	10.87%

EMAIL ENGAGEMENT TRENDS (YOY% Change)

Email Housefile	6.55%	7.11%
Number of Emails Sent	17.86%	7.62%
Number of Fundraising Emails Sent	12.64%	4.45%
Fundraising Email Open Rate	-4.66%	-7.06%
Fundraising Email Click Rate	29.63%	4.35%
Fundraising Email Conversion Rate	0%	0%

Giving

Monthly giving **revenue grew by 18.37% overall**, with some vertical sectors showing 20–40% growth.

We saw online fundraising rise by a healthy 9.1% in 2018. Most vertical sectors, showed double-digit growth, led by Arts, Culture, and Humanities with 19.25%, Human and Social Services with 13.72%, and Public Broadcasting with 13.49%. You can see the full breakdown by vertical in the Fundraising Revenue by Vertical chart on the next page.

Last year's exuberant growth that followed in the wake of political and social upheavals after the 2016 elections seems to have stabilized. Organizations in sectors that raised substantially more revenue last year appear to have channeled this momentum into their sustainer programs. Monthly giving revenue grew by 18.37% overall, with some vertical sectors showing

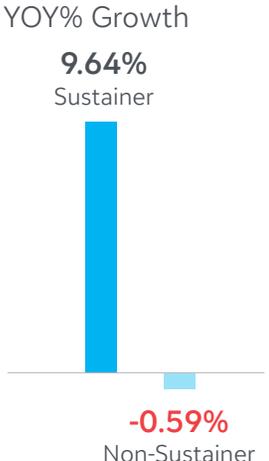
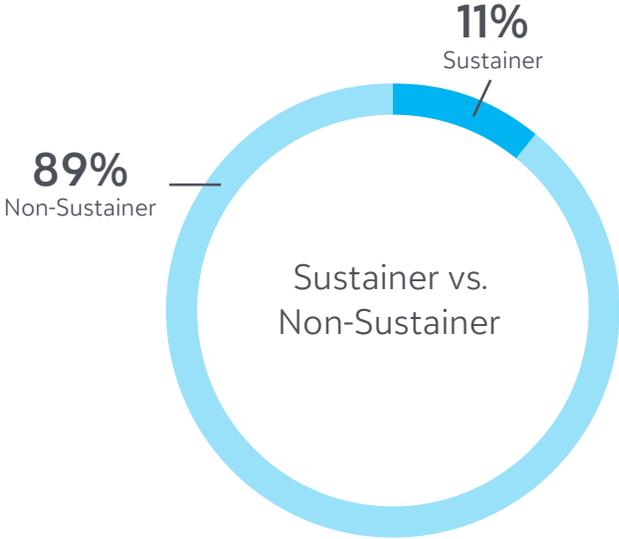
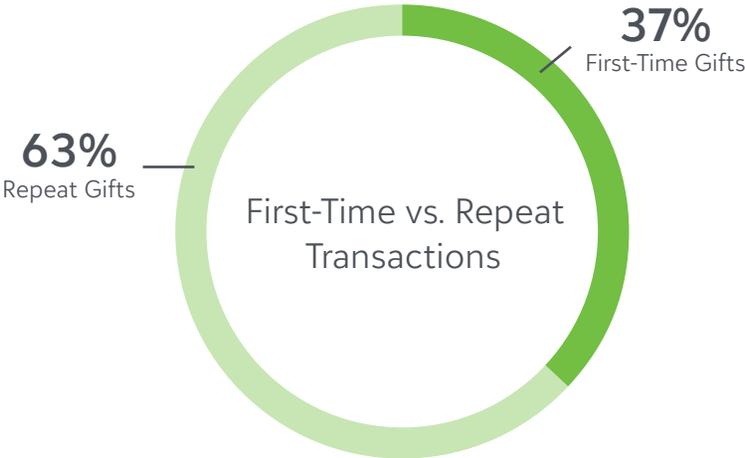
20–40% growth. This reflects an important strategic emphasis on building relationships with donors and growing sustainer programs to build a steady, predictable supporter base for your missions.

With retention going strong (powered by sustainers), first-time giving is experiencing the inverse. First-time giving as a proportion of total online giving was down at a median rate of -6.25%, managing to grow a modest 1.5% in year-over-year revenue in spite of fewer transactions.

Online Fundraising Revenue Mix by Gift Type

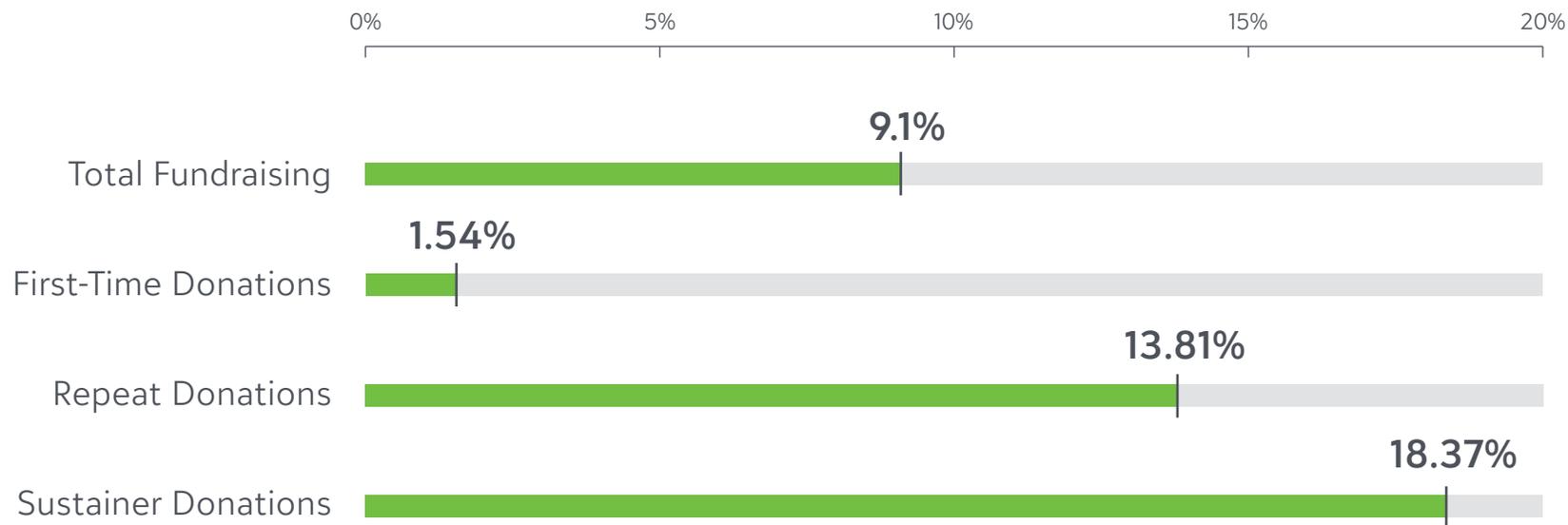
In these charts, we look at the type of gifts that make up the overall online giving mix. Each online gift is either first time or repeat, and each gift is also either sustainer or non-sustainer. First-time transactions are from new constituents, while repeat gifts are from established constituents. Sustainer transactions are from recurring (monthly) gifts that might be from new or established (repeat) donors.

The percent change metrics refer to how the balance has shifted over the last year.



Online Fundraising Revenue Growth by Transaction Type

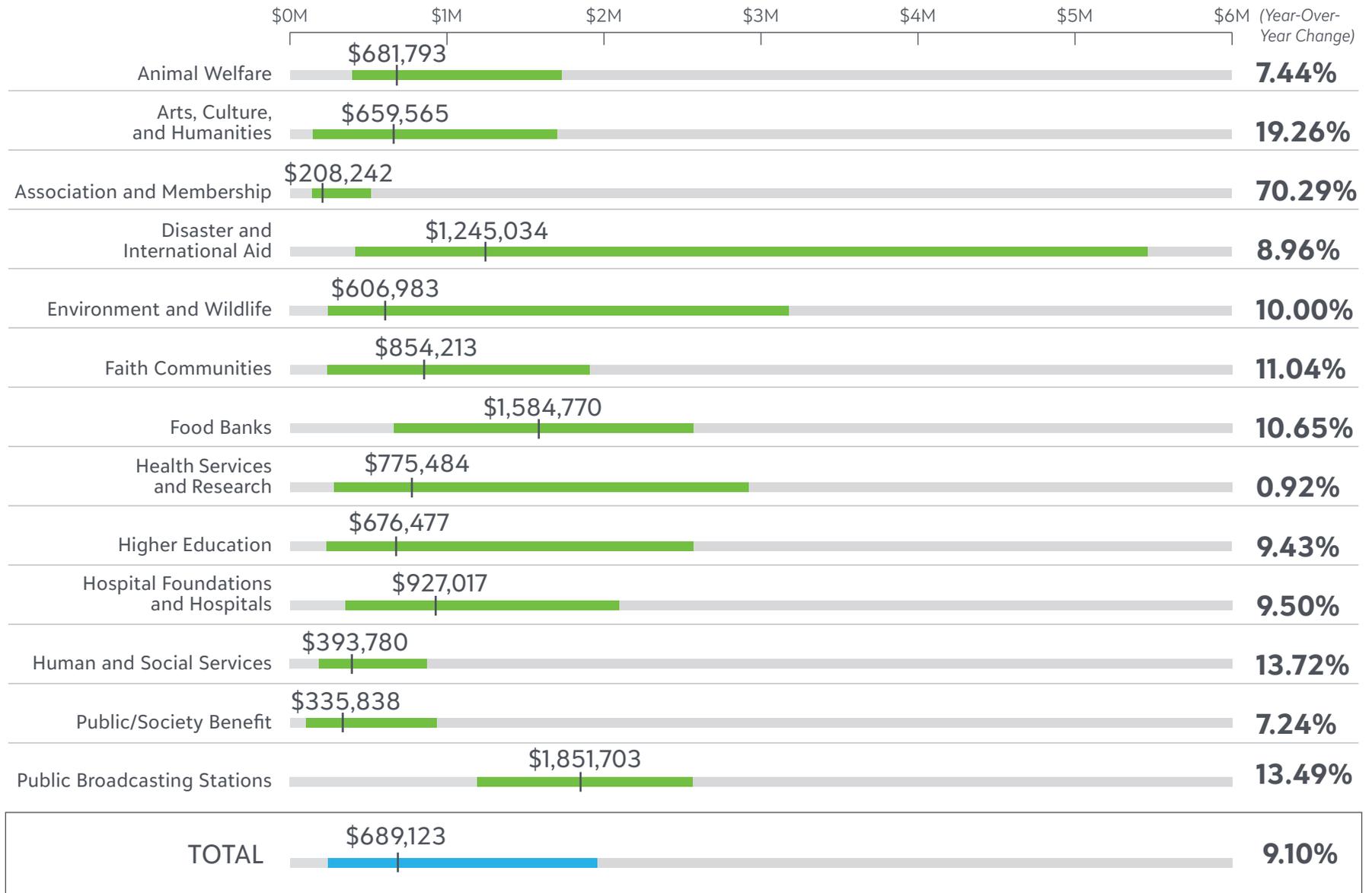
(Total Online Transaction Revenue Year-Over-Year Change)



