

Forecasting the New World

What happens to nonprofit giving when the donation page dissolves into the conversation



A short paper on three channels: organic search, AI assistant referral and in-chat giving.

Graham Covington · Founder, Escalator · August 2026

Are AI assistants the new donation page?

Organic search traffic to nonprofits is falling and AI answers are the reason. The sector reads this as loss. The data say gifts and website visits are decoupling: visits fall, gifts can hold and then grow, in a channel most analytics cannot see.

39%

of nonprofit website visits came from organic search in 2025, and the share fell every month

M+R Benchmarks 2026

100 : 1

pages an AI assistant reads for every visitor it sends to the site that wrote them

Clickport log study, July 2026

+42%

better conversion from AI-referred visitors than from other traffic, in retail

Adobe Digital Insights, March 2026



What we know

Measured facts. Everything else is built on these.



Search referrals to the web fell 34% in a year

Google Search page views across Chartbeat's publisher network, Dec 2024 to Dec 2025. Publishers expect a further 43% fall over three years.



AI answers halve the click

When a Google AI Overview appears, 8% of users click a result, against 15% without one. Under a third of Google searches now send a click to the open web.



Assistants cite four times more than a year ago

Citations appeared in 1.6% of ChatGPT prompts in June 2025 and 6.8% by May 2026. A displayed citation is clicked 5.8% of the time.



The click that comes is a decided one

AI referrals convert at 5.8% across 110M sessions, above organic search and level with paid. The base is small: about 1% of traffic.

One fact is missing: nobody has published a conversion rate for AI-referred visitors to nonprofit websites.



The assumptions

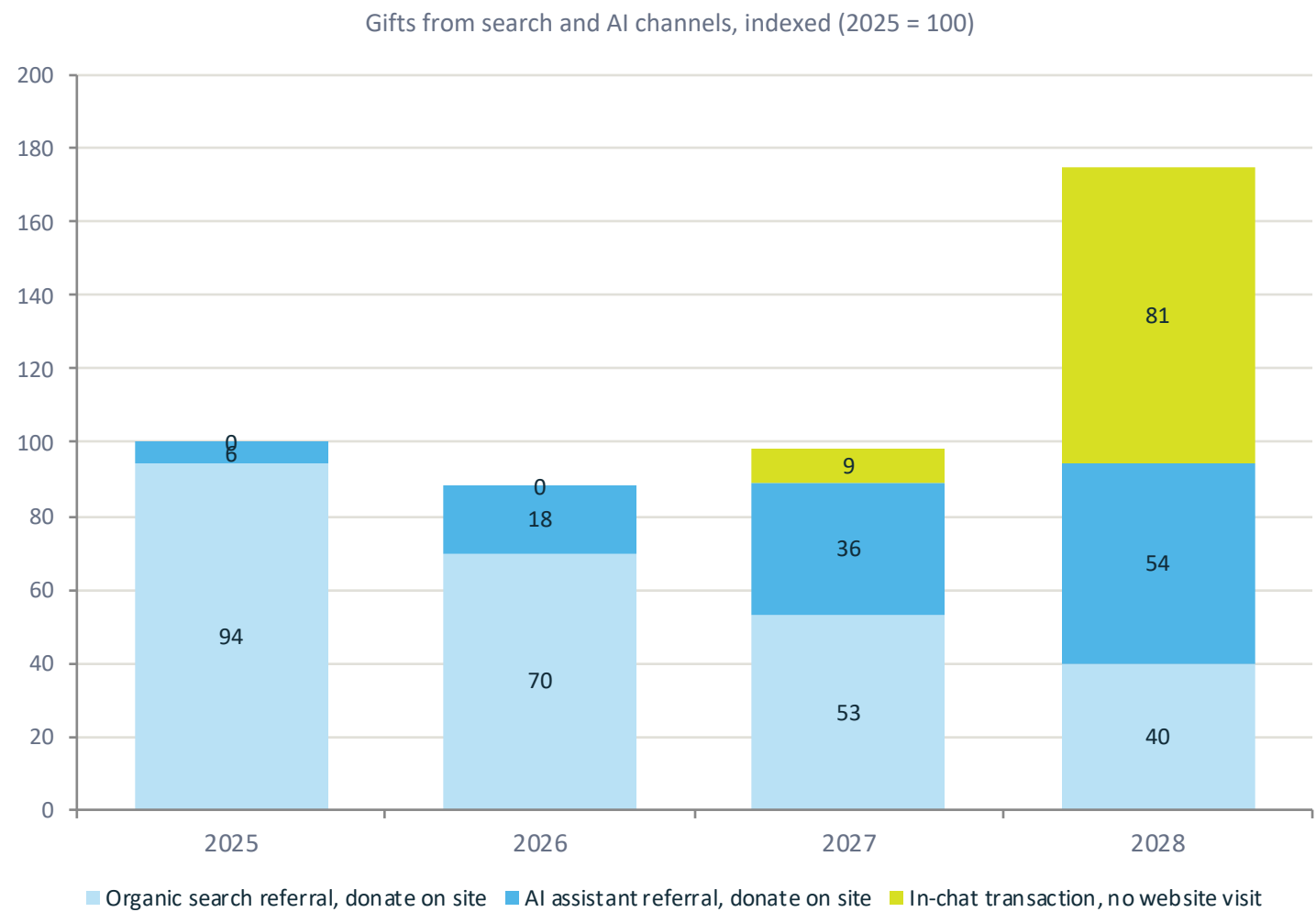
Gifts from organic search and AI assistants, indexed to 100 in 2025. All other channels held constant.

