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Welcome back for the 2015 installment of the **Luminate Online Benchmark Report**. We’re nine years strong and more vibrant than ever!

The Luminate Online customer base of nonprofits represents a spectrum of missions, levels of adoption of digital marketing and engagement, and performance. You might even say this bold team of authors has been over the rainbow and back on a quest for the shiniest golden data nuggets for you.

We produce this report every year, because we love our customers and all nonprofits striving to innovate digital engagement and power their passions. Plus, we’re a bunch of geeks who think of data and trend-watching as fun times, which makes this annual rite of passage all the more special.

We hope this report will paint a clear picture of your performance relative to your peers and serve as a magnifying lens to view your strengths and opportunities. With this understanding, you hold the power to improve and evolve. Whether you use Luminate Online or not, we think you’ll find this report useful for planning your strategies and evaluating your performance.
Using This Report

Here’s the thing about benchmarks: they illuminate questions without answering why. We always say that the most important benchmark is an organization’s own historical performance—seeing how your organization is trending year over year or month over month on key metrics. The metrics in this paper can shed some light on similar organizations, but it depends on you to connect the dots to leverage this information productively to evaluate and shape your strategy. And of course, your friends at Blackbaud are here to help.

A Broad Spectrum

The 2015 Luminate Online Benchmark Report is based on the aggregated data of 685 nonprofit organizations. Collectively over the one-year period covered in this report, these organizations raised $1.5 billion dollars in nearly 22 million transactions and sent 6.3 billion emails. Some of these organizations are the largest, most prominent and recognizable names in the industry, while the majority—80.7%—are comparatively smaller, raising less than $2 million per year online. This large sample size of data collected directly from our Luminate Online cloud-based platform gives us a unique view of the nonprofit industry’s online engagement.
Shine on, You Crazy Diamond

Like last year, we decided to cover a fiscal year for this report, spanning July 1, 2014–June 30, 2015. This affords us a unique opportunity to deliver more timely metrics at a critical time of year for refining plans for the coming year and tweaking efforts to capitalize on end-of-year giving.

The methodology for obtaining each metric is consistent with our previous methodology. You can read specifics in the Methodology section at the end of the report. Similar to previous years, in order to be included in the reported data, organizations must have been consistently using the Luminate Online platform for a minimum of three years through June, 2015. Data from other Blackbaud online fundraising tools was not included in this analysis. All measures use a consistent group of customers in year-over-year calculations, which means reports should not be compared year to year.

New Hues

For the first time in this report’s history, many of the metrics will show performance in quartiles as well as medians. We’ve provided more information about understanding quartiles in the Quartiles section. We’ve also re-integrated organizations that we formerly labeled as National Nonprofit Mailers (indicating a housefile greater than 1 million email addresses) into their respective industries, with the rationale that we offer charts broken down by organization size in most instances.
Classifying Organizations

This study provides separate benchmarks for the nonprofit sector as a whole and for 17 National Taxonomy of Exempt Entities (NTEE) verticals. Canadian nonprofits are treated as one vertical. Organizations that raise 90 percent of their reported funds through team events (using TeamRaiser®) are excluded from this paper. Aside from Canadian nonprofits, all other organizations are classified according to their self-reported NTEE classification.

Quartiles

All measures reported reflect median and quartile values. Quartiles divide a ranked list of metrics into four equal parts: 75th (high), Median/50th (middle), and 25th (low). It’s a method that’s beneficial for de-emphasizing outliers and helping an organization easily identify whether they’re in the top-performing tier, middle, or low-performing tier for any given metric. It also provides insight into the distribution of data, for example, on many graphs, the lower quartile and median will be crunched together, whereas there’s a comparatively wide distance up to the top quartile. This shows that many organizations’ results were concentrated at the more modest performance levels.

Legend
This year, we saw an **11.82%** increase in the median value of constituents with email addresses across all sectors, which is a continuation of a trend several years running: housefiles are expanding. Chart 1 shows a median percent change of usable housefile growth, which is defined as emails that do not hard bounce. It’s not uncommon for people these days to have many different email addresses. While getting the primary, or best, email for a person may remain a challenge for nonprofits, continued growth in usable housefile size shows people are still giving valid emails.

Also trending in the right direction is the number of constituents who donate. In the fiscal year covered in this report, **15.19%** more of an organization’s constituents donated. New for this year, Blackbaud looked at constituents who donate as a percent of the overall email file. Across all nonprofit sectors the median percent of constituents who donate to the organization is **13.4%**, which is up **1.65%** year over year. This indicator is encouraging on multiple levels, because it means organizations are gaining high-quality constituents and presumably doing a better job cultivating their support.

Food banks outperformed other verticals when considering total growth of donating constituents and donors as a percent of the overall constituent population. Organizations with email file sizes less than 200,000 also dramatically outperformed larger organizations in the donors as percent of total category. While the law of small numbers may apply to some degree (i.e., smaller housefiles can change more rapidly), organizations with smaller email files tend to have an easier time segmenting, and thereby an easier time developing compelling asks and communications unique to each group.

While getting the primary or best email for a person remains a challenge for many nonprofits, continued growth in usable housefile size shows people are still giving valid emails.
Housefile Chart 1
Constituents with Email Addresses:
Size of Housefile Overview (FY15 Quartile Totals)

Constituents with Email

Low % Change | Median % Change | High % Change
--- | --- | ---
5.65% | 11.82% | 20.60%
Housefile Chart 2
Constituents with Email Addresses:
Size of Housefile by Vertical (Median Totals and FY14-FY15 Percent Change)
Housefile Chart 4
Year-Over-Year Change in Constituents Who Donate:
FY14-FY15 Change Overview

- LOW: 7.97%
- MEDIAN: 15.19%
- HIGH: 23.92%
Housefile Chart 5
Year-Over-Year Change in Constituents Who Donate:
FY14-FY15 Change by Vertical (Quartile Totals)
**Housefile Chart 6**

Year-Over-Year Change in Constituents Who Donate:
FY14-FY15 Change by Organization Size (Quartile Totals)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>LOW</th>
<th>MEDIAN</th>
<th>HIGH</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2,499</td>
<td>0.00%</td>
<td>2.71%</td>
<td>11.24%</td>
</tr>
<tr>
<td>2.5-9K</td>
<td>6.72%</td>
<td>14.29%</td>
<td>23.54%</td>
</tr>
<tr>
<td>10-24K</td>
<td>8.70%</td>
<td>14.88%</td>
<td>24.08%</td>
</tr>
<tr>
<td>25-74K</td>
<td>8.80%</td>
<td>15.58%</td>
<td>24.55%</td>
</tr>
<tr>
<td>75-124K</td>
<td>11.09%</td>
<td>16.43%</td>
<td>23.73%</td>
</tr>
<tr>
<td>125-199K</td>
<td>13.27%</td>
<td>18.60%</td>
<td>28.66%</td>
</tr>
<tr>
<td>200-349K</td>
<td>6.83%</td>
<td>13.52%</td>
<td>22.34%</td>
</tr>
<tr>
<td>350-499K</td>
<td>5.94%</td>
<td>10.09%</td>
<td>20.72%</td>
</tr>
<tr>
<td>500-749K</td>
<td>9.47%</td>
<td>16.99%</td>
<td>19.71%</td>
</tr>
<tr>
<td>750-999K</td>
<td>–</td>
<td>19.62%</td>
<td>–</td>
</tr>
<tr>
<td>1,000K+</td>
<td>8.19%</td>
<td>13.42%</td>
<td>21.56%</td>
</tr>
</tbody>
</table>
Housefile Chart 7
Percent of Constituents Who Donate: FY14-FY15 Overview

-1.48%  1.66%  9.41%
Low % Change  Median % Change  High % Change

Percent of Total
0%  2.5%  5%  7.5%  10%  12.5%  15%  17.5%  20%  22.5%  25%  27.5%  30%  32.5%  35%
4.81%  13.4%  32.53%
Housefile Chart 8
Percent of Constituents Who Donate: Donation by Vertical (Median Totals and FY14-FY15 Percent Change)

- ANIMAL WELFARE: 20.49% (-0.32%)
- ASSOCIATION & MEMBERSHIP: 0.70% (0.00%)
- CANADIAN ORGANIZATION: 37.88% (3.69%)
- CHRISTIAN MINISTRIES: 12.82% (0.17%)
- DISASTER & INTERNATIONAL RELIEF: 22.11% (3.60%)
- DISEASE & HEALTH SERVICES: 38.93% (0.82%)
- ENVIRONMENT & WILDLIFE: 5.50% (0.00%)
- FOOD BANK: 31.50% (2.12%)
- HEALTH - MEDICAL RESEARCH*: 26.44% (4.85%)
- HIGHER ED: 5.14% (12.64%)
- HOSPITAL FOUNDATION: 24.14% (0.10%)
- HOSPITALS: 22.55% (5.27%)
- HUMAN & SOCIAL SERVICES: 12.91% (2.33%)
- JEWISH: 7.48% (0.98%)
- PERFORMING ARTS & LIBRARIES: 13.31% (5.00%)
- PUBLIC AFFAIRS: 3.86% (2.81%)
- PUBLIC BROADCASTING STATIONS: 19.16% (2.78%)
- VISITATION: 8.86% (7.66%)
- TOTAL: 13.40% (1.65%)
Housefile Chart 9

Percent of Constituents Who Donate:

Donation by Organization Size (Quartile Totals and FY14-FY15 Percent Change)
Email
Our research shows that industry-wide email sends grew at a modest 2.9%, with significant outliers for advocacy and donation focused emails growing at 17% each. The 2016 election cycle along with increased focus on constituent engagement are two of the factors likely contributing to the advocacy push. At Blackbaud, we’re seeing more organizations ditching the generic, mass email solicitations in favor of differentiated, multi-part email donation campaigns aimed at specific constituent segments. So, while each individual target may be receiving a similar number of total emails year over year from an organization, the total solicitation emails sent by a given organization could increase substantially.