Fundraising Revenue by Vertical

 (Indicates 25–75% Range)

(Total Online Transaction Revenue)



Fundraising Revenue by Housefile Size

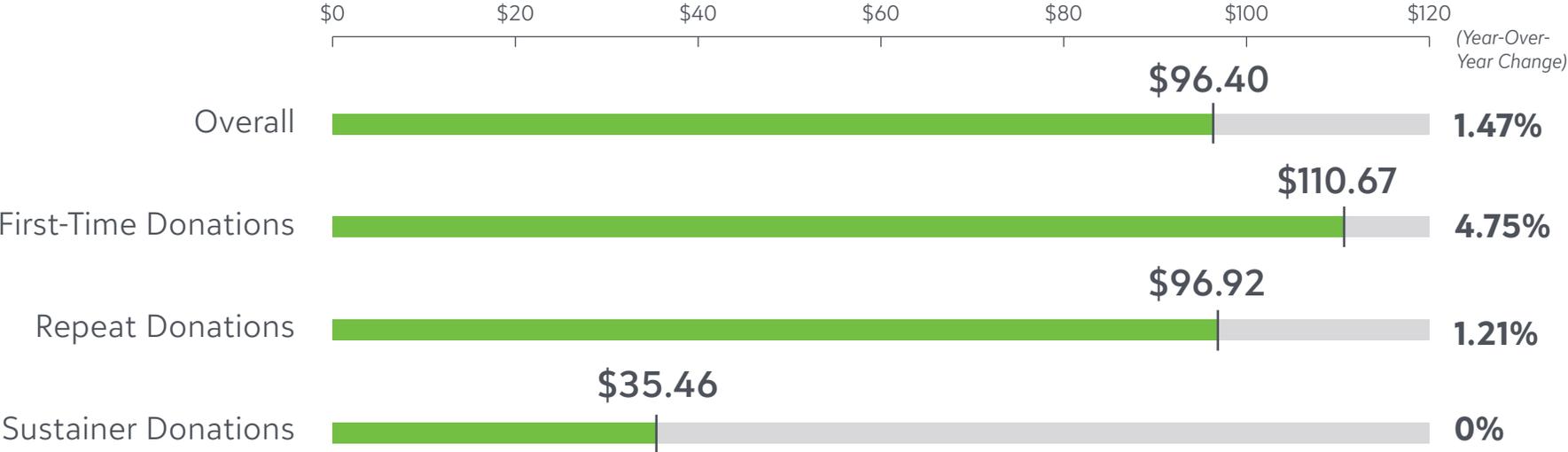
(Total Online Transaction Revenue)

 (Indicates 25–75% Range)



Average Transaction

(Online Transaction Revenue/Count of Online Transactions)



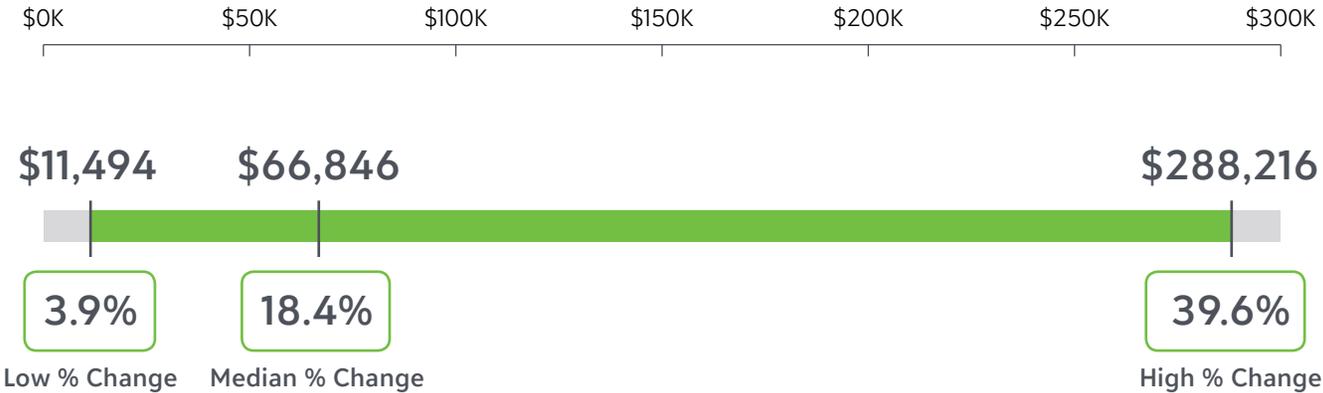
Average Transaction by Vertical and Transaction Type

(Online Transaction Revenue/Count of Online Transactions)

VERTICAL	Median Transaction	First-Time Donations	Repeat Donations	Sustainer Donations
Animal Welfare	\$65.03	\$78.45	\$62.45	\$27.43
Arts, Culture, and Humanities	\$96.61	\$124.31	\$103.82	\$28.20
Association and Membership	\$182.15	\$191.15	\$191.00	\$75.75
Disaster and International Aid	\$101.23	\$136.40	\$96.12	\$37.41
Environment and Wildlife	\$70.81	\$85.51	\$59.34	\$22.45
Faith Communities	\$96.43	\$130.14	\$93.15	\$45.07
Food Banks	\$107.88	\$124.07	\$106.51	\$42.05
Health Services and Research	\$92.29	\$83.85	\$102.54	\$35.98
Higher Education	\$179.43	\$180.81	\$153.63	\$43.56
Hospital Foundations and Hospitals	\$131.02	\$126.65	\$139.90	\$36.52
Human and Social Services	\$151.90	\$160.58	\$151.67	\$40.68
Public/Society Benefit	\$97.18	\$138.37	\$81.05	\$35.69
Public Broadcasting Stations	\$21.72	\$69.62	\$20.19	\$13.71
INDUSTRY	\$96.40	\$110.67	\$96.92	\$35.46

Sustainer Revenue: Year-Over-Year Change

(Total Online Revenue from Transactions that Are Recurring)



Sustainer Revenue by Vertical

 (Indicates 25–75% Range)

(Total Online Revenue from Transactions that Are Recurring)



Sustainer Revenue by Housefile Size

 (Indicates 25–75% Range)

(Total Online Revenue from Transactions that Are Recurring)



Email Housefile

Proactive organizations pursued list hygiene, careful list growth, and strong email engagement strategies in 2018.

This year we saw a more restrained 7.11% growth in housefile size. Since December 2016, successful email sending has depended more and more on the recipient's engagement with the emails you send. Proactive organizations have subsequently been pursuing list hygiene and careful list growth.

Under these conditions, simply sending more email without a careful segmentation and engagement strategy can jeopardize the long-term health of your email program. In fact, we saw some organizations improve email performance by sending less email, culling email recipients, and thoughtfully segmenting to optimize engagement.

