Charitable Giving Report

How Fundraising Performed in 2017

BLACKBAUD INSTITUTE | FOR PHILANTHROPIC IMPACT

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FOREWORD

Giving in an Uncertain Year

Across the world, 2017 was a year defined by change and uncertainty. We saw our landscape shaped by political divides, natural disasters, and tense reform. And the question all along has been: through all this tumult, how was philanthropy affected?

This 2017 *Charitable Giving Report* gives us our first means of answering that question through data. The data supports many of the trends we saw shaping up over the year. As political rifts deepened around us and natural disasters called on our reflexes to help, more and more people started to get involved directly with the causes that matter to them. Many organizations have seen a huge influx of new donors, particularly when their causes are in the political spotlight. While new donors are less likely to continue their support in the long term, organizations willing to put in the effort for strong stewardship will likely find many of these passionate supporters sticking around.

In the same theme, the ways in which people donated throughout 2017 continued to shift the donor into the driver's seat. Giving platforms and other intermediaries such as donor-advised funds (DAFs) continued to proliferate, allowing donors even more avenues for giving. Though the donor may enjoy the increased options, organizations still struggle with the complexities of not having a direct tie to the people giving them money. As these giving vehicles play a much larger role in philanthropy, nonprofits are navigating the intricacies of soliciting and acknowledging those gifts. Organizations continue to test and learn the balance between democratizing giving and setting guidelines that still allow them to represent their mission and connect with donors.

Perhaps the most momentous change to philanthropy in 2017 happened in the last few weeks of the year: the passing of the new federal tax law. With so little time between the passing of the law and the end-of-year giving season, it remains to be seen how many donors and organizations responded directly to the reform by changing their giving and fundraising habits. It is possible that a spike in December giving is due to donors increasing their giving in 2017 because they are uncertain whether tax incentives for giving will still exist at the end of 2018. We may not have answers on that question until next year, when full 2018 numbers come in, or even beyond. For now, organizations are encouraged to remain conservative in their projections, with the understanding that increased donations in 2017 may have been a response to changing times, not growth that can be sustainably built upon.

For now, what *is* certain is that a focus on the fundamentals of fundraising and relationship building has never been more important. Organizations facing tight budgets and changing market conditions must steward their donors and retain them, with the knowledge that previous giving incentives like tax deductions may not be enough to keep donations coming in.

Overall, the full effects of 2017's many shakeups will take time to show themselves. As our first glimpse into the data behind the trends, the 2017 *Charitable Giving Report* offers us a place to start.

Chuck Longfield
Blackbaud Chief Scientist
Senior Advisor, Blackbaud Institute

INTRODUCTION

Now in its sixth year, the 2017 *Charitable Giving Report* leverages the Blackbaud Index to provide a year in review based on the largest analysis of overall and online giving data anywhere in the sector. With nearly $30 billion in fundraising data powering its findings, this report is one of the most credible resources on fundraising performance in the social good community. By providing the earliest comprehensive look at annual giving year over year, the *Charitable Giving Report* helps organizations benchmark their performance and guide their fundraising strategies for the year and beyond.

The report includes overall giving data from 8,453 organizations representing $29.7 billion in total fundraising from 2017. The report also includes online giving data from 5,709 organizations representing $3.1 billion in online fundraising from 2017.

It should be noted that significant work has gone into building the analysis model and making sure the data meets strict requirements. This includes collecting giving data on a monthly basis over a period of 24 months, checking and rechecking for anomalies, classifying each organization by sector using the National Taxonomy of Exempt Entities (NTEE) code, matching and retrieving reported total revenue information, and applying statistical expertise to the data.

In addition to this year-in-review report, the Blackbaud Index is updated monthly to showcase the latest charitable giving trends. Visit www.blackbaud.com/blackbaudindex for additional insight, to chart your organization's performance against the index, and to sign up for free monthly fundraising alerts.

Executive Summary

In 2017, overall charitable giving in the United States increased 4.1% on a year-over-year basis. Large organizations grew by 4.3%; medium organizations increased 3.9%; and small nonprofits grew 4.2% compared to the same time period in 2016.

Online giving grew 12.1% in 2017 compared to 2016. Large organizations grew 11.0%; medium-sized organizations grew 14.9%; and small nonprofits grew 10.7% on a year-over-year basis.

