M+R

2021

Welcome to Benchmarks 2021!
While we wait to get started, tell us in the chat:
Where are you finding joy today?

IN THIS ISSUE

EDITORIAL →
A hard-hitting exposé of the key findings, top trends, and major takeaways in this year's Benchmarks.

CHARTS →
Democracy dies in darkness, but data dances in daylight. Here, the numbers speak for themselves.

APPENDIX →
The stuff that goes below the fold: our list of participants by sector, glossary, and archive of past editions.

We are M+R

We are communicators, marketers, fundraisers, campaigners, and mild-mannered muckrakers who unleash the power of people to do good.

We work exclusively with nonprofits who are alleviating suffering, fighting for human rights, working in solidarity with marginalized communities, building a more equitable world, ensuring a sustainable future, making art and knowledge accessible to everyone, and safeguarding democracy so that it does not die in darkness. Our services include:

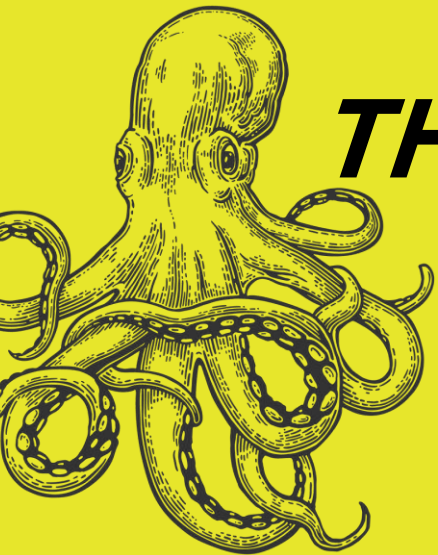Digital Fundraising + Advocacy

Digital Organizing

Media Relations

Advertising

Social Media

THANK YOU, PARTICIPANTS!

220 participating groups total!

- Cultural: 9
- Disaster/International Aid: 34
- Environmental: 47
- Health: 40
- Hunger/Poverty: 18
- Public Media: 7
- Rights: 20
- Wildlife/Animal Welfare: 22
- Other: 21

BENCHMARKS TERMINOLOGY

AVERAGE: We use the *median* figure when we calculate averages, to avoid swings based on outliers.

SIZE: We use these definitions for nonprofit size:

      Small: Nonprofits with annual online revenue less than $500,000

      Medium: Nonprofits with annual online revenue between $500,000 and $3,000,000

      Large: Nonprofits with annual online revenue greater than $3,000,000

SECTOR: Participants self-identify by sector. In cases where a chart does not report a given sector, it's because we lacked sufficient data to report a reliable average.

YEAR-OVER-YEAR CHANGES: We base all YOY changes using historical data from this year's participants, rather than referencing previous editions of Benchmarks.
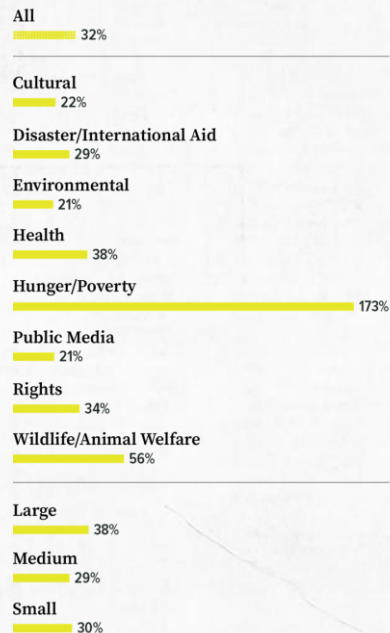
FRONT PAGE NEWS

Online revenue grew by 32% in 2020.

This growth is extraordinary, well above what we typically report for year-over-year changes.

This dramatic increase in online giving is most likely attributable to the COVID pandemic.

Change in online revenue 2019 to 2020

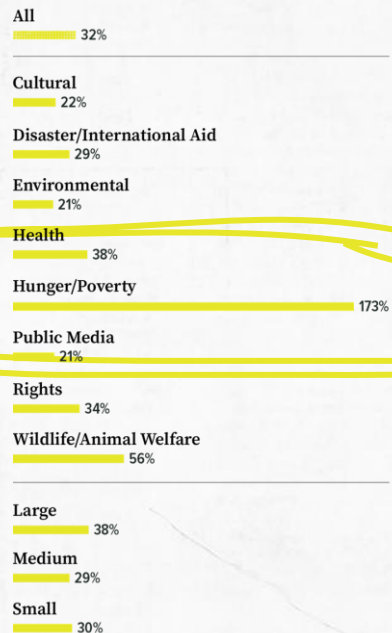|	
All	32%
Cultural	22%
Disaster/International Aid	29%
Environmental	21%
Health	38%
Hunger/Poverty	173%
Public Media	21%
Rights	34%
Wildlife/Animal Welfare	56%
Large	38%
Medium	29%
Small	30%

FRONT PAGE NEWS

Hunger and Poverty groups reported a stunning 173% increase in online revenue over the previous year.

