# EUROPEAN NONPROFIT PULSE 2025:

## Strategic insights to navigate 2026

-EFA-
European Fundraising Association

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EUROPEAN NONPROFIT PULSE 2025:
Tracking change, challenges & digital transformation

STRATEGIC INSIGHTS

# WELCOME



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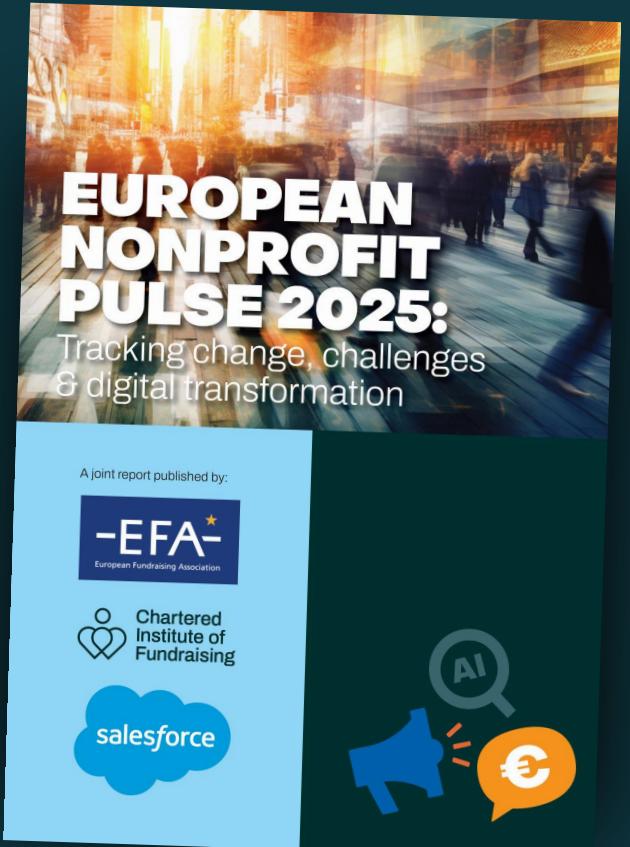
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# INTRODUCTION

## Research methodology

This report covers 2024-25 data collected by Salesforce in a global survey in April 2025, comprising responses from 751 nonprofits in four European countries – France, Germany, The Netherlands and the United Kingdom – representing a variety of staff sizes and causes.

## Staff sizes

Small (0-100)

Medium (101-500)

Large (500+)

## Primary causes

| | |
|---|---|
| Animals | Human/Social Services |
| Arts & Culture | International Aid |
| Children & Young People | Poverty & Social Welfare |
| Education & Schools | Religion & Faith-based |
| Elderly | Rescue |
| Environmental & Nature | Science & Research |
| Health & Hospitals | Sports |
| Human Rights | |

## Countries

The Netherlands (74)
9.9%

United Kingdom (300)
39.9%

Germany (194)
25.8%

France (183)
24.4%

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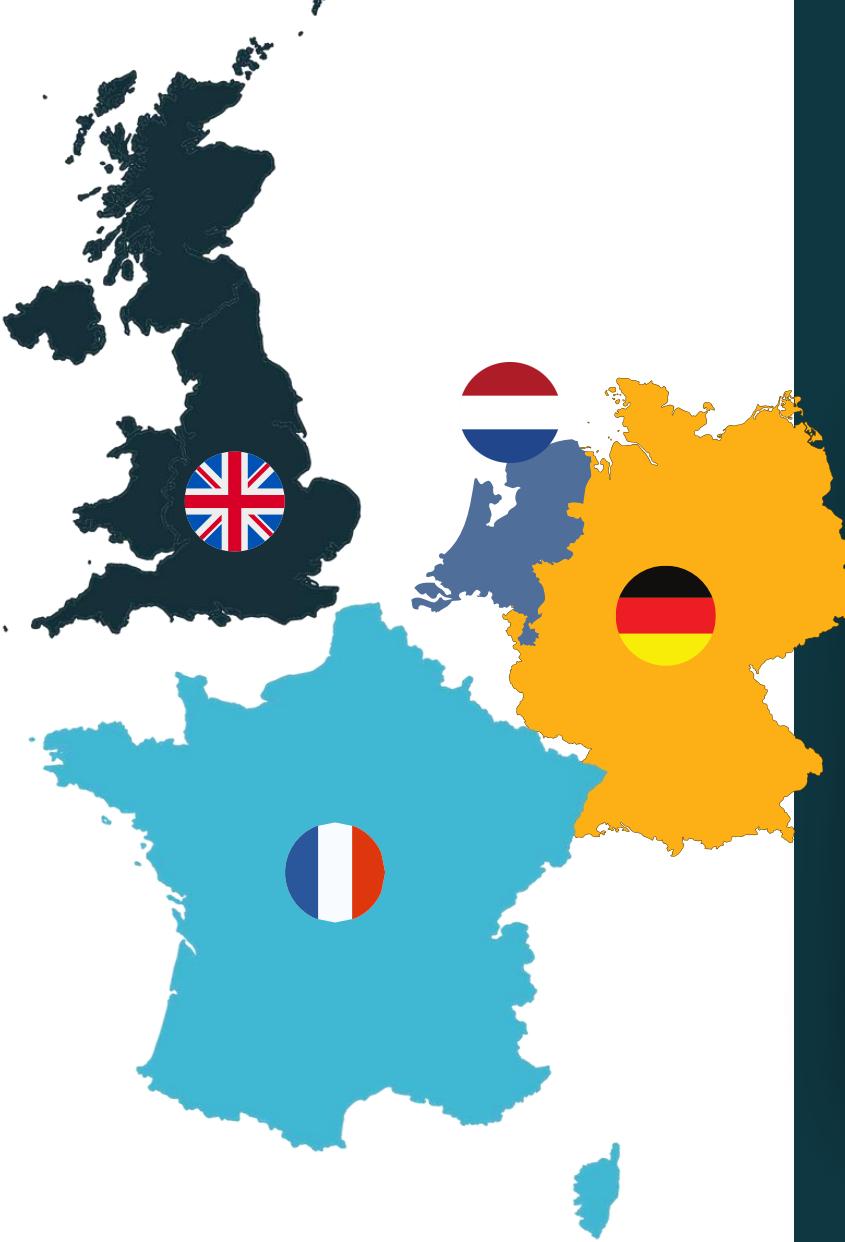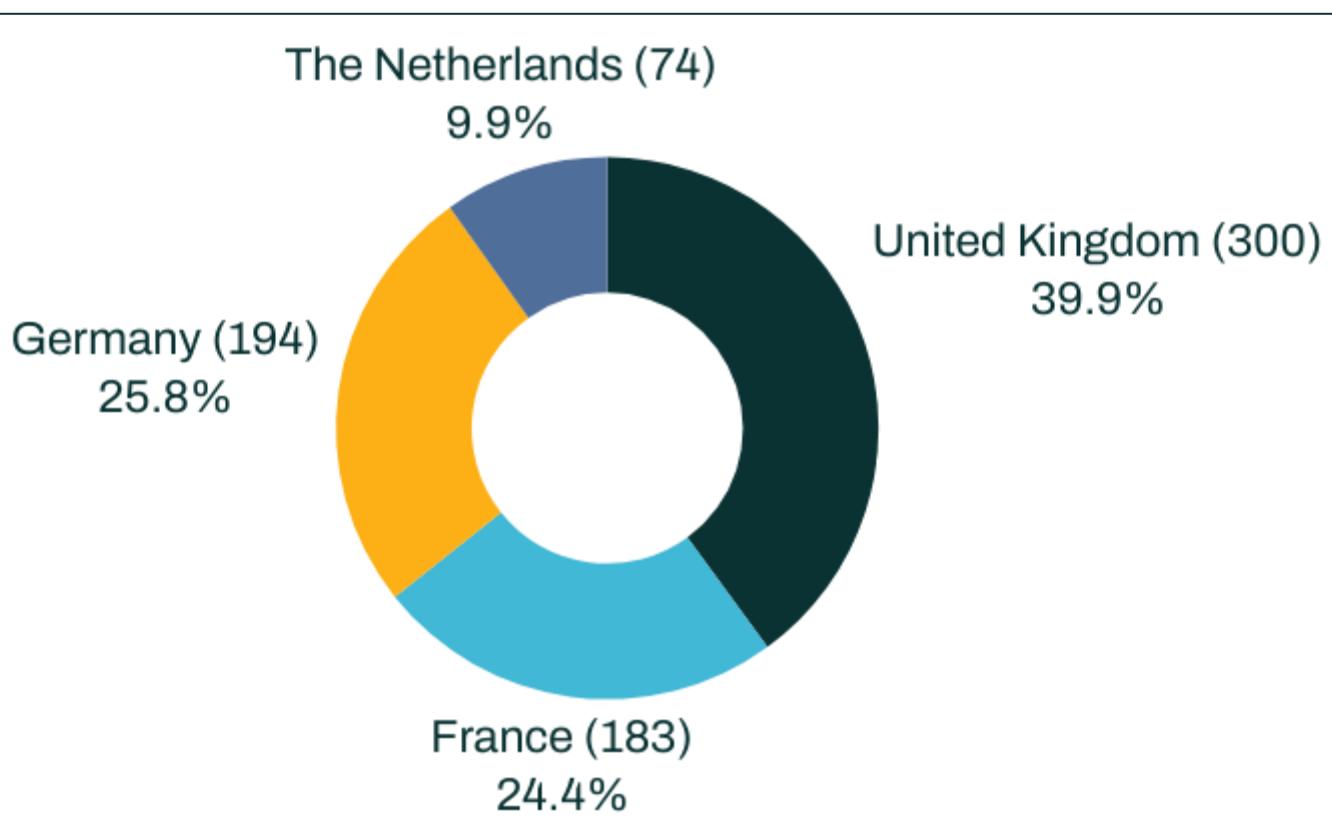
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# WHAT HAS CHANGED?

