



Moore Report

Mail Fundraising Returns
to Earth in 2022



2022: Mail Fundraising Returns to Earth

Charitable giving shot up in 2020 and 2021. So it was no surprise that charitable giving declined in 2022, reversing some of the previous years' gains.

TOTAL GIFTS	AVERAGE GIFT	REVENUE
Down 15.5%	Up 6.3%	Down 10.1%

With 2022's inflation, the cost of everything went up, including charitable giving. Usually, in challenging economic times, mail giving is relatively robust because mail donors are more likely to be of an age where income is fixed, or their job is settled. Unfortunately, inflation hurts these older donors disproportionately as the buying power of their fixed income decreases in real terms. This should be less of a challenge in 2023 because inflation is receding and because Social Security payments were inflation-adjusted at the beginning of 2023.

Whenever average gift increases and number of gifts decrease, there are multiple interlocking causes:

- 1 People consciously choosing to make larger gifts. Since we started to see increased average gifts in the third quarter of 2021 when revenues were still increasing, this likely is part of the equation. However, because revenues decreased consistently in 2022, it is likely that more of a factor is...

Last year, we all thought everything was fine. And then we had an invasion in ... Ukraine.

And interest rates started to creep up. And the economy started to wobble a bit... And we started to lose confidence. We started to see increases in costs and inflation and the market started to change.”

Bruce Biegel

Senior Managing Director
Winterberry Group



- 2 Smaller-dollar donors decreasing by more than larger-dollar donors. Smaller donors are more likely to have fixed incomes and thus are those most hurt by inflation. This would cause the average gift to increase without individual people increasing their gifts. We can also tell this by type of gift. The overwhelming majority—93.8%—of mail gifts were made by check, with 3.5% through credit cards and 2.7% as cash; check donors skew older as well.
- 3 Choice on behalf of charities. With a three percent decrease in mail volume, mailings to smaller-dollar donors were cut more than those to higher-dollar donors. Additionally, as you’ll see, volume shifted slightly from acquisition mail to donor mail; active donors usually have significantly higher gifts than newly acquired donors.

Years with great increases tend to have significantly less impressive follow-up years.

All three are likely at play as we analyze these results, which are fairly consistent across sectors. They are compounded by 2021 being an exceptional year to the upside. Thus, what we saw in 2022 is a reversion to trend, which is why we predicted we would see drops in donor numbers, increases in average gifts, and continually increasing costs that came to pass. According to Giving USA data, since 1985, there have been six double-digit growth years in individual giving. Across those six cases, the subsequent year's giving has increased by less than 3% on average. Years with great increases tend to have significantly less impressive follow-up years.



Overview by Sector

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
Animal Rescue	-8%	+8%	-15%
Domestic Services	-12%	+9%	-20%
Environmental & Wildlife	-9%	0%	-9%
Health - Disease	-9%	+9%	-17%
Health - Medical	-9%	+5%	-14%
Hunger & Poverty	-17%	-3%	-14%
International Relief	-15%	-3%	-12%
Museums & Preservation	-14%	-3%	-12%
Political & Advocacy	-4%	+21%	-21%
Religious	-7%	+6%	-12%
Veteran Services	-10%	+4%	-14%
Overall	-10%	+6%	-15%

Revenues and responses were uniformly down. A small part of this was fewer mailings, but the majority was increased inflationary pressures on direct marketing donors and the regression to the mean of artificially high response rates.

A few sectors did see a decrease in average gift from 2021's highs, but these were relatively minor dips. Overall, nonprofits saw a healthy increase in average gift.

Average Gift

Sector Breakdown



SECTOR	2022 AVG. GIFT
Animal Rescue	\$32
Domestic Services	\$31
Environmental & Wildlife	\$54
Health - Disease	\$29
Health - Medical	\$38
Hunger & Poverty	\$68
International Relief	\$86
Museums & Preservation	\$58
Political & Advocacy	\$30
Religious	\$61
Veteran Services	\$26
Overall	\$40

Hunger/poverty, museums, and religious organizations lead the way with the largest average gifts. On the other hand, animal rescue, disease, political, and veteran services organizations consistently had average gifts under \$40.