Change in online revenue 2019 to 2020

All
32%

Cultural
22%

Disaster/International Aid
29%

Environmental
21%

Health
38%

Hunger/Poverty
173%

Public Media
21%

Rights
34%

Wildlife/Animal Welfare
56%

Large
38%

Medium
29%

Small
30%

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THREE BIG QUESTIONS

1. Is <mark>**fighting for racial justice**</mark> a primary focus of your organization's work?

2. In 2020, did your organization do <mark>**electoral work in the United States**</mark>?

3. In 2020, did your organization help provide <mark>**relief in response to COVID-19**</mark> — either directly or through advocacy efforts?

A FOCUS ON RACIAL JUSTICE

Is fighting for racial justice a primary focus of your organization's work?

Nonprofits from every sector and issue area claimed racial justice as a priority, which we hope reflects a commitment to making long overdue changes within our industry.

We did not see any significant differences in performance between nonprofits who identified racial justice as a priority and those that did not.

ELECTORAL WORK IN THE U.S.

In 2020, did your organization do electoral work in the United States?

Some slight minor differences (revenue increase was slightly higher on average for electoral nonprofits, while organic web traffic increased more for non-electoral nonprofits). But nothing big.

We found no reason to believe that the intense focus on the presidential election hampered digital programs for nonprofits that didn't engage in election work.

DIRECT COVID RELIEF WORK

In 2020, did your organization help provide relief in response to COVID-19 — either directly or through advocacy efforts?

Nonprofits which answered YES reported a 39% increase in online revenue, compared to a 22% increase for nonprofits that did not do COVID work.

This difference was driven by a surge in one-time giving to COVID response nonprofits — which means that retention efforts will be especially important.

Change in online revenue by type 2019 to 2020: COVID response

Provided relief
- 41% One-time
- 26% Monthly

Did not provide relief
- 21% One-time
- 26% Monthly

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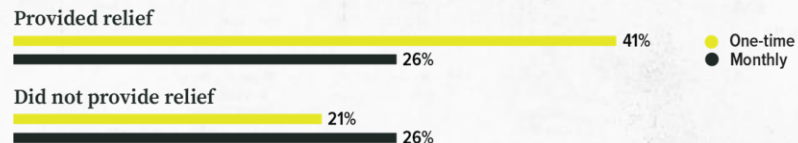
DIGITAL ADS HEADLINES

★ Nonprofit spending on digital ads increased by 33% in 2020, with nonprofits spending an average of $0.10 for every dollar raised in online revenue. (This is a measure of the level of spending relative to total budget, not a direct measure of return on investment.)

★ Digital ad spending was concentrated toward the end of the year, with almost a third of all spending occuring in December.

★ Direct fundraising ads accounted for 60% of all ad spending. Branding, awareness, or education ads accounted for 25%, and lead generation for 14%.

★ Return on ad spend was highest for search ads ($4.78), followed by social media ($1.05), display ($0.38), and video ($0.27).

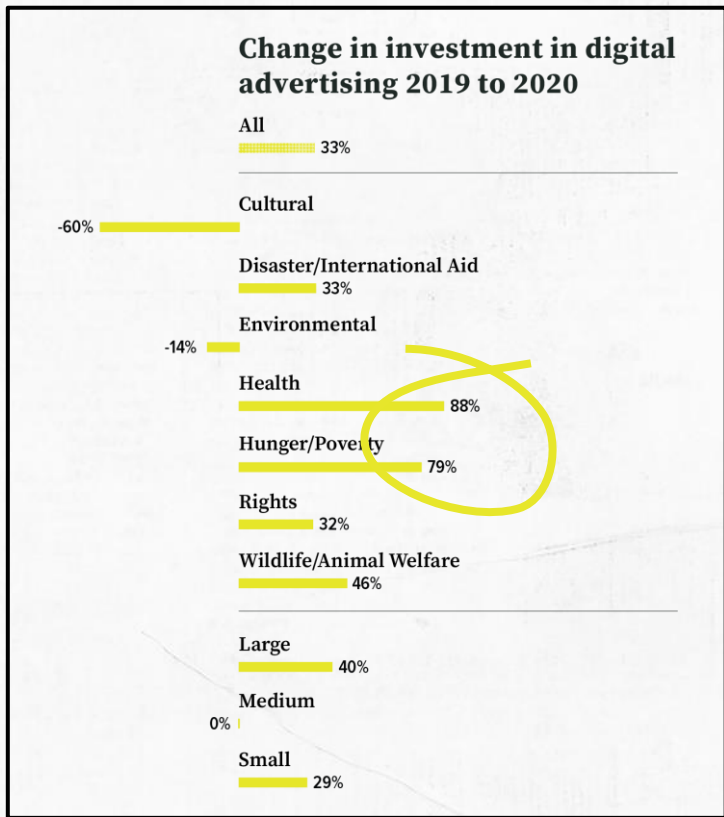★ On average, the cost to acquire a new lead through digital advertising was

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DIGITAL ADS BUDGETS

NOTE: This is a measure of ad budget relative to overall online revenue, not return on investment.