Open rates and click-through rates declined year over year across the industry, although the rate of change has slowed considerably from years past. Advocacy-focused emails outperformed all other email types in both categories, indicating a considerably higher level of engagement among advocates. However, advocacy still remains a key acquisition opportunity. With only 6.5% of advocates donating, it appears to be an under-exploited conversion opportunity to drive giving and overall engagement when they’re all mixed together as part of a complete communication strategy.
Email Chart 1
Total Emails Sent: 2015 Totals by Type and FY14-FY15 Percent Change

<table>
<thead>
<tr>
<th>EMAIL TYPE</th>
<th>% CHANGE</th>
<th>Total Emails Sent</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVOCACY</td>
<td>17.24%</td>
<td>440,013</td>
</tr>
<tr>
<td>DONATION</td>
<td>17.62%</td>
<td>425,575</td>
</tr>
<tr>
<td>NEWSLETTER</td>
<td>3.83%</td>
<td>420,157</td>
</tr>
<tr>
<td>OTHER</td>
<td>15.84%</td>
<td>636,708</td>
</tr>
</tbody>
</table>
### Email Chart 3

**Email Messages Sent:** Sent by Organization Size (Quartiles Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>1-2,499*</th>
<th>2.5-9K</th>
<th>10-24K</th>
<th>25-74K</th>
<th>75-124K</th>
<th>125-199K</th>
<th>200-349K</th>
<th>350-499K</th>
<th>500-749K</th>
<th>750-999K*</th>
<th>1,000K+</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW</td>
<td>–</td>
<td>23</td>
<td>45</td>
<td>59</td>
<td>115</td>
<td>153</td>
<td>161</td>
<td>127</td>
<td>345</td>
<td>–</td>
<td>287</td>
</tr>
<tr>
<td>MEDIAN</td>
<td>–</td>
<td>36</td>
<td>82</td>
<td>122</td>
<td>189</td>
<td>229</td>
<td>317</td>
<td>227</td>
<td>783</td>
<td>639</td>
<td>1044</td>
</tr>
<tr>
<td>HIGH</td>
<td>–</td>
<td>76</td>
<td>134</td>
<td>206</td>
<td>287</td>
<td>445</td>
<td>553</td>
<td>500</td>
<td>1021</td>
<td>–</td>
<td>4310</td>
</tr>
<tr>
<td>% CHANGE</td>
<td>–</td>
<td>-2.53%</td>
<td>-0.66%</td>
<td>2.71%</td>
<td>4.60%</td>
<td>3.09%</td>
<td>0.35%</td>
<td>7.14%</td>
<td>-1.75%</td>
<td>18.34%</td>
<td>6.48%</td>
</tr>
</tbody>
</table>
Email Chart 4
Open Rates: Opens by Type of Email (FY15 Quartile Totals and FY14-FY15 Percent Change)
Email Chart 5
Open Rates: Opens by Vertical (Median Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>Vertical</th>
<th>FY14 Median Totals</th>
<th>FY15 Median Totals</th>
<th>FY14-FY15 Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL WELFARE</td>
<td>15.71%</td>
<td>14.74%</td>
<td>16.59%</td>
</tr>
<tr>
<td>ASSOCIATION &amp; MEMBERSHIP</td>
<td>21.29%</td>
<td>17.50%</td>
<td>20.95%</td>
</tr>
<tr>
<td>CANADIAN ORGANIZATION</td>
<td>–</td>
<td>19.74%</td>
<td>22.40%</td>
</tr>
<tr>
<td>CHRISTIAN MINISTRIES</td>
<td>–</td>
<td>17.23%</td>
<td>16.07%</td>
</tr>
<tr>
<td>DISASTER &amp; INTERNATIONAL RELIEF</td>
<td>15.40%</td>
<td>14.00%</td>
<td>14.68%</td>
</tr>
<tr>
<td>DISEASE &amp; HEALTH SERVICES</td>
<td>13.56%</td>
<td>12.69%</td>
<td>13.12%</td>
</tr>
<tr>
<td>ENVIRONMENT &amp; WILDLIFE</td>
<td>16.24%</td>
<td>15.38%</td>
<td>15.21%</td>
</tr>
<tr>
<td>FOOD BANK</td>
<td>–</td>
<td>14.94%</td>
<td>15.77%</td>
</tr>
<tr>
<td>HEALTH - MEDICAL RESEARCH</td>
<td>–</td>
<td>20.55%</td>
<td>–</td>
</tr>
<tr>
<td>HIGHER ED</td>
<td>–</td>
<td>23.05%</td>
<td>25.24%</td>
</tr>
<tr>
<td>HOSPITAL FOUNDATION</td>
<td>–</td>
<td>–</td>
<td>15.28%</td>
</tr>
<tr>
<td>HOSPITALS</td>
<td>–</td>
<td>–</td>
<td>15.63%</td>
</tr>
<tr>
<td>HUMAN &amp; SOCIAL SERVICES</td>
<td>–</td>
<td>–</td>
<td>15.42%</td>
</tr>
<tr>
<td>JEWISH</td>
<td>14.85%</td>
<td>15.42%</td>
<td>16.81%</td>
</tr>
<tr>
<td>PERFORMING ARTS &amp; LIBRARIES</td>
<td>–</td>
<td>–</td>
<td>21.07%</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS</td>
<td>–</td>
<td>20.09%</td>
<td>23.34%</td>
</tr>
<tr>
<td>PUBLIC BROADCASTING STATIONS</td>
<td>–</td>
<td>16.90%</td>
<td>13.89%</td>
</tr>
<tr>
<td>VISITATION</td>
<td>–</td>
<td>17.72%</td>
<td>17.77%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>16.58%</td>
<td>15.34%</td>
<td>16.39%</td>
</tr>
</tbody>
</table>

Open Rates by Email Type

- Advocacy
- Donation
- Newsletter
- Other
### Email Chart 6

**Open Rates:** Opens by Organization Size (Median Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>1-2,499*</th>
<th>2.5-9K</th>
<th>10-24K</th>
<th>25-74K</th>
<th>75-124K</th>
<th>125-199K</th>
<th>200-349K</th>
<th>350-499K</th>
<th>500-749K</th>
<th>750-999K*</th>
<th>1,000K+</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVOCACY</td>
<td>–</td>
<td>20.34%</td>
<td>21.92%</td>
<td>16.41%</td>
<td>16.70%</td>
<td>16.56%</td>
<td>16.74%</td>
<td>16.41%</td>
<td>15.88%</td>
<td>–</td>
<td>14.82%</td>
</tr>
<tr>
<td>DONATION</td>
<td>–</td>
<td>19.72%</td>
<td>16.03%</td>
<td>15.47%</td>
<td>14.94%</td>
<td>14.81%</td>
<td>13.86%</td>
<td>12.56%</td>
<td>14.60%</td>
<td>10.76%</td>
<td>13.09%</td>
</tr>
<tr>
<td>NEWSLETTER</td>
<td>–</td>
<td>22.38%</td>
<td>17.30%</td>
<td>16.38%</td>
<td>16.13%</td>
<td>14.42%</td>
<td>16.87%</td>
<td>14.48%</td>
<td>12.68%</td>
<td>14.10%</td>
<td>13.23%</td>
</tr>
<tr>
<td>OTHER</td>
<td>–</td>
<td>22.40%</td>
<td>18.87%</td>
<td>17.73%</td>
<td>16.59%</td>
<td>15.53%</td>
<td>15.66%</td>
<td>14.44%</td>
<td>13.55%</td>
<td>12.10%</td>
<td>13.78%</td>
</tr>
</tbody>
</table>
### Email Chart 7

**Click-Through Rates:** Clicks by Type of Email (FY15 Quartile Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>EMAIL TYPE</th>
<th>% CHANGE</th>
<th>Click-Through Rates by Email Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVOCACY</td>
<td>-12.45%</td>
<td>2.00%</td>
</tr>
<tr>
<td>DONATION</td>
<td>-8.41%</td>
<td>0.61%</td>
</tr>
<tr>
<td>NEWSLETTER</td>
<td>-7.92%</td>
<td>1.54%</td>
</tr>
<tr>
<td>OTHER</td>
<td>-11.14%</td>
<td>1.29%</td>
</tr>
</tbody>
</table>
### Email Chart 8

**Click-Through Rates**: Clicks by Vertical (Median Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Advocacy</th>
<th>Donation</th>
<th>Newsletter</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL WELFARE</td>
<td>2.11%</td>
<td>0.76%</td>
<td>1.78%</td>
<td>1.30%</td>
</tr>
<tr>
<td>ASSOCIATION &amp; MEMBERSHIP</td>
<td>1.81%</td>
<td>0.70%</td>
<td>2.43%</td>
<td>1.14%</td>
</tr>
<tr>
<td>CANADIAN ORGANIZATION</td>
<td>–</td>
<td>0.93%</td>
<td>2.34%</td>
<td>2.65%</td>
</tr>
<tr>
<td>CHRISTIAN MINISTRIES</td>
<td>–</td>
<td>0.90%</td>
<td>1.82%</td>
<td>1.13%</td>
</tr>
<tr>
<td>DISASTER &amp; INTERNATIONAL RELIEF</td>
<td>1.55%</td>
<td>0.50%</td>
<td>0.98%</td>
<td>0.96%</td>
</tr>
<tr>
<td>DISEASE &amp; HEALTH SERVICES</td>
<td>1.14%</td>
<td>0.43%</td>
<td>1.43%</td>
<td>1.13%</td>
</tr>
<tr>
<td>ENVIRONMENT &amp; WILDLIFE</td>
<td>3.16%</td>
<td>0.47%</td>
<td>1.86%</td>
<td>1.31%</td>
</tr>
<tr>
<td>FOOD BANK</td>
<td>–</td>
<td>0.71%</td>
<td>1.32%</td>
<td>1.40%</td>
</tr>
<tr>
<td>HEALTH - MEDICAL RESEARCH</td>
<td>–</td>
<td>0.65%</td>
<td>–</td>
<td>1.55%</td>
</tr>
<tr>
<td>HIGHER ED</td>
<td>–</td>
<td>0.75%</td>
<td>2.53%</td>
<td>1.92%</td>
</tr>
<tr>
<td>HOSPITAL FOUNDATION</td>
<td>–</td>
<td>–</td>
<td>1.73%</td>
<td>2.02%</td>
</tr>
<tr>
<td>HOSPITALS</td>
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<td>0.58%</td>
<td>1.21%</td>
<td>1.14%</td>
</tr>
<tr>
<td>HUMAN &amp; SOCIAL SERVICES</td>
<td>0.96%</td>
<td>0.80%</td>
<td>1.31%</td>
<td>1.29%</td>
</tr>
<tr>
<td>JEWISH</td>
<td>–</td>
<td>–</td>
<td>1.58%</td>
<td>1.02%</td>
</tr>
<tr>
<td>PERFORMING ARTS &amp; LIBRARIES</td>
<td>–</td>
<td>0.73%</td>
<td>2.69%</td>
<td>1.99%</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS</td>
<td>2.32%</td>
<td>0.43%</td>
<td>1.29%</td>
<td>1.47%</td>
</tr>
<tr>
<td>PUBLIC BROADCASTING STATIONS</td>
<td>–</td>
<td>0.53%</td>
<td>1.41%</td>
<td>1.21%</td>
</tr>
<tr>
<td>VISITATION</td>
<td>–</td>
<td>0.47%</td>
<td>1.69%</td>
<td>1.41%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>2.00%</td>
<td>0.61%</td>
<td>1.54%</td>
<td>1.29%</td>
</tr>
</tbody>
</table>
## Email Chart 9