Overview by Type of Mailing

Change from 2021 to 2022

MAILING TYPE	AMOUNT MAILED	REVENUE	RESPONSE RATE	AVERAGE GIFT	REVENUE PER PIECE
Acquisition	-5%	-27.6%	-25.1%	+2.6%	-23.2%
Lapsed	-2.4%	-18.3%	-19.7%	+4.3%	-16.2%
Renewal	+0.5%	-9.7%	-12.8%	+3.0%	-10.1%
Newsletter	+5.5%	-10.7%	-18.3%	+3.6%	-15.3%
Overall	-2.6%	-12.8%	-14.3%	+4.2%	-10.2%

These results show the impact of coming off multi-year highs from the COVID bubble in 2021 and regression to the previous pattern of declining donation numbers.

Research shows that people change their giving and buying patterns when experiencing a life event (e.g., people change charities when moving). Thus, it's natural to see the greatest decline in response rates in acquisition mailing because 2020 and 2021 can be characterized as a global life event. As things came back to the general trend, people were less likely to change or add new charities in 2022 than in the previous two years. Thus, acquisition and reactivation were impacted more than renewal and newsletter mailings.

As noted earlier, as nonprofits pulled back on mail, they tended to pull back on acquisition and lapsed mailing while continuing with donor mailing. This helped increase average gift and minimize revenue declines but at the expense of future growth.

SMARTLY CUTTING COSTS

Stabilizing non-postal costs in 2023 and beyond

While the paper market isn't returning to 2019 prices, organizations can now count on stabilized pricing for print production. Inventory levels for producers and buyers alike are holding steady. Paper manufacturers are forecasting strong production capacity for 2023 and stabilization of stockpiles. We've seen this stabilization so far in the year.

Paper manufacturers are forecasting strong production capacity for 2023.

As inventories and pricing stabilize, smart direct mailers are taking steps to decrease their costs by:

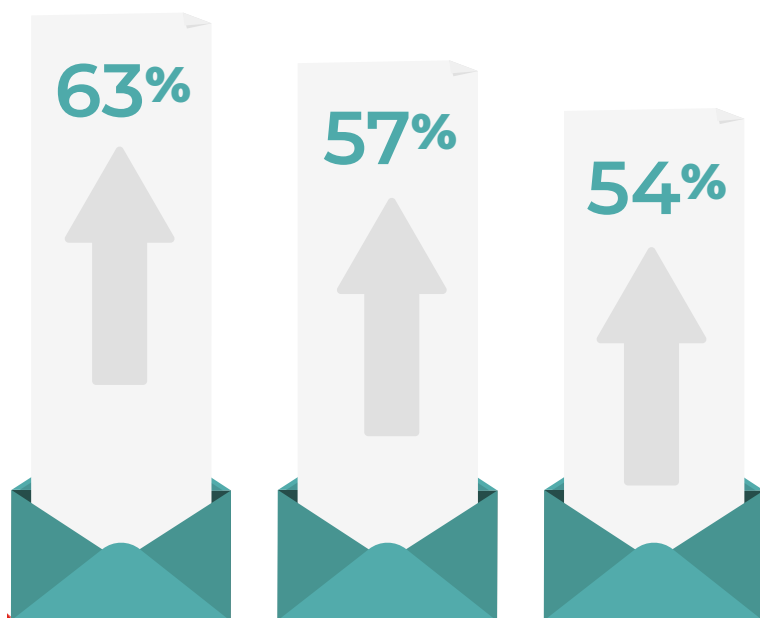
- Reformulating packages to take advantage of new technology and digital printing. For example, new scanners and optical systems enable printing and inserting multiple customized components simultaneously to decrease costs.
- Using data to trim mailing volume. Smart marketers are using scalpels, not cleavers, to cut quantity. One mailer used SimioAudience Ensemble modeling to test removing the bottom 6% of their acquisition file. When tested, the prospective donors identified by SimioAudience had a .28% response rate, compared with .59% for the program average. Cutting that quantity would enable the mailer to save costs that it cannot recuperate even over time.
- Taking advantage of USPS postal promotions. Those hit by the increasing cost of postage can recover some of that increase by using increased USPS promotions to cut costs. As you'll see at right, this has helped many mailers save money in a tough 2022.