Nonprofit digital advertising spending increased by 33% year over year.

Largest budget increases by sector: Health (88%) and Hunger/Poverty (79%).

Sectors with declining budgets: Cultural (-60%) and Environmental (-14%).

Change in investment in digital advertising 2019 to 2020

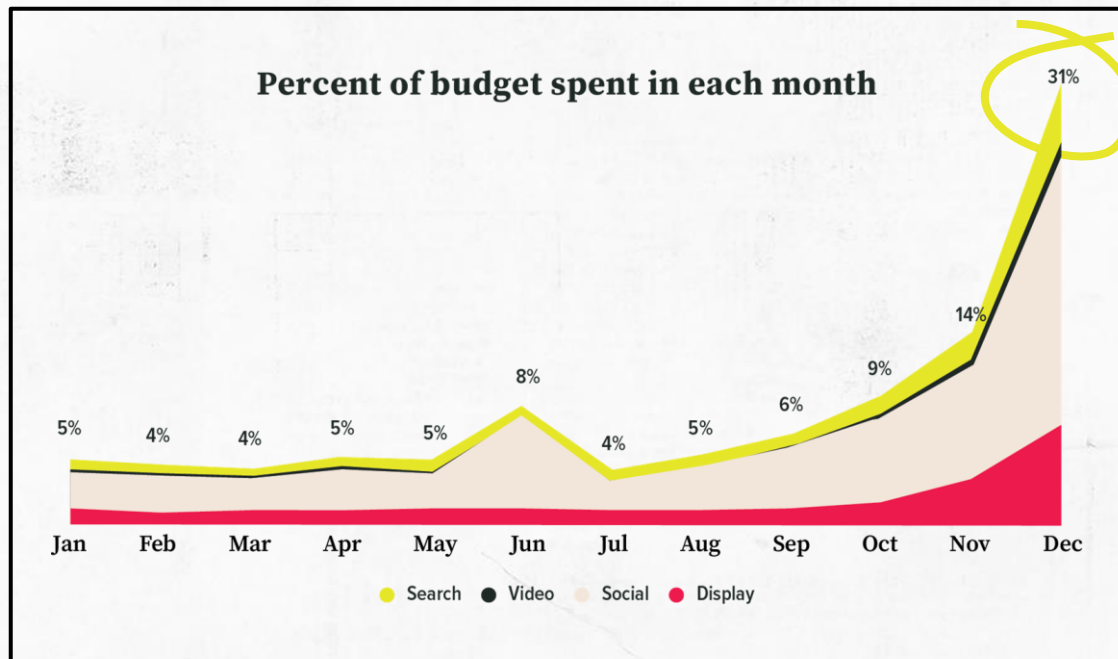| Sector	Change
All	33%
Cultural	-60%
Disaster/International Aid	33%
Environmental	-14%
Health	88%
Hunger/Poverty	79%
Rights	32%
Wildlife/Animal Welfare	46%
Large	40%
Medium	0%
Small	29%

ADS SPENDING BY MONTH

December spending was 31% of annual digital ad investment.

A smaller spike in June (8% of all spending) may coincide with fiscal year-end efforts.

Changes in spending primarily driven by Social and Display.

Percent of budget spent in each month

5%　4%　4%　5%　5%　8%　4%　5%　6%　9%　14%　31%

Jan　Feb　Mar　Apr　May　Jun　Jul　Aug　Sep　Oct　Nov　Dec

● Search　● Video　● Social　● Display

BUDGET PRIORITIES BY SIZE

Large nonprofits (annual online revenue over $3,000,000) emphasized ==fundraising==, and invested significant resources in ==display ads==.

Small nonprofits (annual online revenue below $500,000) emphasized ==branding/awareness==, and invested most of their ad budgets in ==social media==.

Large nonprofits may feel less of a need to elevate brand recognition, while Small nonprofits may find the higher costs of display advertising (in technology, creative, and staffing) to be prohibitive.

DIGITAL ADS SPENDING

Share of digital advertising budget by investment type

		All	Large	Medium	Small
Percent of Digital Advertising Budget by Goal	*Branding, Awareness, or Education*	25%	25%	20%	64%
	Direct Fundraising	60%	62%	39%	8%
	Lead Generation	14%	12%	38%	18%
	Other	1%	1%	3%	10%
Percent of Digital Fundraising Budget by Channel	*Display*	31%	32%	13%	15%
	Search	20%	19%	45%	12%
	Social Media	42%	42%	40%	73%
	Video	3%	3%	1%	0%
	Other	3%	3%	1%	0%

DIGITAL ADS RESULTS

Cost per donation was much higher for display and video than for search. Social media fell in between.

The flipside: Return on ad spend was lowest for display and video, highest for search. Social media fell in between.

Search is not as scalable as display, as we saw in the monthly spending breakout.

Small nonprofits reported a much higher cost per donation than Large nonprofits — except on social media (which is where they spent 73% of fundraising ad budgets).