**Demand for services has surged**
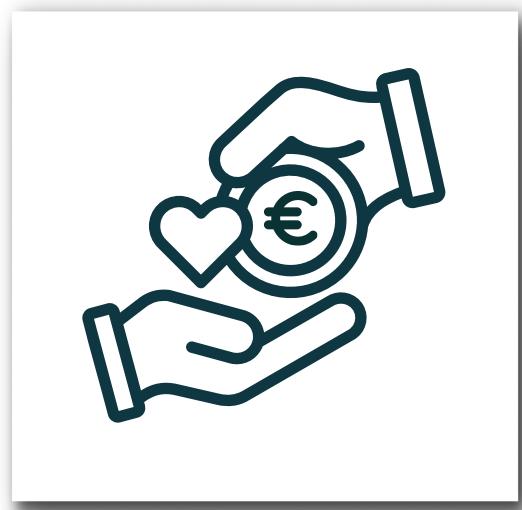
**Funding hasn't kept pace**

↑**36%** boosted investment in staff wellbeing

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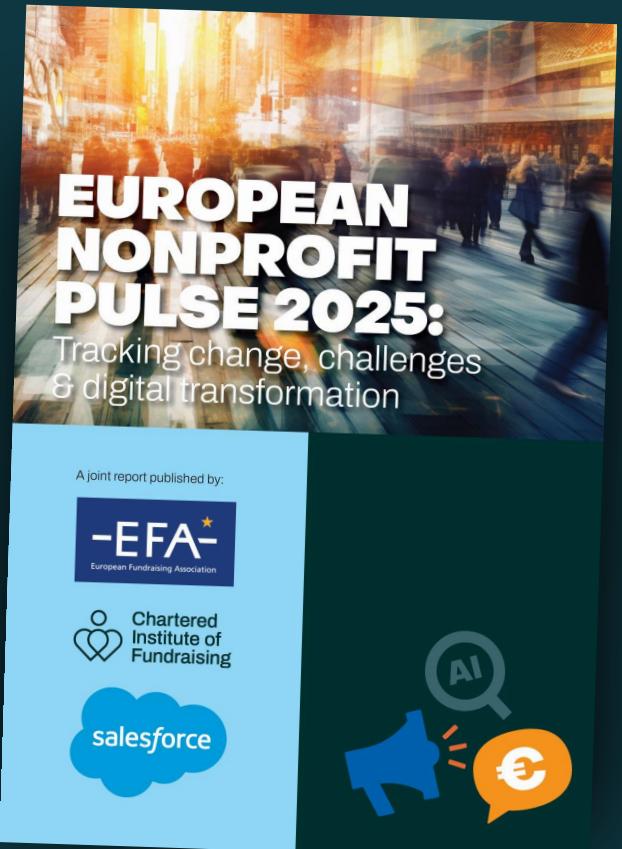
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# BIGGEST CHALLENGES

## Funding and workforce pressures dominate across all countries as the top operational concerns
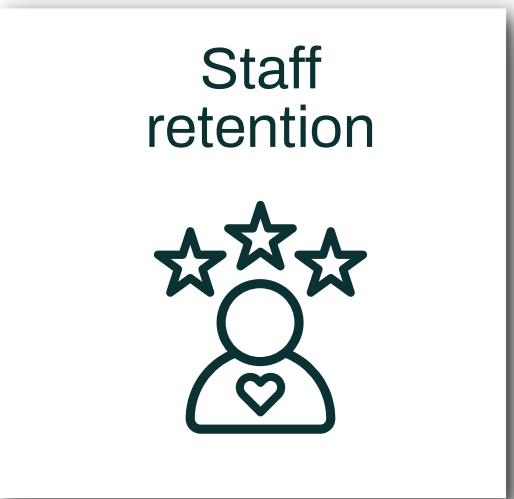
| Raising sufficient funds | Managing workload | Staff recruitment | Staff retention | Replacing funding cut by government |
|:---:|:---:|:---:|:---:|:---:|
| 36% | 35% | 29% | 28% | 27% |