Cost-conscious mailers: Using USPS promotions to slow increasing costs

Production Solutions works across its network of production facilities to drive down costs for nonprofit mailers. They also work to optimize postal costs. In 2022, USPS increased the discount (from 2% to 4%) of Informed Delivery mail campaigns. Thanks to this expanded promotion, Production Solutions's advocacy of it, and canny nonprofit marketers:

- 63% more organizations used Informed Delivery
- 57% more Informed Delivery campaigns were mailed
- 54% more mail pieces were mailed under Informed Delivery
- **Total savings from Informed Delivery increased by 478%**

That means more than \$1 million in postal savings for nonprofit organizations trying to spread their message through the mail.



THE NEED FOR SPEED

Urgency at all points in the process

The most successful nonprofits acted with urgency to ask supporters for help. A grateful patient ask from a hospital the month after their first visit achieves twice the response rate of an ask sent out one month later. Proactive organizations use triggered communications (that are personalized; more on that next) to strike while the irons are hot. They also use a first-mover advantage when new events hit, whether a natural disaster like the Haiti earthquake or events like the 2022 Dobbs decision.



The most successful nonprofits also respond to donors and get donor data with urgency. One otherwise successful national health charity found their gift processing center was impacted by staffing challenges. This had an adverse effect on donor retention and revenue, including:

- Lost campaign revenue based on not having the right selection of donors
- Lost revenue from new-to-file donor acknowledgments
- Lost revenue from established multi-donors not being timely thanked
- Lost revenue from the new donor welcome series

These delays in gift processing last year are projected to have negatively impacted their gross revenue by \$3,000,000. This isn't that surprising, as processing delays mean delays in welcome messages and subsequent asks. People who give multiple times in year one are 39-59% less likely to lapse.

These data are also vital for modeling other donors. One of the massive advantages of machine learning is that it learns. Every response is an opportunity to make an even better model of the future and future donors so faster data can improve audiences.

Save the Children: Acting Quickly

Shortly before the pandemic shutdown, Haiti suffered a devastating earthquake. Save the Children needed to garner support for their relief efforts.

They worked with Moore to immediately create video advertising and used SimioCloud to find those most likely to engage with Save the Children, including:

- Prior emergency donors
- Lapsed donors
- Save the Children's telemarketing file
- A SimioAudience acquisition file

This used a \$10/month sustainer ask and was bolstered by programmatic digital advertising.

The campaign delivered over 3.2 million impressions with a return on ad spend (ROAS) of 1.52. Campaign responders were both higher-value and younger, and many also became sustaining donors to help Save the Children respond whenever children are in peril.

The technique was so successful that we deployed it in 2022 when Russia invaded Ukraine. Save the Children's ads were on the air in 24 hours, and the first weeks of that campaign had a ROAS of 24.9.



**GIVE TO THE HAITI
EARTHQUAKE CRISIS
RELIEF FUND**

 Save the Children.



Children in Haiti
need your help
more than ever.

DONATE

INVESTING IN DATA

Data is relevance and relevance is revenue

“When individuals receive mail customized to their interests, preferences, and lifestyles, they’re more likely to give.”

Despite the significant drop in nonprofit mail volume, the Winterberry Group estimates programmatic direct mail spend will more than double from 2021 to 2025. Why the expected jump? Programmatic—or customized triggered—mail is more effective for two reasons:

- 1 It helps automate (and speed up!) the process of sending and receiving mail.
- 2 When individuals receive mail customized to their interests, preferences, and lifestyles, they’re more likely to give.

