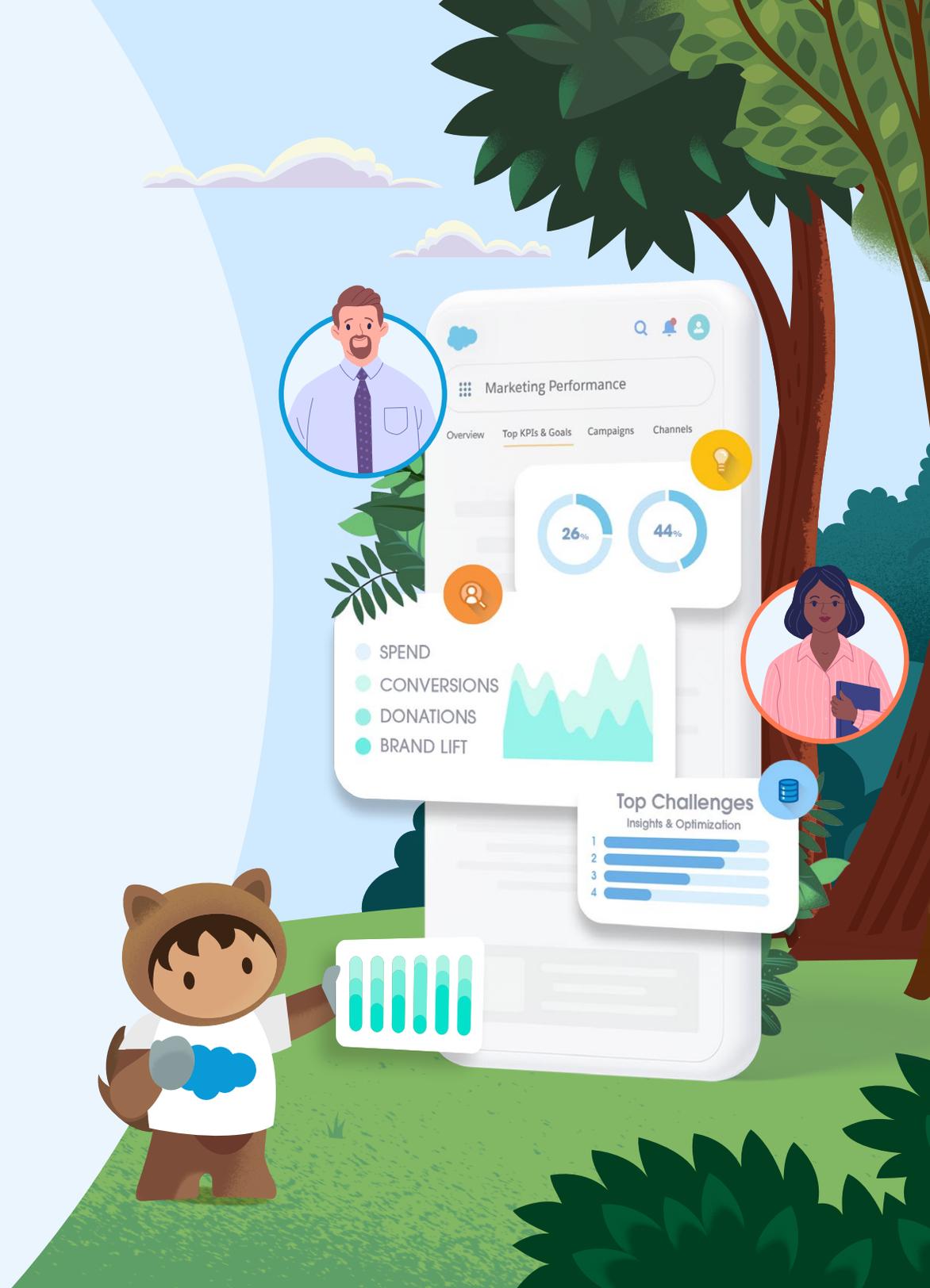


State of Nonprofit Marketing

Insights and trends from over 8,200 global marketers with a focus on how over 390 nonprofits marketers are adapting their strategies in 2021.



The State of Marketing Report

The Salesforce State of Marketing report, which is in its 7th year, surveyed over 8,200 marketing leaders in 2021. For the majority of the Nonprofit version of this report, we analyzed specific results from over 390 nonprofit marketers in more than 30 countries, to find out:

- Which shifts have occurred in marketing strategies, priorities, and challenges
- The current state and trajectory of marketing's digital transformation
- Trends in marketing data management
- How collaboration is changing as many teams operate remotely

Occasionally you may see terms used in a corporate setting, however data not relevant to the nonprofit space was excluded. Data in this report is from a double-blind survey conducted from May 4 through June 3, 2021 from marketing managers, directors, VPs, and CMOs. Respondents include marketers across North America, South America, Asia Pacific, Europe, the Middle East, and Africa.

Additionally, this report includes results from The Nonprofit Experience Index survey of over 4,900 donors, volunteers, and beneficiaries worldwide. [Learn more.](#)



Salesforce Research provides data-driven insights to help businesses transform how they drive customer success. Browse all reports at salesforce.com/research.



Over 8,200 marketing leaders, and over 390 nonprofit marketers, surveyed worldwide

Organisation Sizing

Small (21-100 employees)31%
Medium (101-3,500 employees)53%
Large (3,501+ employees)16%

*Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers). Sizing percentages are based on the entire population of 8,200 marketers, except where called out in the report as nonprofit sizing responses.



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Executive Summary

Nonprofit marketers are blazing new trails as they prioritize innovation, digital transformation, and a work-from-anywhere future that constitutes anything but “back to normal.”

To get there, they are embracing technology, data, and new measures of success.