The percentage of total fundraising that came from online giving reached another record high in 2017. About 7.6% of overall fundraising revenue, excluding grants, was raised online. In 2017, 21% of online transactions were made using a mobile device. This is the continuation of a growth trend Blackbaud has measured over many years now.

International Affairs organizations had the largest growth in overall fundraising during 2017. Faith-Based nonprofits experienced the largest growth in online giving in 2017 compared to 2016. Only Arts and Culture and K–12 Education institutions experienced year-over-year declines in overall fundraising. All sectors had growth in their online giving programs in 2017.

A convergence of economic, political, technological, and philanthropic trends helped boost giving in 2017. The 4.1% increase in giving during 2017 was a substantial jump compared to relatively flat growth in 2016. A strong stock market, spikes in giving in response to political issues or disasters, and the continued shift to digital giving all influenced giving in 2017. This growth was also fueled by a 5.1% increase in giving during the final three months of 2017. The potential implications of new U.S. tax laws may have contributed to this late surge in charitable giving.

2017 was also a year when prior predictions about the future of donor demographics and behavior became the new normal. Across a broader set of research initiatives, Blackbaud has observed 2017 as a turning point in the use of digital, mobile, and social channels by donors. Today's modern donor is engaged across multiple channels and devices. This modern donor is younger and has higher expectations about nonprofit engagement. Slacktivism turned into actigiving. The most generous in society chose to give more. The new normal for donors is here, even if not all nonprofits recognize it yet.

Overall 2017 Giving Trends

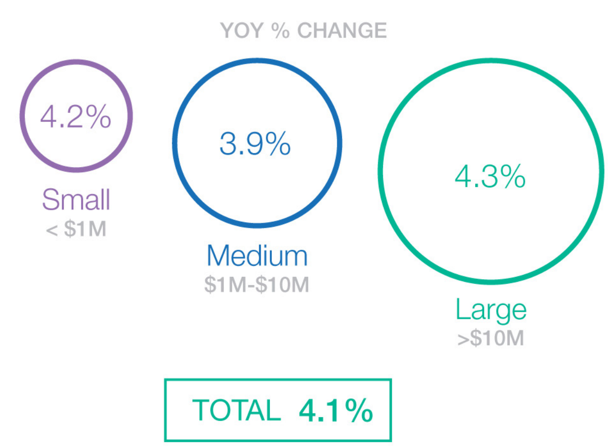
Overall giving in 2017 grew 4.1% on a year-over-year basis for the 8,453 nonprofit organizations in the analysis. This is the sixth consecutive year where the *Charitable Giving Report* has found an increase in giving.

Fundraising by large organizations, with annual total fundraising more than $10 million, was up by 4.3%. Medium-sized organizations, with annual total fundraising between $1 million and $10 million, had an increase of 3.9% on a year-over-year basis. Small nonprofits, with annual total fundraising less than $1 million, experienced a 4.2% growth rate in fundraising results compared to 2016.

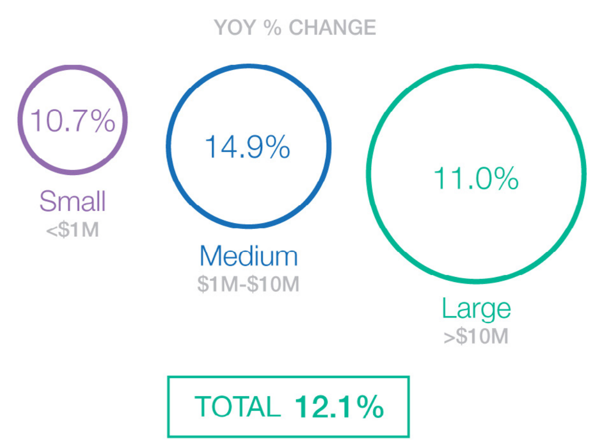
Online giving in 2017 grew 12.1% year over year for the 5,709 nonprofit organizations in the analysis. 2017 saw a return to double-digit growth rates in online giving for all size categories that Blackbaud measures.

Nonprofit organizations of all sizes grew their online giving in 2017 compared to 2016. Large organizations, with annual total fundraising more than $10 million, grew their online fundraising by 11.0% in 2017. Medium-sized nonprofits, with annual total fundraising between $1 million and $10 million, had the largest increase of 14.9% in their online fundraising. Small nonprofits, with annual total fundraising less than $1 million, grew their online fundraising by 10.7%.