It used to be that cost, speed, and customization traded off. But now, nonprofits can optimize all three for organizations that use data as the connective tissue between all fundraising channels. For decades, individuals have been able to personalize based on names, addresses and perhaps one additional variable at a time. But thanks to technology’s rapid advancement, those working in a CDP system can customize countless data points, including:

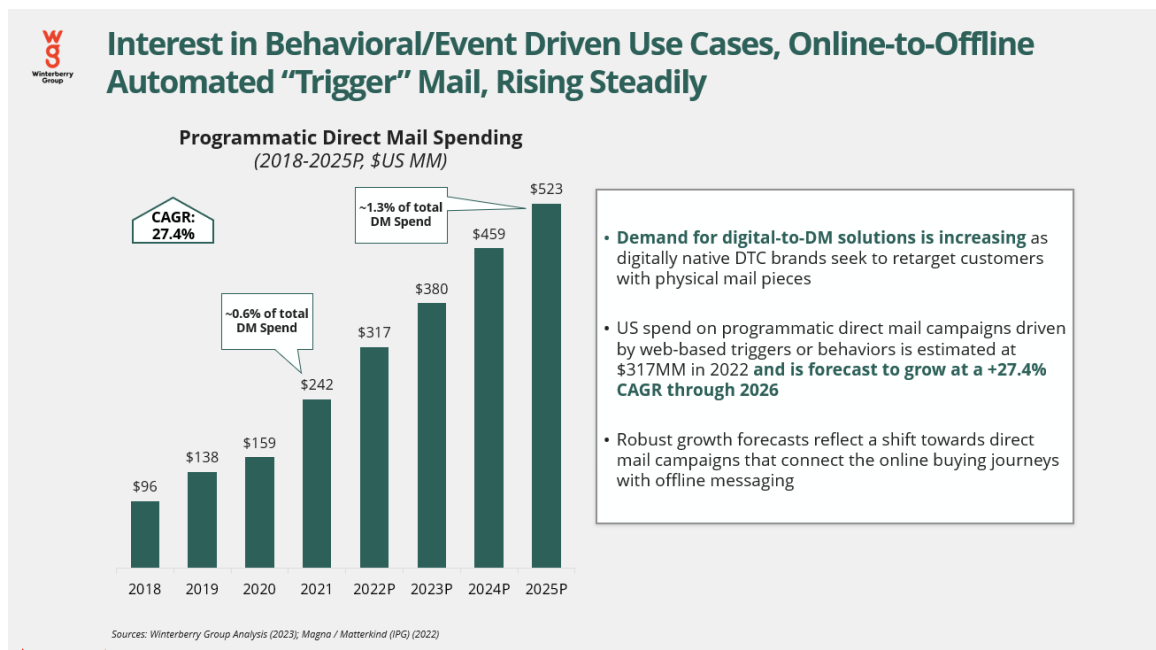
- Channel preferences
- Language preference
- Cultural background
- Volunteer experience
- Giving history to you and other organizations
- Whether they’ve received services from your organization
- Religious preference

- What content they've consumed and liked from you
- Disaster versus non-disaster donor
- Parents versus non-parents
- Political affiliation

All at once, and more. And this only scratches the surface. This level of customization is something humans can't do alone, as it means thousands of letter variations. But a CDP can dynamically change copy and images without sacrificing speed.

This means that someone can download an informational guide on your website, your CDP models them to see if they would be a strong donor, and, if it's valuable, a customized mail piece can automatically be sent to them the next day. And that mail piece can be for the right donor journey, whether it's a one-time, monthly, mid-level, major, or planned giving pitch.

This is a huge step forward in relevance, which makes donors happy and give more. You can see how with the example of Children's Hospital of Philadelphia.





CHOP: Creating data-driven growth

CHOP Associate Vice President Jon Thompson told us, “Each significant engagement with Moore’s SimioCloud team has yielded a positive ROI within months.” CHOP Senior Director of Development Freddie Marianacci credited our Major Gifts model with being able to produce a seven-figure gift from a prospect who had not shown up through CHOP’s prior major gift wealth modeling.