01 Marketers Shift with the Changes in Uncertain Times

Nonprofit marketers are adapting at a rapid pace as uncertainty continues to shape supporter expectations. 89% have changed their digital engagement strategy.

02 Marketing Steps Up to Today's Digital Expectations

With the shift to digital, marketers are accelerating their digital transformations. 88% of nonprofit marketers changed their content strategy, yet only 4 in 10 donors, volunteers and beneficiaries say that they receive personalised nonprofit communication.

03 Collaboration Drives the Market-from-Anywhere Era

No longer tied to offices, a distributed workforce is reevaluating how they engage with not only customers, but with each other. 75% of marketers say the pandemic has permanently shifted how they collaborate and communicate at work.

04 Marketing is Spelled D-A-T-A

Data empowers marketers to deliver the trusted, personalised engagement customers expect, but managing data is becoming more complex. Marketers expect a 40% increase in the number of data sources they use between 2021 and 2022.

05 Metrics and KPIs Continue to Evolve

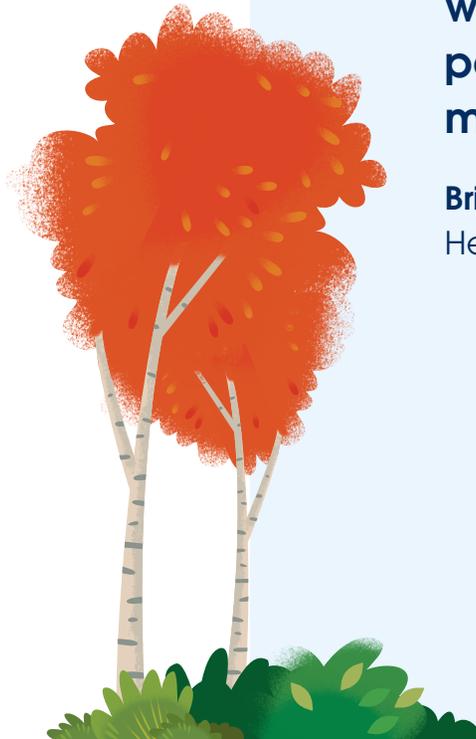
As their work becomes more strategic and valuable for the business at large, marketers are reevaluating what successful marketing looks like. 84% of CMOs align their KPIs with their CEO's.



Marketers Shift with the Changes in Uncertain Times

Nonprofits are experiencing change at unprecedented scale and speed. Rocked by a pandemic and all of its effects on constituent expectations and behaviors, nonprofit marketers are shifting their strategies in new ways – as is true for corporations also.

49% percent of nonprofit marketers say their digital engagement strategy has completely changed since the pandemic (62% at large organisations). 48% say their marketing channel mix completely changed (64% at large nonprofits). Across every metric except for workplace strategy, far more large and small nonprofits shifted when compared to medium nonprofits.



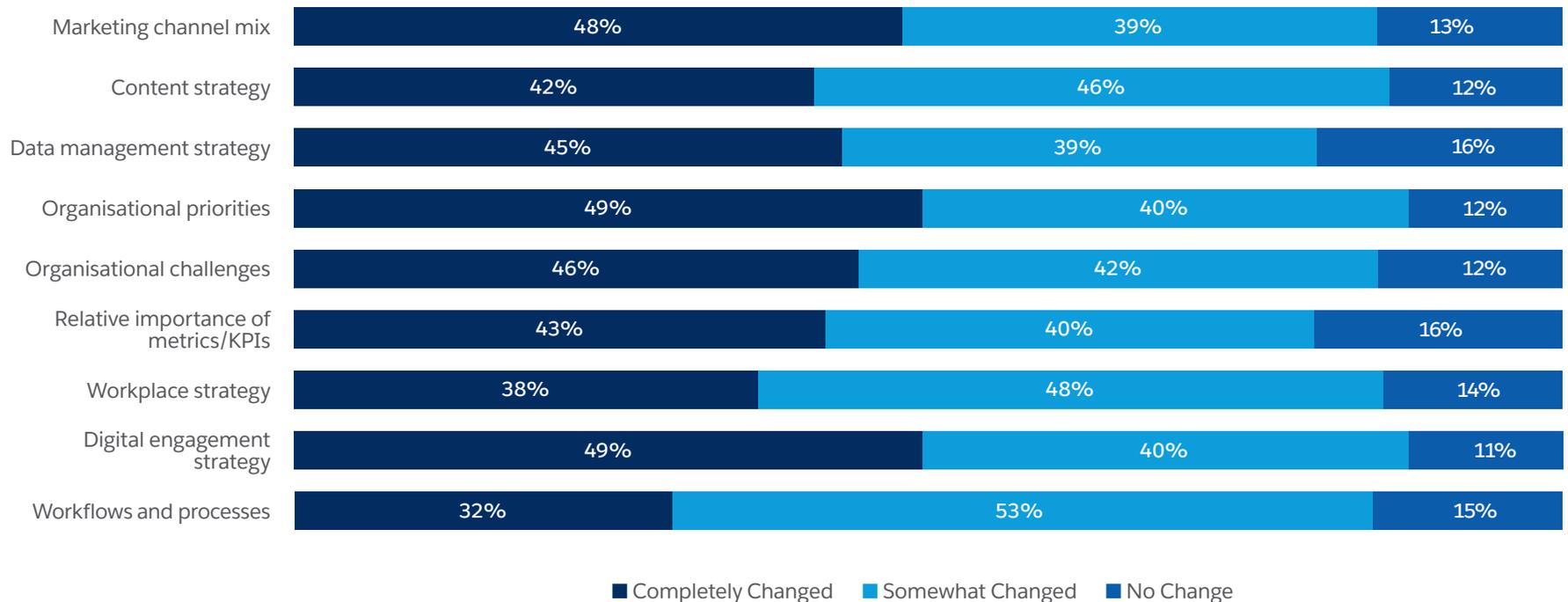
“We realized that people were going to be connecting with us virtually more and more. As the data about those interactions became more voluminous, we wanted to make it centralized and leverageable. These issues were already at play before the pandemic, but it made the need more urgent.”