Assumption	Value	Basis	Confidence
Organic search visits	Fall 25% a year	M+R shows the decline under way; publishers expect –43% over three years	Measured trend
AI referral visits	Grow 3×, 2×, 1.5× a year from a 1% base	Citation rates quadrupled in a year; clickable brand links lifted ChatGPT referrals 158% in a week	Measured trend
Conversion, search visitors	1.6% donate	M+R site average; conversion by channel not published	Assumed
Conversion, AI-referred visitors	4.0% donate (2.5× search)	Premium measured in retail; not yet measured for giving	Assumed
In-chat gifts	Pilot 2027; 2028 at 1.5× AI-referral gifts	Needs a charity category in a commerce protocol and the nonprofit as merchant of record	Speculative

The weakest joint: the AI conversion premium is transplanted from commerce. The mechanism has no obvious reason to fail for giving, but it is untested.



Gifts rise while visits fall



1

Gifts hold flat while visits fall

Website visits drop 14% by 2028; gifts finish 2027 at 98. The AI conversion premium offsets the volume loss.

2

The growth arrives without a visit

By 2028 in-chat gifts are the largest source, bigger than organic search ever was. None appear in web analytics.

3

The website changes job

From destination to source: the pages assistants read to decide whether to recommend you.



The yellow segment can go one of two ways

In-chat giving will arrive. The chart cannot tell you which shape it takes.



Through a protocol

The nonprofit stays merchant of record. The gift is yours, the donor is yours, the receipt is yours. This is how ACP and Google's UCP are designed for retail.

Raises money and keeps the relationship



Through a fund

One integration with an intermediary that disburses cheques, the way social fundraisers already work. The simplest route for an assistant to reach two million charities.

Raises money and loses the donor

Same segment, opposite futures. Decided in protocol specifications this year.



Three channels, three jobs

Organic search

Shrinking

Be read correctly and cited

- Direct answer in the first paragraph
- Documented impact numbers
- Registry hygiene across Candid, Charity Navigator, Google
- Schema markup
- A phone that gets answered

AI assistant referral

Growing, worth more per visit

Be cited, then be worth the click

- Landing pages that confirm, not persuade
- Tag AI referrers in analytics
- An agent front door (MCP) so assistants can answer specifics
- Conversational giving on channels you own