We put our audience-focused strategies in place for CHOP, starting with their major gift program. They found:

- A \$35 million projected increase in prospective major gifts
- 22.6% higher average gift
- 17.4% increase in velocity to gift
- 42% increase in response rate
- 3,000 new major gift Grateful Family prospects

Joe Cross, Director, Direct Response of CHOP, said these improvements in effectiveness by reaching the best target audience members, and efficiency by being able to reduce quantity are in part why he and CHOP chose Moore to be their full-service agency and marketing partner.

GOING OMNICHANNEL

The more, the merrier

While this report focuses primarily on mail benchmarking, the most successful nonprofits in 2022 used mail not as a standalone siloed channel but as a part of a balanced omnichannel breakfast.

Organizations committed to taking their direct mail programs to the next level are creating surround sound experiences for their donors. They connect their direct mail messages to the content they send through digital, television, social media, telecommunications, and other channels. It is well known that it usually takes several touchpoints to get someone's attention and more touchpoints to keep it. 2022 shows that those touchpoints need not be in the same channel and that layering in additional addressable channels across mail, email, programmatic digital, programmatic video (CTV) advertising, and more increased revenues in each more than the sum of the individual parts would have done alone.

Even older donors are more likely than they used to be to transact online.

CTV is bringing in strong results in particular; that's why it's the fastest-growing segment of online marketing spend. Disabled American Veterans started a 2nd gift conversion CTV program to target donors within seven days of their first gift. The ads have had a 3.1 return on ad spend, with many of these one-time donors converting to valuable, better-retaining monthly donors.

Another important part of our omnichannel environment is a shift in donor behavior. Mail remains an effective channel of influence, but the channel of transaction may be digital. One organization found that for younger (under 50 and especially under 40) donors

from the mail, half or more of all mail-influenced donations were made online. Even older donors are more likely than they used to be to transact online. Thus, some of the “decline” in mail performance is a decline in the performance through the mail. The mail is still generating donations, just to a different channel.

Looking at data across channels gives you a more holistic view of donors. In an analysis of one charity’s mail acquisition, once you included online donations stimulated by mail, every age decile under the age of 70 (down to 20-somethings) had lower cost-to-raise-a-dollar than everyone over the age of 70 (and especially over age 80). They also had higher average gifts. This innovative organization benefited from systematically rejiggering its donor mix based on better attribution. If you are allocating donations by the channel of transaction (aka final touch attribution), you might be missing that fact and undermailing that audience.

This creates a virtuous circle with investing in donor surround sound. As you better attribute results, the more you can invest across channels in getting and keeping more valuable donors, which then improves the results of those channels.

A photograph of a man with a beard and dark hair, wearing a red button-down shirt over a white t-shirt. He is smiling and talking on a black mobile phone. He is sitting at a desk with a laptop and a patterned cup. In the background, there is a white bookshelf with books and a teal wall. The image has a teal overlay.

MMOORE

1,305
donors

\$119
average
gift

58%
ROI

158%
gross
revenue

March of Dimes: Going omnichannel

March of Dimes added CTV to their marketing mix leading into 2022. In particular, they wanted to maximize 2021 year-end revenues and reactivate lapsed donors at net neutral or better.

Inactive donors were merged with SimioJourney model scoring to form a target audience with the highest propensity to give an online donation and conducted the media buys that were most appropriate for those donors. We optimized media in real-time and served up display ads accordingly.

For March of Dimes, the heart and soul of their fundraising is sharing impact stories to leverage emotion and show impact. Our campaign creative strategy repurposed in-house video assets for a :30 CTV spot. The poignant video featured a mission-affected family and their son, Gabriel, who were helped through March of Dimes' research and programs offered in the neonatal intensive care unit. The creative focused on the amazing families helped by March of Dimes and shared their personal stories through storytelling, photos, and awe-inspiring videos.

The campaign worked to reactivate donors. Early results allowed for further optimization, pushing more impressions toward the donor segments generating the highest revenue. The campaign reactivated 1,305 donors with an average gift of \$119, a 58% ROI, and a 158% in gross revenue versus budget.