Brian Tumpowsky,
Head of Digital Technology, UNICEF USA

Marketers Shift with the Changes in Uncertain times

As the World Transformed, so Did Marketing

Extent to Which Nonprofit Marketers Say the Following Have Changed Since Before the Pandemic



01

Marketers are Optimistic and Feel Valued, Yet Also Feel the Pressure to Evolve

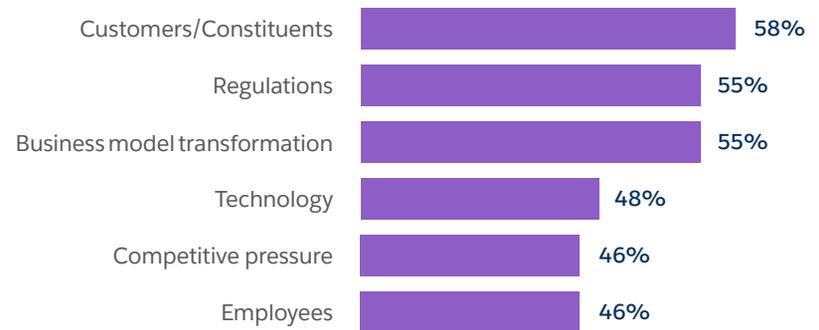
The majority of nonprofit marketers are entering the next phase of their work with renewed optimism and purpose from a financial lens. In fact, 64% of marketers expect revenue growth, yet only 6% expecting decline. What's more, marketers see themselves as having a bigger role in driving that growth; 78% of marketers feel their work provides greater value now than it did a year ago, with only 1% disagreeing with that statement.

Optimism and purpose do not translate into complacency, however, and this is particularly true during times of change. **84% of CMOs say their marketing must transform in order to be competitive.**

Marketers are Optimistic as Their Strategies Shift



Marketers Who Say the Following Factors Impact Their Strategy



The Focus is on Data and Innovation, but Staff Struggle to Create a Great Experience

A primary focus on internal data and tools will help nonprofits solve their larger challenges of making decisions and collaborating to provide a better constituent experience.

Nonprofits are prioritizing unifying data sources so that information can be shared across the organisation. This makes sense, as without access to data, innovation is difficult. Innovation was their #3 priority and the #1 challenge. Coming in #4 on the priorities list was improving the use of technology, which was #2 for large organisations, and is foundational to every other priority.

Aside from the two top internal challenges around innovating and collaboration, the majority focused on a cohesive journey and real-time engagement to keep ahead of rapidly shifting supporter expectations.

Marketers Face a Mix of Familiar and New Priorities and Challenges

Nonprofit Marketers' Top Priorities

- 1  Improving Marketing ROI/ Attribution
- 2  Unifying Customer Data Sources
- 3  Innovating
- 4  Improving Use of Tools & Technologies
- 5  Sharing a Unified View of Customer Data Across Business Units

Response Category

-  Data & Metrics
-  People, Process & Technology
-  Engagement & Experience

Nonprofits' Top Challenges

- 1  Innovating
- 2  Collaboration
- 3  Engaging Customers in Real Time
- 4  Evolving Digital Customer Experiences
- 5  Creating a Cohesive Customer Journey Across Channels and Devices

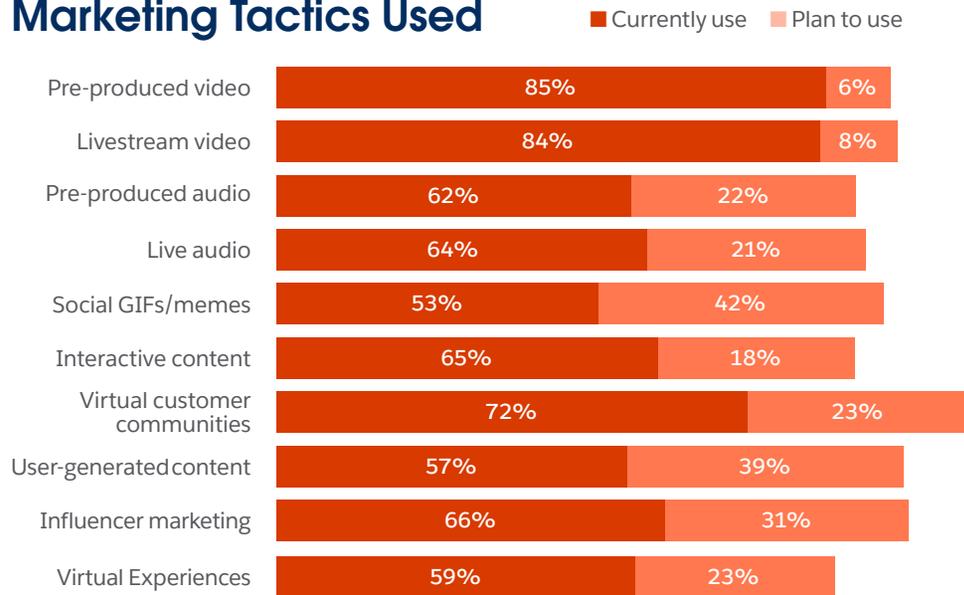
Steps to Achieving Priorities and Overcoming Challenges

You can combine these top challenge and priority areas into a plan that helps you make data-driven decisions and drive innovation to improve every part of your cause marketing experience. Although these areas aren't always linear, each relates, beginning with tools, data, and collaboration internally, so that you can engage with and measure the stakeholder experience externally.