OVERALL GIVING TRENDS BY ORGANIZATION SIZE



ONLINE GIVING TRENDS BY ORGANIZATION SIZE



Giving Trends by Nonprofit Sector

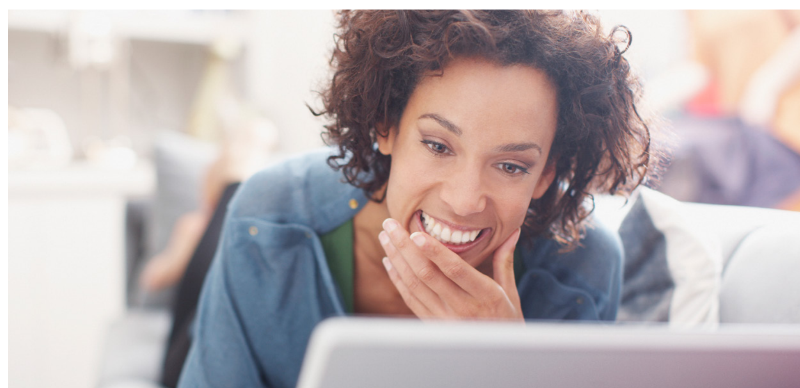
2017 OVERALL GIVING TRENDS BY SECTOR

SECTOR	YOY % CHANGE
Arts and Culture	-0.1%
Environment/Animal Welfare	7.9%
Faith-Based	4.7%
Healthcare	4.6%
Higher Education	1.6%
Human Services	2.3%
International Affairs	19.2%
K–12 Education	-1.0%
Medical Research	4.9%
Public and Society Benefit	3.2%

Each organization in the Blackbaud Index is categorized by one of 10 sectors using its National Taxonomy of Exempt Entities (NTEE code) as reported on its 990 tax return. These sectors are Arts and Culture, Environment and Animal Welfare, Faith-Based, Healthcare, Higher Education, Human Services, International Affairs, K–12 Education, Medical Research, and Public and Society Benefit. Each sector is weighted based on Giving USA data to ensure that no individual organization or sector is overrepresented in the analysis.

International Affairs had the largest increase in year-over-year fundraising with 19.2% growth. This was followed by Environment and Animal Welfare organizations with a growth rate of 7.9%. Medical Research organizations grew 4.9% and Faith-Based nonprofits grew by 4.7% compared to 2016.

This was a reversal of trends from 2016 when many of these organizations had a declining or nearly flat fundraising performance. The declines in 2017 by Arts and Culture and K–12 Education institutions were small considering their more pronounced growth in 2016.



Foundations Spotlight

The Blackbaud Index began tracking overall giving to foundations in 2016. The Foundations Index includes giving data from 109 organizations with over $481 million in charitable giving. Overall giving to foundations was up 4.1% in 2017.

2017 ONLINE GIVING TRENDS BY SECTOR

SECTOR	YOY % CHANGE
Arts and Culture	17.2%
Environment/Animal Welfare	17.6%
Faith-Based	18.1%
Healthcare	10.7%
Higher Education	13.2%
Human Services	12.2%
International Affairs	8.5%
K–12 Education	8.2%
Medical Research	0.9%
Public and Society Benefit	15.1%

Faith-Based nonprofits grew their online giving the most with an 18.1% year-over-year growth rate. Environment and Animal Welfare, Arts and Culture, and Public and Society Benefit organizations also had very strong online giving growth in 2017 compared to 2016.

Unlike 2016, all sectors experienced growth in their online giving programs. Medical Research and International Affairs rebounded from online giving declines in 2016 to post year-over-year growth in 2017. Online giving continues to grow as donors shift in age and other demographics.