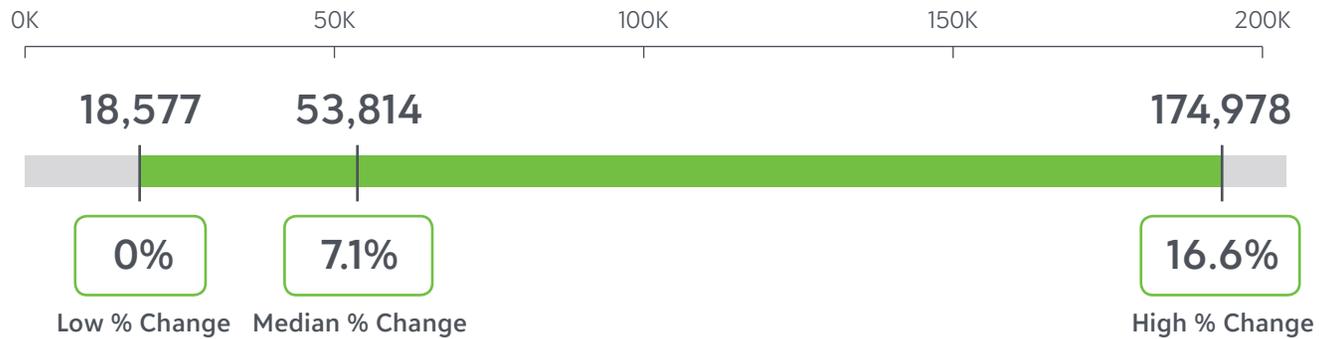
We presented this research in a webinar, *When Less Is More: Cracking the Email Deliverability Code in 2018*, and found that:

- Feeding America reduced its email audience size by 60% and saw a 17% increase in performance from email
- The Nature Conservancy sent 17% fewer emails and enjoyed an 84% increase in revenue per 1,000 emails sent

Good stewardship ensures that more people within the housefile donate. From FY 2017 to FY 2018, the number of constituents who donated grew by 10.3%. Overall, 18.42% of supporters in your housefiles donated in FY 2018.

Constituents with Email Addresses: **Year-Over-Year Change**

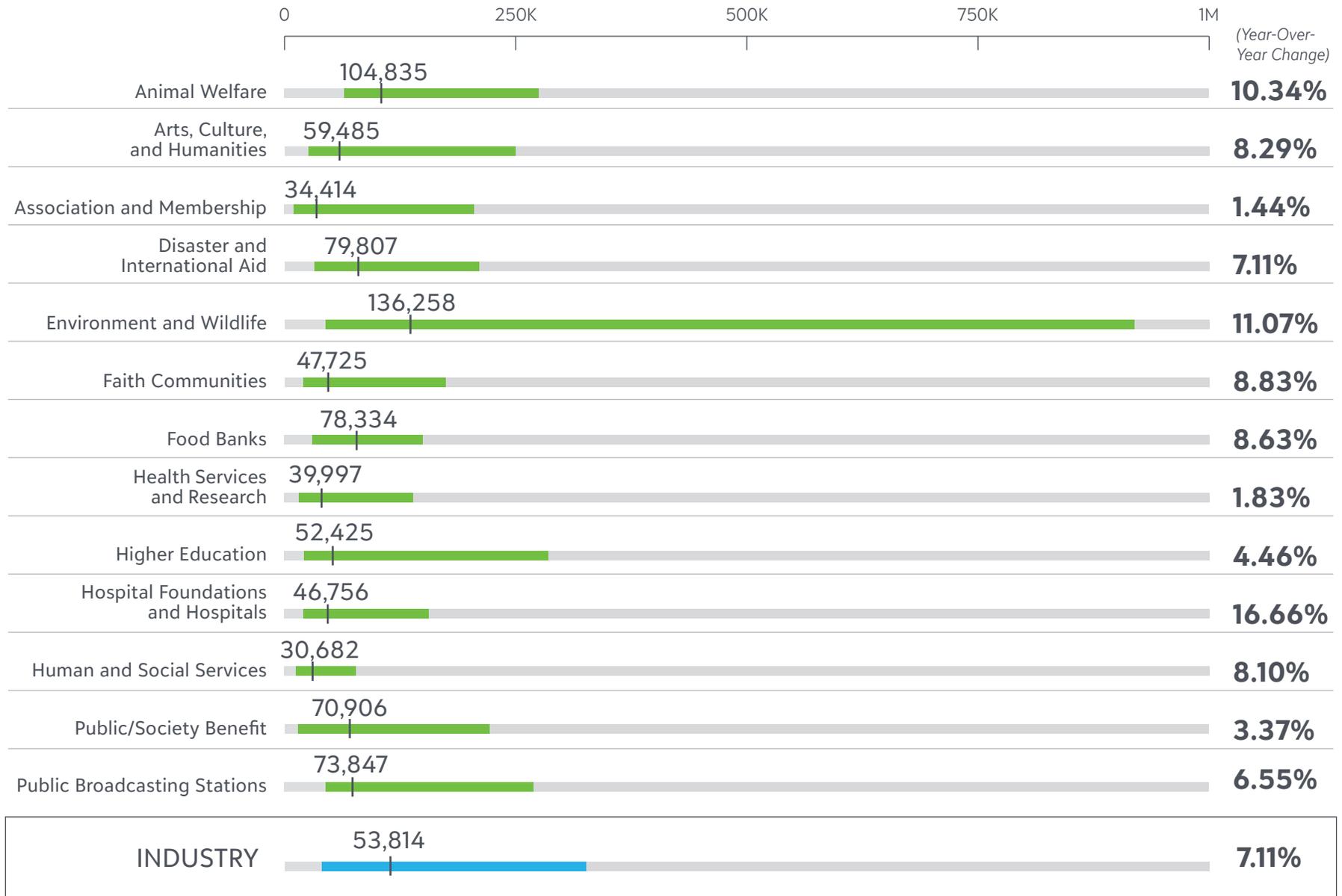
(Size of Housefile Based on Number of Constituents with Email Addresses as of Fiscal Year-End)



Constituents with Email Addresses by Vertical

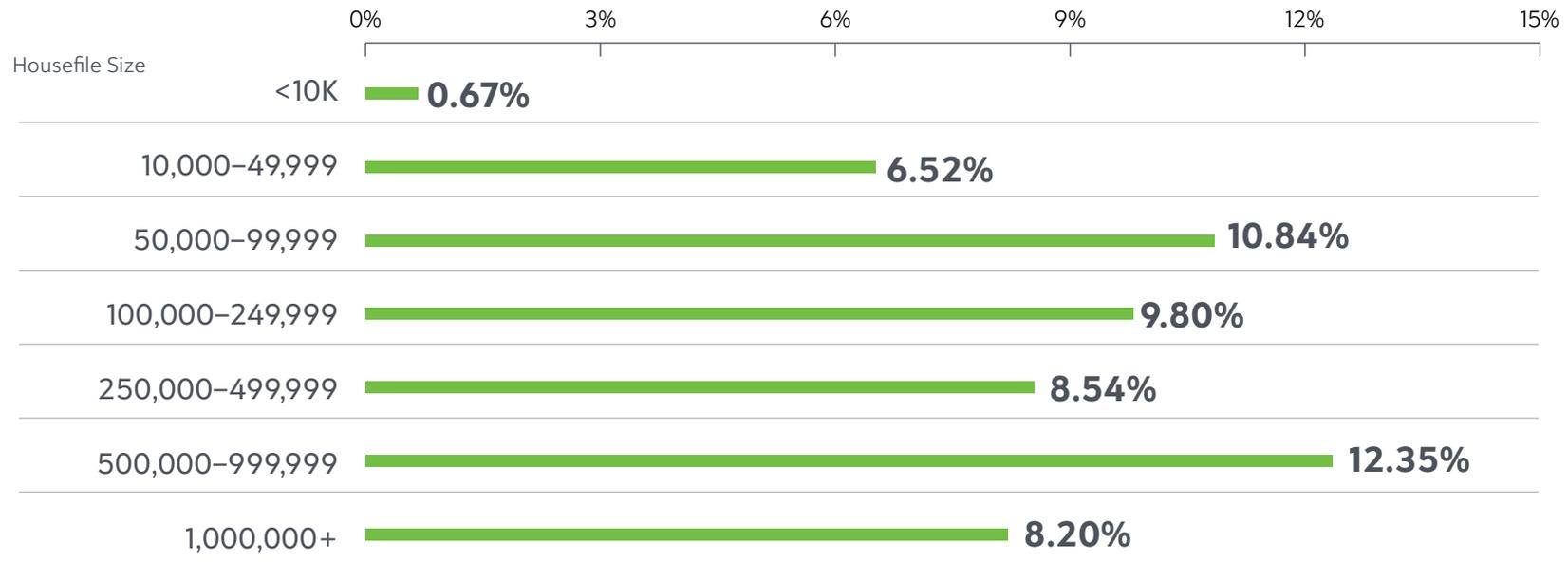
 (Indicates 25–75% Range)

(Number of Constituents with Email Addresses as of Fiscal Year-End)