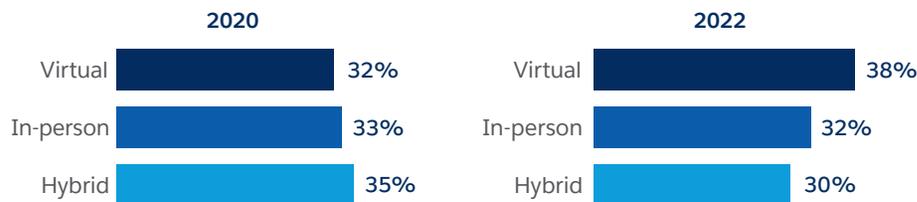


Marketing Steps Up to Today's Digital Expectations

Marketing Tactics Used



Estimated Distribution of Marketing Event/Sponsorship Formats



Stakeholder Experience Remains a Priority — With Nonprofits Moving to New Tactics to Change With the Times

Marketers have widely adopted video as the top currently used tactic, however are shifting with trending formats. For example, **42% of nonprofits are planning to adopt Social GIFs and Memes**, which was the least currently used response, but particularly popular with the younger generations.

Highly personal user-generated content is the second highest increase, with **39% planning to use**, followed by influencer marketing, leveraging highly networked individuals to be advocates for their mission.

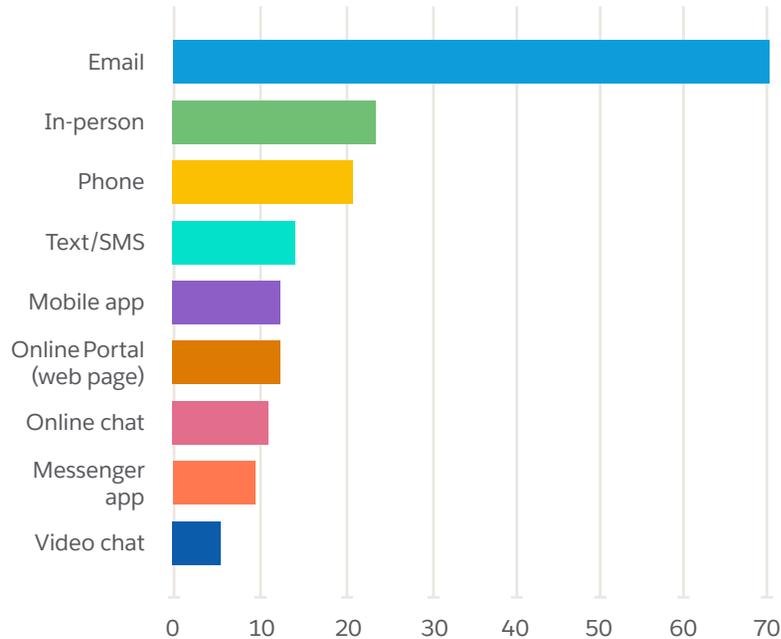
Given that, it makes sense that the top 5 increases in use of channels is video, social, and ads, followed by digital content and nonprofit's website.

Events too are gradually making a return, however, with the rapid shift to virtualized events marketers made in 2020, **virtual events are only expected to increase by 6% in 2022**.

* Salesforce State of the Connected Customer Report, October 2020.

Most Supporters Prefer Email, Yet it Doesn't Feel Personalised to Them

Communication channel preferences



See Nonprofit Experience Index Survey

Supporter Communications are Core to their Experience

6 in 10 respondents in the Nonprofit Experience Index survey had supported or benefited from charitable services in the first half of 2021, with 9 in 10 all saying the organisation met or even exceeded their expectations.

Email was by far the #1 communication channel preferred, however responding to the statement that “**The communications I received from the nonprofit were personalised for me**”, only 33.6% agree, and 6.4% strongly agree.

Additionally, certain people think that nonprofits ask too much of them – 19% say that the organisation asks too often for money and 16% say they are asked too often to volunteer. However, similar proportion (18%) would like to be asked to give more often and one quarter to volunteer more (25%).

This provides an opportunity for nonprofits to meet people on the channels they prefer, and use data to time and personalise content.

Although email still remains a top preferred channel for constituents, this preference shifts per demographic and individual, with increasing numbers each year preferring other channels.

Some Supporters Want More Opportunities to Give, Others Want Less

Surveys and engagement data can help segment people and time communications

“The nonprofit or charity asks me for volunteer time too often” (weighted)

Response	Present
1 Strongly Disagree	25.8%
2 Disagree	32.5%
3 Neutral/Neither Agree nor Disagree	25.5%
4 Agree	12.4%
5 Strongly Agree	3.9%

“The nonprofit or charity asks me for money time too often” (weighted)

Response	Present
1 Strongly Disagree	23.6%
2 Disagree	32.0%
3 Neutral/Neither Agree nor Disagree	25.0%
4 Agree	15.4%
5 Strongly Agree	4.0%

“I’d like it if the nonprofit or charity asked me to volunteer more often” (weighted)

Response	Present
1 Strongly Disagree	13.1%
2 Disagree	23.4%
3 Neutral/Neither Agree nor Disagree	38.7%
4 Agree	20.4%
5 Strongly Agree	4.4%

“I’d like it if the nonprofit or charity asked me to donate more often” (weighted)

Response	Present
1 Strongly Disagree	17.2%
2 Disagree	28.8%
3 Neutral/Neither Agree nor Disagree	35.7%
4 Agree	14.2%
5 Strongly Agree	4.0%



Marketers Invest in Technology to Support & Drive Strategy

Although demand for marketer's creativity isn't going anywhere soon, the increasing digital nature of constituent engagement means that marketers increasingly need to understand technology and automation.