Giving Trends by Month

2017 OVERALL GIVING DISTRIBUTION PERCENTAGE BY MONTH BY SECTOR

SECTOR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Arts and Culture	8.0%	6.9%	9.2%	7.1%	8.1%	8.7%	6.4%	6.6%	5.8%	6.8%	9.2%	17.0%
Environment/Animal Welfare	7.1%	5.4%	7.1%	6.3%	9.3%	11.6%	5.2%	6.4%	6.3%	7.5%	8.2%	19.8%
Faith-Based	7.6%	5.7%	8.3%	6.3%	7.8%	7.8%	6.8%	7.7%	7.9%	7.6%	8.1%	18.5%
Healthcare	7.2%	7.1%	7.1%	6.3%	6.3%	8.8%	6.9%	6.3%	6.6%	7.2%	7.5%	22.6%
Higher Education	6.1%	5.2%	6.7%	6.6%	7.9%	9.3%	9.1%	7.2%	8.0%	8.3%	8.0%	17.6%
Human Services	6.8%	3.5%	8.0%	3.9%	4.0%	4.1%	5.9%	11.2%	21.8%	13.1%	6.6%	11.0%
International Affairs	9.4%	5.7%	7.5%	6.0%	8.0%	8.9%	5.8%	5.6%	6.1%	8.1%	8.3%	20.6%
K–12 Education	10.4%	8.1%	10.7%	6.7%	7.2%	7.3%	5.8%	6.9%	6.5%	6.2%	8.3%	15.8%
Medical Research	6.5%	7.0%	7.7%	7.2%	8.8%	9.0%	7.5%	6.9%	6.7%	7.4%	7.8%	17.5%
Public and Society Benefit	6.8%	6.2%	7.8%	6.7%	8.2%	9.9%	6.5%	7.0%	7.6%	8.4%	7.9%	17.1%
OVERALL	**7.2%**	**5.9%**	**7.6%**	**6.3%**	**7.6%**	**8.9%**	**6.8%**	**7.1%**	**8.3%**	**8.2%**	**7.9%**	**18.2%**

The analysis looked at the distribution of giving across all of 2017. While December remains the largest giving month of the year, there are continuing shifts to the rest of the calendar year. June has continued to be the second largest giving month of the year, and this aligns with the end of fiscal year for many nonprofit organizations.

2017 ONLINE GIVING DISTRIBUTION BY MONTH BY SECTOR

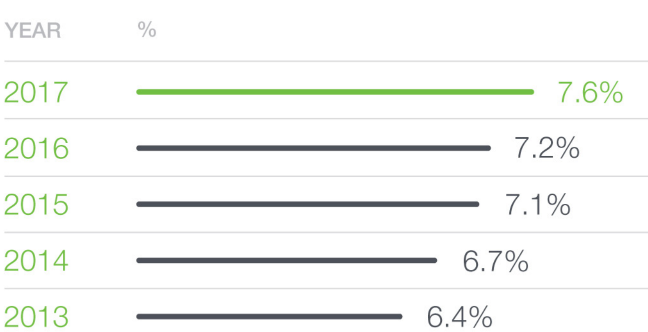
SECTOR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Arts and Culture	7.3%	7.5%	9.2%	7.5%	6.4%	6.6%	6.0%	5.9%	7.0%	7.6%	9.0%	20.1%
Environment/Animal Welfare	8.0%	12.6%	9.4%	7.2%	7.3%	9.0%	3.4%	4.7%	5.0%	7.0%	8.1%	18.3%
Faith-Based	5.5%	5.5%	6.9%	7.0%	7.3%	6.3%	5.3%	9.3%	9.2%	5.9%	8.8%	23.2%
Healthcare	8.0%	7.9%	8.1%	7.2%	7.4%	6.0%	5.2%	5.8%	7.2%	7.5%	8.3%	21.5%
Higher Education	4.7%	4.6%	6.0%	5.8%	5.7%	5.0%	4.2%	9.4%	10.2%	7.2%	10.1%	26.9%
Human Services	4.2%	4.5%	6.2%	5.6%	6.1%	4.9%	4.4%	7.6%	12.7%	9.6%	9.7%	24.4%
International Affairs	3.3%	5.6%	9.4%	11.8%	10.9%	6.8%	4.8%	8.4%	13.9%	11.6%	4.8%	8.6%
K–12 Education	16.6%	8.4%	7.8%	6.5%	5.9%	5.7%	5.0%	5.5%	5.7%	6.8%	7.7%	18.4%
Medical Research	5.3%	6.2%	7.7%	6.5%	6.4%	8.6%	5.5%	7.9%	8.8%	7.2%	8.6%	21.2%
Public and Society Benefit	5.0%	5.5%	8.4%	7.6%	6.8%	8.2%	3.8%	5.1%	6.0%	6.8%	9.3%	27.4%
OVERALL	**6.5%**	**6.6%**	**7.9%**	**7.7%**	**7.4%**	**6.6%**	**4.7%**	**7.2%**	**9.1%**	**8.0%**	**8.1%**	**20.1%**