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# TOP 3 CONCERNS BY COUNTRY



**France**
- Demand for services
- Use of digital channels
- Investment/tools/donors

**Germany**
- Demand for services
- Use of digital channels
- Number of staff

**Netherlands**
- Use of digital channels
- Investment/tools/donors
- Number of volunteers

**UK**
- Demand for services
- Use of digital channels
- Employee wellbeing

0%  10%  20%  30%  40%  50%  60%

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# GOVERNMENT SUPPORT

**Perceptions of how supportive national governments have been of fundraising vary widely by country**

**France**
**21%**

**Germany**
**44%**

**Netherlands**
**89%**

**UK**
**20%**
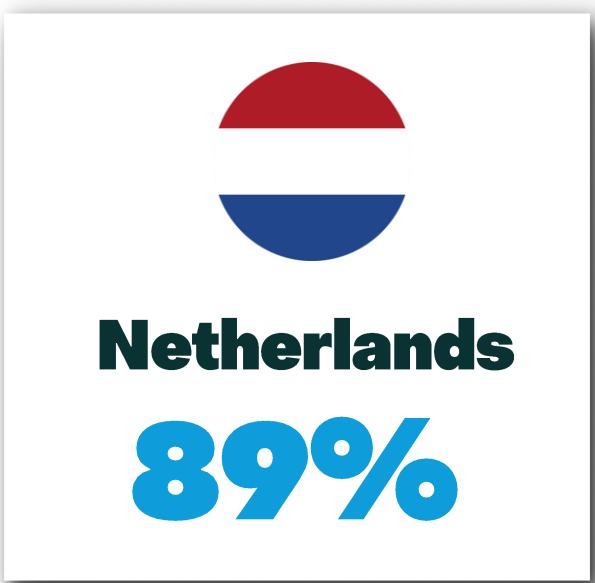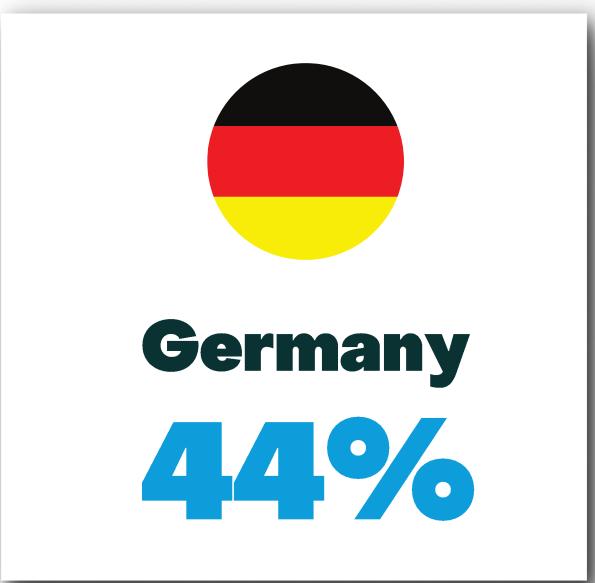
Percentage % of organisations choosing 4 or 5 on a scale of 1-5
where 1 is not at all supportive and 5 is very supportive

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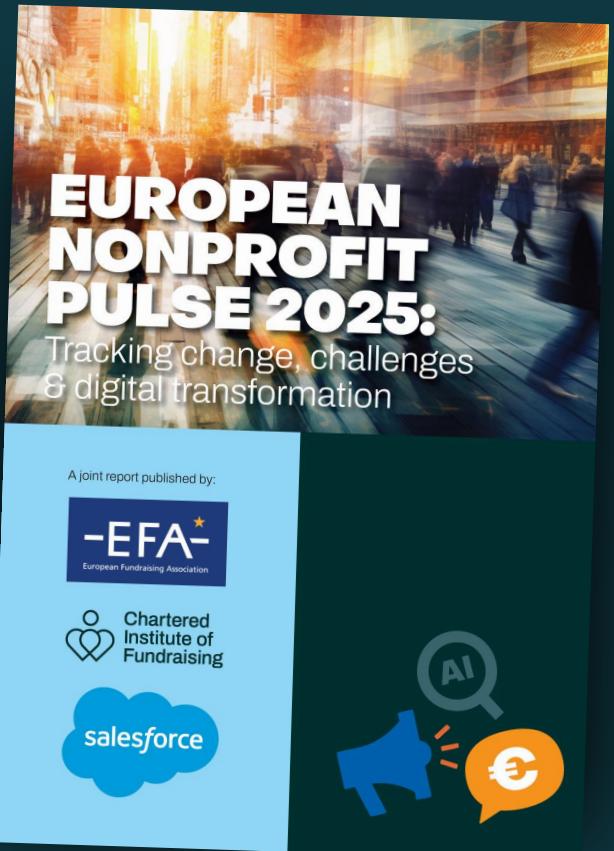
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# FUNDRAISING