Most marketers have CRM and Marketing Automation capabilities, but over half of marketers said that departments used different CRM systems, which causes siloes.

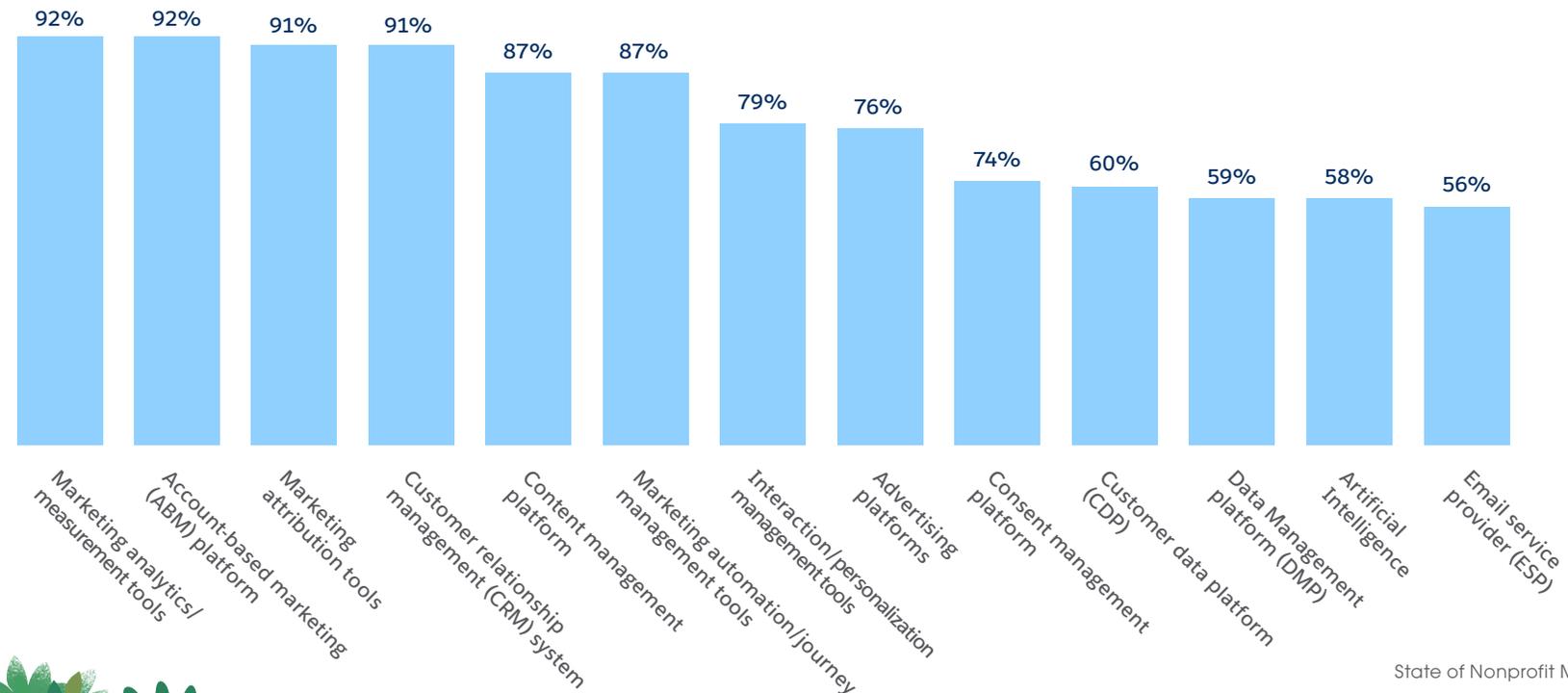
Technology was also the #2 factor impacting marketing strategy, just behind customer/constituents.

Digital is more important than ever. 83% say people's preferences are changing our digital strategies, and 82% say meeting expectations depends on their digital capabilities.

Additionally, 79% of nonprofit marketers said their work will be more technology-driven after the pandemic than it was before.

As Digital Customer Engagement Grows, so Does the Marketer's Toolkit

Marketing Tools and Technologies Used



03

Collaboration Drives the Market-from-Anywhere Era

Marketers rank collaboration as the second highest challenge this year, and improving collaboration as #6 on their priorities. **68% of nonprofits marketers say it's harder to collaborate now than before the pandemic.**

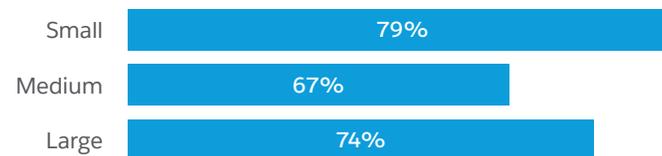
Most organisations feel that the pandemic has permanently shifted the way they collaborate and communicate at work.

Despite the fact that staff at many nonprofits have been physically apart, they don't necessarily feel disconnected from each other. In fact, the majority of marketers say they feel more connected to their managers, supporters, marketing colleagues, and partners. However, this is less so across departments.