Percentage of Fundraising from Online Giving Trends

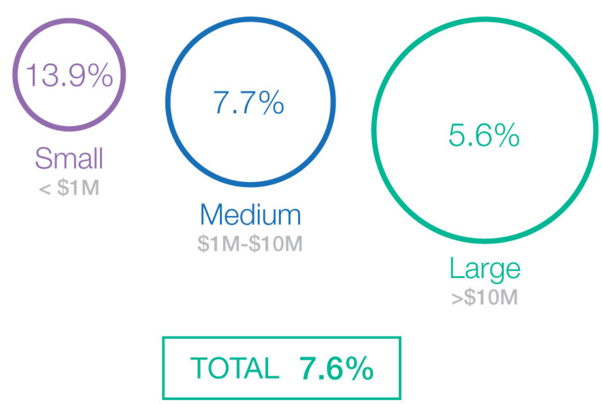
Blackbaud has been measuring the growth of online giving for nearly 20 years. A key metric is the percentage of total fundraising that comes from online giving. This metric can be used by nonprofit organizations to benchmark their online giving performance against peer organizations within each sector or of a similar size.

Blackbaud used data over the past year to examine the percentage of total fundraising that came from online giving. In 2017, 7.6% of total fundraising came from online giving and is the highest level online giving has ever reached. This is based on an analysis of data from 3,293 organizations with $21.1 billion in total fundraising in 2017.

PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING



PERECENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING BY ORGANIZATION SIZE



2017 PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING

SECTOR	%
Arts and Culture	8.1%
Environment/Animal Welfare	8.2%
Faith-Based	7.3%
Healthcare	5.9%
Higher Education	7.3%
Human Services	6.5%
International Affairs	11.8%
K–12 Education	9.9%
Medical Research	11.9%
Public and Society Benefit	11.8%

Small nonprofits are the first group to surpass the 10% mark with 13.9% of total fundraising coming from online giving. Medium-sized organizations moved to 7.7% and larger nonprofits were 5.6% in 2017.

Medical Research, Public and Society Benefit, and International Affairs organizations continue to see a larger percentage of giving coming from online donations. 2017 saw significant growth in online giving mix with Higher Education, Human Services, and Arts and Culture nonprofits.

Today, online giving still represents less than 10% of total fundraising. As a point of comparison, the U.S. Department of Commerce estimates that e-commerce sales in the third quarter of 2017 accounted for 9.1% of total sales.

While the nonprofit sector is lagging broader retail trends, the continued shift by donors is in line with consumer behavior.

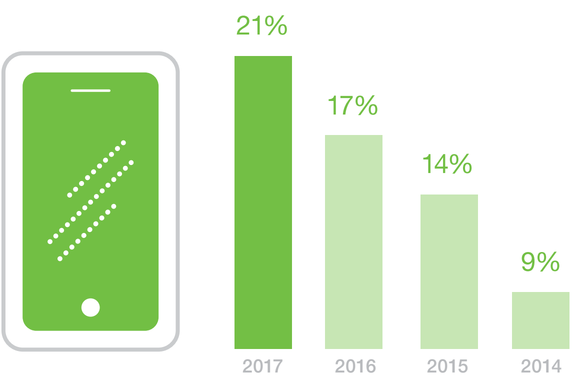
Mobile Device Giving Trends

Blackbaud has done extensive research on the impact of mobile device giving over the years. In 2017, an estimated 21% of online transactions were made using mobile devices. This has grown steadily since 2014, and even higher rates occur for event registration and membership purchases.

In 2017, the peak for mobile transactions was in August at 23.3% of all online donations. The low for the year was in January with 18.1% of online transactions occurring on mobile devices. Blackbaud continues to see seasonality with mobile device transactions as percentages fluctuate throughout the year.

Every nonprofit organization needs to understand that mobile-friendly is linked to being donor-friendly. This is no longer optional, and the lack of websites, donation forms, and email messages will put nonprofits at a distinct disadvantage. All of these should be used in combination to maximize the giving experience for supporters.