## Top 5 fundraising strategy shifts

We are diversifying our strategy to include a wider mix of channels — **30%**
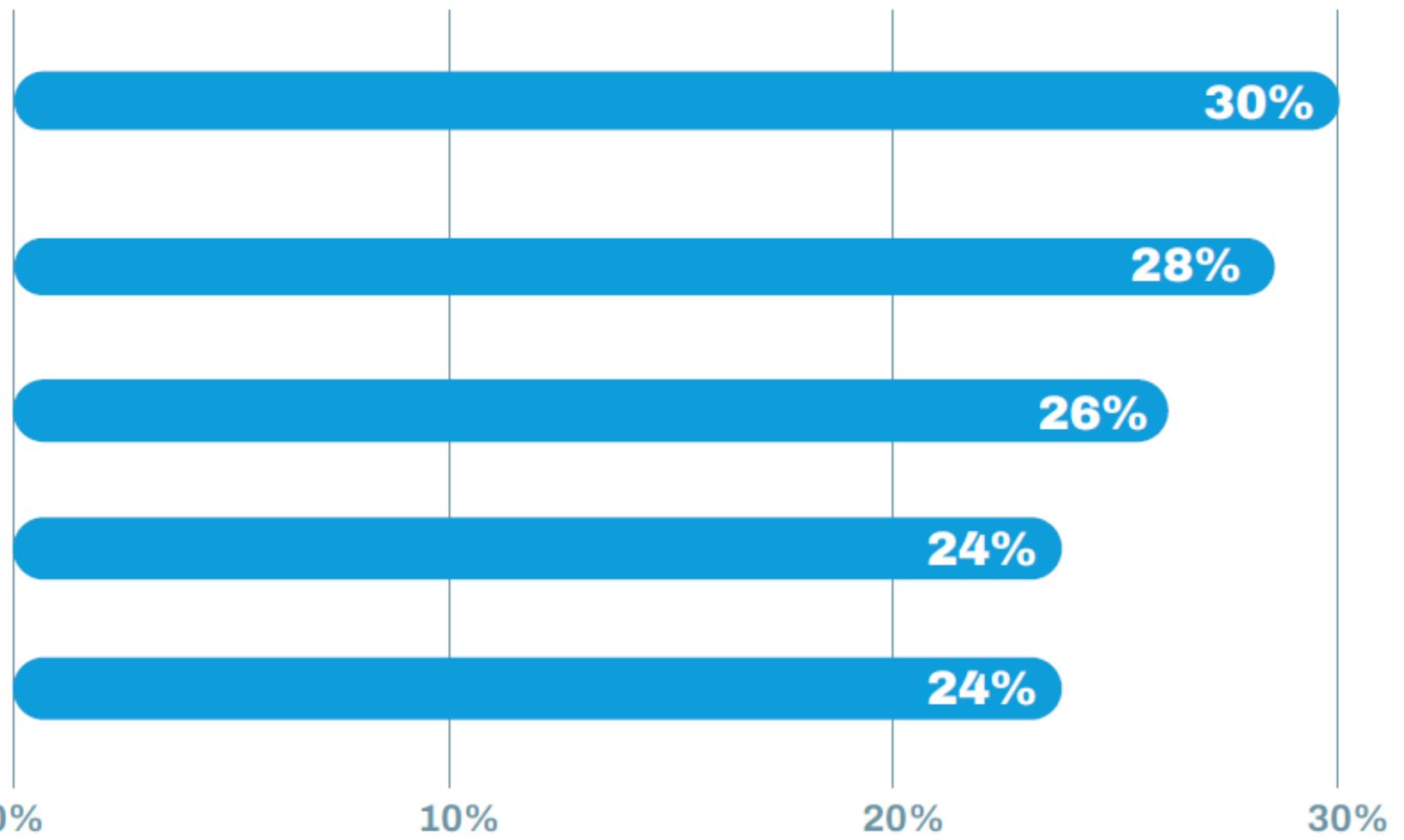
We are investing more in fundraising, marketing and communications — **28%**

We are increasing our focus on digital channels — **26%**

We are increasing our focus on supporter care/retention — **24%**

We are increasing our focus on supporter acquisition — **24%**
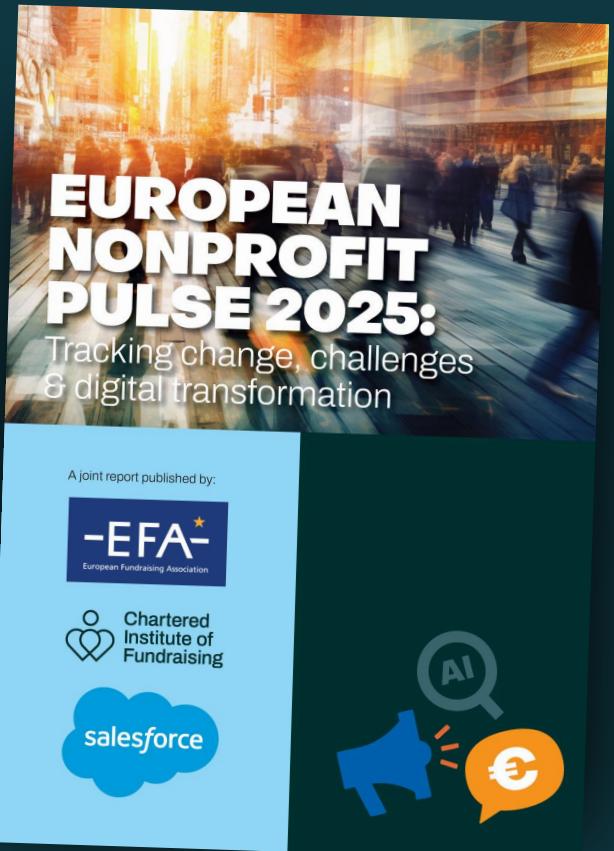
0%   10%   20%   30%



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# CHANNELS

## Top 5 channels

1. Social media
2. Website
3. Email
4. Social ads (paid)
5. F2F fundraising

**2024 report**     **2025 report**

| | 2024 report | | 2025 report |
|---|---|---|---|
| Social media 51% | 1 | | Social media: 51% |
| Website 47% | 2 | | Website: 48% |
| Email 46% | 3 | | Email: 37% |
| Social media advertising 33% | 4 | | Social media advertising: 37% |
| Face to face fundraising: 39% | 5 | | Face to face fundraising: 33% |
| Online or digital advertising: 24% | 6 | | Online or digital advertising: 26% |
| Virtual events 17% | 7 | | Instant messaging: 25% |
| Telephone 23% | 8 | | Telephone: 20% |
| Mail 27% | 9 | | Mail: 19% |
| Instant messaging 15% | 10 | | Display advertising: 18% |

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# CYBERSECURITY & DATA HANDLING

## Progress, but still weak preparedness

**42%**
provide cybersecurity training
(up from 33%)

**38%**
have GDPR-compliant software

**37%**
have a data handling policy

**37%**
investment in cybersecurity planning & software
(up from 24%)

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# AI ADOPTION BY NONPROFITS

## AI has firmly entered the nonprofit sector, driving greater efficiency, engagement, and impact.

- 48% now use AI, and over half (56%) are in the process of adopting AI.

- Regardless of how well AI is understood, everybody's already using it:
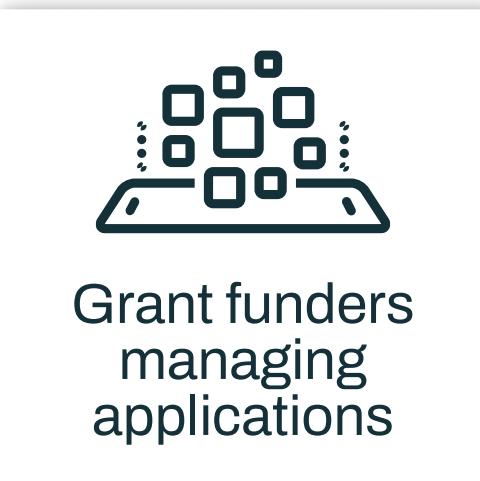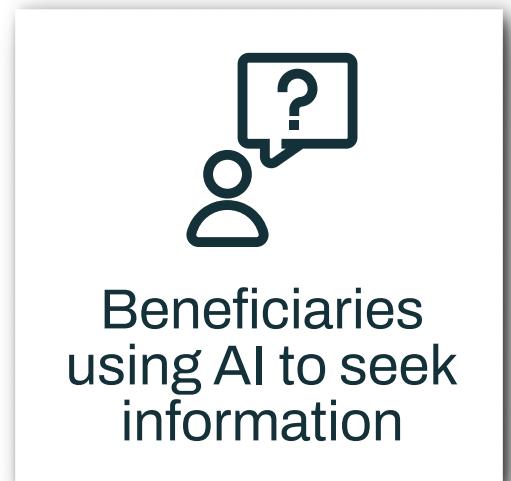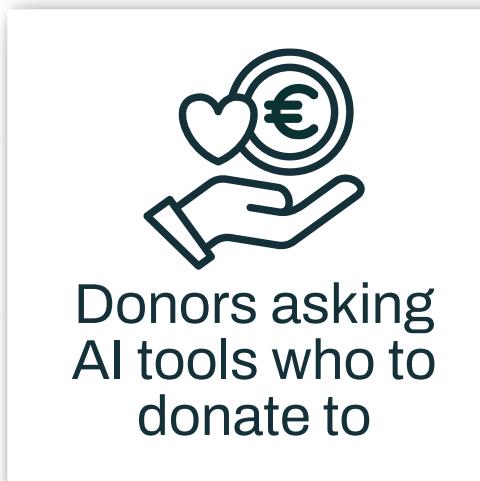
**48%**
of nonprofits now use AI