**Click-Through Rates:** Clicks by Organization Size (Median Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>ADVOCACY</th>
<th>DONATION</th>
<th>NEWSLETTER</th>
<th>OTHER</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2,499*</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>2.5-9K</td>
<td>2.14%</td>
<td>1.04%</td>
<td>2.09%</td>
<td>2.24%</td>
</tr>
<tr>
<td>10-24K</td>
<td>1.56%</td>
<td>0.69%</td>
<td>1.47%</td>
<td>1.42%</td>
</tr>
<tr>
<td>25-74K</td>
<td>2.74%</td>
<td>0.67%</td>
<td>1.73%</td>
<td>1.58%</td>
</tr>
<tr>
<td>75-124K</td>
<td>1.79%</td>
<td>0.63%</td>
<td>1.53%</td>
<td>1.24%</td>
</tr>
<tr>
<td>125-199K</td>
<td>2.17%</td>
<td>0.50%</td>
<td>1.21%</td>
<td>1.02%</td>
</tr>
<tr>
<td>200-349K</td>
<td>1.14%</td>
<td>0.44%</td>
<td>1.37%</td>
<td>1.21%</td>
</tr>
<tr>
<td>350-499K</td>
<td>4.51%</td>
<td>0.34%</td>
<td>1.27%</td>
<td>0.98%</td>
</tr>
<tr>
<td>500-749K</td>
<td>1.72%</td>
<td>0.39%</td>
<td>1.22%</td>
<td>0.95%</td>
</tr>
<tr>
<td>750-999K*</td>
<td>–</td>
<td>0.34%</td>
<td>1.43%</td>
<td>1.10%</td>
</tr>
<tr>
<td>1,000K+</td>
<td>–</td>
<td>0.37%</td>
<td>1.56%</td>
<td>0.91%</td>
</tr>
</tbody>
</table>

*Percent change for FY14-FY15.*
Email Chart 10
Conversion Rates:
Conversion Overview (Quartile Totals and FY14-FY15 Percent Change)
Email Chart 11
Conversion Rates: Conversions by Vertical (Median Totals and FY14-FY15 Percent Change)

- ANIMAL WELFARE: 0.07% increase by 14.65%
- ASSOCIATION & MEMBERSHIP: 0.03% increase by 0.00%
- CANADIAN ORGANIZATION: 0.04% decrease by 32.32%
- CHRISTIAN MINISTRIES: 0.05% increase by 0.00%
- DISASTER & INTERNATIONAL RELIEF: 0.05% increase by 0.00%
- DISEASE & HEALTH SERVICES: 0.02% increase by 0.00%
- ENVIRONMENT & WILDLIFE: 0.05% increase by 0.00%
- FOOD BANK: 0.12% decrease by 23.21%
- HEALTH - MEDICAL RESEARCH: 0.02% decrease by 66.67%
- HIGHER ED: 0.07% increase by 0.00%
- HOSPITAL FOUNDATION: --
- HOSPITALS: 0.04% decrease by 28.57%
- HUMAN & SOCIAL SERVICES: 0.03% decrease by 33.33%
- JEWISH: --
- PERFORMING ARTS & LIBRARIES: 0.07% decrease by 34.89%
- PUBLIC AFFAIRS: 0.04% decrease by 15.00%
- PUBLIC BROADCASTING STATIONS: 0.08% decrease by 16.67%
- VISITATION: 0.03% decrease by 33.33%
- TOTAL: 0.04% decrease by 11.11%

Conversion Rates: 0.00% to 0.28%
Email Chart 12
Conversion Rates: Conversions by Organization Size (Quartile Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>LOW</th>
<th>MEDIAN</th>
<th>HIGH</th>
<th>% CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2,499*</td>
<td>–</td>
<td>0.02%</td>
<td>0.03%</td>
<td>–</td>
</tr>
<tr>
<td>2.5-9K</td>
<td>0.02%</td>
<td>0.05%</td>
<td>0.17%</td>
<td>-13.75%</td>
</tr>
<tr>
<td>10K-24K</td>
<td>0.03%</td>
<td>0.06%</td>
<td>0.13%</td>
<td>-6.25%</td>
</tr>
<tr>
<td>25-74K</td>
<td>0.02%</td>
<td>0.05%</td>
<td>0.12%</td>
<td>-9.76%</td>
</tr>
<tr>
<td>75-124K</td>
<td>0.02%</td>
<td>0.04%</td>
<td>0.11%</td>
<td>-28.12%</td>
</tr>
<tr>
<td>125-199K</td>
<td>0.02%</td>
<td>0.02%</td>
<td>0.09%</td>
<td>-25.00%</td>
</tr>
<tr>
<td>200-349K</td>
<td>0.01%</td>
<td>0.02%</td>
<td>0.05%</td>
<td>-25.00%</td>
</tr>
<tr>
<td>350-499K</td>
<td>0.03%</td>
<td>0.03%</td>
<td>0.04%</td>
<td>0.00%</td>
</tr>
<tr>
<td>500-749K</td>
<td>0.02%</td>
<td>0.03%</td>
<td>0.04%</td>
<td>0.00%</td>
</tr>
<tr>
<td>750-999K*</td>
<td>–</td>
<td>0.03%</td>
<td>–</td>
<td>0.00%</td>
</tr>
<tr>
<td>1,000K+</td>
<td>0.01%</td>
<td>0.02%</td>
<td>0.04%</td>
<td>-8.33%</td>
</tr>
</tbody>
</table>
Median online revenue grew this year by 8.89%—officially marking the fifth year of strong growth in online giving. Giving in all industries grew with the exceptions of association, membership, and higher education, which decreased 10.79%, 1.44%, and 0.55% respectively. Giving to hospitals grew the most, up 25.84% from last year. Giving to medical research fell right behind hospitals with a 21.24% increase, likely due in part to the $115 million dollars donated to the ALS Association from the Ice Bucket Challenge. And the median number of donations is also up 7.01% across all verticals. This is further evidence that donors continue to migrate toward giving online and online fundraising is an integral part of the direct response mix.

The increase in median online revenue and quantity of gifts metrics yielded a slight increase in median average transaction, which is up 2.05% to $92.08 this year. Higher education, hospital foundations, and human and social services led the pack with the highest median average transactions. Not surprisingly, public broadcasting stations trail the other industries with $34.97, the lowest median average gift. This is due to the fact that the high percentage (80.51%) of public broadcasting stations’ transactions are sustaining gifts, which are typically smaller than a one-time gift. Public broadcasting organizations have a median average gift of $33.46, in line with their strong monthly giving base. This trend witnessed in public broadcasting rings less true for nonprofits overall, as seen through declines in first-time gifts and an increase in sustaining gifts as a percentage of total giving.

In FY15, the median annual online revenue per usable email address was down 2.89% to $11.77 from $12.70 in FY14. Similar to last year, housefile growth is outpacing revenue growth and bigger housefiles don’t necessarily mean more money, especially if newly acquired email addresses don’t represent constituents with likelihood to give.

Truth: First-time giving growth is sluggish, with a median less than 2%.

The bright side? Repeat giving makes a strong showing, indicating that digital marketing channels are leading the way in retention.
**Giving Chart 1**

Online Fundraising Revenue Growth by Donation Type: FY14-FY15 Median Percent Change

*See note on page 46 about the dichotomies of giving.*
Giving Chart 2

Total Online Revenue Amount: Giving Overview (FY15 Quartile Totals)

- Low % Change: -3.82%
- Median % Change: 8.89%
- High % Change: 23.16%
Giving Chart 3
Year-Over-Year Change in Transaction Total: Change by Vertical (FY14-FY15 Median Percent Change)

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Median Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL WELFARE</td>
<td>12.29%</td>
</tr>
<tr>
<td>ASSOCIATION &amp; MEMBERSHIP</td>
<td>-10.79%</td>
</tr>
<tr>
<td>CANADIAN ORGANIZATION*</td>
<td>-1.44%</td>
</tr>
<tr>
<td>CHRISTIAN MINISTRIES</td>
<td>19.18%</td>
</tr>
<tr>
<td>DISASTER &amp; INTERNATIONAL RELIEF</td>
<td>7.42%</td>
</tr>
<tr>
<td>DISEASE &amp; HEALTH SERVICES</td>
<td>1.45%</td>
</tr>
<tr>
<td>ENVIRONMENT &amp; WILDLIFE</td>
<td>12.83%</td>
</tr>
<tr>
<td>FOOD BANK</td>
<td>12.46%</td>
</tr>
<tr>
<td>HEALTH - MEDICAL RESEARCH*</td>
<td>21.24%</td>
</tr>
<tr>
<td>HIGHER ED</td>
<td>-0.55%</td>
</tr>
<tr>
<td>HOSPITAL FOUNDATION*</td>
<td>0.79%</td>
</tr>
<tr>
<td>HOSPITALS</td>
<td>25.84%</td>
</tr>
<tr>
<td>HUMAN &amp; SOCIAL SERVICES</td>
<td>6.00%</td>
</tr>
<tr>
<td>JEWISH</td>
<td>18.52%</td>
</tr>
<tr>
<td>PERFORMING ARTS &amp; LIBRARIES</td>
<td>20.91%</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS</td>
<td>10.88%</td>
</tr>
<tr>
<td>PUBLIC BROADCASTING STATIONS</td>
<td>8.86%</td>
</tr>
<tr>
<td>VISITATION</td>
<td>11.24%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>8.89%</td>
</tr>
</tbody>
</table>