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DIGITAL ADS RESULTS

Digital advertising: cost per donation

	Display	Search	Social Media	Video
All	$116	$29	$40	$147
Disaster/International Aid	$84	$27	$45	$67
Environmental	$60	$34	$60	–
Health	$112	$19	$38	–
Hunger/Poverty	$124	$11	$21	$94
Rights	$331	$52	$41	–
Wildlife/Animal Welfare	$120	$33	$31	$111
Large	$83	$23	$36	$184
Medium	$129	$32	$60	$82
Small	$107	$228	$35	–

Digital advertising: ROAS

	Display	Search	Social Media	Video
All	$0.38	$4.78	$1.05	$0.27
Disaster/International Aid	$0.45	$3.76	$0.91	$0.62
Environmental	$0.85	$3.94	$0.47	$0.36
Health	$0.38	$5.39	$1.59	
Hunger/Poverty	$0.82	$17.77	$3.09	$0.63
Wildlife/Animal Welfare	$0.19	$1.96	$1.20	$0.61
Large	$1.04	$5.44	$1.27	$0.42
Medium	$0.19	$3.61	$0.68	$0.12
Small	$0.30	$0.42	$0.68	

View-through revenue accounted for ==24% for all digital ads giving== in 2020.

This is revenue from donors who made a donation after seeing, but not clicking on, an ad.
Typically tracked within a 30-day window.

TEXT MESSAGING HEADLINES

★ Nonprofit mobile audiences grew by 26% in 2020, compared to a 3% average increase in email list size.

★ Nonprofits had 50 mobile list members for every 1,000 email subscriber

★ Mobile message click-through rates were 6.3% for fundraising messages and 10% for advocacy messages. Both figures are far higher than comparable email metrics.

★ Peer-to-peer text message audiences received 1.2 messages per month in 2020, and responded 9.8% of the time.

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TEXT MESSAGING AUDIENCES

Compared to email, ==mobile audiences were much smaller== (50 mobile list members per 1,000 email subscribers)...

==but grew much faster== (26% year-over-year growth for mobile, 3% for email).

TEXT MESSAGING ENGAGEMENT

Mobile messaging statistics

	Click-through Rate		Response Rate		Unsubscribe Rate	
Mobile Fundraising	6.3%	(+27%)	–	–	0.90%	(+47%)
Mobile Advocacy Click Messages	10%	(-20%)	–	–	0.47%	(-11%)
Mobile Advocacy Call Messages	–	–	1.6%	(-61%)	0.40%	(+110%)

Click-through rates were about 3 times higher for mobile than for email. For comparison, fundraising email had a CTR for 1.7%; email advocacy messages had a CTR of 3.3%.

EMAIL HEADLINES

★ Most email metrics — including open rates, click-through rates, response rates, and page completion rates — went up in 2020.

★ Email list sizes increased by 3% in 2020, the same growth rate reported for 2019.

★ For every 1,000 fundraising messages sent, nonprofits raised $78. This marks a 35% increase over 2019.

★ Nonprofits sent an average of 59 email messages per subscriber in 2020, a 17% increase in volume.

★ The average response rate for advocacy email was 3.6%, a 5% increase over the previous year. The average response rate for fundraising email was 0.10%, a 41% increase over the previous year.

EMAIL MESSAGING VOLUME

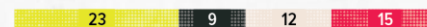Nonprofits sent more email to more people in 2020.

Email list sizes grew by 3%.

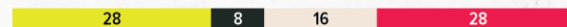Email volume increased by 17%, to an average of 59 messages per list member.

Messages per year per subscriber

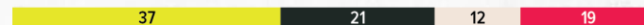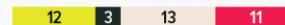● Fundraising   ● Advocacy   ● Newsletter   ● Other

All
23 | 9 | 12 | 15

Cultural
28 | 8 | 16 | 28

Disaster/International Aid
13 | 3 | 11 | 12

Environmental
37 | 21 | 12 | 19

Health
12 | 3 | 13 | 11

Hunger/Poverty
21 | 5 | 10 | 11

Public Media
23 | 58 | 15

Rights
27 | 24 | 4 | 13

Wildlife/Animal Welfare
28 | 6 | 10 | 23

23
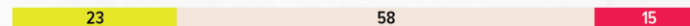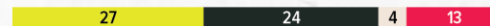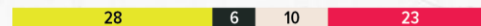
EMAIL MESSAGES BY MONTH

Overall, ==December was the highest-volume month for email messaging==, corresponding with end-of-year fundraising.

Cultural nonprofit messaging spiked in February and May.

Disaster/International Aid and Public Media also increased messaging volume in May.

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EMAIL FUNDRAISING

For every 1,000 fundraising messages delivered, ==nonprofits raised an average of $78==.

That marked a ==35% jump== from the previous year.

EMAIL METRICS

Most email metrics improved. This may be partially driven by generally higher levels of engagement from supporters. It may also reflect better targeting and list hygiene by nonprofits.