Housefile Growth by Housefile Size

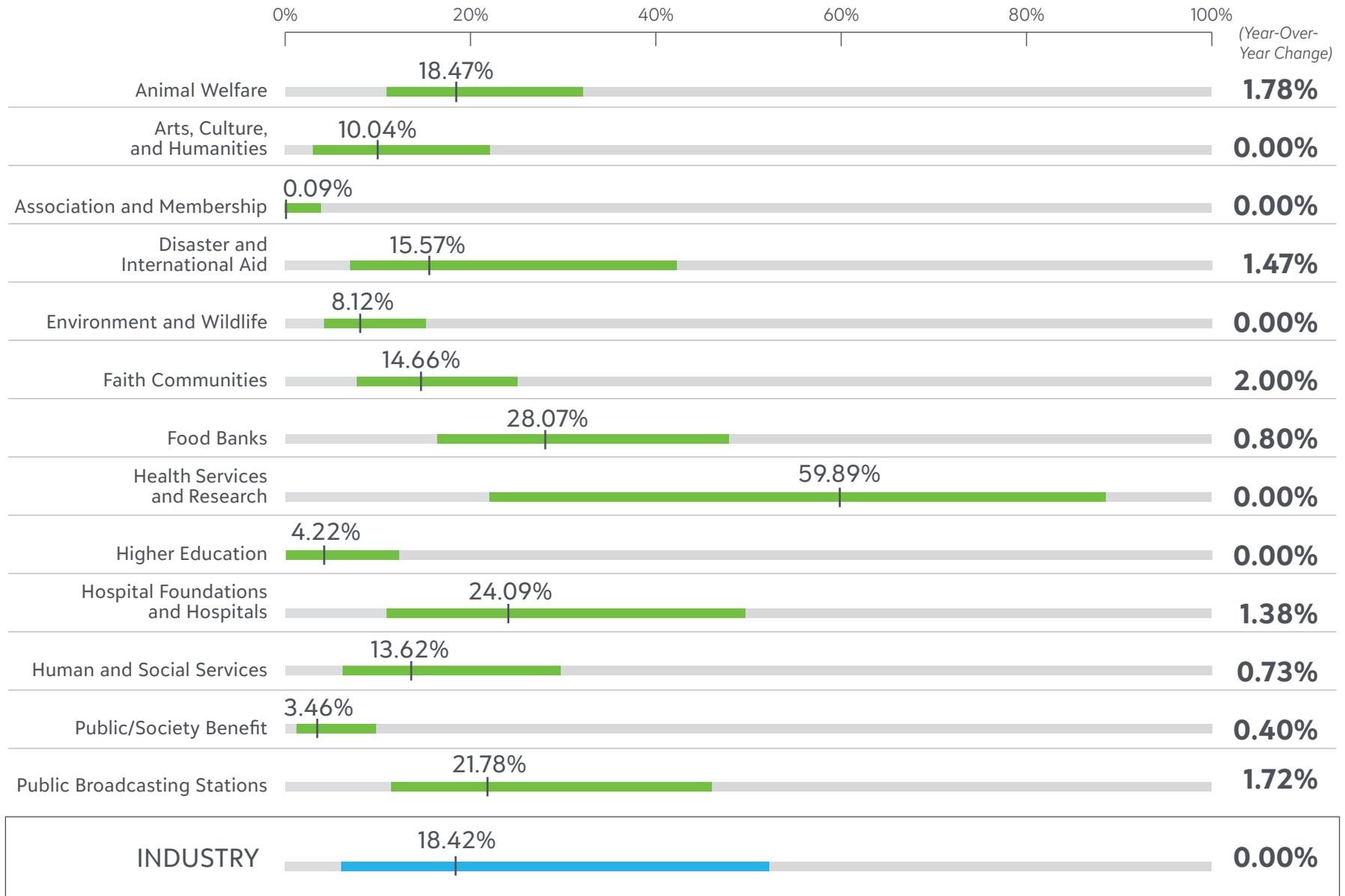
(Number of Constituents with Email Addresses by Email List Size)



Percent of Housefile that Donates

 (Indicates 25–75% Range)

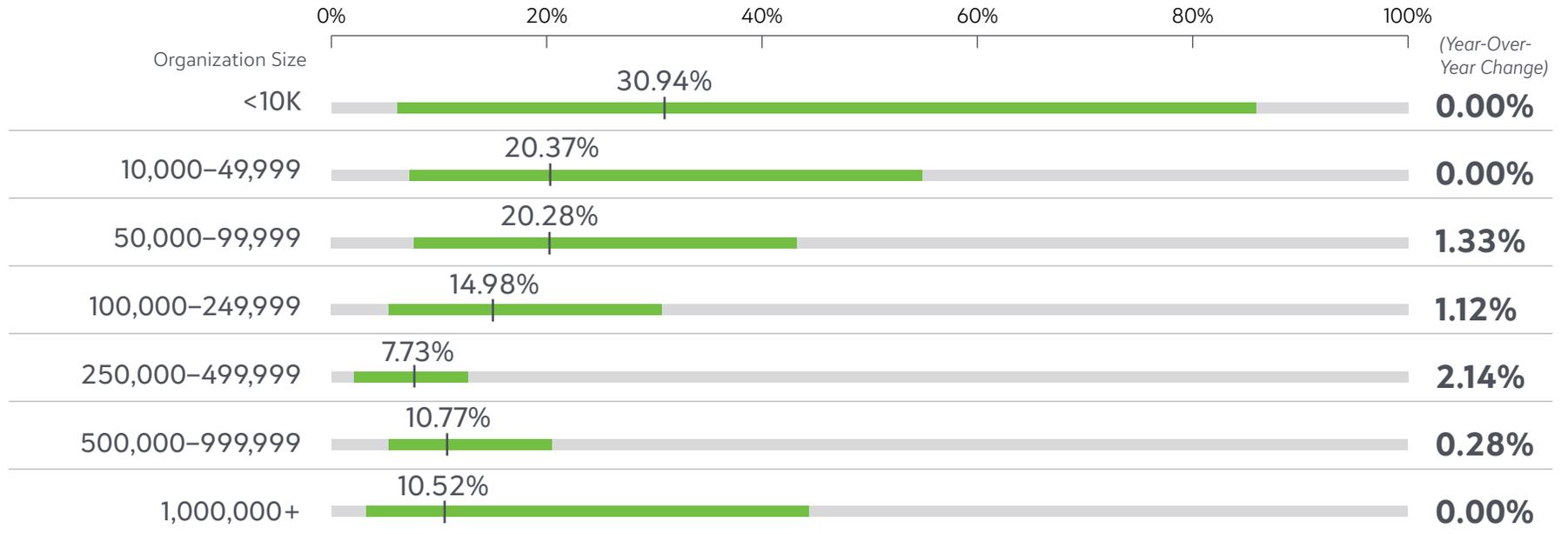
(Constituents Who Donate/Constituents with Email)



Percent of Housefile that Donates by Organization Size

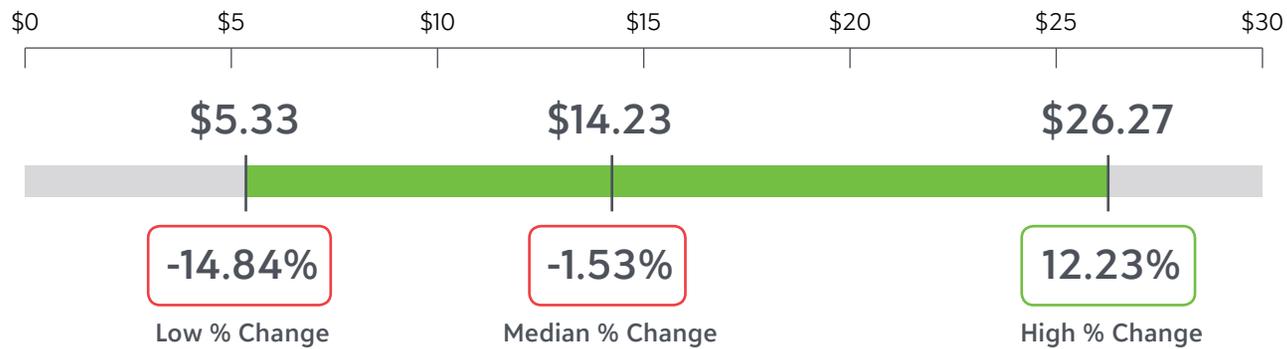
(Constituents Who Donate/Constituents with Email)

■ (Indicates 25–75% Range)