Change in Total Transactions

-35% -30% -25% -20% -15% -10% -5% 0% 5% 10% 15% 20% 25% 30% 35% 40% 45% Median
### Giving Chart 4

**Year-Over-Year Change in Transaction Total:**
Change by Organization Size (FY14-FY15 Quartile Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>LOW</th>
<th>MEDIAN</th>
<th>HIGH</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2,499*</td>
<td>–</td>
<td>-18.71%</td>
<td>–</td>
</tr>
<tr>
<td>2.5-9K</td>
<td>-1.97%</td>
<td>9.13%</td>
<td>20.68%</td>
</tr>
<tr>
<td>10-24K</td>
<td>-0.46%</td>
<td>10.55%</td>
<td>25.05%</td>
</tr>
<tr>
<td>25-74K</td>
<td>-3.95%</td>
<td>6.73%</td>
<td>23.76%</td>
</tr>
<tr>
<td>75-124K</td>
<td>-1.58%</td>
<td>8.90%</td>
<td>18.47%</td>
</tr>
<tr>
<td>125-199K</td>
<td>-6.50%</td>
<td>2.78%</td>
<td>20.33%</td>
</tr>
<tr>
<td>200-349K</td>
<td>4.53%</td>
<td>9.05%</td>
<td>18.49%</td>
</tr>
<tr>
<td>350-499K</td>
<td>13.84%</td>
<td>26.12%</td>
<td>30.46%</td>
</tr>
<tr>
<td>500-749K</td>
<td>13.84%</td>
<td>26.12%</td>
<td>30.46%</td>
</tr>
<tr>
<td>750-999K*</td>
<td>–</td>
<td>9.10%</td>
<td>–</td>
</tr>
<tr>
<td>1,000K+</td>
<td>-0.82%</td>
<td>11.71%</td>
<td>25.18%</td>
</tr>
</tbody>
</table>

*Note: Percentage change data is represented graphically with error bars indicating quartile range.
### Giving Chart 6

**Total Transaction Amount:** Giving by Organization Size (Quartiles and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>1-2,499*</th>
<th>2.5-9K</th>
<th>10-24K</th>
<th>25-74K</th>
<th>75-124K</th>
<th>125-199K</th>
<th>200-349K</th>
<th>350-499K</th>
<th>500-749K</th>
<th>750-999K*</th>
<th>1,000K+</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW</td>
<td>–</td>
<td>$67,631</td>
<td>$127,782</td>
<td>$233,858</td>
<td>$373,689</td>
<td>$555,330</td>
<td>$531,171</td>
<td>$386,048</td>
<td>$966,689</td>
<td>–</td>
<td>$2,156,910</td>
</tr>
<tr>
<td>MEDIAN</td>
<td>$77,166</td>
<td>$164,292</td>
<td>$227,746</td>
<td>$560,413</td>
<td>$904,899</td>
<td>$1,179,662</td>
<td>$1,607,635</td>
<td>$1,120,099</td>
<td>$2,724,780</td>
<td>$2,119,234</td>
<td>$3,719,592</td>
</tr>
<tr>
<td>HIGH</td>
<td>–</td>
<td>$278,076</td>
<td>$621,417</td>
<td>$1,218,862</td>
<td>$1,870,589</td>
<td>$2,141,681</td>
<td>$4,922,322</td>
<td>$1,895,208</td>
<td>$6,626,625</td>
<td>–</td>
<td>$15,633,192</td>
</tr>
<tr>
<td>% CHANGE</td>
<td>29.45%</td>
<td>1.47%</td>
<td>9.13%</td>
<td>10.55%</td>
<td>6.73%</td>
<td>8.90%</td>
<td>2.78%</td>
<td>9.05%</td>
<td>26.12%</td>
<td>9.10%</td>
<td>11.71%</td>
</tr>
</tbody>
</table>

---

*Note: Data for 750-999K and 1,000K+ are not available.*
Giving Chart 7

Average Transaction Amount: Giving Overview (FY15 Quartile Totals)

Low % Change  Median % Change  High % Change
-6.90%  2.10%  9.40%
## Giving Chart 8

**Average Transaction Amount:** Giving by Vertical (Median and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Median</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL WELFARE</td>
<td>$63.43</td>
<td>1.98%</td>
</tr>
<tr>
<td>ASSOCIATION &amp; MEMBERSHIP</td>
<td>$88.19</td>
<td>1.64%</td>
</tr>
<tr>
<td>CANADIAN ORGANIZATION*</td>
<td>$70.91</td>
<td>3.57%</td>
</tr>
<tr>
<td>CHRISTIAN MINISTRIES</td>
<td>$104.02</td>
<td>3.29%</td>
</tr>
<tr>
<td>DISASTER &amp; INTERNATIONAL RELIEF</td>
<td>$121.01</td>
<td>0.35%</td>
</tr>
<tr>
<td>DISEASE &amp; HEALTH SERVICES</td>
<td>$82.14</td>
<td>3.97%</td>
</tr>
<tr>
<td>ENVIRONMENT &amp; WILDLIFE</td>
<td>$72.48</td>
<td>-1.04%</td>
</tr>
<tr>
<td>FOOD BANK</td>
<td>$107.57</td>
<td>1.23%</td>
</tr>
<tr>
<td>HEALTH - MEDICAL RESEARCH*</td>
<td>$123.50</td>
<td>0.18%</td>
</tr>
<tr>
<td>HIGHER ED</td>
<td>$262.18</td>
<td>0.57%</td>
</tr>
<tr>
<td>HOSPITAL FOUNDATION*</td>
<td>$152.43</td>
<td>7.60%</td>
</tr>
<tr>
<td>HOSPITALS</td>
<td>$123.15</td>
<td>1.13%</td>
</tr>
<tr>
<td>HUMAN &amp; SOCIAL SERVICES</td>
<td>$150.61</td>
<td>6.31%</td>
</tr>
<tr>
<td>JEWISH</td>
<td>$93.43</td>
<td>-9.23%</td>
</tr>
<tr>
<td>PERFORMING ARTS &amp; LIBRARIES</td>
<td>$107.79</td>
<td>6.12%</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS</td>
<td>$93.59</td>
<td>0.28%</td>
</tr>
<tr>
<td>PUBLIC BROADCASTING STATIONS</td>
<td>$34.97</td>
<td>-8.19%</td>
</tr>
<tr>
<td>VISITATION</td>
<td>$99.21</td>
<td>-7.58%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$92.09</td>
<td>2.05%</td>
</tr>
</tbody>
</table>
Giving Chart 9
Average Transaction Amount: Giving by Organization Size (Quartiles and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>1-2,499*</th>
<th>2.5-9K</th>
<th>10-24K</th>
<th>25-74K</th>
<th>75-124K</th>
<th>125-199K</th>
<th>200-349K</th>
<th>350-499K</th>
<th>500-749K</th>
<th>750-999K*</th>
<th>1,000K+</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW</td>
<td>-</td>
<td>$88.92</td>
<td>$79.56</td>
<td>$72.10</td>
<td>$58.51</td>
<td>$44.95</td>
<td>$66.25</td>
<td>$42.82</td>
<td>$47.41</td>
<td>-</td>
<td>$35.71</td>
</tr>
<tr>
<td>MEDIAN</td>
<td>$153.76</td>
<td>$130.57</td>
<td>$102.60</td>
<td>$98.30</td>
<td>$86.33</td>
<td>$80.31</td>
<td>$90.81</td>
<td>$45.97</td>
<td>$79.86</td>
<td>$65.09</td>
<td>$58.15</td>
</tr>
<tr>
<td>HIGH</td>
<td>-</td>
<td>$213.99</td>
<td>$161.67</td>
<td>$154.39</td>
<td>$129.07</td>
<td>$108.02</td>
<td>$141.77</td>
<td>$61.03</td>
<td>$92.58</td>
<td>-</td>
<td>$77.46</td>
</tr>
<tr>
<td>% CHANGE</td>
<td>11.09%</td>
<td>2.09%</td>
<td>0.48%</td>
<td>2.14%</td>
<td>-0.30%</td>
<td>1.55%</td>
<td>5.04%</td>
<td>6.38%</td>
<td>1.64%</td>
<td>1.35%</td>
<td>3.53%</td>
</tr>
</tbody>
</table>
Giving Chart 10
Revenue per Usable Email: Giving Overview (FY15 Quartile Totals)

Low % Change: -16.90%
Median % Change: -2.89%
High % Change: 12.24%
Giving Chart 11

Revenue per Usable Email: Giving by Vertical (Median and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Median</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL WELFARE</td>
<td>$11.82</td>
<td>-5.69%</td>
</tr>
<tr>
<td>ASSOCIATION &amp; MEMBERSHIP</td>
<td>$1.78</td>
<td>-24.52%</td>
</tr>
<tr>
<td>CANADIAN ORGANIZATION*</td>
<td>$13.97</td>
<td>-12.10%</td>
</tr>
<tr>
<td>CHRISTIAN MINISTRIES</td>
<td>$31.48</td>
<td>-0.28%</td>
</tr>
<tr>
<td>DISASTER &amp; INTERNATIONAL RELIEF</td>
<td>$15.78</td>
<td>-9.47%</td>
</tr>
<tr>
<td>DISEASE &amp; HEALTH SERVICES</td>
<td>$4.28</td>
<td>-1.79%</td>
</tr>
<tr>
<td>ENVIRONMENT &amp; WILDLIFE</td>
<td>$36.60</td>
<td>-2.60%</td>
</tr>
<tr>
<td>FOOD BANK</td>
<td>$19.61</td>
<td>-3.75%</td>
</tr>
<tr>
<td>HEALTH - MEDICAL RESEARCH*</td>
<td>$13.07</td>
<td>-3.34%</td>
</tr>
<tr>
<td>HIGHER ED</td>
<td>$11.62</td>
<td>-5.75%</td>
</tr>
<tr>
<td>HOSPITAL FOUNDATION*</td>
<td>$13.43</td>
<td>-1.75%</td>
</tr>
<tr>
<td>HOSPITALS</td>
<td>$16.70</td>
<td>6.67%</td>
</tr>
<tr>
<td>HUMAN &amp; SOCIAL SERVICES</td>
<td>$3.61</td>
<td>1.47%</td>
</tr>
<tr>
<td>JEWISH</td>
<td>$12.23</td>
<td>3.35%</td>
</tr>
<tr>
<td>PERFORMING ARTS &amp; LIBRARIES</td>
<td>$6.34</td>
<td>-11.76%</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS</td>
<td>$11.77</td>
<td>-2.89%</td>
</tr>
<tr>
<td>PUBLIC BROADCASTING STATIONS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VISITATION</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Giving Chart 12