Email messaging rates

	Open Rate		Click-through Rate		Page Completion Rate		Response Rate		Unsubscribe Rate	
All	21%	(+9%)							0.18%	(-5%)
Advocacy	20%	(+9%)	3.3%	(+2%)	83%	(+2%)	3.6%	(+5%)	0.16%	(+2%)
Fundraising	18%	(+7%)	1.7%	(-5%)	18%	(+39%)	0.10%	(+41%)	0.19%	(-4%)
Newsletter	21%	(+7%)	2.0%	(+7%)					0.16%	(-4%)

DONORS VS. PROSPECTS

The average response rate for fundraising emails to donor audiences was 0.29%.

That's several times higher than the prospect audience response rate of 0.05%.

The difference emerged almost entirely from landing page completion rates.

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DONORS VS. PROSPECTS

Email messaging rates

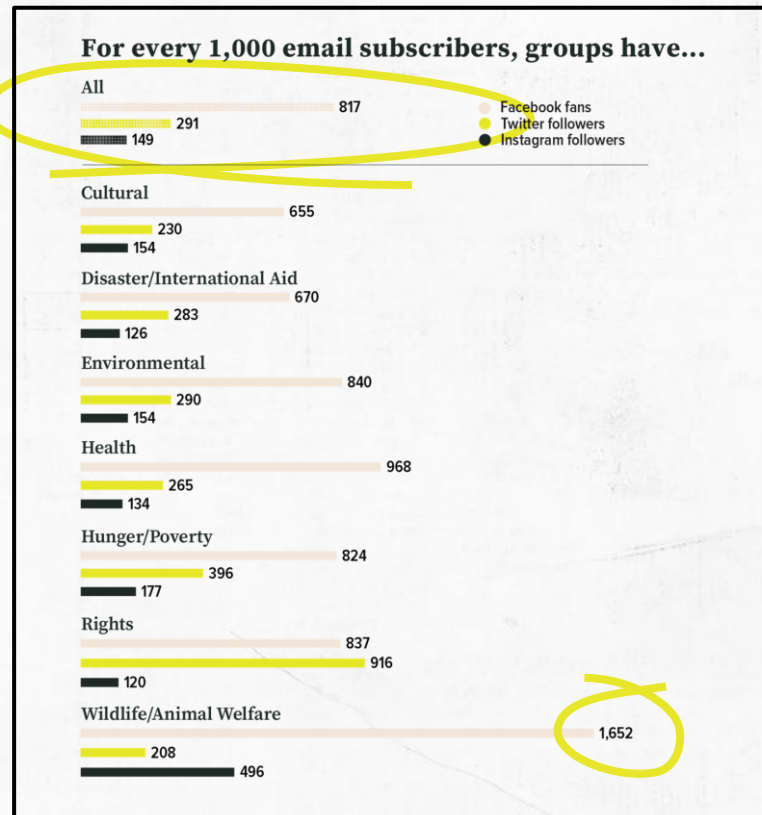|	Open Rate		Click-through Rate		Page Completion Rate		Response Rate		Unsubscribe Rate	
Fundraising ask to donor audiences	22%	(+3%)	1.6%	(+13%)	32%	(+14%)	0.29%	(+10%)	0.16%	(-3%)
Fundraising ask to prospect audiences	18%	(+3%)	1.7%	(-9%)	8%	(+31%)	0.05%	(+39%)	0.18%	(-4%)

SOCIAL MEDIA HEADLINES

★ For every 1,000 email addresses, nonprofits had an average of 817 Facebook fans, 291 Twitter followers, and 149 Instagram followers.

★ We did not find major differences in Facebook engagement based on the day of week or post type.

★ Each organic Facebook post only reached 4% of a nonprofit page's fans. Meanwhile, 29% of the audience reached by a given post was not already following the nonprofit.

★ Revenue from Facebook Fundraisers increased by 14% overall, with Hunger and Poverty nonprofits seeing a 946% increase in Fundraisers revenue.

★ Facebook Fundraisers accounted for 1.3% of all online revenue.

SOCIAL MEDIA AUDIENCES

Nonprofits had the largest audiences on Facebook, but Instagram audiences increased at a much higher rate.

Twitter audiences were particularly large for the Rights sector.

Wildlife/Animal Welfare nonprofits had the largest Facebook and Instagram audiences relative to email list size. (Possibly because of all the cute animal photos?)