Revenue Per Usable Email: Year-Over-Year Change

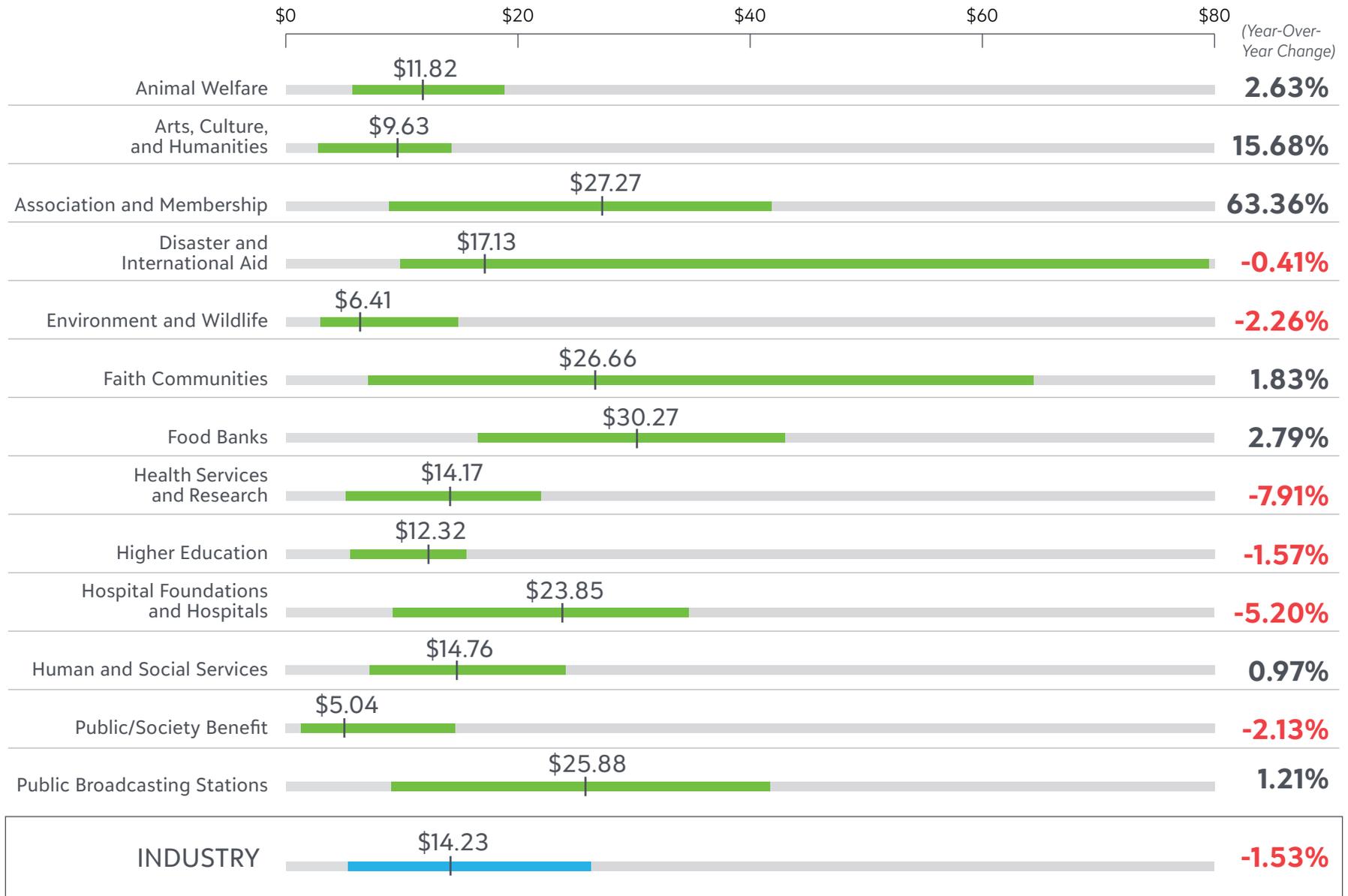
(Total Online Revenue/Constituents with Usable Email Address)



Revenue Per Usable Email Address by Vertical

■ (Indicates 25–75% Range)

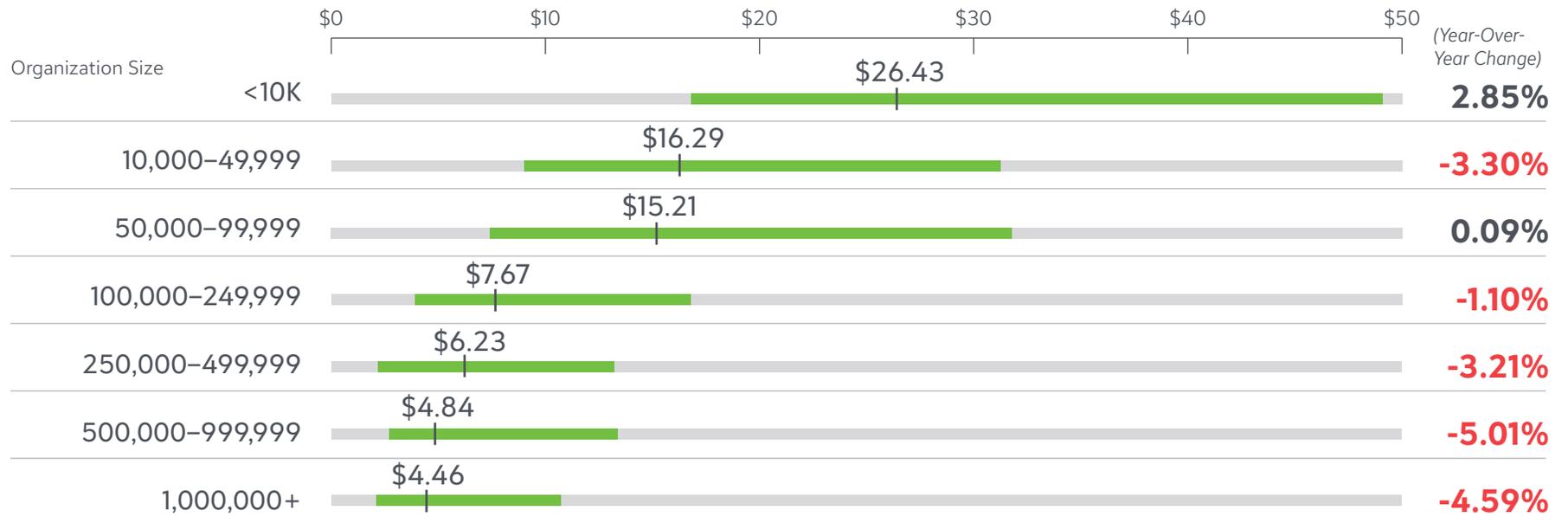
(Total Online Revenue/Constituents with Usable Email Address)



Revenue Per Usable Email Address by Housefile Size

(Total Online Revenue/Constituents with Usable Email Address)

■ (Indicates 25–75% Range)



Email Performance

Enhanced scrutiny on email lists and sending practices paid off with improved statistics.

This year we saw a positive trend toward moderation in email sending. In 2016, we saw huge shifts in the email deliverability landscape; it became harder for nonprofit organizations to get their emails into inboxes. Last year's *Blackbaud Luminare Online Benchmark Report* showed how many organizations seemed to be responding to declining statistics by sending more emails. This proved to be a short-term strategy as a deluge of emails caused open and click-through rates to plunge.

This year we saw a regrouping. You grew your lists at roughly the same rate you increased your email sends; individuals didn't get more emails from you. Instead, organizations seemed to be seeking balance in quality and quantity. There was also a large focus on list hygiene, not sending to unengaged contacts, and refining email sending practices.

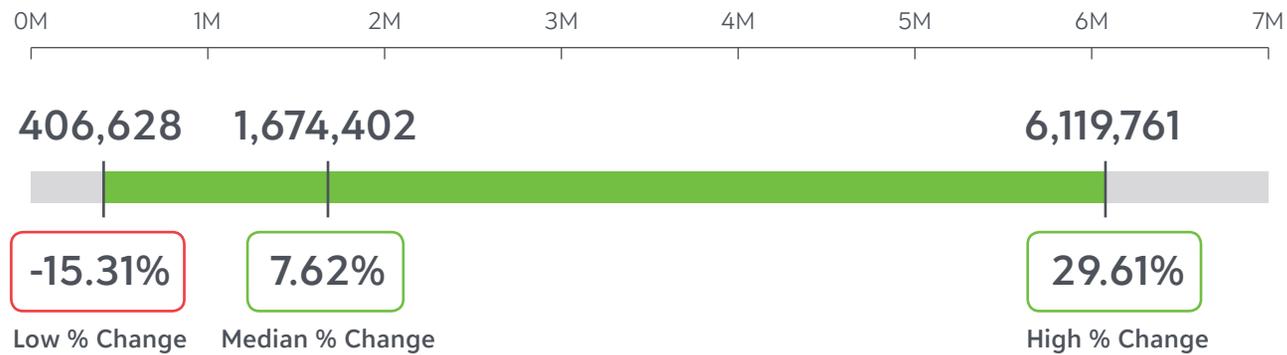
This enhanced scrutiny on email lists and sending practices paid off with improved statistics. If people took the time to open your emails, they engaged more with them. While in general open rates declined, click rates increased and conversion rates stayed steady. Compared to the double-digit plunges in engagement rates we saw last year, we'll take it. Moderation for the win!

We invite you to review the email performance benchmarks from this past year and draw your own conclusions.

Note: "Email Campaign Type" (Fundraising, eNewsletter, Advocacy, and Other) is self-classified by organizations as they set up email messages.