Donors asking AI tools who to donate to

Beneficiaries using AI to seek information

Grant funders managing applications

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# AI ADOPTION BY NONPROFITS



|  | UK | France | Netherlands | Germany |
|---|---|---|---|---|
| AI users | 42% | 36% | 78% | 57% |
| Open to AI | 49% | 47% | 91% | 61% |
| Familiar with AI agents | 51% | 59% | 91% | 68% |
| Interest in AI agents | 19% | 31% | 47% | 43% |
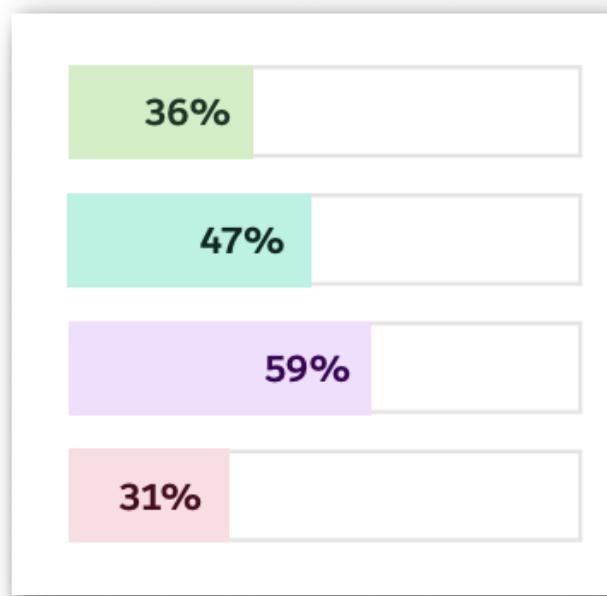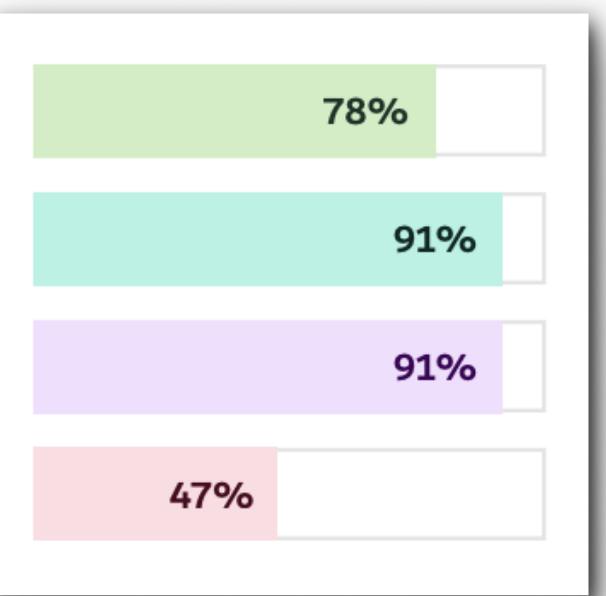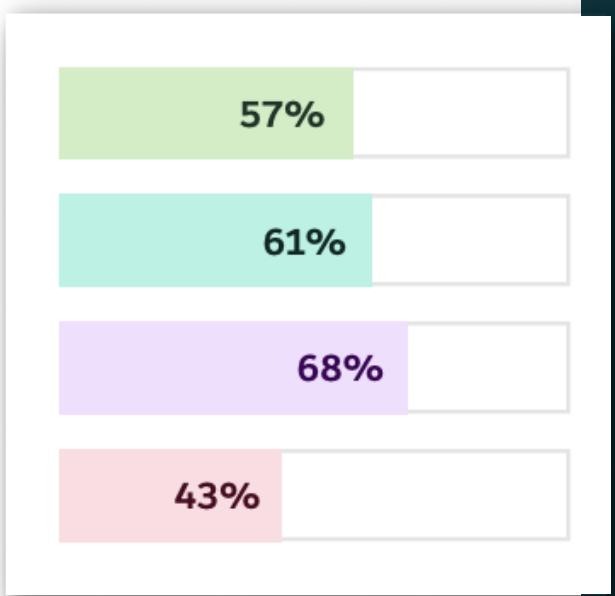
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# AI ADOPTION LESSONS



## Germany

| | |
|---|---|
| Government support | **44%** |
| AI for programme design | **39%** |
| Agentic AI interest | **43%** |

Driving adoption:

AI funding + Staffing crisis

## United Kingdom

| | |
|---|---|
| Government support | **20%** |
| AI for marketing content | **25%** |
| Agentic AI interest | **19%** |

Halting adoption:

Digital maturity, leading to a more cautious approach

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Funding confidence in Germany is driving rapid tech experimentation, while the UK's digital maturity has led to a 'safety first' approach, with concerns cited about AI hallucination, bias and governance.