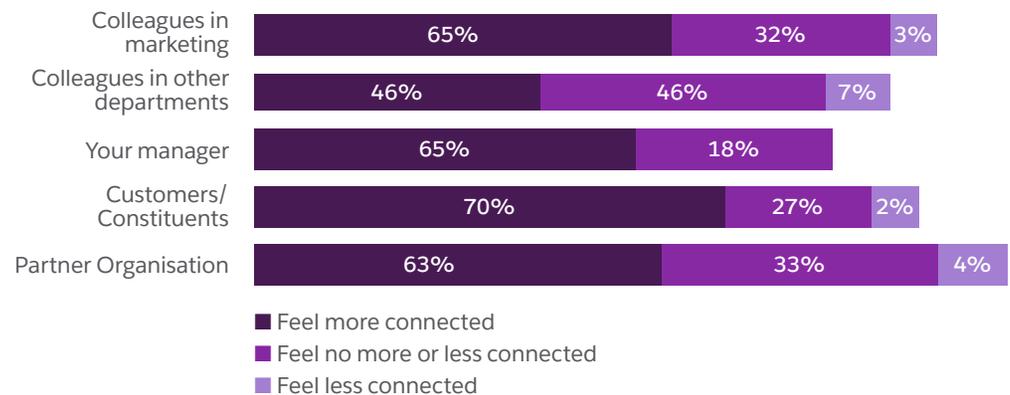
75% of nonprofits are adopting new policies around remote work, versus 82% of corporations.

Though Collaboration is More Challenging and Has Evolved, Many Marketers Feel More Connected

Marketers Who Say the Pandemic Has Permanently Shifted How They Collaborate and Communicate at Work



Marketers' Feelings of Connectedness to the Following Parties Versus a Year Ago



03

Collaboration Drives the Market-from-Anywhere Era

Marketers made a striking realization during more than a year of varying shelter-in-place orders: Employees can work from anywhere, with the right tools and processes.

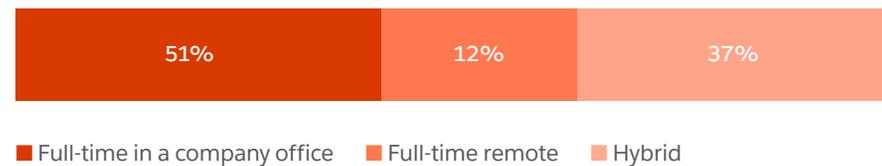
Like many changes made over the course of 2020 and 2021, this shift to working from anywhere is not going away, although the extent to which it will stick varies by region.

Nonprofit marketers are also adapting, in no small part by reevaluating the tools they use to connect. **77% of nonprofits have adopted new work collaboration technology due to the pandemic.**

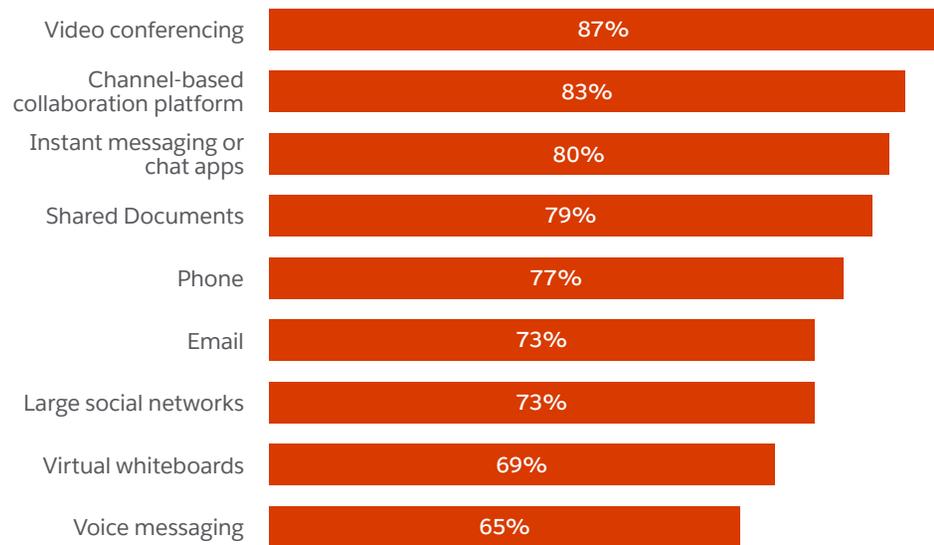
Real-time and video conferencing apps are the top used, while more nonprofits start to use newer technologies like virtual whiteboards.

The Work-from-Anywhere Era Will Continue

Anticipated Post-Pandemic Work Location



Employee Collaboration Technologies Used



Marketing is Spelled D-A-T-A

Customer Data is Plentiful, but Using it Remains Tricky

Average Number of Data Sources Used



Marketers Mostly Focus on First-Party Data

- 1 Transactional data
- 2 Declared interest/preferences
- 3 Known digital identities
- 4 Inferred interest/preferences
- 5 Second-party data

Like humans need water, marketing needs data – and lots of it – to be effective.

71% of nonprofit marketers say their engagement is data-driven.

Marketers across the board continue to forecast increases in the number of data sources they'll leverage. Nonprofits expect 4 new data sources by 2022, whereas corporations only expect 3. However, marketers feel they can do better in terms of using that data to drive experiences.