PERCENTAGE OF ONLINE DONATIONS MADE ON A MOBILE DEVICE



INTERNATIONAL GIVING TRENDS

Canadian Giving Spotlight

The Blackbaud Index was expanded in 2014 to begin tracking overall and online giving for Canadian nonprofits. The Canadian Index includes giving data from 560 nonprofits with over $1.4 billion in charitable giving.

- Overall charitable giving was up 1.5% among Canadian nonprofits in 2017
- Online giving increased 12.2% for nonprofits in Canada during 2017

UK Giving Spotlight

The Blackbaud Index added tracking of online and overall giving in the United Kingdom during 2017. The UK Index includes giving data from 359 organizations with over $889,000 in charitable giving.

- Overall charitable giving was up 2.9% among UK nonprofits in 2017
- Online giving increased 18.5% among UK nonprofits in 2017

#GivingTuesday Online Giving Trends

The sixth-annual #GivingTuesday was held on November 28, 2017, and the growth in the global movement continues.

- Blackbaud processed more than $60.9 million in U.S. online donations on #GivingTuesday 2017
- Online giving on #GivingTuesday 2017 increased 28% compared to 2016
- 26% of digital donations were made on mobile devices on #GivingTuesday 2017

Blackbaud is a founding partner of #GivingTuesday and has analyzed more than $203 million in online donations made on #GivingTuesday since 2012. This represents the largest amount of #GivingTuesday data ever analyzed and represents transaction data from across more than 7,200 nonprofit organizations.

Blackbaud's analysis found that #GivingTuesday donations continue to shift to medium-sized and smaller-sized organizations. Large organizations only represent 57% of the #GivingTuesday revenue compared to 80% in 2012. Medium-sized nonprofits are receiving 36% of #GivingTuesday revenue, followed by 7% for smaller organizations.

DISTRIBUTION OF #GIVINGTUESDAY REVENUE BY SIZE

SIZE	2017	2016	2015	2014	2013	2012
Small (Less than $1M)	7%	8%	7%	5%	3%	5%
Medium ($1M–$10M)	36%	26%	22%	21%	13%	15%
Large ($10M+)	57%	66%	71%	74%	84%	80%

DISTRIBUTION OF #GIVINGTUESDAY REVENUE BY SECTOR

SECTOR	2017	2016	2015	2014	2013	2012
Arts and Culture	2%	5%	3%	1%	1%	2%
Environment/Animal Welfare	12%	19%	10%	4%	3%	4%
Faith-Based	6%	6%	16%	21%	40%	2%
Healthcare	12%	18%	7%	13%	8%	9%
Higher Education	20%	17%	13%	17%	8%	9%
Human Services	19%	21%	15%	10%	13%	23%
International Affairs	4%	10%	8%	9%	8%	13%
K–12 Education	9%	8%	8%	10%	6%	3%
Medical Research	6%	12%	13%	13%	11%	33%
Public and Society Benefit	5%	8%	6%	3%	2%	2%

In 2017, Higher Education, Human Services, Healthcare, and Environment and Animal Welfare organizations captured the largest share of online donations. #GivingTuesday donations continue to have variability across different sectors. We expect this trend to continue over time as changes in focus and participation by different organizations ebb and flow.

Key Metrics from Across the U.S. Nonprofit Sector

Through its data science and data assets, Blackbaud Target Analytics® is in the unique position to provide key insight into the U.S. nonprofit sector. These numbers provide answers to some of the most common questions asked by fundraising and nonprofit professionals:

RETENTION

31% First-year offline-only donor retention rate for nonprofits in the U.S.

61% Multi-year offline-only donor retention rate for nonprofits in the U.S.

25% First-year online-only donor retention rate for nonprofits in the U.S.

64% Multi-year online-only donor retention rate for nonprofits in the U.S.

DONATION AMOUNTS

$20 Median donation amount for gifts below $1,000 in the U.S.

$2,000 Median donation amount for gifts above $1,000 in the U.S.

$132 Average online donation amount

DONOR GIVING

64 Average age of donor in the U.S.

2 Average number of charitable gifts per U.S. donor

A Closer Look at the 2017 Charitable Giving Report

The findings in this report are based on giving data from 8,453 nonprofit organizations and more than $29.7 billion in fundraising revenue. The online fundraising findings are based on data from 5,709 nonprofit organizations and more than $3.1 billion in online fundraising revenue.