DATA-FOCUSED BUDGETING

Addressing the asterisk

For most organizations, 2020 and 2021 will look like outliers on metrics for as long as they are included in metrics. For museums and arts organizations, 2020 will likely be a year when attendance dropped significantly. For other organizations, especially those directly addressing the pandemic, there was a jump up in finances that likely returned to form in 2022.

A challenge with these types of asterisk years is to budget reasonably. There's a temptation to assume that good times will always be with us and that challenging years will be only one year. Smart organizations approach budgeting with a clear-eyed data focus, knowing that:

- All donors are not created equal. Multi-year donors will retain better and give more than newly acquired donors. Thus, a jump in acquisition in one year will not instantly transform a donor file, as many donors will not make their second gift.
- Budgeting by channel has as many flaws as marketing by channel. Smart organizations can flex their spending to what is working and know what is working with true attribution.
- Bottom-up budgeting (assessing by campaign and communication) and top-down budgeting (assessing file health and metrics) are perfect complements. Doing both helps you determine if any weak points in your budgeting process or communications require strengthening. It also means they grew as other organizations shrank.



Christian Appalachian Project: Omnichannel budgeting for omnichannel marketing

For many years, CAP had used a bottom-up approach to budgeting, campaign by campaign and program by program. The process was done at each segment level within each campaign to establish accurate costs and revenue KPIs.

These budgets were fairly accurate until they took a more integrated approach to their program. Between 2018 and 2022, they:

- Started email acquisition
- Added search and display ads
- Increased digital touches to 153 for the year
- Tested multiple digital platforms to improve the user experience
- Launched a crypto donation platform
- Added peer-to-peer testing

They will also be adding influencer marketing with GIVEfluentia this year. They are constantly adjusting and pivoting based on what's happening in the world. Neither mail nor digital are on autopilot. Nor do they live in silos. How did they get there? They:

- Integrated the communications and digital teams
- Aligned earned media with paid media
- Tested various co-targeting techniques for direct mail and digital together
- Increased very valuable multi-channel donors by using data and modeling to identify digital donor prospects from mail and vice versa.

All this change and investment meant more than a bottom-up budgeting approach was needed. The total budget numbers were being met, but campaign-level budgeting was inaccurate. For 2022, they approached the budgeting season differently by applying a top-down approach alongside the bottom-up approach as a reference point.

The top-down approach was simple: it entailed forecasting the total revenue budget using CAP's donor life-cycle trends. When comparing it to the bottom-up approach, the total revenue had a difference between the two of less than 1%. This allowed CAP and Moore to set up new KPI expectations. Rather than focusing on each program, CAP and Moore look at their file makeup and the goals associated with new donors, consecutive-year donors, etc. This revolutionized fundraising at CAP and how fundraising is measured.

PUTTING IT ALL TOGETHER

Building the ark before the rain

There is a proverb that says that the best time to plant a tree was 20 years ago; the second-best time is today. Part of what winded some organizations coming into 2022 is they didn't invest in 2020 or 2021. This creates what we call the old mattress problem. When you look at a graph of donors acquired, it looks fine on the left of the graph, fine on the right of the graph, with a distinct droop in the middle.

“There is a proverb that says that the best time to plant a tree was 20 years ago; the second-best time is today.”

That's a droop that will never fully go away. If you acquired fewer donors in 2021, you will almost certainly have fewer second-year donors in 2022. If you acquired fewer in 2019 or 2020, you will have a drop in 3+ year donors. Many a direct marketing fundraiser has wished for a time machine to go back and build a more robust file; few, if any, wish they could have stopped their past selves from acquiring too many donors.

What's the moral of this story? Act now to lift that droop and set your organization up for a robust, file-filling future.

If you haven't started thinking proactively about creative ways to cut costs, the time is now.

Today is the day if you haven't begun prioritizing speed at all points of the mailing process.

If you're not shifting data to be the force that powers the rest of your fundraising programs, start shifting now.

If you haven't started CTV advertising, welcome. It's a perfect time to start. Your results could be great this year. But imagine what it will feel like next year as you watch results boom when your systems are set up, your ads are honed, your targeting refined with a year of data to digest, and more.