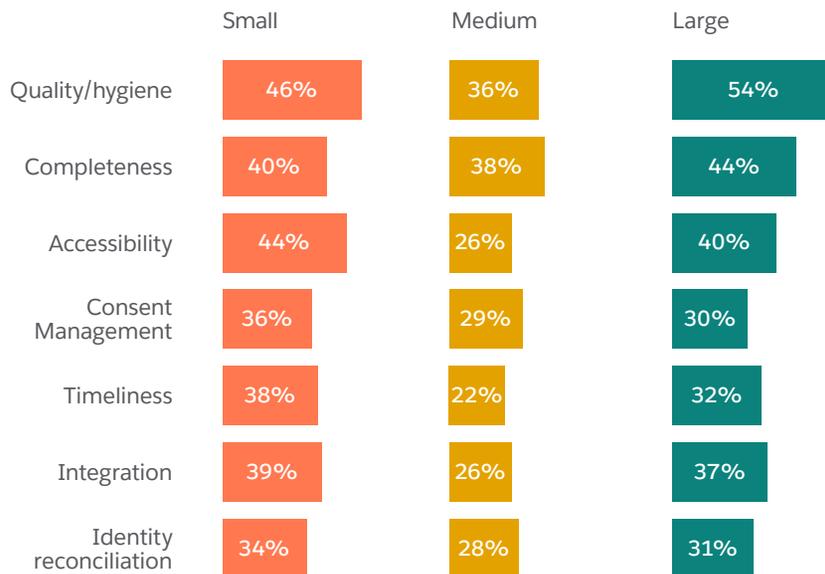
33% of nonprofit marketers are completely satisfied in their ability to create more relevant experiences with stakeholder data.

The most popular data sources are still 1st party, with 3rd party and anonymized data not showing up in the top 5 data sources used.

Marketing is Spelled D-A-T-A

Marketing Data Quality Still Leaves Much to Be Desired

Nonprofit Marketers Who are Completely Satisfied with the Following Aspects of Their Supporter Data



With so much emphasis being placed on supporter data and its implications for marketing, it's reasonable to assume that nonprofits would pull out all the stops to ensure its overall quality. Although many are satisfied, other nonprofit marketers have made only marginal – if any – progress in improving data hygiene, timeliness, and integration over time.

Data hygiene is by far the highest at 46% completely satisfied, with timeliness of data lowest at 33% completely satisfied across organizations of all sizes.

Additionally, small and large organisations are more likely to say that they are completely satisfied with their data.



Marketing is Spelled D-A-T-A

With so many types and sources of data at their fingertips, marketers are turning to technology to help them make sense of it all.

The ways in which nonprofit marketers leverage data management technology are as varied as the fragmented landscape of solutions, ranging from CRM platforms to homegrown solutions.

Audience segmentation was ranked #1, however personalization shows up lower, which aligns with the response in the Nonprofit Experience Index, **where only 40% of supporters agreeing that “The communications I received from the nonprofit were personalised for me”.**

Marketing Data Quality Still Leaves Much to Be Desired

Ranking of Customer Data Management Technology Use Cases

- 1 Audience Segmentation
- 2 Consent Management
- 3 Customer Insights
- 4 Personalization
- 5 Identity Resolution Across Systems



Spotlight: Artificial Intelligence (AI)

For nonprofits, Artificial Intelligence is primarily used for automating processes, and customer interactions.

Nonprofits overall, are wary of the rapid growth of AI. **77% of nonprofit marketers believe it will replace marketing roles and processes.**

While AI tools are continuing to evolve into ever-more powerful iterations, it's fundamental purpose is less about replacing individual marketers, and more about simplifying their daily search for data.

Nonprofit marketers adopt AI for its ability to surface more complex insights and predictions from large pools of data, making the process of data-driven marketing easier.



Nonprofits Are Expanding Use of AI

Marketers Focus on AI Use Cases to Impact Staff & Constituents

Top AI Use Cases Among Marketers 2021

- 1 Process Automation
- 2 Automate Customer/Constituent Interactions
- 3 Resolve Customer/Constituent Identities
- 4 Drive Next Best Actions in Real Time
- 5 Personalize The Overall Customer/Constituent Journey

** Base: Marketers who report using AI.

Although Lower on Types of Technology Adopted, Over Half Use AI



Metrics and KPIs Continue to Evolve

The definition of marketing success was already evolving prior to the events of 2020. But the radical shift in people's expectations and behaviors – not to mention nonprofit objectives – put that evolution into overdrive.

This has caused marketers to shift quite a bit, with strong emphasis on satisfaction, content performance, the marketing funnel, and revenue.

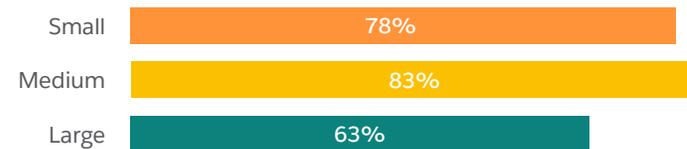
75% of nonprofit marketers have changed or reprioritized their metrics during the pandemic.

In a time of constant flux, CEOs and Executive Directors have been focused on the metrics that help nonprofits maintain focus, which marketers have stayed close to.

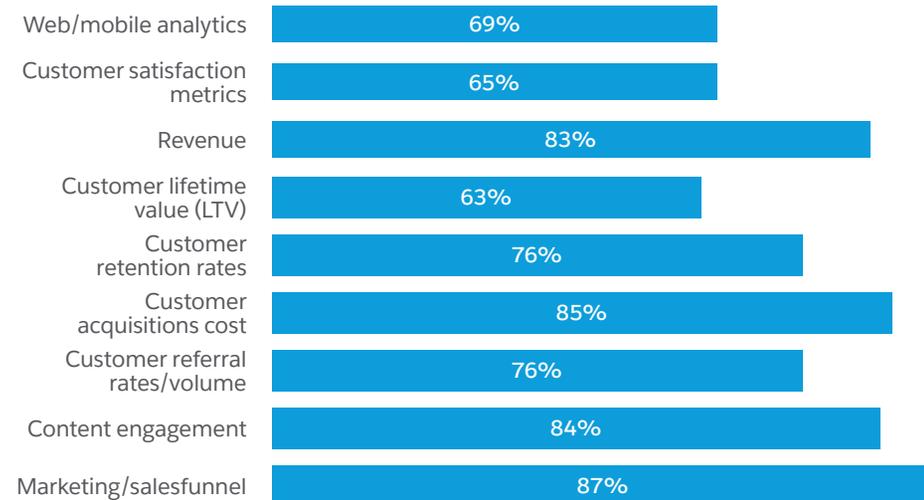
84% of nonprofit marketers align their KPIs with the CEO's priorities.