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# AI ADOPTION BY NONPROFITS

## AI is making proven impact – but you can't unlock its potential with data that's still on the sidelines



A new way of working in the age of AI

Siloed systems & data
Manual workflows
Reactive support
Staff burnout

Fully unified data
Conversational, AI-first
Always-on experiences
Ability to focus on mission
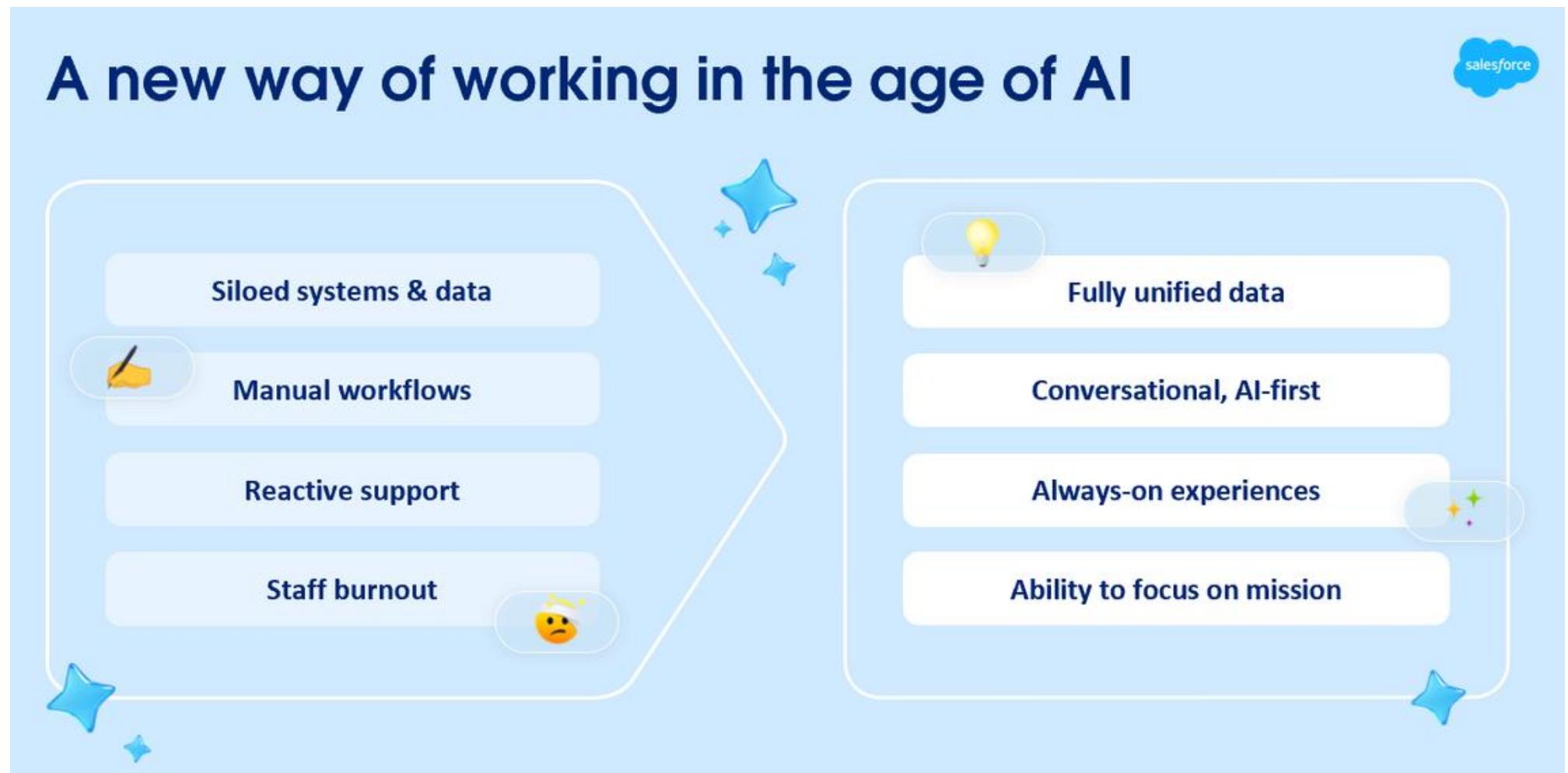
Success is defined not by organisation size, budget or cause, but by data maturity across tech, people and process.

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# AI AT THE WILDLIFE TRUSTS
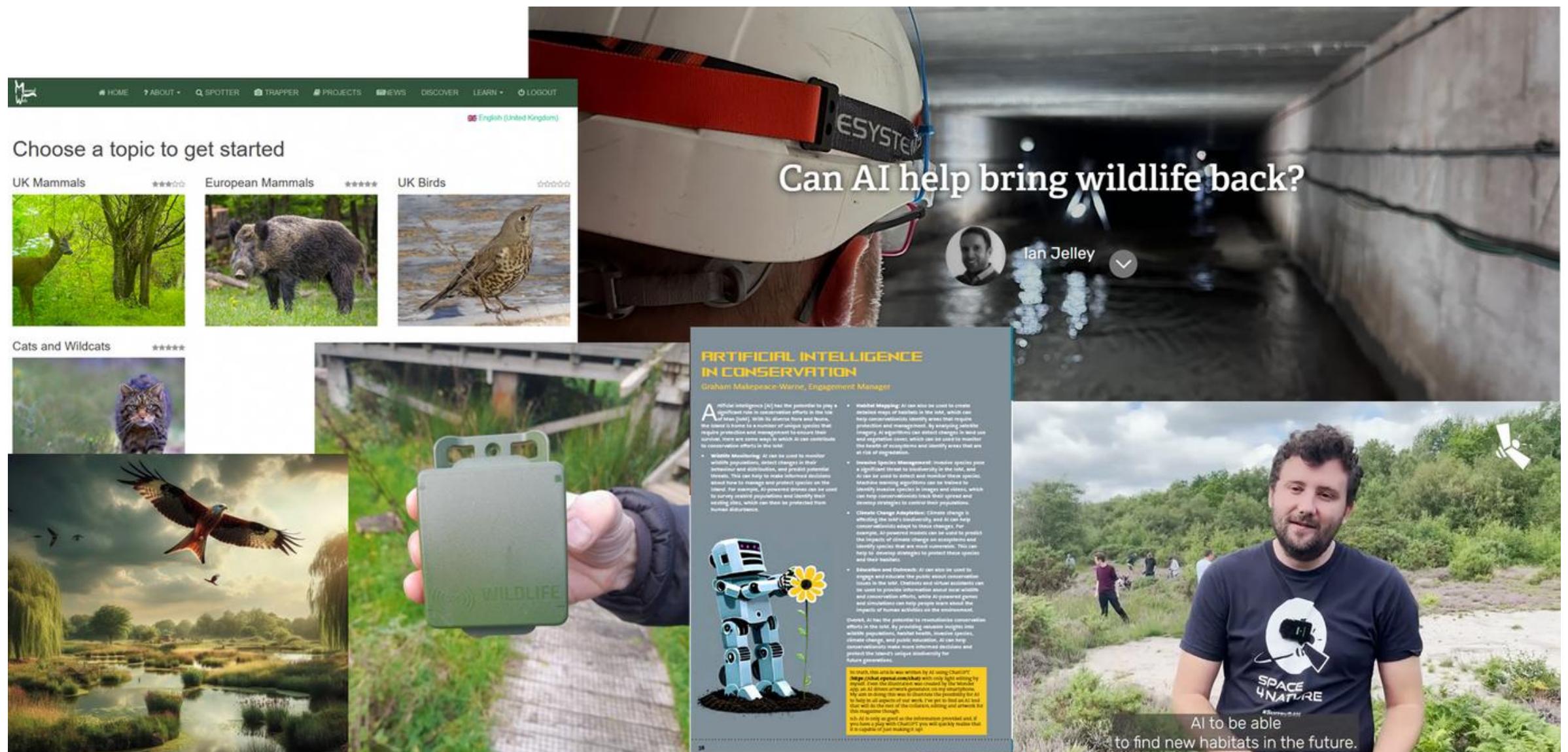