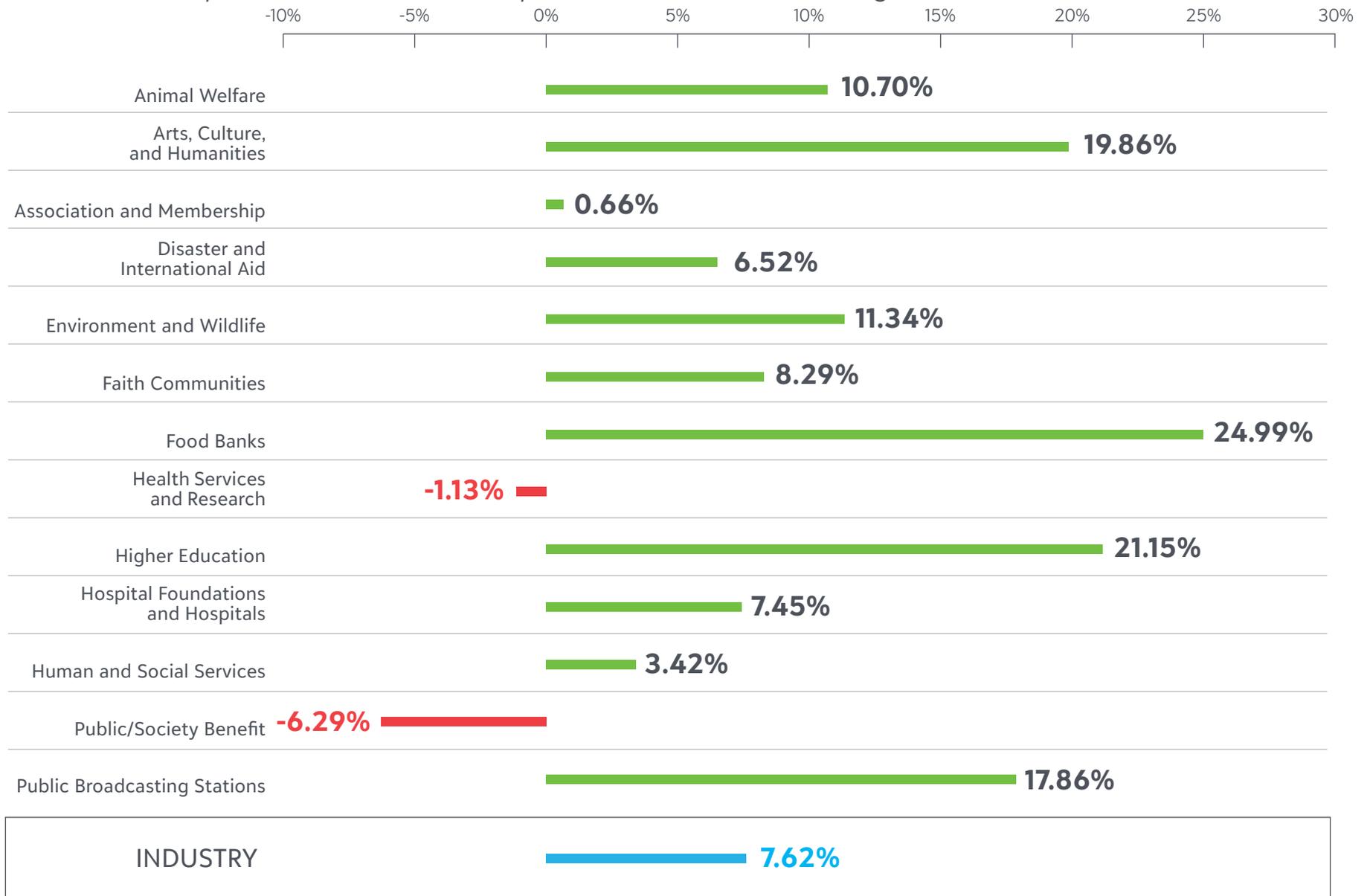
Total Emails Sent

(Total Number of Emails Delivered to Recipients)



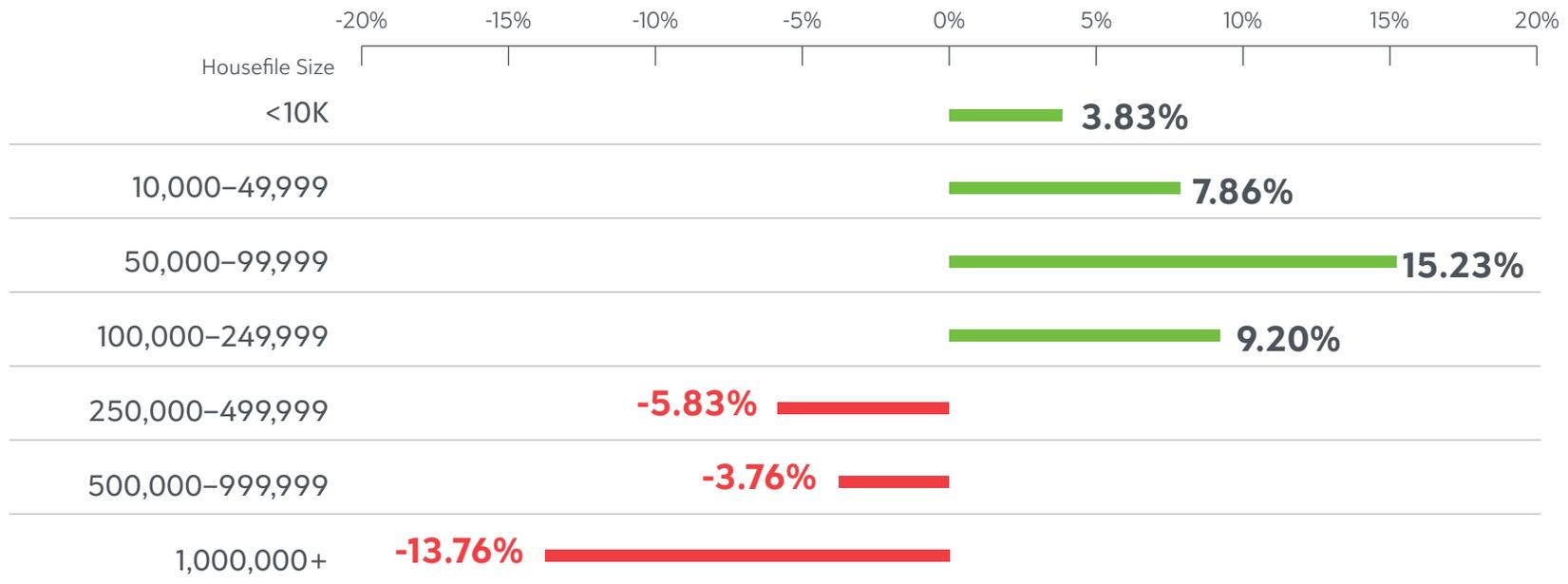
Total Emails Sent: Median Percent Change by Vertical

(Total Number of Emails Delivered to Recipients, Year-Over-Year Change, Median)



Total Emails Sent: Median Percent Change by Housefile Size

(Total Number of Emails Delivered to Recipients, Year-Over-Year Change, Median)



Fundraising Email Engagement Rates: Year-Over-Year Change

(Based on Emails Delivered Where Email Campaign Type="Fundraising Appeal")

VERTICAL	Total Emails Sent % Change	Open Rate % Change	Click Rate % Change	Conversion Rate % Change
Animal Welfare	-0.58%	-14.03%	-10.96%	0.00%
Arts, Culture, and Humanities	42.03%	-7.39%	9.80%	0.00%
Disaster and International Aid	38.13%	-7.08%	3.63%	0.00%
Environment and Wildlife	5.29%	-5.27%	1.10%	0.00%
Faith Communities	15.11%	-5.29%	-5.66%	-32.55%
Food Banks	4.17%	-2.96%	4.66%	-25.40%
Health Services and Research	0.83%	-6.09%	11.11%	0.00%
Higher Education	36.47%	-11.09%	2.44%	-7.69%
Hospital Foundations and Hospitals	12.48%	-9.22%	9.98%	0.00%
Human and Social Services	-10.13%	-6.29%	4.72%	-2.63%
Public/Society Benefit	-12.96%	-7.36%	9.62%	0.00%
Public Broadcasting Stations	12.64%	-4.66%	29.63%	0.00%
INDUSTRY	4.45%	-7.06%	4.35%	0.00%

Fundraising Email Engagement Rates by Vertical

VERTICAL	Open Rate	Click Rate	Conversion Rate
Animal Welfare	12.17%	0.54%	0.06%
Arts, Culture, and Humanities	20.01%	0.72%	0.06%
Disaster and International Aid	12.57%	0.43%	0.03%
Environment and Wildlife	15.74%	0.56%	0.05%
Faith Communities	17.76%	0.72%	0.05%
Food Banks	11.60%	0.62%	0.08%
Health Services and Research	13.03%	0.54%	0.02%
Higher Education	17.06%	0.46%	0.02%
Hospital Foundations and Hospitals	16.91%	0.58%	0.04%
Human and Social Services	13.41%	0.75%	0.03%
Public/Society Benefit	13.43%	0.53%	0.03%
Public Broadcasting Stations	16.58%	0.79%	0.11%
INDUSTRY	13.98%	0.58%	0.04%

Email Newsletter Engagement Rates: Year-Over-Year Change

(Based on Emails Delivered Where Email Campaign Type="Newsletter")

VERTICAL	Open Rate	Click Rate	Conversion Rate
Animal Welfare	2.56%	-6.93%	-8.79%
Arts, Culture, and Humanities	1.69%	-1.69%	-2.75%
Disaster and International Aid	-17.93%	-7.32%	-2.75%
Environment and Wildlife	20.77%	-6.66%	-13.31%
Faith Communities	10.31%	-7.71%	-9.00%
Food Banks	77.96%	-16.27%	-4.03%
Health Services and Research	-4.38%	-5.60%	4.08%
Higher Education	-0.48%	-2.70%	15.34%
Hospital Foundations and Hospitals	-4.79%	-3.66%	4.31%
Human and Social Services	-12.46%	-9.03%	-1.56%
Public/Society Benefit	1.78%	-1.53%	-6.25%
Public Broadcasting Stations	35.71%	-2.98%	-2.54%
INDUSTRY	3.67%	-5.78%	-2.74%