Let's look at one more case study to drive this point home.



Anti-Defamation League: Growth from reimagining direct marketing

In May 2021, Moore and ADL partnered to focus initially on their direct mail program. After completing data analysis and identifying areas of opportunity, the team created a prioritized road map outline. In the first year, the focus was on re-establishing their acquisition program, which had been put on hold when COVID hit. Retention and donor value were two primary focuses for their renewal program. To improve these, we spent a year testing repeatedly while also designing a donor journey for the brand-new mid-level program called Front Line.

These moves resulted in:

- 11 new controls after a year of testing
- An 18% increase in overall revenue
- A two percent increase in current-year donors
- An 11% increase in overall donor retention
- A 16% increase in revenue per donor

Then, in 2022, ADL increased its investment in acquisition and entrusted its digital program to Moore. We continued to focus on retention and donor value and helped create:

- A 53% increase in direct mail revenue
- A 15% increase in digital revenue
- A 22% increase in current-year donors
- A 9% increase in revenue per donor
- Doubling the number of \$1,000 gifts from the focus on real mid-level donor journeys
- A 70% increase in new donors

This did not require a much larger investment into their program but rather an optimization of their existing budgets. Once the program turned around, they increased only the acquisition budget, keeping all donor programs the same.

Remember: It is never too late to creatively cut costs, increase your speed to market, optimize data as your connective tissue, and go omnichannel. Your future self will thank you.



Animal Rescue

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
Animal Rescue	-8%	+8%	-15%

SECTOR	RESP. RATE	AVG. GIFT	REV. PER PIECE
Overall	1.52%	\$37	\$0.57
Renewal	2.75%	\$44	\$1.22
Acquisition	0.94%	\$27	\$0.26

Animal-focused organizations had among the most moderate losses from 2021 to 2022 partly because they did not have the same increases from 2019 to 2021 as many organizations experienced. While they have strong acquisition response rates, lower average gifts tend to be the flipside of that same coin.

Domestic Services

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
Domestic Service	-12%	+9%	-20%

SECTOR	RESP. RATE	AVG. GIFT	REV. PER PIECE
Overall	1.55%	\$58	\$0.90
Renewal	3.03%	\$62	\$1.89
Acquisition	0.54%	\$45	\$0.25

One of the sector's largest increases in average gift year-over-year was likely due to the sector's largest drop in the number of gifts. This may be due in part to a shift to international relief efforts with the Ukraine crisis shifting some giving priorities. For example, as four new international relief organizations in Ukraine entered Fidelity Charitable's top 20 for donor-advised fund disbursements, two domestic services organizations (Feeding America and YMCA) fell out.



Environmental and Wildlife

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
Environmental & Wildlife	-9%	+0%	-9%

SECTOR	RESP. RATE	AVG. GIFT	REV. PER PIECE
Overall	1.52%	\$37	\$0.57
Renewal	2.75%	\$44	\$1.22
Acquisition	0.94%	\$27	\$0.26

Environmental organizations came closer than any other sector to matching 2021 results. This is likely in part because they did not have the same huge increases from 2019 to 2021 as other sectors. Environmental donors also tend to be younger and thus less impacted by inflation than other organizations' donors. The lower-than-average revenue per mailing among donors is worth addressing.



Health – Disease

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
Health - Disease	-9%	+9%	-17%

SECTOR	RESP. RATE	AVG. GIFT	REV. PER PIECE
Overall	1.68%	\$36	\$0.60
Renewal	2.97%	\$38	\$1.13
Acquisition	0.69%	\$25	\$0.17

It has been a challenging time to raise money for diseases that don't start with a C and end with OVID-19. The disease sector has the lowest revenue per mailing from donor mailings and below average acquisition revenue per piece as well. Thankfully, successful disease organizations have been diversifying outside of mail and making great gains in DRTV and programmatic media, as discussed earlier with the omnichannel approach.



