



2011

eNonprofit Benchmarks Study

An Analysis of Online Messaging, Fundraising and
Advocacy Metrics for Nonprofit Organizations

Authored by:



ACKNOWLEDGEMENTS

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ABOUT M+R STRATEGIC SERVICES

M+R is dedicated to helping our clients advance their missions in order to bring about positive change. We do this by helping organizations and campaigns we believe in develop smart and effective strategies, hone their messages, mobilize their members, build grassroots support, raise money, and communicate effectively with the media, the public, and decision-makers, both online and offline.

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NTEN is a community transforming technology into social change. We aspire to a world where all nonprofit organizations skillfully and confidently use technology to meet community needs and fulfill their missions. We connect our members to each other, provide professional development opportunities, educate our constituency on issues of technology use in nonprofits, and spearhead groundbreaking research, advocacy, and education on technology issues affecting our entire community.

www.nten.org

This complete report is available for free download online at www.e-benchmarksstudy.com.

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INTRODUCTION

Online fundraising grew 14% from 2009 to 2010, after declining from 2008 to 2009 for the groups in this year's study. The International sector drove this growth, spurred by disasters such as the earthquake in Haiti and the flooding in Pakistan. With careful cultivation of email lists and thoughtful fundraising, organizations may continue to see this uptick as the economy continues to improve.

This year's eNonprofit Benchmarks Study from M+R Strategic Services and NTEN marks our fifth year of the study, and includes data collected from 40 nonprofit organizations – more participants than ever before. With so many groups participating in this year's study, we were able to add a new sector to our analysis: Wildlife / Animal Welfare organizations.

As in the 2010 study, this year's study includes an analysis by sector and by email list size (Small, Medium, and Large). Also, to represent the range of results similar programs may see, many of the charts in this year's study include results from the 25th to 75th percentile as well as the median result.

We also analyze social media and text messaging programs. Social media, specifically Facebook and Twitter, continue to grow and most nonprofits in the study had a presence on both platforms (34 groups participated in the Facebook analysis and 36 groups participated in the Twitter analysis). Text messaging programs are becoming increasingly common, but they are still far rarer than email marketing programs and social media profiles among nonprofits. Of the 40 participants in this year's study, 10 provided data about their text messaging programs.

Although you may be tempted to compare the results of this year's study with past studies, we want to emphasize that the 2011 study represents just a single snapshot in time. The make-up of the participating nonprofits varies from year to year, and therefore we cannot confidently extrapolate year-over-year trends by placing the two studies side-by-side. At any point in this study where we refer to results from past years, we are using historical data provided by this year's participants to make the comparison.

We hope that this study will inform and inspire your reporting. The Benchmarks study is most useful when used as a complement to the analysis of your online program!

KEY FINDINGS

- The 2010 fundraising response rate was 0.08%. From 2009 to 2010, fundraising response rates declined 19% on average.
- The 2010 advocacy response rate was 3.3%. From 2009 to 2010, advocacy response rates declined 7% on average.
- Annual email list churn was 18%.
- The average study participant sent 3.6 emails per subscriber per month, and sent 6 emails per subscriber in December.
- Online fundraising revenue grew overall by 14% between 2009 and 2010. This rebound was led by an enormous 163% increase in the International sector due to emergencies like the earthquake in Haiti and flooding in Pakistan. However, all sectors saw an increase of some size in overall revenue from 2009, driven by an increase in the number of online gifts.
- On average, nonprofit Facebook fan pages had 15,053 users, defined as people who “Like” a fan page.
- Facebook users for nonprofit fan pages grew an average of 14% per month in 2010.
- Facebook users were much more engaged with nonprofits in the Wildlife / Animal Welfare sector than in any other sector. The Wildlife / Animal Welfare sector had a Facebook fan page action rate that was nearly twice as high as the average.
- On average, an organization’s text messaging list size was 1.9% of its email list size.
- Annual mobile list churn was 14% in 2010.

EMAIL MESSAGING

EMAIL RATES BY MESSAGE TYPE

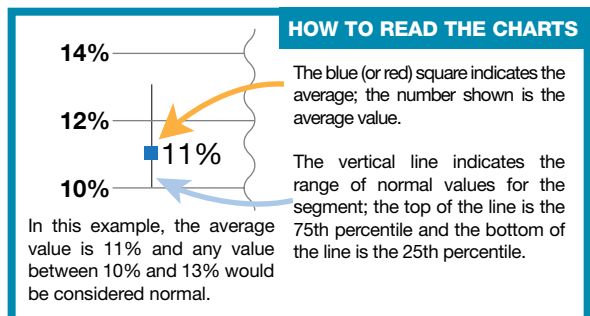
	OPEN RATE	CLICK-THROUGH RATE	RESPONSE RATE	UNSUBSCRIBE RATE
All	13%	1.9%	-	0.23%
Fundraising	12%	0.6%	0.08%	0.24%
Advocacy	13%	3.7%	3.30%	0.16%
Newsletter	12%	2.0%	-	0.22%

For every sector and across all organization sizes, we evaluated three distinct types of messages: fundraising appeals, advocacy alerts and email newsletters.