Email Newsletter Engagement Rates **by Vertical**

VERTICAL	Open Rate	Click Rate
Animal Welfare	13.48%	1.13%
Arts, Culture, and Humanities	21.42%	1.47%
Disaster and International Aid	15.38%	0.62%
Environment and Wildlife	15.56%	1.50%
Faith Communities	17.68%	1.80%
Food Banks	11.41%	0.86%
Health Services and Research	13.02%	1.13%
Higher Education	24.40%	1.62%
Hospital Foundations and Hospitals	20.27%	1.77%
Human and Social Services	13.10%	0.95%
Public/Society Benefit	14.16%	1.31%
Public Broadcasting Stations	17.75%	1.41%
INDUSTRY	14.33%	1.24%

Email Newsletter Engagement Rates **by Housefile Size**

HOUSEFILE SIZE	Open Rate	Click Rate
<10K	18.09%	1.72%
10,000–49,999	15.85%	1.24%
50,000–99,999	14.50%	1.30%
100,000–249,999	13.03%	1.16%
250,000–499,999	14.32%	0.72%
500,000–999,999	13.32%	0.99%
1,000,000+	11.81%	1.15%

“Other” Email Engagement Rates: Year-Over-Year Change

(Based on Emails Delivered Where Email Campaign Type Not “Advocacy Appeal” or “Fundraising Appeal” or “Newsletter”)

VERTICAL	Total Emails Sent % Change	Open Rate % Change	Click Rate % Change
Animal Welfare	-7.97%	-2.19%	10.96%
Disaster and International Aid	0.71%	-9.25%	-18.30%
Environment and Wildlife	-15.65%	-2.17%	-7.23%
Faith Communities	29.43%	-6.76%	2.36%
Food Banks	21.44%	-2.15%	1.60%
Health Services and Research	-6.93%	-6.72%	14.12%
Hospital Foundations and Hospitals	-17.79%	3.10%	-8.06%
Human and Social Services	-3.23%	-5.46%	-6.45%
Public/Society Benefit	1.30%	-5.26%	-2.74%
INDUSTRY	-6.58%	-4.13%	-2.63%

“Other” Email Engagement Rates by Vertical

(Based on Emails Delivered Where Email Campaign Type Not “Advocacy Appeal” or “Fundraising Appeal” or “Newsletter”)

VERTICAL	Open Rate	Click Rate
Animal Welfare	14.36%	1.05%
Disaster and International Aid	14.08%	0.73%
Environment and Wildlife	18.82%	1.20%
Faith Communities	17.47%	1.93%
Food Banks	14.84%	1.00%
Health Services and Research	14.96%	1.01%
Hospital Foundations and Hospitals	22.87%	1.55%
Human and Social Services	15.94%	1.08%
Public/Society Benefit	14.58%	0.86%
INDUSTRY	16.80%	1.11%

“Other” Email Engagement Rates by Housefile Size

HOUSEFILE SIZE	Open Rate	Click Rate
10,000–49,999	18.26%	1.25%
50,000–99,999	15.90%	1.18%
100,000–249,999	15.79%	0.96%
250,000–499,999	16.43%	1.05%
500,000–999,999	12.61%	0.70%
1,000,000+	13.55%	0.90%

Advocacy

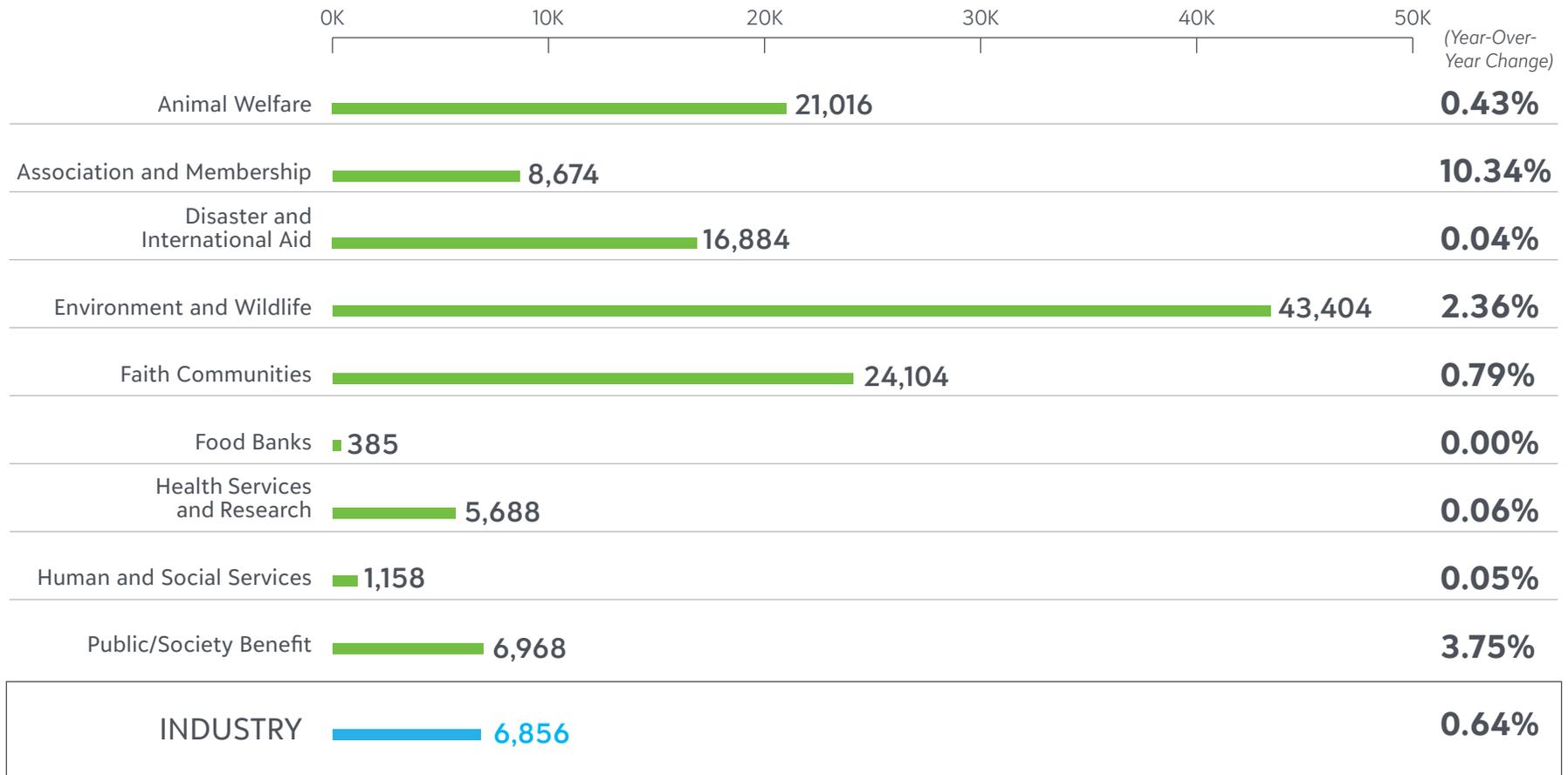
Standout segments like Environment and Wildlife experienced significant increases in percentage of total constituents who advocate (9.4%) and advocates who donate (13.1%).

Understatement: FY 2017 was a busy one for nonprofits engaged in advocacy. FY 2018 saw leveling off for most verticals—perhaps due to fatigue from the action-packed year before. Verticals like Environment and Wildlife (2.4% YOY increase) and Public/Society Benefit (3.8%) continued to grow their base of advocates, but less aggressively than the

previous year. However, the residual effects of that spike in activism—paired with the right engagement strategies—will continue: Environment and Wildlife saw one of the highest growth rates of sustainer transactions (37.1%) out of any vertical in FY 2018, which likely was driven by growth in housefile through advocacy.

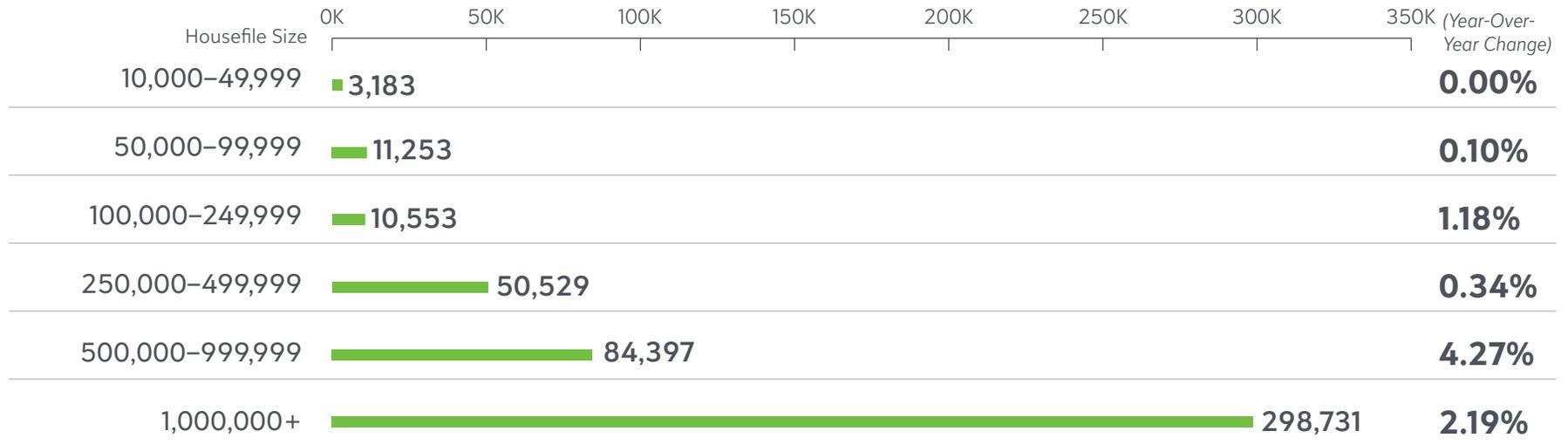
Constituents Who Advocate by Vertical

(Constituents Who Advocate as of Fiscal Year-End)