Health – Medical

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
Health - Medical	-17%	-3%	-14%

SECTOR	RESP. RATE	AVG. GIFT	REV. PER PIECE
Overall	1.21%	\$63	\$0.76
Renewal	3.38%	\$72	\$2.42
Acquisition	0.42%	\$37	\$0.15

Medical charities had a strong year of results with donor communications with the highest revenue per mailing for renewal mailings. However, they also had the most challenging year of any sector at recruiting new donors to their missions, with the lowest revenue per mailing in acquisition. This would tend to indicate that part of the long-term prospects for medical charities is to shift investment from new donor acquisition to lapsed reactivation.

Hunger and Poverty

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
Hunger & Poverty	-17%	-3%	-14%

SECTOR	RESP. RATE	AVG. GIFT	REV. PER PIECE
Overall	1.21%	\$63	\$0.76
Renewal	3.38%	\$72	\$2.42
Acquisition	0.42%	\$37	\$0.15

Hunger relief organizations tend to get more donations when people believe there are hard economic times, as there were in 2020-2021. Because of this increase in 2020 and 2021, 2022 giving remains well above 2019 levels.





International Relief

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
International Relief	-15%	-3%	-12%

SECTOR	RESP. RATE	AVG. GIFT	REV. PER PIECE
Overall	3.22%	\$43	\$1.37
Renewal	3.70%	\$44	\$1.63
Acquisition	1.40%	\$33	\$0.47

International relief charities had the best year of any sector with acquisition. With the sector's best acquisition response rate and an above average gift, acquisition results fell year-over-year but still were the envy of nonprofits. Much of this is Ukraine-related. For example, the four organizations that entered Fidelity Charitable's top 20 for donor-advised fund disbursements were international relief charities working in Ukraine: World Central Kitchen, United States Fund for UNICEF, Save the Children Federation, and CARE. This shift to acquisition may also explain the sector's worst average gift result with a shifting of volume and results in new audiences with lower average gifts.

Political and Advocacy

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
Political & Advocacy	-4%	+21%	-21%

SECTOR	RESP. RATE	AVG. GIFT	REV. PER PIECE
Overall	1.99%	\$32	\$0.65
Renewal	5.01%	\$32	\$1.61
Acquisition	0.61%	\$33	\$0.20

Political and advocacy giving was one of the most robust sectors in 2022. This is likely partly from the mid-term elections and the rise of salient issues like the Dobbs decision. It remains to be seen whether 2023 will raise similar issues to trigger reactive giving.

Religious

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
Religious	-7%	+6%	-12%

SECTOR	RESP. RATE	AVG. GIFT	REV. PER PIECE
Overall	2.35%	\$31	\$0.73
Renewal	3.83%	\$32	\$1.21
Acquisition	0.74%	\$29	\$0.21

Religious organizations have lower-than-average revenue per mailing among donors in large part due to lower average gifts. This may be because some donors to religious organizations treat their donations like tithing, resulting in more frequent, smaller gifts. There's also less difference between acquisition and renewal average gift, potentially showing these gifts are more difficult to upgrade than those in other sectors because of this tithing-like behavior.



Veteran Services

Change from 2021 to 2022

SECTOR	REVENUE	AVG. GIFT	# OF GIFTS
Veteran Services	-10%	+4%	-14%

SECTOR	RESP. RATE	AVG. GIFT	REV. PER PIECE
Overall	2.28%	\$33	\$0.76
Renewal	3.80%	\$36	\$1.36
Acquisition	1.07%	\$23	\$0.25

Veteran services organizations had the second-highest response rate to acquisition mailings in 2022, behind only Ukraine-crisis-fueled international relief acquisition. This also contributes to a lower-than-average average gift among VSO donors as these organizations tend to strategically be more welcoming to smaller-dollar donors.



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Methodology

Mail data come from two sources:

- Approximately \$2 billion from Moore's response management facilities across 181 organizations. Only data from those with full caging results for 2021 and 2022 were used. All sector data is from organizations with \$50 million or more in results.
- Results from over 700 million pieces mailed by Moore's agency clients with about 15 million responses.



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