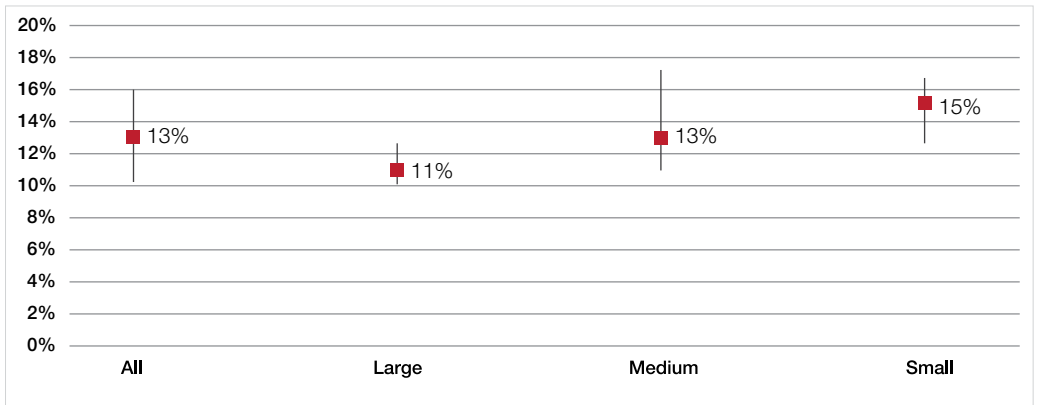
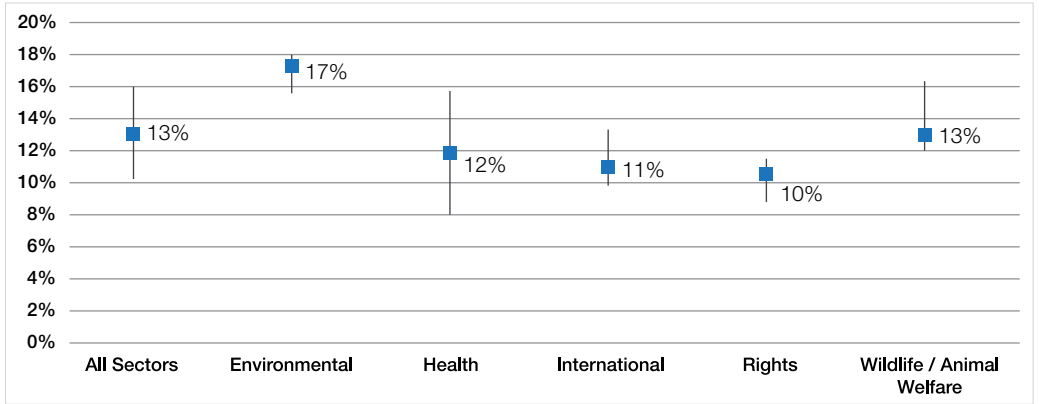
Advocacy emails had the highest open, click-through, and response rates of any type of email, as well as the lowest unsubscribe rate. Fundraising emails had the lowest click-through rate.

From 2009 to 2010, the open rate for organizations of all sizes and sectors declined by 12% on average. The fundraising response rate fell by 19%, while the advocacy response rate fell by 7%. Meanwhile, unsubscribe rates held steady from 2009 to 2010.

This snapshot provides easy benchmarks for any organization – but in the sections that follow (and for email newsletters on page 9) we take a deeper look at each of these message types by sector and by list size.