Marketers Greatly Expanded Their KPIs over the Past Year

Nonprofits That Have Changed or Reprioritized Metrics Due to the Pandemic



Nonprofits That Track the Following Metrics





Look Ahead: Marketing Skills and Training

Today, marketers need a unique and evolving collection of knowledge that constantly shifts between right- and left-brain mentalities. But many nonprofit marketers aren't getting the training they need.

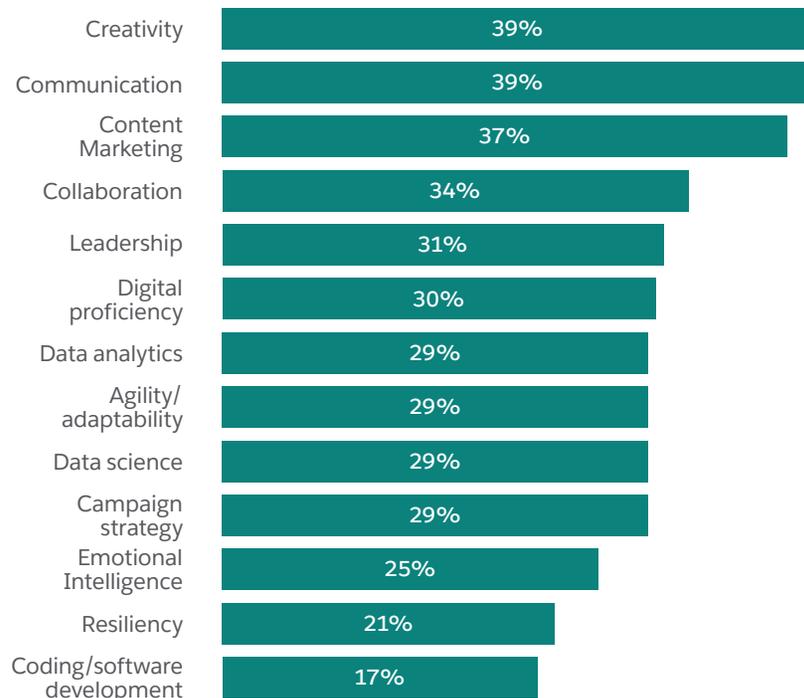
79% of nonprofit marketers agreed that their work would be more technology-centric after the pandemic than ever before, but just 30% say that they were trained on digital proficiency.

While creativity, content, and communication are the most common elements of marketing organizations' curriculums, they are provided by only a minority of organizations.

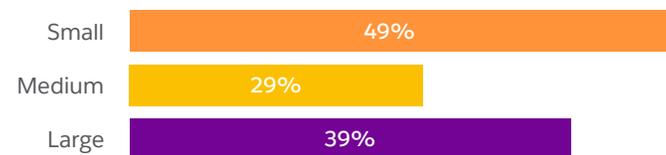
Even less common is training on interpersonal skills like emotional intelligence, the data science that underpins digital customer engagement and attribution, and perhaps the most important skill of all in 2021: resiliency.

As Marketing Evolves, Training Is Falling Behind

Marketers Who Say Their Employers Offer the Following Training



Marketers Who Rate the Employee Training as Excellent



Additional Survey of Nonprofit Donors,
Volunteers & Clients

The Nonprofit Experience Index

The Salesforce.org team also wanted to more directly understand the experience of donors, volunteers, and clients to see where there are opportunities to improve their experience and communications.

This data complements and expands upon the view of the marketer in the State of Marketing, with the findings shared in specific chapters of this report. We wanted to find out:

- What was the supporters experience with volunteering or donating, and similarly what was the client or beneficiary experience?
- How did they learn about the mission and what was the communication experience like?
- What do constituents prefer in terms of channels and what would they like to see more of?

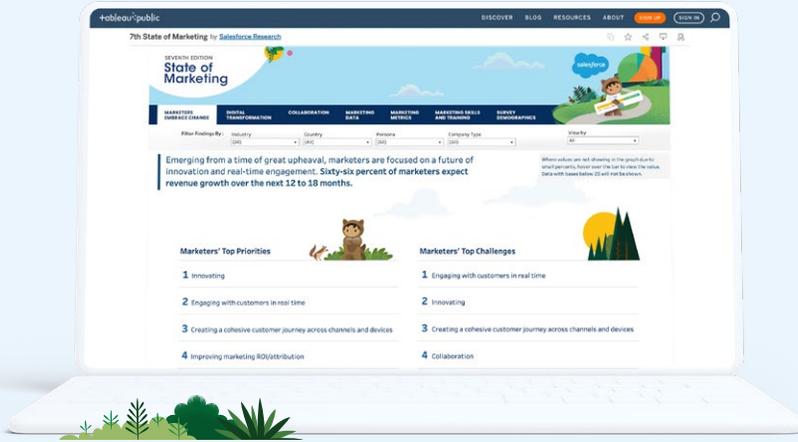
This is a summary of key findings from a global survey in the summer of 2021 exploring what over 4,900 donors, volunteers and beneficiaries in 7 nations think about their encounters with nonprofits.

[Read more](#)



Over 4,900 donors, volunteers,
and beneficiaries worldwide.

Resources



Explore State of Marketing Data in Tableau

Segment data by geography, industry, and more in our interactive Tableau dashboard.

[Explore the data](#)



Learn More About Marketing Cloud for Nonprofits

Build constituent-first communications fast.

[Learn more](#)



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