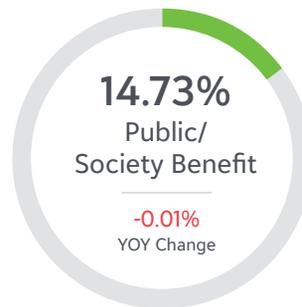
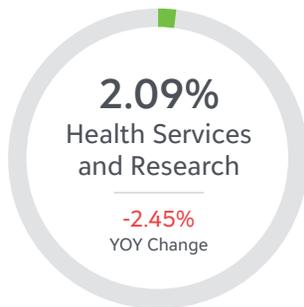
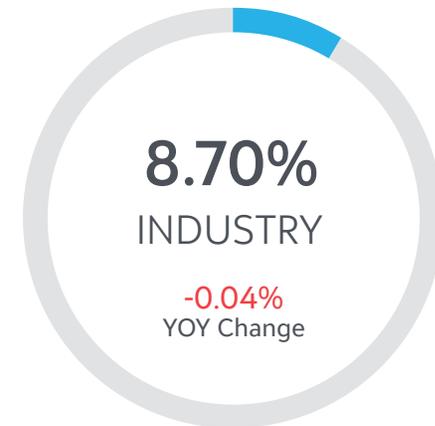
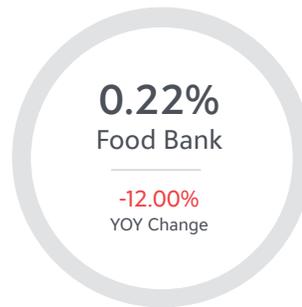
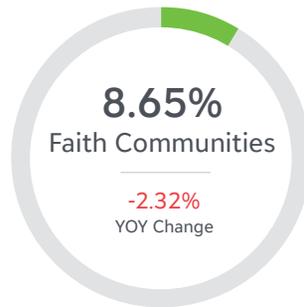
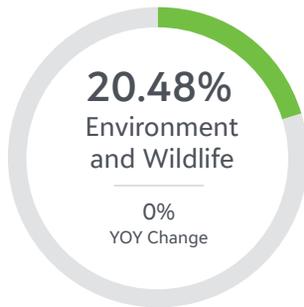
Constituents Who Advocate by Housefile Size

(Constituents Who Advocate as of Fiscal Year-End)



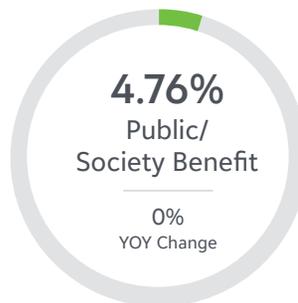
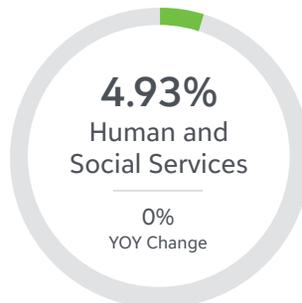
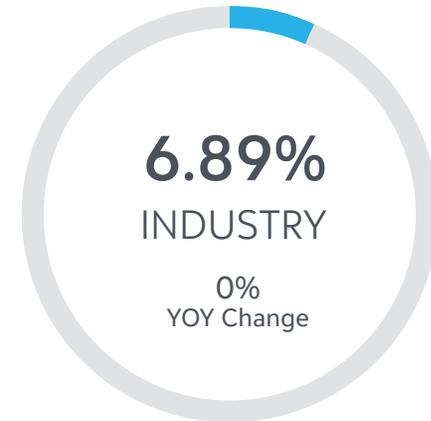
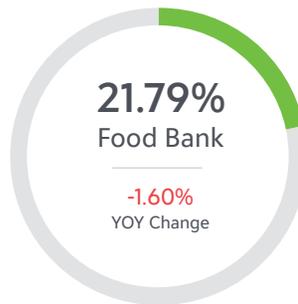
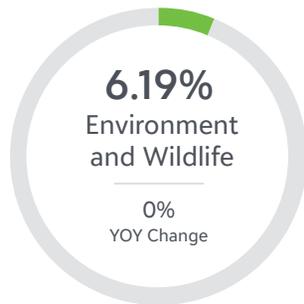
Percent of All Constituents Who Advocate by Vertical

(Constituents Who Advocate/Constituents with Email)



Percent of Advocates Who Also Donate **by Vertical**

(Number of Constituents Who Advocate and Donate as of Fiscal Year-End)



Conclusion /

It's a busy, crowded world out there, with lots of other organizations jostling for the attention of your supporters online and in their email inboxes. We hope this report can help arm you with the information you need to benchmark your performance and guide your fundraising strategies this year and beyond.

Methodology /

Study Participants

As in prior years, to be included in the reported data, organizations must have used the Blackbaud Luminate® platform consistently for a minimum of three years through June 2018. Data from other Blackbaud online fundraising tools was not included in this analysis.

Using the housefile and transaction data from 937 nonprofit organizations using the Blackbaud Luminate Online platform allows us to avoid 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. Making valid comparisons is difficult when the data is volunteered or when sources are self-selected or normalized to look better.

As much as we would have liked to include every Blackbaud customer in this year's study, our objective is to provide nonprofits the best and most accurate insight into how the industry fared in fiscal year 2017–2018. As such, we excluded organizations that did not have at least 36 months of data on the Blackbaud Luminate Online platform, as organizations migrating to a new platform tend to perform differently than those with an established program. Because of this exclusion, the number and composition of organizations in our study will always vary slightly depending on when they join Blackbaud and when they deploy additional modules.

Methodology /

Some Useful Definitions

This year's study included results from 937 organizations grouped by self-selected NTEE vertical designations, with the exception of Canadian nonprofits, which were classified by mission most closely matching the vertical industries studied. We reviewed online fundraising by focusing on multiple types of donations that have their own influence on the overall metrics.

They are:

Email Housefile: The full list of supporters with email addresses

Usable Email: A valid email address that accepts messages

Total Fundraising: Every online financial transaction

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

Sustainer Donations: Monthly recurring transactions

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

In this year's report, we prepared a summary of metrics by the following views:

NTEE Assigned Vertical (with some consolidation): Shows how organizations with similar missions compare to one another

Organization Size–Valid Email Address Bands: Allows us to see if growth or contraction is being led by large or small organizations based on the size of the email file

We provided more consolidated views on key reporting metrics, such as email types and donation types. These will help organizations better understand and assess what email and donation performance metrics really mean.

Methodology /

Industry Verticals

Organizations with at least 36 complete months of data on the Blackbaud Luminate platform were combined into groups that we believed to be similar based on a common organizational mission or vertical within the nonprofit sector. 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. Verticals that did not have at least 10 similar organizations with a common mission were excluded from this study.

We do not include all verticals in all metrics. A vertical would be excluded if a very small sample size of customers in that vertical met the criteria. For example, advocacy is a metric that is not as relevant for a public broadcasting station or hospital as it might be for an environmental organization. As a result, none of the advocacy-related metrics in this study includes results for public broadcasting stations or hospitals.

Study Universe

This study observes mature Blackbaud Luminate Online users who showed consistent activity for a full three years (July 2015 through June 2018). We apply this three-year rule for each type of activity within Blackbaud Luminate Online. For example, to be included, fundraising organizations must have had at least three full years of monthly fundraising revenue to represent mature fundraisers on the Blackbaud Luminate Online product.

Summary of Observed Universes /

Measure Group	Definition of “Mature”
Housefile	Organization operating Blackbaud Luminate Online site for 36 months, <i>July 2015–June 2018</i>
Advocacy	Organization with advocates on file in each fiscal year period, <i>July 2015–June 2018</i>
Total Transactions	Organization with online transaction activity within each month for 36 months, <i>July 2015–June 2018</i>
First Transactions	Organization with first-time donors giving within each month for 36 months, <i>July 2015–June 2018</i>
Repeat Transactions	Organization with repeat donors giving within each month for 36 months, <i>July 2015–June 2018</i>
Sustainer Transactions	Organization with sustainer donations within each month for 36 months, <i>July 2015–June 2018</i>
All Email	Organization with any emails sent in each fiscal year period, <i>July 2015–June 2018</i>
Advocacy Email	Organization with advocacy email activity in each fiscal year period, <i>July 2015–June 2018</i>
Donation Email	Organization with donation emails sent in each fiscal year period, <i>July 2015–June 2018</i>
eNews Email	Organization with eNewsletters sent in each fiscal year period, <i>July 2015–June 2018</i>
Other Email	Organization with unclassified emails sent in each fiscal year period, <i>July 2015–June 2018</i>

Where to Go from Here /

Talk data with us! Our team of experts can work with you to create your own personalized benchmark review that provides a more in-depth analysis of your program's performance. Contact your customer success manager or email us at solutions@blackbaud.com.

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