Revenue per Usable Email: Giving by Organization Size (Quartiles and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>LOW</th>
<th>MEDIAN</th>
<th>HIGH</th>
<th>% CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2,499*</td>
<td>–</td>
<td>$11.32</td>
<td>$24.70</td>
<td>25.19%</td>
</tr>
<tr>
<td>2.5-9K</td>
<td>$11.32</td>
<td>$24.70</td>
<td>$42.81</td>
<td>-9.04%</td>
</tr>
<tr>
<td>10-24K</td>
<td>$8.48</td>
<td>$16.22</td>
<td>$36.43</td>
<td>1.18%</td>
</tr>
<tr>
<td>25-74K</td>
<td>$5.98</td>
<td>$14.25</td>
<td>$29.14</td>
<td>-0.38%</td>
</tr>
<tr>
<td>75-124K</td>
<td>$4.15</td>
<td>$7.46</td>
<td>$18.84</td>
<td>-2.02%</td>
</tr>
<tr>
<td>125-199K</td>
<td>$2.98</td>
<td>$5.72</td>
<td>$15.19</td>
<td>-7.06%</td>
</tr>
<tr>
<td>200-349K</td>
<td>$2.29</td>
<td>$4.81</td>
<td>$10.70</td>
<td>-7.69%</td>
</tr>
<tr>
<td>350-499K</td>
<td>$0.99</td>
<td>$2.33</td>
<td>$6.92</td>
<td>-3.40%</td>
</tr>
<tr>
<td>500-749K</td>
<td>$1.74</td>
<td>$4.15</td>
<td>–</td>
<td>9.20%</td>
</tr>
<tr>
<td>750-999K*</td>
<td>–</td>
<td>$2.66</td>
<td>–</td>
<td>-10.60%</td>
</tr>
<tr>
<td>1,000K+</td>
<td>$0.95</td>
<td>$2.12</td>
<td>–</td>
<td>-3.00%</td>
</tr>
</tbody>
</table>
Types of Giving

The following charts illustrate giving metrics based on two dichotomies: Gifts are either first-time or repeat, and they are also either sustainer or non-sustainer. Every gift gets classified within both dichotomies.

For example, if a first-time donor gives a single gift, that gift is classified as a first-time and a non-sustainer gift. Someone who gives a sustaining gift would have that gift classified as a repeat and a sustainer gift.
Median average online donation for first-time gifts was $104.16 in FY15, up 3.65% from FY14. The median average online donation for repeat gifts was $94.25 in FY15, up 1.9% from FY14. Why is the average online donation higher for first-time gifts? We know that donors tend to give higher gifts at the end of the year, and it’s possible that donors are giving for the first time in December.

Despite a higher average gift, the median online revenue from first-time giving as a percent of total online revenue dropped 6.21%. This is a result of the 5.12% year-over-year decrease in the number of first-time gifts as a percent of total gifts. The median online revenue from repeat giving as a percent of total online revenue, however, is up 4.24%. The median number of repeat gifts as a percent of total gifts is also up year over year. The net? Donors are coming back and giving again. This is likely the result of organizations getting more sophisticated in their approach to building relationships with donors, making them feel more like partners. This is also good news for organizations, because repeat giving is more sustainable revenue.

First-Time vs. Repeat Giving

Organizations will never turn every constituent into a donor. Keep quality over quantity in mind when growing your housefile, and don’t forget the importance of engagement right from the start. These are the keys to conversion.
### Giving Chart 13

First vs. Repeat Average Transaction:

Giving Overview (Quartile Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>TYPE</th>
<th>LOW</th>
<th>MEDIAN</th>
<th>HIGH</th>
<th>LOW CHANGE</th>
<th>MEDIAN CHANGE</th>
<th>HIGH CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>FIRST TRANSACTION</td>
<td>$71.35</td>
<td>$104.16</td>
<td>$159.28</td>
<td>-9.51%</td>
<td>3.65%</td>
<td>14.83%</td>
</tr>
<tr>
<td>REPEAT TRANSACTION</td>
<td>$63.70</td>
<td>$95.25</td>
<td>$145.81</td>
<td>-6.37%</td>
<td>1.90%</td>
<td>10.56%</td>
</tr>
</tbody>
</table>
## Giving Chart 14
### First vs. Repeat Average Transaction: Transaction Type by Vertical (Median and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Median First Transaction</th>
<th>Percent Change First Transaction</th>
<th>Median Repeat Transaction</th>
<th>Percent Change Repeat Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL WELFARE</td>
<td>$71.97</td>
<td>3.49%</td>
<td>$61.92</td>
<td>3.04%</td>
</tr>
<tr>
<td>ASSOCIATION &amp; MEMBERSHIP</td>
<td>$81.50</td>
<td>0.03%</td>
<td>$86.67</td>
<td>-0.90%</td>
</tr>
<tr>
<td>CANADIAN ORGANIZATION</td>
<td>$74.31</td>
<td>7.50%</td>
<td>$73.96</td>
<td>1.11%</td>
</tr>
<tr>
<td>CHRISTIAN MINISTRIES</td>
<td>$125.09</td>
<td>-0.46%</td>
<td>$97.03</td>
<td>4.82%</td>
</tr>
<tr>
<td>DISASTER &amp; INTERNATIONAL RELIEF</td>
<td>$134.06</td>
<td>4.20%</td>
<td>$118.77</td>
<td>-1.46%</td>
</tr>
<tr>
<td>DISEASE &amp; HEALTH SERVICES</td>
<td>$77.44</td>
<td>3.88%</td>
<td>$98.39</td>
<td>4.92%</td>
</tr>
<tr>
<td>ENVIRONMENT &amp; WILDLIFE</td>
<td>$80.21</td>
<td>1.88%</td>
<td>$66.62</td>
<td>-0.30%</td>
</tr>
<tr>
<td>FOOD BANK</td>
<td>$108.47</td>
<td>6.62%</td>
<td>$105.84</td>
<td>-0.72%</td>
</tr>
<tr>
<td>HEALTH - MEDICAL RESEARCH</td>
<td>$108.96</td>
<td>1.49%</td>
<td>$152.00</td>
<td>5.11%</td>
</tr>
<tr>
<td>HIGHER ED</td>
<td>$279.17</td>
<td>3.69%</td>
<td>$298.50</td>
<td>1.43%</td>
</tr>
<tr>
<td>HOSPITAL FOUNDATION</td>
<td>$169.82</td>
<td>6.08%</td>
<td>$148.34</td>
<td>8.67%</td>
</tr>
<tr>
<td>HOSPITALS</td>
<td>$128.11</td>
<td>0.38%</td>
<td>$144.49</td>
<td>2.85%</td>
</tr>
<tr>
<td>HUMAN &amp; SOCIAL SERVICES</td>
<td>$155.28</td>
<td>8.74%</td>
<td>$153.02</td>
<td>3.93%</td>
</tr>
<tr>
<td>JEWISH</td>
<td>$112.86</td>
<td>-10.88%</td>
<td>$89.49</td>
<td>-5.71%</td>
</tr>
<tr>
<td>PERFORMING ARTS &amp; LIBRARIES</td>
<td>$116.15</td>
<td>5.68%</td>
<td>$102.76</td>
<td>3.26%</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS</td>
<td>$122.29</td>
<td>8.02%</td>
<td>$90.19</td>
<td>0.50%</td>
</tr>
<tr>
<td>PUBLIC BROADCASTING STATIONS</td>
<td>$99.49</td>
<td>1.96%</td>
<td>$26.46</td>
<td>-7.64%</td>
</tr>
<tr>
<td>VISITATION</td>
<td>$107.76</td>
<td>-2.97%</td>
<td>$101.66</td>
<td>-0.85%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$104.16</td>
<td>3.65%</td>
<td>$95.25</td>
<td>1.90%</td>
</tr>
</tbody>
</table>
Giving Chart 15
First vs. Repeat Average Transaction:
Transaction Type by Organization Size (Quartiles and FY14-FY15 Percent Change)
Giving Chart 16
First vs. Repeat as Percent of Total Fundraising Revenue:
Giving Overview (Quartile Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>TYPE</th>
<th>Percent of Total Fundraising</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW</td>
<td>28.99%</td>
</tr>
<tr>
<td>MEDIAN</td>
<td>38.61%</td>
</tr>
<tr>
<td>HIGH</td>
<td>51.59%</td>
</tr>
<tr>
<td>LOW CHANGE</td>
<td>-14.94%</td>
</tr>
<tr>
<td>MEDIAN CHANGE</td>
<td>-6.21%</td>
</tr>
<tr>
<td>HIGH CHANGE</td>
<td>3.58%</td>
</tr>
<tr>
<td>REPEAT TRANSACTION</td>
<td>48.54%</td>
</tr>
<tr>
<td>MEDIAN CHANGE</td>
<td>61.42%</td>
</tr>
<tr>
<td>HIGH CHANGE</td>
<td>71.07%</td>
</tr>
<tr>
<td>REPEAT TRANSACTION</td>
<td>2.07%</td>
</tr>
</tbody>
</table>
Giving Chart 17
First vs. Repeat as Percent of Total Fundraising Revenue:
Transaction Type by Vertical (Median and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>Vertical</th>
<th>FIRST TRANSACTION</th>
<th>REPEAT TRANSACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL WELFARE</td>
<td>33.65%</td>
<td>66.36%</td>
</tr>
<tr>
<td>ASSOCIATION &amp; MEMBERSHIP</td>
<td>35.47%</td>
<td>64.53%</td>
</tr>
<tr>
<td>CANADIAN ORGANIZATION</td>
<td>42.86%</td>
<td>57.14%</td>
</tr>
<tr>
<td>CHRISTIAN MINISTRIES</td>
<td>19.31%</td>
<td>80.69%</td>
</tr>
<tr>
<td>DISASTER &amp; INTERNATIONAL RELIEF</td>
<td>27.19%</td>
<td>72.81%</td>
</tr>
<tr>
<td>DISEASE &amp; HEALTH SERVICES</td>
<td>53.55%</td>
<td>46.45%</td>
</tr>
<tr>
<td>ENVIRONMENT &amp; WILDLIFE</td>
<td>32.62%</td>
<td>67.18%</td>
</tr>
<tr>
<td>FOOD BANK</td>
<td>29.78%</td>
<td>70.23%</td>
</tr>
<tr>
<td>HEALTH - MEDICAL RESEARCH</td>
<td>51.72%</td>
<td>48.28%</td>
</tr>
<tr>
<td>HIGHER ED</td>
<td>46.62%</td>
<td>53.38%</td>
</tr>
<tr>
<td>HOSPITAL FOUNDATION</td>
<td>45.58%</td>
<td>54.42%</td>
</tr>
<tr>
<td>HOSPITALS</td>
<td>52.47%</td>
<td>47.53%</td>
</tr>
<tr>
<td>HUMAN &amp; SOCIAL SERVICES</td>
<td>44.52%</td>
<td>55.48%</td>
</tr>
<tr>
<td>JEWISH</td>
<td>37.45%</td>
<td>62.55%</td>
</tr>
<tr>
<td>PERFORMING ARTS &amp; LIBRARIES</td>
<td>36.73%</td>
<td>63.27%</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS</td>
<td>40.31%</td>
<td>59.69%</td>
</tr>
<tr>
<td>PUBLIC BROADCASTING STATIONS</td>
<td>32.92%</td>
<td>67.74%</td>
</tr>
<tr>
<td>VISITATION</td>
<td>54.39%</td>
<td>45.61%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>38.61%</td>
<td>61.42%</td>
</tr>
</tbody>
</table>