To be included in the analysis, these organizations needed to have 24 months of complete giving data with no gaps or missing information. Each organization was then classified by sector using their NTEE code as reported on its 990 tax return. If you are not sure which sector your organization is classified as, you may refer to your 990 to find your NTEE code. Visit http://nccs.urban.org/classification/NTEE.cfm for a complete list of sectors.

Organizations were then grouped into three size categories: total annual fundraising less than $1 million (small), total annual fundraising between $1 million and $10 million (medium), and total annual fundraising exceeding $10 million (large). This is based on recorded giving in each organization's fundraising system, reported fundraising in IRS Form 990 data, and matching done through the National Center for Charitable Statistics.

Organizations without all the research criteria were not included in this analysis. Organizations based outside the United States were excluded from this analysis, with the exception of the Canadian Index and UK Index results. We do not include the unfulfilled portion of pledge gifts or recurring gifts that are processed offline. Giving USA data is used to weight the data to ensure that no individual organization or sector is overrepresented in the analysis.

The percentage of total fundraising from online giving trends research is based on 3,293 nonprofits in the Blackbaud Index. These organizations represent $21.1 billion in total fundraising in 2017. The mobile giving research is based on data from more than 4,500 nonprofit organizations and their mobile transactions made in 2017. The #GivingTuesday research is based on data from more than 7,200 nonprofit organizations and more than $203 million in online giving between 2012 and 2017.

This report would not be possible without the contributions of Chuck Longfield, Angele Vellake, Heath Young, Brandon Granger, Ashley Thompson, Erin Duff, Nicole Gear, Olivia Franzese, and Anna Key.

KEY FINDINGS

The *Charitable Giving Report* analyzes trends from over $29.7 billion in fundraising revenue from 2017. Here are some key findings:

- Overall giving grew approximately 4.1% in 2017
- Online giving grew 12.1% in 2017 compared to 2016
- Online donations made up 7.6% of all fundraising in 2017
- #GivingTuesday online donations were up 28% in 2017
- Over 21% of online donations were made on a mobile device in 2017

About the Blackbaud Index

Economic conditions, natural disasters, and market fluctuations have made it extremely difficult for nonprofits to make fundraising decisions informed by the latest donor behavior. That is why we created the Blackbaud Index of Charitable Giving in 2010—to provide insight into what happened in the prior few weeks and valuable analysis by leaders in the sector into what fundraisers can learn from it.

The Blackbaud Index brings you the most up-to-date information on charitable giving today. Tracking approximately $29.7 billion in U.S.-based charitable giving, the index is updated on the first of each month and is based on year-over-year percent changes. Featuring overall and online giving, the index can be viewed by size and sub-sectors of the nonprofit industry.

> Visit www.blackbaud.com/blackbaudindex to experience the enhanced interactive index charts where you can easily compare by size or sector.

About the Blackbaud Institute for Philanthropic Impact

The Blackbaud Institute drives research and insight to accelerate the impact of the social good community. It convenes expert partners from across the philanthropic sector to foster diverse perspectives, collective thinking, and collaborative solutions to the world's greatest challenges. Using the most comprehensive dataset in the social good community, the Blackbaud Institute and its partners conduct research, uncover strategic insight, and share results broadly, all in order to drive effective philanthropy at every stage, from fundraising to outcomes. Knowledge is powering the future of social good, and the Blackbaud Institute is an engine of that progress. Learn more, sign up for the newsletter, and check out our latest resources at www.blackbaudinstitute.com.

About Blackbaud

Blackbaud (NASDAQ: BLKB) is the world's leading cloud software company powering social good. Serving the entire social good community—nonprofits, foundations, corporations, education institutions, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through software, services, expertise, and data intelligence. The Blackbaud portfolio is tailored to the unique needs of vertical markets, with solutions for fundraising and relationship management, digital marketing, advocacy, accounting, payments, analytics, school management, grant management, corporate social responsibility, and volunteerism. Serving the industry for more than three decades, Blackbaud is headquartered in Charleston, South Carolina, and has operations in the United States, Australia, Canada, Ireland, and the United Kingdom. For more information, visit www.blackbaud.com.

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