In-chat transaction

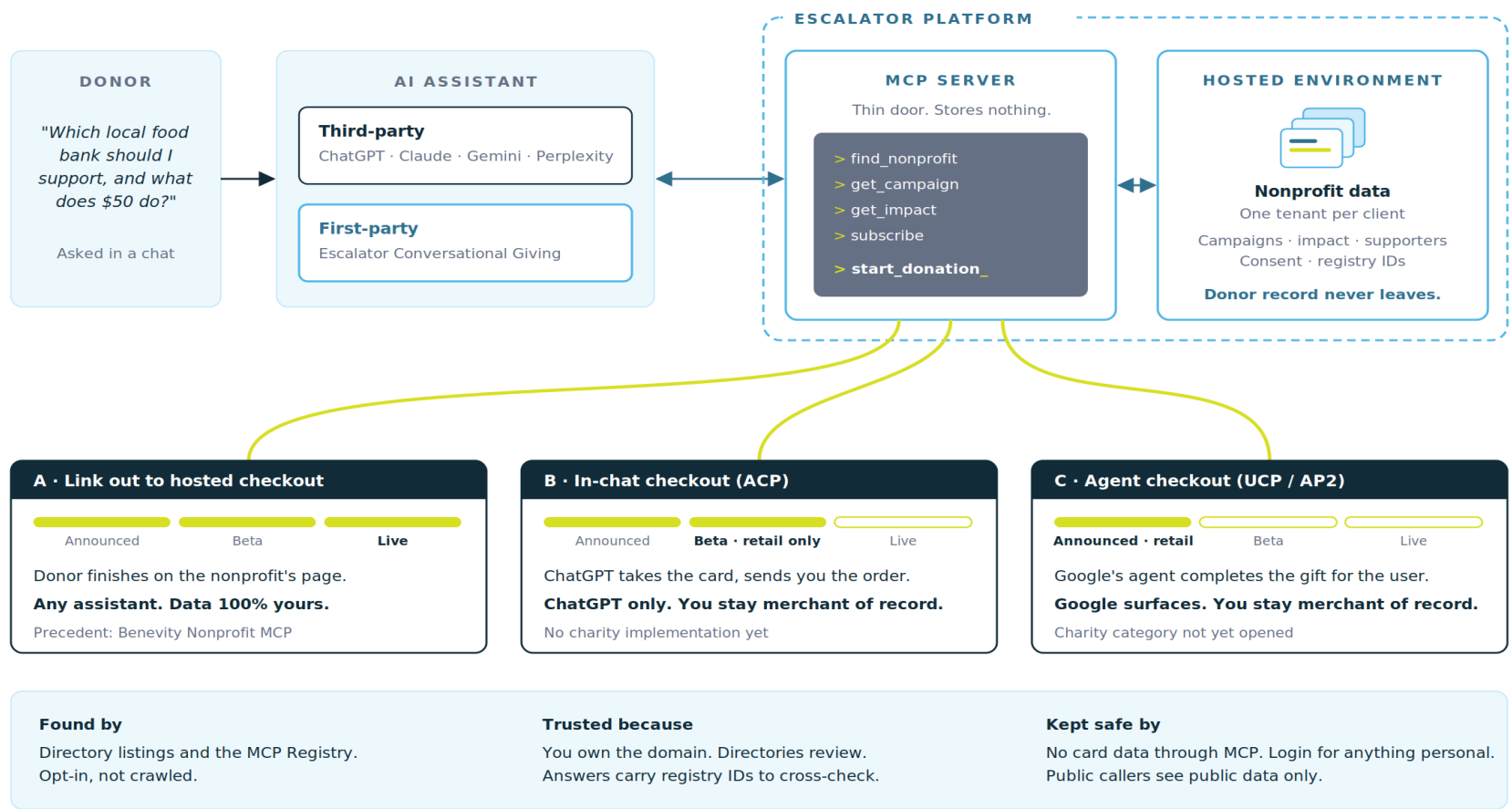
Contingent, largest prize

Be ready, and shape the rules

- Nothing live for charities yet
- Build the front door so you can plug in the week a category opens
- Insist on merchant of record and the donor record with the gift



An agent-answerable nonprofit



The MCP server is a thin door into the platform. Data stays inside. Payment is a swappable tail at three stages of readiness.



How to live in the new world

The first two stages pay off whether or not in-chat giving arrives. Only the third is a bet.



Now

0–6 months

- Registry hygiene
- Rewrite key pages for direct answers and documented impact
- Tag AI referrers in analytics
- Make sure the phone is answered

Raises citation and search performance now; costs little

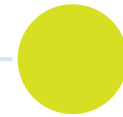


Next

6–18 months

- Publish an agent front door (MCP) with identity, campaigns, impact, FAQ and a giving link
- Conversational giving on email, web, SMS, WhatsApp
- A voice agent for AI-initiated calls

Converts the visitors who come; owned channels are where you can still initiate



Then

18–24 months+

- Protocol checkout (ACP, UCP) when a charity category opens, keeping merchant of record
- Pilot apps inside assistants

Optionality on the largest segment; worthless without the first two stages



What would change our mind



AI-referred donors convert no better than search visitors

The flat line in 2026–27 becomes a falling one.



Assistants route gifts through funds by default

The yellow segment grows; the supporter file does not.



Citation click-through stalls below 5%

The blue segment stops growing before it matters.

One measurement

The number the sector lacks is the conversion rate of AI-referred visitors to nonprofit websites. Any platform with a few dozen clients can produce it in a quarter by tagging assistant referrers and counting gifts.

Escalator intends to publish it.

None of the three has happened yet. All are measurable within a year.

“Traffic was never the point. Gifts are.”

Read the paper: Forecasting the New World, Escalator, August 2026



© Escalator IP Limited 2026