Percent of Total Fundraising

Median | Percent Change | Median | Percent Change
### Giving Chart 18

First vs. Repeat as Percent of Total Fundraising Revenue:
Transaction Type by Organization Size (Quartiles and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>FIRST MEDIAN</th>
<th>FIRST MEDIAN CHANGE</th>
<th>REPEAT MEDIAN</th>
<th>REPEAT MEDIAN CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2,499</td>
<td>34.62%</td>
<td>-4.17%</td>
<td>65.38%</td>
<td>2.95%</td>
</tr>
<tr>
<td>2.5-9K</td>
<td>42.06%</td>
<td>-8.40%</td>
<td>57.94%</td>
<td>6.72%</td>
</tr>
<tr>
<td>10-24K</td>
<td>36.32%</td>
<td>-6.40%</td>
<td>63.68%</td>
<td>4.83%</td>
</tr>
<tr>
<td>25-74K</td>
<td>36.41%</td>
<td>-6.84%</td>
<td>63.59%</td>
<td>5.49%</td>
</tr>
<tr>
<td>75-124K</td>
<td>40.06%</td>
<td>-6.96%</td>
<td>59.94%</td>
<td>4.83%</td>
</tr>
<tr>
<td>125-199K</td>
<td>41.99%</td>
<td>-4.58%</td>
<td>58.01%</td>
<td>2.83%</td>
</tr>
<tr>
<td>200-349K</td>
<td>40.42%</td>
<td>-7.59%</td>
<td>59.58%</td>
<td>2.83%</td>
</tr>
<tr>
<td>350-499K</td>
<td>31.22%</td>
<td>-3.19%</td>
<td>68.79%</td>
<td>1.22%</td>
</tr>
<tr>
<td>500-749K</td>
<td>37.45%</td>
<td>-1.27%</td>
<td>62.55%</td>
<td>0.48%</td>
</tr>
<tr>
<td>750-999K</td>
<td>43.97%</td>
<td>-4.48%</td>
<td>56.03%</td>
<td>4.19%</td>
</tr>
<tr>
<td>1,000K+</td>
<td>43.97%</td>
<td>-4.48%</td>
<td>56.03%</td>
<td>4.19%</td>
</tr>
</tbody>
</table>
Giving Chart 19
First vs. Repeat as Percent of Total Fundraising Transactions:
Online Overview (Quartile Totals and FY14-FY15 Percent Change)
Giving Chart 20

First vs. Repeat as Percent of Total Fundraising Transactions:
Online Giving by Vertical (Median and FY14-FY15 Percent Change)

ANIMAL WELFARE
ASSOCIATION & MEMBERSHIP
CANADIAN ORGANIZATION
CHRISTIAN MINISTRIES
DISASTER & INTERNATIONAL RELIEF
DISEASE & HEALTH SERVICES
ENVIRONMENT & WILDLIFE
FOOD BANK
HEALTH - MEDICAL RESEARCH
HIGHER ED
HOSPITAL FOUNDATION
HOSPITALS
HUMAN & SOCIAL SERVICES
JEWISH
PERFORMING ARTS & LIBRARIES
PUBLIC AFFAIRS
PUBLIC BROADCASTING STATIONS
VISITATION
TOTAL

Percent of Total Online Transactions

Median Percent
Change
Median Percent
Change

FIRST TRANSACTION
REPEAT TRANSACTION

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90%
Giving Chart 21
First vs. Repeat as Percent of Total Fundraising Transactions:
Online Giving by Organization Size (Median and FY14-FY15 Percent Change)
Non-sustaining median average gift increased 4.56% to $128.76 from last year. Online gifts continue to be higher on average than traditional offline giving. As we’ve seen in the past, higher education organizations had the highest median average gift at $342.58. This may be a testimony to alumni’s deep rooted affection for their alma maters, and these organizations’ characteristic emphasis on cultivating high-value donors. Animal Welfare is at the bottom with a median average gift of $86.38. Overall, every vertical showed growth this year, except Jewish and visitation organizations.

While non-sustaining revenue made up a substantial percent of total online revenue (91.50%), it is down slightly (0.35%), as is the percentage of total gifts (1.31%) from last year. Monthly giving, however, continued to grow—revenue as a percent of total increasing 7.76%. Monthly gifts as a percent of total transactions also has increased by 6.04%. This trend is significant, because it is the way we would like giving to be—a more reliable, sustainable revenue stream than its one-time gift counterpart.
### Giving Chart 22

Non-Sustaining vs. Sustaining Average Transaction:
Giving Overview (Quartile Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>TYPE</th>
<th>LOW CHANGE</th>
<th>MEDIAN CHANGE</th>
<th>HIGH CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW</td>
<td>-4.84%</td>
<td>4.56%</td>
<td>13.11%</td>
</tr>
<tr>
<td>MEDIAN</td>
<td>-5.81%</td>
<td>1.21%</td>
<td>9.48%</td>
</tr>
<tr>
<td>HIGH</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LOW</td>
<td>$86.74</td>
<td>$128.76</td>
<td>$201.30</td>
</tr>
<tr>
<td>MEDIAN</td>
<td>$22.97</td>
<td>$33.46</td>
<td>$49.53</td>
</tr>
<tr>
<td>HIGH</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Average Transaction**: $0, $20, $40, $60, $80, $100, $120, $140, $160, $180, $200, $220

- **Type**: Non-Sustaining Transaction, Sustaining Transaction
Giving Chart 23
Non-Sustaining vs. Sustaining Average Transaction:
Transaction Type by Vertical (Median and FY14-FY15 Percent Change)
### Giving Chart 24

**Non-Sustaining vs. Sustaining Average Transaction:**
Transaction Type by Organization Size (Median and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>NON-SUSTAINING MEDIAN</th>
<th>NON-SUSTAINING CHANGE</th>
<th>SUSTAINING MEDIAN</th>
<th>SUSTAINING CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2,499*</td>
<td>$175.60</td>
<td>16.15%</td>
<td>$42.36</td>
<td>-0.02%</td>
</tr>
<tr>
<td>2.5-9K</td>
<td>$164.83</td>
<td>5.83%</td>
<td>$36.59</td>
<td>2.03%</td>
</tr>
<tr>
<td>10-24K</td>
<td>$146.77</td>
<td>3.60%</td>
<td>$35.75</td>
<td>1.37%</td>
</tr>
<tr>
<td>25-74K</td>
<td>$142.19</td>
<td>3.56%</td>
<td>$29.32</td>
<td>0.60%</td>
</tr>
<tr>
<td>75-124K</td>
<td>$123.74</td>
<td>5.17%</td>
<td>$23.96</td>
<td>-1.78%</td>
</tr>
<tr>
<td>125-199K</td>
<td>$111.44</td>
<td>3.70%</td>
<td>$30.55</td>
<td>2.82%</td>
</tr>
<tr>
<td>200-349K</td>
<td>$154.82</td>
<td>7.01%</td>
<td>$21.89</td>
<td>0.59%</td>
</tr>
<tr>
<td>350-499K</td>
<td>$75.81</td>
<td>6.39%</td>
<td>$22.04</td>
<td>7.31%</td>
</tr>
<tr>
<td>500-749K</td>
<td>$93.88</td>
<td>2.28%</td>
<td>$32.32</td>
<td>0.67%</td>
</tr>
<tr>
<td>750-999K</td>
<td>$103.50</td>
<td>5.77%</td>
<td>$22.04</td>
<td>1.95%</td>
</tr>
<tr>
<td>1,000K+</td>
<td>$69.80</td>
<td>4.07%</td>
<td>$22.57</td>
<td></td>
</tr>
</tbody>
</table>
Giving Chart 25
Non-Sustaining vs. Sustaining as Percent of Total Fundraising:
Giving Overview (Quartile Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>TYPE</th>
<th>LOW</th>
<th>LOW CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW</td>
<td>81.07%</td>
<td>-2.39%</td>
</tr>
<tr>
<td>MEDIAN</td>
<td>91.50%</td>
<td>-0.35%</td>
</tr>
<tr>
<td>HIGH</td>
<td>97.69%</td>
<td>0.54%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TYPE</th>
<th>MEDIAN CHANGE</th>
<th>HIGH CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW CHANGE</td>
<td>-8.06%</td>
<td>33.77%</td>
</tr>
<tr>
<td>MEDIAN CHANGE</td>
<td>7.76%</td>
<td></td>
</tr>
<tr>
<td>HIGH CHANGE</td>
<td>20.68%</td>
<td></td>
</tr>
</tbody>
</table>
Giving Chart 26
Non-Sustaining vs. Sustaining as Percent of Total Fundraising:
Transaction Type by Vertical (Median and FY14-FY15 Percent Change)