**Alice Kershaw**
Head of Digital Transformation, The Wildlife Trusts

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# TENSIONS



✦ AI Overview

Yes, there is a herd of European bison grazing in Worcestershire, UK, in a wood pasture and scrubland habitat managed by the Worcestershire Wildlife Trust at Green Farm. These bison are part of a project to improve biodiversity and are also found with Exmoor ponies and native sheep, creating a rich habitat for other species. 🔗

## What to know about the Worcestershire bison:

- **Location:** They are located at Green Farm, a site managed by the Worcestershire Wildlife Trust. 🔗

- **Purpose:** The bison are part of a rewilding effort to enhance biodiversity. 🔗

- **Other Animals:** They share the habitat with other grazing animals, including Exmoor ponies and native sheep. 🔗

- **Habitat:** The bison graze in a wood pasture and scrubland area, which is rich in biodiversity and supports a variety of wildlife. 🔗

## How to learn more: 🔗

- You can find more information on the Worcestershire Wildlife Trust website.
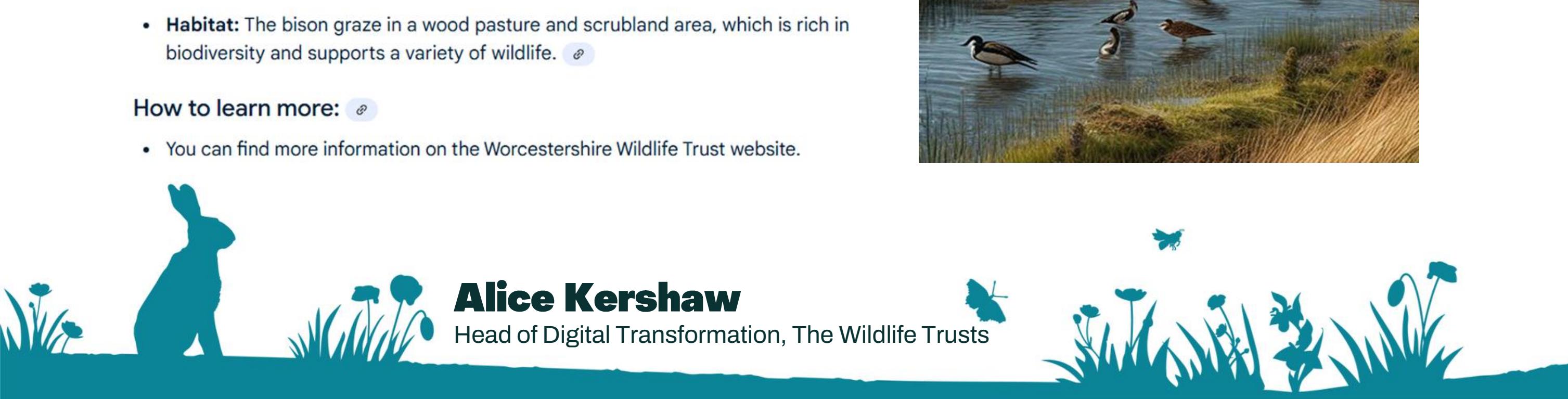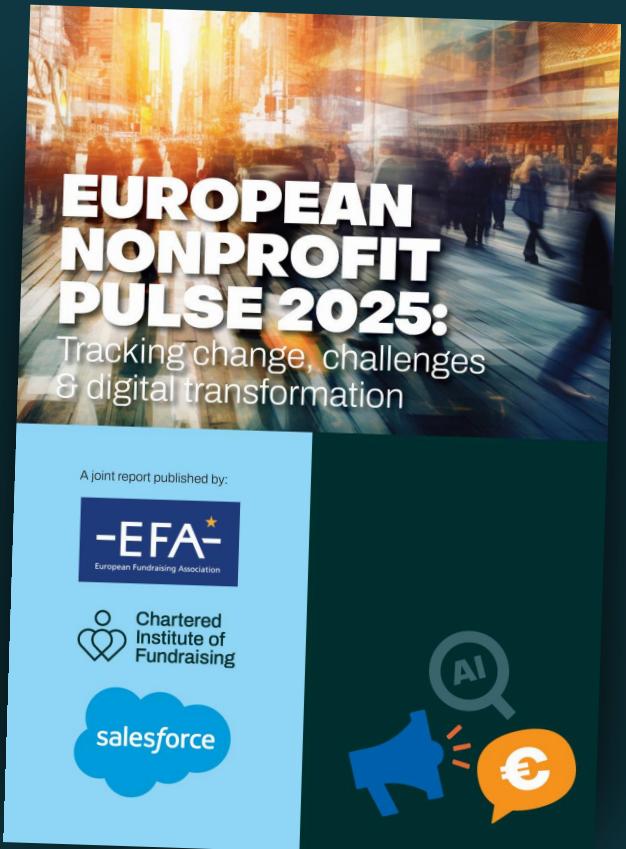
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Head of Digital Transformation, The Wildlife Trusts

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# ISSUES



Individual autonomy and emotional disempowerment
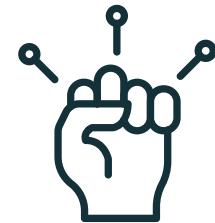
Lack of governance

Use of creative work and IP issues

Transparency and accountability

Environmental impact

Political manipulation

Unequal access to knowledge

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# AI RISK



The Wildlife Trusts

## AI Risk Assessement
NOTE: PROTOTYPE/ WORKING DRAFT

| Task | Type | Biggest Area(s) of risk | Theme | Ethics (yes or no go?) | Does it have a potential positive impact | Challenges & constraints (specifically with regards to equity, transparency, bias, and accountability) | Possible tool/ AI approach [NEEDS MORE RESEARCH, NOT RECOMMENDATION] | Safety cri |
|---|---|---|---|---|---|---|---|---|
| **Write fundraising proposal** | Analyse | Hallucination, information loss, additional time to check needed | Fundraising | | | Proposals exhibiting demographic biases and lacking compelling narratives for diverse audiences. Boring copy. | *OpenAI's GPT-3, Claude.AI* | - [x] Rigor Implement |
| **Summarise videos audio** | Analyse | Bias, data security, data quality, additional work | Operations | | | Summaries distorting original meaning across diverse speakers/contexts. | *Descript, Otter.ai, Teams transcription* | - [x] Mitiga quality inp |