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

All
817 — Facebook fans
291 — Twitter followers
149 — Instagram followers

Cultural
655
230
154

Disaster/International Aid
670
283
126

Environmental
840
290
154

Health
968
265
134

Hunger/Poverty
824
396
177

Rights
837
916
120

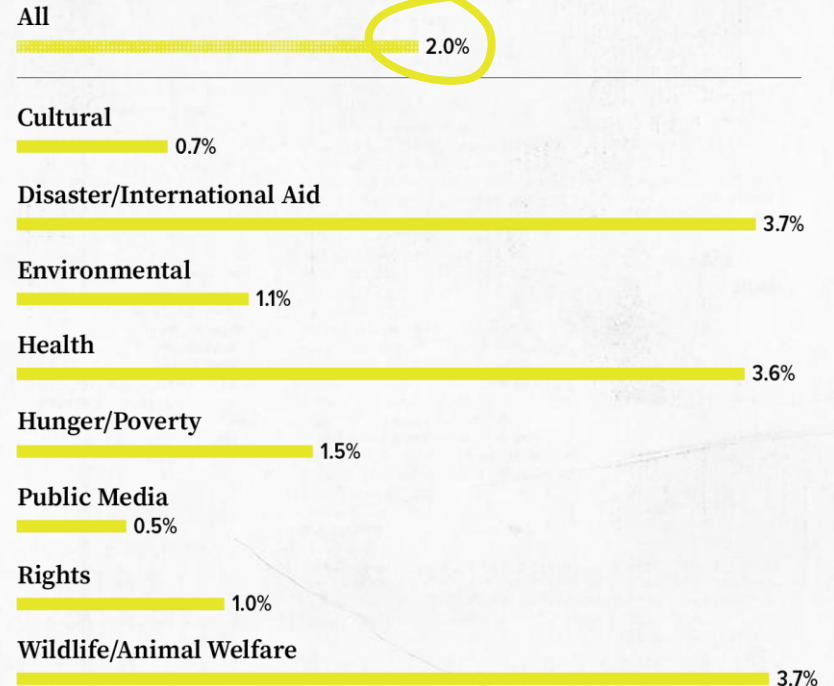**Wildlife/Animal Welfare**
1,652
208
496

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FACEBOOK REACH

Organic (i.e. non-paid) Facebook posts reached just 4% of a nonprofit's followers.

Of those who saw a given Facebook post, 29% were not already fans.

Overall, 2% of Facebook posts had paid reach.

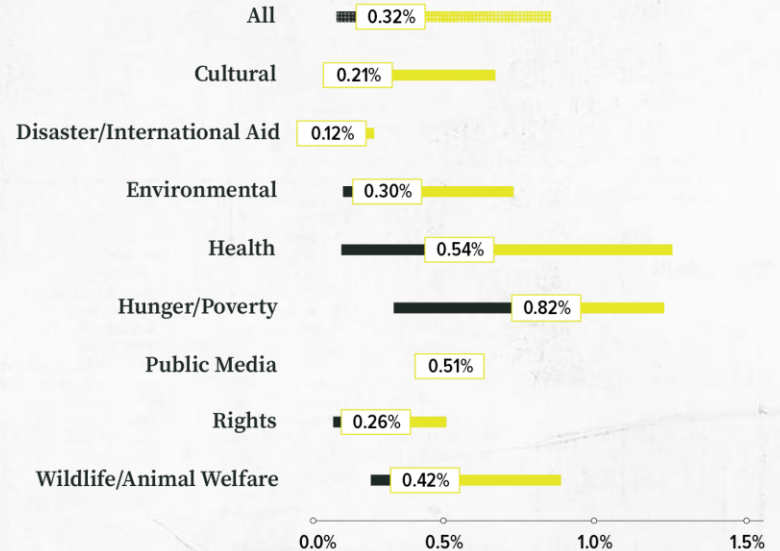**Facebook percent of posts that had paid reach**

All
2.0%

Cultural
0.7%

Disaster/International Aid
3.7%

Environmental
1.1%

Health
3.6%

Hunger/Poverty
1.5%

Public Media
0.5%

Rights
1.0%

Wildlife/Animal Welfare
3.7%

FACEBOOK ENGAGEMENT

Engagement Score is the number of users who interacted with a post divided by the number of fans when the content was posted.

The average engagement score of 0.32% means that a nonprofit with 100,000 fans would see 320 likes, clicks, and shares.

Engagement scores declined by 21% from 2019. Health nonprofits saw a massive increase (537%), with smaller gains for Public Media (139%) and Wildlife/Animal Welfare (77%).