ANIMAL WELFARE
ASSOCIATION & MEMBERSHIP
CANADIAN ORGANIZATION
CHRISTIAN MINISTRIES
DISASTER & INTERNATIONAL RELIEF
DISEASE & HEALTH SERVICES
ENVIRONMENT & WILDLIFE
FOOD BANK
HEALTH - MEDICAL RESEARCH
HIGHER ED
HOSPITAL FOUNDATION
HOSPITALS
HUMAN & SOCIAL SERVICES
JEWS
PERFORMING ARTS & LIBRARIES
PUBLIC AFFAIRS
PUBLIC BROADCASTING STATIONS
VISITATION
TOTAL

Percent of Fundraising

Percent of Fundraising

Non-Sustaining Transaction
Sustaining Transaction
### Giving Chart 27

Non-Sustaining vs. Sustaining as Percent of Total Fundraising:
Transaction Type by Organization Size (Medians and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>NON-SUSTAINING MEDIAN</th>
<th>NON-SUSTAINING CHANGE</th>
<th>SUSTAINING MEDIAN</th>
<th>SUSTAINING CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2,499K*</td>
<td>96.95%</td>
<td>-0.10%</td>
<td>94.22%</td>
<td>6.47%</td>
</tr>
<tr>
<td>2.5-9K</td>
<td>94.22%</td>
<td>-0.04%</td>
<td>91.39%</td>
<td>9.12%</td>
</tr>
<tr>
<td>10-24K</td>
<td>91.39%</td>
<td>-0.43%</td>
<td>91.80%</td>
<td>9.22%</td>
</tr>
<tr>
<td>25-74K</td>
<td>91.80%</td>
<td>-0.45%</td>
<td>91.83%</td>
<td>8.90%</td>
</tr>
<tr>
<td>75-124K</td>
<td>91.83%</td>
<td>-0.48%</td>
<td>87.59%</td>
<td>12.47%</td>
</tr>
<tr>
<td>125-199K</td>
<td>87.59%</td>
<td>-0.36%</td>
<td>89.30%</td>
<td>13.47%</td>
</tr>
<tr>
<td>200-349K</td>
<td>89.30%</td>
<td>-0.40%</td>
<td>79.28%</td>
<td>20.94%</td>
</tr>
<tr>
<td>350-499K</td>
<td>79.28%</td>
<td>-0.09%</td>
<td>82.00%</td>
<td>18.14%</td>
</tr>
<tr>
<td>500-749K</td>
<td>82.00%</td>
<td>-0.01%</td>
<td>95.01%</td>
<td>4.99%</td>
</tr>
<tr>
<td>750-999K</td>
<td>95.01%</td>
<td>-2.93%</td>
<td>92.62%</td>
<td>8.71%</td>
</tr>
<tr>
<td>1,000K+</td>
<td>92.62%</td>
<td>-0.06%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Giving Chart 28

**Non-Sustaining vs. Sustaining as Percent of Total Transactions:** Overview (Quartile Totals and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>TYPE</th>
<th>LOW</th>
<th>MEDIAN</th>
<th>HIGH</th>
<th>LOW CHANGE</th>
<th>MEDIAN CHANGE</th>
<th>HIGH CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW</td>
<td>48.47%</td>
<td>72.36%</td>
<td>92.28%</td>
<td>-7.16%</td>
<td>-1.31%</td>
<td>0.74%</td>
</tr>
<tr>
<td>MEDIAN</td>
<td>10.14%</td>
<td>30.34%</td>
<td>52.76%</td>
<td>-4.32%</td>
<td>6.04%</td>
<td>23.81%</td>
</tr>
</tbody>
</table>
Giving Chart 29
Non-Sustaining vs. Sustaining as Percent of Total Transactions:
Transaction Type by Vertical (Median and FY14-FY15 Percent Change)
Giving Chart 30
Non-Sustaining vs. Sustaining as Percent of Total Transactions:
Transaction Type by Organization Size (Medians and FY14-FY15 Percent Change).
Advocacy continues to grow as a means of influencing change and as a tool for effective audience engagement. The quantity of supporters who advocate showed strong year-over-year growth, with a median of 7.26%, and the highest quartile showing a 19.75% growth. However, as a percent of organizations’ total housefiles, the number of supporters who advocate decreased by .69% for the median, which is likely the result of overall housefile growth outpacing the growth in number of supporters taking action.

The percent of advocates who also donate is holding steady with a median of 6.51%, which is down .28% from the previous year. Even among industry verticals that are excelling with having advocates who give, such as performing arts and libraries (14.19% median) and food banks (25.51% median), year over year this indicator is declining—down a median of 7.47% and .87% respectively year over year.

*Some verticals are excluded–see Methodology section for details*

Historically, many organizations have worked with advocates and donors in silos, but supporters today appreciate engaging with causes beyond the donation. It is now necessary to break down barriers and form a cohesive approach to engagement. Cross-channel coordination between calls to action and giving are key.
Advocacy Chart 1
Constituents Who Advocate:
Overview (Quartile Totals and FY14-FY15 Percent Change)
Advocacy Chart 2
Constituents Who Advocate: Advocacy by Vertical (Median and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Median</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL WELFARE</td>
<td>41,894</td>
<td>7.62%</td>
</tr>
<tr>
<td>ASSOCIATION &amp; MEMBERSHIP</td>
<td>29,592</td>
<td>10.21%</td>
</tr>
<tr>
<td>CANADIAN ORGANIZATION</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>CHRISTIAN MINISTRIES</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>DISASTER &amp; INTERNATIONAL RELIEF</td>
<td>14,145</td>
<td>1.82%</td>
</tr>
<tr>
<td>DISEASE &amp; HEALTH SERVICES</td>
<td>5,719</td>
<td>8.72%</td>
</tr>
<tr>
<td>ENVIRONMENT &amp; WILDLIFE</td>
<td>81,449</td>
<td>17.49%</td>
</tr>
<tr>
<td>FOOD BANK</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>HEALTH - MEDICAL RESEARCH*</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>HIGHER ED</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>HOSPITAL FOUNDATION</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>HOSPITALS</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>HUMAN &amp; SOCIAL SERVICES</td>
<td>817</td>
<td>5.28%</td>
</tr>
<tr>
<td>JEWISH</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>PERFORMING ARTS &amp; LIBRARIES</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS</td>
<td>16,229</td>
<td>6.44%</td>
</tr>
<tr>
<td>PUBLIC BROADCASTING STATIONS</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>VISITATION</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>TOTAL</td>
<td>11,308</td>
<td>7.28%</td>
</tr>
</tbody>
</table>
# Advocacy Chart 3

**Constituents Who Advocate:**

Advocacy by Organization Size (Quartiles and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>1-2,499</th>
<th>2.5-9K</th>
<th>10-24K</th>
<th>25-74K</th>
<th>75-124K</th>
<th>125-199K</th>
<th>200-349K</th>
<th>350-499K</th>
<th>500-749K</th>
<th>750-999K</th>
<th>1,000K+</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW</td>
<td>–</td>
<td>–</td>
<td>748</td>
<td>1,207</td>
<td>3,002</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>75,628</td>
</tr>
<tr>
<td>MEDIAN</td>
<td>–</td>
<td>1,251</td>
<td>4,773</td>
<td>6,103</td>
<td>6,666</td>
<td>26,096</td>
<td>51,988</td>
<td>164,166</td>
<td>177,073</td>
<td>–</td>
<td>480,169</td>
</tr>
<tr>
<td>HIGH</td>
<td>–</td>
<td>–</td>
<td>7,272</td>
<td>18,562</td>
<td>24,867</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>1,089,678</td>
</tr>
<tr>
<td>% CHANGE</td>
<td>–</td>
<td>1.72%</td>
<td>7.54%</td>
<td>3.54%</td>
<td>8.27%</td>
<td>10.90%</td>
<td>10.24%</td>
<td>16.04%</td>
<td>7.33%</td>
<td>–</td>
<td>15.93%</td>
</tr>
</tbody>
</table>
### Advocacy Chart 4
Constituents Who Advocate as Percent of Total:
Overview (Quartiles and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>Advocacy Percentage</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.25%</td>
<td>-40.00%</td>
</tr>
<tr>
<td>9.20%</td>
<td>-11.11%</td>
</tr>
<tr>
<td>26.12%</td>
<td>6.25%</td>
</tr>
<tr>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>
### Advocacy Chart 5
Constituents Who Advocate as Percent of Total:
Advocacy by Vertical (Median and FY14–FY15 Percent Change)

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Median</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL WELFARE</td>
<td>25.96%</td>
<td>-2.08%</td>
</tr>
<tr>
<td>ASSOCIATION &amp; MEMBERSHIP</td>
<td>13.94%</td>
<td>-2.61%</td>
</tr>
<tr>
<td>CANADIAN ORGANIZATION</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>CHRISTIAN MINISTRIES</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>DISASTER &amp; INTERNATIONAL RELIEF</td>
<td>3.15%</td>
<td>0.00%</td>
</tr>
<tr>
<td>DISEASE &amp; HEALTH SERVICES</td>
<td>2.76%</td>
<td>-1.49%</td>
</tr>
<tr>
<td>ENVIRONMENT &amp; WILDLIFE</td>
<td>31.10%</td>
<td>-2.25%</td>
</tr>
<tr>
<td>FOOD BANK</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>HEALTH - MEDICAL RESEARCH*</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>HIGHER ED</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>HOSPITAL FOUNDATION</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>HOSPITALS</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>HUMAN &amp; SOCIAL SERVICES</td>
<td>2.45%</td>
<td>0.00%</td>
</tr>
<tr>
<td>JEWISH</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>PERFORMING ARTS &amp; LIBRARIES</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS</td>
<td>16.94%</td>
<td>0.00%</td>
</tr>
<tr>
<td>PUBLIC BROADCASTING STATIONS</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>VISITATION</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>TOTAL</td>
<td>9.20%</td>
<td>-0.69%</td>
</tr>
</tbody>
</table>
## Advocacy Chart 6