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# POLICY & STRATEGY
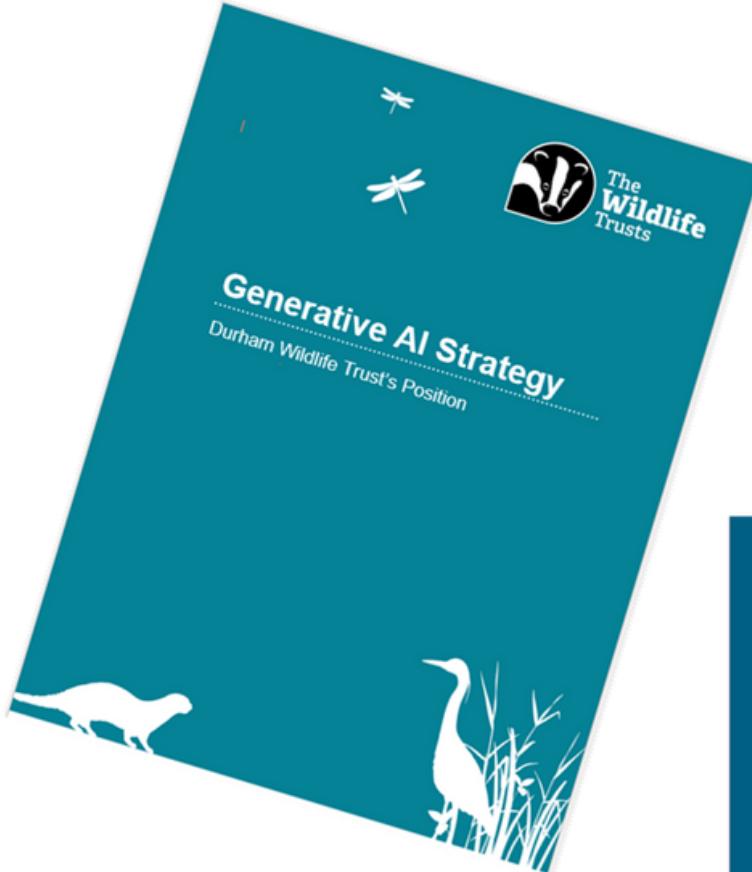


## Introduction

This policy specifically addresses the use of **generative AI** – AI that creates content, such as text, images, or audio, based on the data it has been trained on. While generative AI has potential, the key question we must always ask is: **"Does the use of generative AI provide enough value to justify using it?"**. At Durham Wildlife Trust we recognise that generative AI is already being used in various forms to help streamline tasks and support our work.

It is important to understand that generative AI should **never** be used to create final versions of content. There must always be a human involved in reviewing, editing, and approving anything generated by AI before it is shared publicly or acted upon. Additionally, when using large language models (such as ChatGPT), these tools must be configured to ensure they are **not training on our data** and that our information is kept secure.

This policy outlines our approach to responsible experimentation, oversight, and the ethical use of AI, ensuring it aligns with our values and strategic goals.

### Generative AI Strategy
Durham Wildlife Trust's Position

### Generative AI (GenAI) Acceptable Use Policy
RSWT
24 March 2025, DRAFT

### AI Notetaking and Meeting Recording Policy
RSWT Policy - DRAFT

### Generative AI
Briefing Note: The Wildlife Trusts
DRAFT V1 10 September 2025

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Head of Digital Transformation, The Wildlife Trusts

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# AI STRATEGIC RECOMMENDATIONS

## A proven 4-step framework to embed AI

### Design the Future with AI at the Core

Your ROI depends on choosing the right workflows. Agents shine where humans struggle

### Win Early, Win Big

Overcome resistance and secure buy-in by demonstrating tangible, undeniable wins

### Prove The Value

Establish measurement mechanisms from day one, ensuring real-time visibility of wins to build momentum and secure future investment

### Ship, Iterate, Expand

Move fast (but cautiously) and expect to shift your mindset



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www.salesforce.com/form/sfdo/ngo/ngo-ai-agents-beginners-guide-ebook

## STRATEGIC INSIGHTS

# KEY TAKEAWAYS

**1** Broaden your recruitment search

**2** Diversify your funding sources
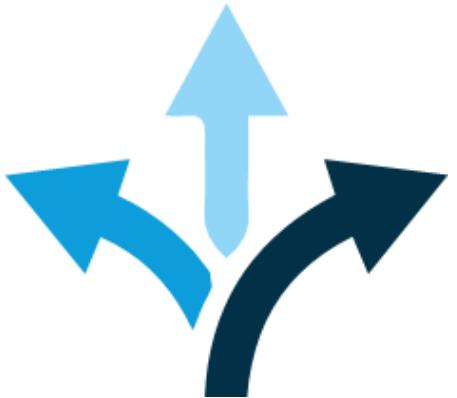
**3** Balance digital & traditional channels

**4** Start small with AI but with purpose
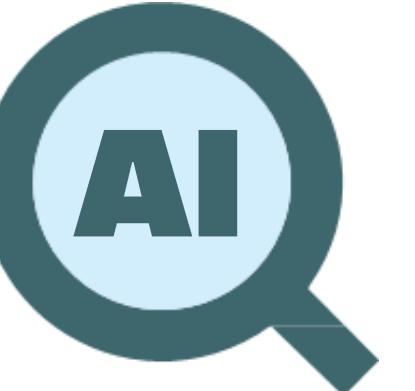
**5** Focus on the human element

**6** Strengthen data & digital infrastructure

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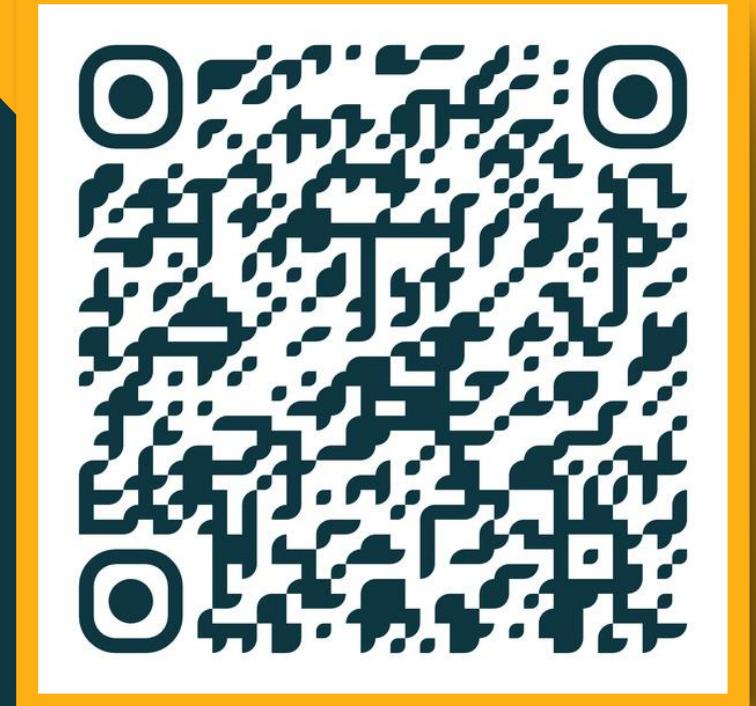
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