Facebook engagement score

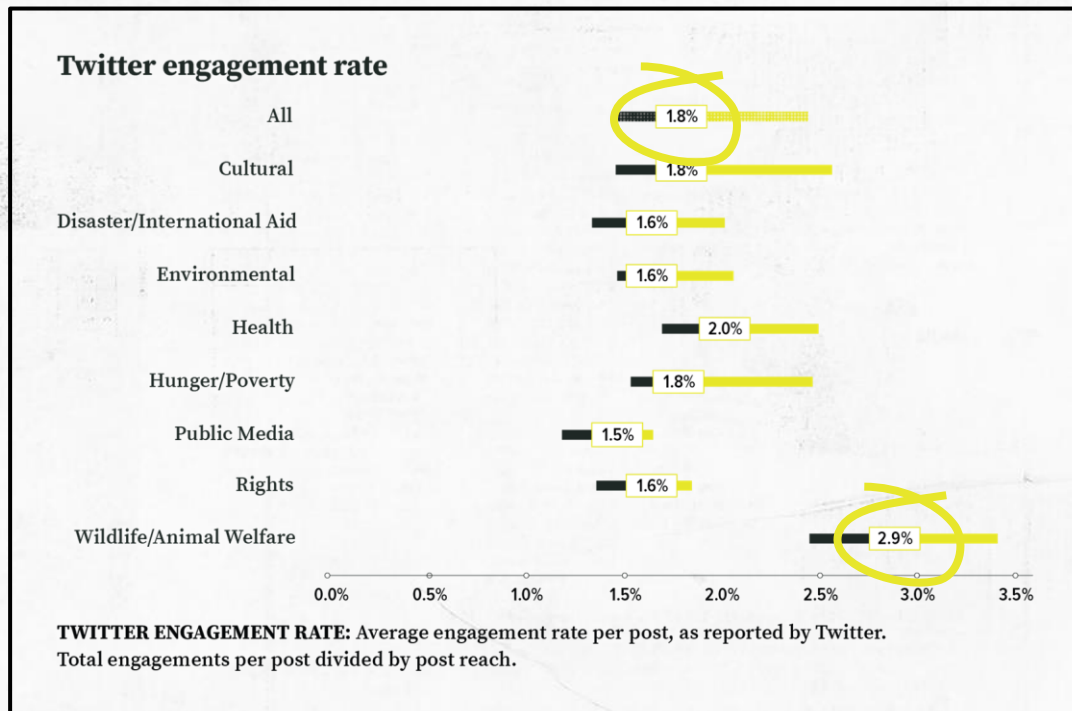| Category	Score
All	0.32%
Cultural	0.21%
Disaster/International Aid	0.12%
Environmental	0.30%
Health	0.54%
Hunger/Poverty	0.82%
Public Media	0.51%
Rights	0.26%
Wildlife/Animal Welfare	0.42%

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

TWITTER ENGAGEMENT

Engagement Rate is reported by Twitter as engagements per post divided by post reach.

The average Twitter engagement rate was 1.8%.

The Wildlife/Animal Welfare was an outlier, with a 2.9%.

Twitter engagement rate

All	1.8%
Cultural	1.8%
Disaster/International Aid	1.6%
Environmental	1.6%
Health	2.0%
Hunger/Poverty	1.8%
Public Media	1.5%
Rights	1.6%
Wildlife/Animal Welfare	2.9%

0.0%   0.5%   1.0%   1.5%   2.0%   2.5%   3.0%   3.5%

TWITTER ENGAGEMENT RATE: Average engagement rate per post, as reported by Twitter. Total engagements per post divided by post reach.
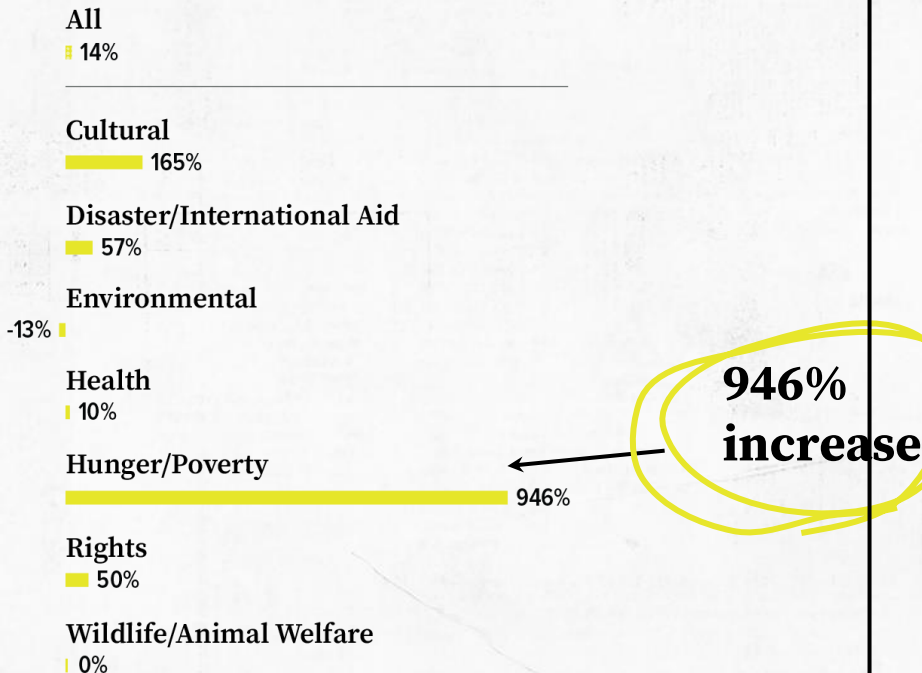
FACEBOOK FUNDRAISERS

Revenue from Facebook Fundraisers, the built-in peer-to-peer fundraising tool, increased by 14% overall.

The growth rate was higher for Hunger/Poverty nonprofits.