### Constituents Who Advocate as Percent of Total:
Advocacy by Organization Size (Quartiles and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>ORG SIZE</th>
<th>LOW</th>
<th>MEDIAN</th>
<th>HIGH</th>
<th>% CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2,499</td>
<td>-</td>
<td>13.78%</td>
<td>23.26%</td>
<td>1.36%</td>
</tr>
<tr>
<td>2.5-9K</td>
<td>2.35%</td>
<td>12.55%</td>
<td>22.04%</td>
<td>16.72%</td>
</tr>
<tr>
<td>10-24K</td>
<td>1.19%</td>
<td>5.77%</td>
<td>12.79%</td>
<td>31.31%</td>
</tr>
<tr>
<td>25-74K</td>
<td>1.21%</td>
<td>4.56%</td>
<td>7.38%</td>
<td>-</td>
</tr>
<tr>
<td>75-124K</td>
<td>-</td>
<td>6.87%</td>
<td>27.49%</td>
<td>0.14%</td>
</tr>
<tr>
<td>125-199K</td>
<td>-</td>
<td>7.38%</td>
<td>22.04%</td>
<td>-2.08%</td>
</tr>
<tr>
<td>200-349K</td>
<td>-</td>
<td>27.49%</td>
<td>11.32%</td>
<td>-2.34%</td>
</tr>
<tr>
<td>350-499K</td>
<td>-</td>
<td>-</td>
<td>7.38%</td>
<td>-45%</td>
</tr>
<tr>
<td>500-749K</td>
<td>-</td>
<td>-</td>
<td>11.32%</td>
<td>-0.59%</td>
</tr>
<tr>
<td>750-999K</td>
<td>-</td>
<td>-</td>
<td>6.87%</td>
<td>0.11%</td>
</tr>
<tr>
<td>1,000K+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-0.03%</td>
</tr>
</tbody>
</table>

### Advocacy Percentage

<table>
<thead>
<tr>
<th>Advocacy Percentage</th>
<th>0%</th>
<th>5%</th>
<th>10%</th>
<th>15%</th>
<th>20%</th>
<th>25%</th>
<th>30%</th>
<th>35%</th>
<th>40%</th>
<th>45%</th>
<th>50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORG SIZE</td>
<td>1-2,499</td>
<td>2.5-9K</td>
<td>10-24K</td>
<td>25-74K</td>
<td>75-124K</td>
<td>125-199K</td>
<td>200-349K</td>
<td>350-499K</td>
<td>500-749K</td>
<td>750-999K</td>
<td>1,000K+</td>
</tr>
<tr>
<td>LOW</td>
<td>-</td>
<td>-</td>
<td>2.35%</td>
<td>1.19%</td>
<td>1.21%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1.36%</td>
</tr>
<tr>
<td>MEDIAN</td>
<td>13.78%</td>
<td>12.55%</td>
<td>5.77%</td>
<td>4.56%</td>
<td>6.87%</td>
<td>7.38%</td>
<td>27.49%</td>
<td>11.32%</td>
<td>-</td>
<td>16.72%</td>
<td></td>
</tr>
<tr>
<td>HIGH</td>
<td>-</td>
<td>23.26%</td>
<td>22.04%</td>
<td>12.79%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>31.31%</td>
<td></td>
</tr>
<tr>
<td>% CHANGE</td>
<td>0.00%</td>
<td>0.14%</td>
<td>-2.08%</td>
<td>-0.59%</td>
<td>0.03%</td>
<td>0.11%</td>
<td>0.94%</td>
<td>-3.97%</td>
<td>-</td>
<td>-2.34%</td>
<td></td>
</tr>
</tbody>
</table>
Advocacy Chart 7
Percent of Advocates Who Donate:
Overview (Quartiles and FY14-FY15 Percent Change)

Donation Percentage

% CHANGE

-7.49%  -0.28%  2.19%

12.83%  6.51%  2.61%
Advocacy Chart 8
Percent of Advocates Who Donate: Donations by Vertical (Median and FY14-FY15 Percent Change)

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Median</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL WELFARE</td>
<td>10.62%</td>
<td>-1.55%</td>
</tr>
<tr>
<td>ASSOCIATION &amp; MEMBERSHIP</td>
<td>0.16%</td>
<td>0.00%</td>
</tr>
<tr>
<td>CANADIAN ORGANIZATION</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>CHRISTIAN MINISTRIES</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>DISASTER &amp; INTERNATIONAL RELIEF</td>
<td>7.20%</td>
<td>0.00%</td>
</tr>
<tr>
<td>DISEASE &amp; HEALTH SERVICES</td>
<td>13.42%</td>
<td>-0.53%</td>
</tr>
<tr>
<td>ENVIRONMENT &amp; WILDLIFE</td>
<td>5.42%</td>
<td>-6.10%</td>
</tr>
<tr>
<td>FOOD BANK</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HEALTH - MEDICAL RESEARCH*</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HIGHER ED</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HOSPITAL FOUNDATION</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HOSPITALS</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HUMAN &amp; SOCIAL SERVICES</td>
<td>7.32%</td>
<td>0.00%</td>
</tr>
<tr>
<td>JEWISH</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>PERFORMING ARTS &amp; LIBRARIES</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS</td>
<td>4.93%</td>
<td>0.00%</td>
</tr>
<tr>
<td>PUBLIC BROADCASTING STATIONS</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>VISITATION</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>TOTAL</td>
<td>6.51%</td>
<td>-0.28%</td>
</tr>
</tbody>
</table>
Advocacy Chart 9
Percent of Advocates Who Donate:
Donations by Organization Size (Quartiles and FY14-FY15 Percent Change)
Take-Aways
Experienced fundraisers know that not every ask is a financial one. Engaging with donors and constituents in non-monetary ways is a crucial part in deepening relationships with supporters, reducing attrition and ultimately encouraging people to follow through and give when you do make the financial ask.

Working with Blackbaud’s award winning Essentials with Go! program, Yivo Institute for Jewish Research developed a unique multi-part email campaign for constituents to engage with the organization in an easy, fun, and non-financial way. Employing native Luminate Online functionality, Yivo created an online survey asking respondents how well they knew Yiddish curse words. The full campaign included a five-part email series promoting the survey, branded autoresponders, landing page, social sharing, and badges that could be posted on Facebook®.

The campaign was a huge hit. Over 600 constituents took the quiz in the first 24 hours, with that number blossoming to over 1,500 responses by the end of the campaign.

The survey helped YIVO connect with their constituents in a light-hearted and entertaining way, and is a great example of an organization thinking creatively about how to keep people invested in the organization outside of prime giving seasons.
Methodology
Using the transaction data from nearly 700 nonprofit organizations using the 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 who volunteer to participate in a study often perform differently than non-volunteers. The second, called measurement bias, occurs when comparing organizations’ results from different sources and measuring them in different ways. This is commonly seen when different organizations may selectively include or exclude different 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 like to include every Blackbaud client in this year’s study, our objective is to provide nonprofits the best and most accurate insight into how the industry fared in the 2014–2015 fiscal year. As such, we excluded organizations that did not have at least 36 months of data on the Luminate Online platform, because organizations that are newer to online fundraising tend to perform differently than those with more mature online marketing programs. As a result of this exclusion, the number and composition of organizations in our study will always vary slightly depending on when they joined Blackbaud and when they deployed additional modules.

Some Useful Definitions

This year’s study included results from almost 700 organizations grouped by self-selected NTEE vertical designations, with the exception of Canadian nonprofits. We reviewed online fundraising by focusing on multiple types of donations that influence the overall metrics. They are:

**Total Fundraising:** Every online financial transaction

**One-Time Donations:** Traditional email campaign and web form donations, excluding all monthly sustainer transactions

**Sustainer Donations:** Monthly recurring transactions

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

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

In this year’s report, we have prepared a summary for metrics by the following views:

**NTEE-Assigned Vertical:** 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 have 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.
**Industry Verticals**

Organizations with at least 36 complete months of data on the Luminate Online 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 comparably. For example, Christian organizations were combined into a common vertical group called Christian ministries. Jewish organizations, however, while having a religious component to their mission, were deemed different enough from the Christian ministries to warrant a separate vertical for comparison. 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 based on their common mission were excluded from the study.

There are 23 charts and 38 tables contained in this report. The only time a vertical would not be represented in a particular metric would be if a very small sample size (or zero) clients in that vertical met the criteria. For example, advocacy is a metric that is not as relevant for a public broadcasting station as it might be for a public affairs organization. As a result, none of the public broadcasting stations in this study had results for the advocacy-related metrics. Other verticals that were removed from the advocacy-related charts include hospitals and visitation organizations.

Previous studies that we have conducted have shown that larger organizations perform dramatically differently from organizations with smaller email files. This is partly because large email files allow organizations to drive fundraising and advocacy communications to a greater number of constituents. We illustrate the difference of these organizations with a view of performance strictly by organization size.

**Study Universe**

The Luminate Online™ Benchmark Report identifies the median and quartile organizations’ performance within key metrics, allowing Luminate Online clients to identify whether their organization is within the top 75%, median, or bottom 25% of Luminate Online clients within each key performance indicator.

This study includes mature Luminate Online users only. These are organizations that have been using the Luminate Online product for a full three years (July 2012 through June 2015). This three-year rule is applied within each type of activity within Luminate Online. For example, fundraising organizations must have at least three full years of monthly fundraising revenue so that they represent mature fundraisers using Luminate Online.

**Some verticals excluded from Advocacy section**

We’ve excluded the verticals that contained zero or very few Luminate Advocacy™ clients due to the small sample size. These verticals include hospitals, public broadcasting, visitation organizations, Canadian organizations, Jewish organizations, health-medical research, and hospital foundations.
Thank you!

For us and so many others, this report is a bright spot in our year. We wish to extend our whole-hearted gratitude to everyone who helped make this report happen.