Change in amount raised on Facebook

All
14%

Cultural
165%

Disaster/International Aid
57%

Environmental
-13%

Health
10%

Hunger/Poverty
946%

946% increase

Rights
50%

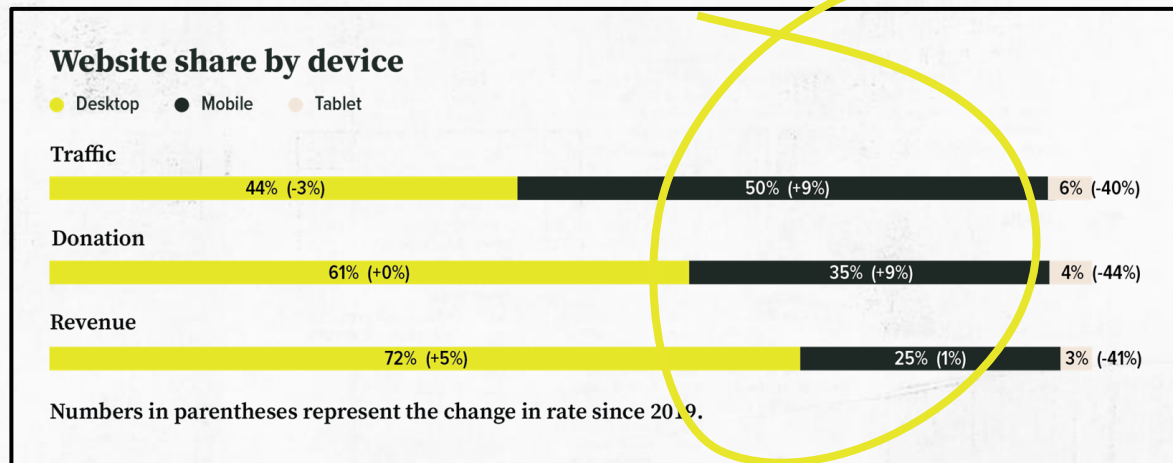**Wildlife/Animal Welfare**
0%

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WEB PERFORMANCE HEADLINES

★ Half of all nonprofit website visits came from users on mobile devices. The traffic share for mobile devices increased by 9% in 2020.

★ Users on desktop devices made up the majority of donation transactions (61%) and revenue (72%).

★ The average gift made on a desktop device was $80; for mobile users, the average gift was $42.

★ Organic traffic (website traffic generated by unpaid search results) comprised 42% of all nonprofit website visits in 2020.

★ Overall, 0.08% of organic website visitors made a donation, generating an average of $0.12 per visitor.

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WEBSITE SHARE BY DEVICE

Half of all traffic was from users on mobile devices, a 9% increase in traffic share.

Desktop users remained more likely to give (12% main donation page conversion rate) than mobile users (9% conversion rate).

The average gift from website users was $80, nearly twice the $42 average gift for mobile users.

Website share by device

● Desktop   ● Mobile   ● Tablet

Traffic

44% (-3%) | 50% (+9%) | 6% (-40%)

Donation

61% (+0%) | 35% (+9%) | 4% (-44%)

Revenue

72% (+5%) | 25% (1%) | 3% (-41%)

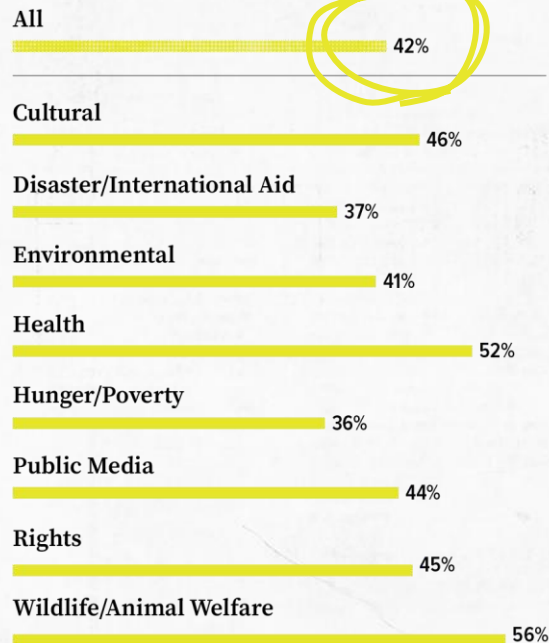Numbers in parentheses represent the change in rate since 2019.

ORGANIC WEBSITE TRAFFIC

Organic traffic — driven by non-paid search results — accounted for 42% of all visitors.

Of all organic visitors, 0.08% completed a gift, for an average revenue per organic visitor of $0.12.

With such a large share of traffic, even small changes to those small numbers can make a major impact.

Organic traffic volume as percent of overall traffic

All — 42%

Cultural — 46%

Disaster/International Aid — 37%

Environmental — 41%

Health — 52%

Hunger/Poverty — 36%

Public Media — 44%

Rights — 45%

Wildlife/Animal Welfare — 56%

QUESTIONS? QUESTIONS? QUESTIONS? QUESTIONS? QUESTIONS? QUESTIONS? QUESTIONS? QUESTIONS?

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