EMAIL OPEN RATES

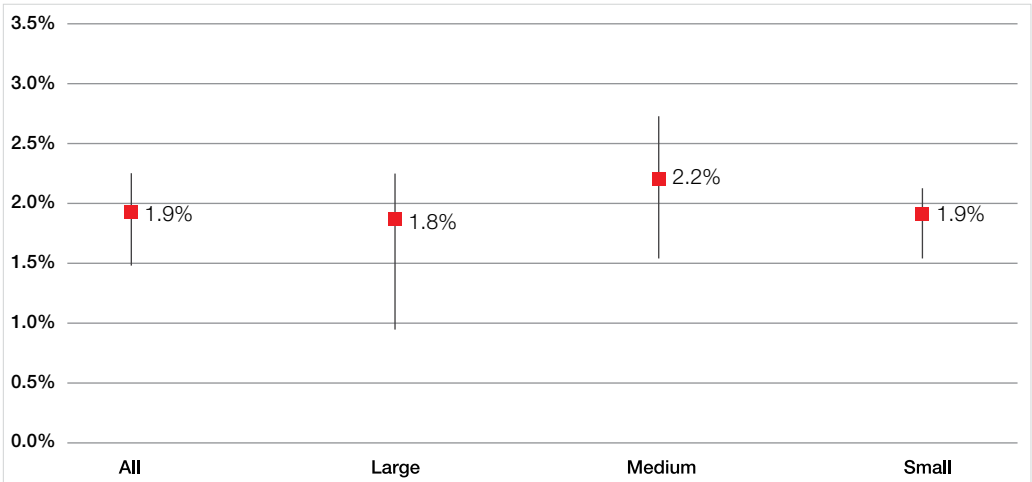
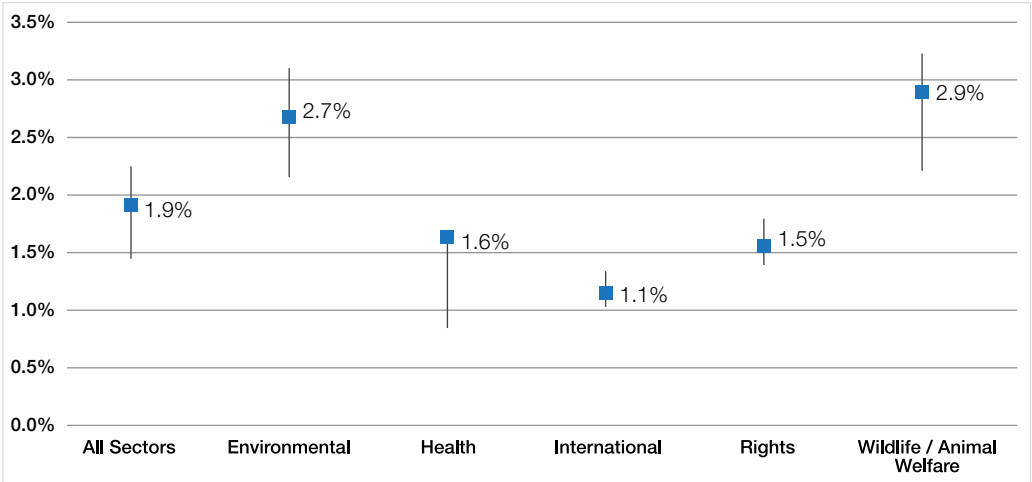


On average, open rates decreased by 12% from 2009 to 2010. Health organizations saw the biggest decline, with a 17% drop, followed by Rights (16% decrease), International (14% decrease), and Environmental organizations (13% decrease). The median open rate for Wildlife / Animal Welfare groups held steady with no change from 2009 to 2010.

Small groups in our study continued to have a higher open rate than Medium and Large organizations, but the gap has shrunk since 2009. Large organizations, which are more likely to have significant numbers of long-time, lapsed subscribers, had the lowest open rate.

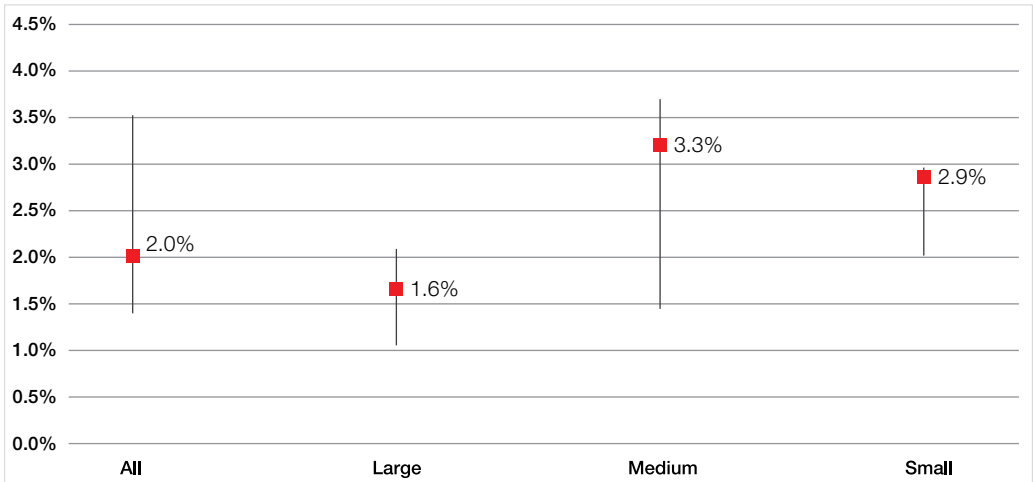
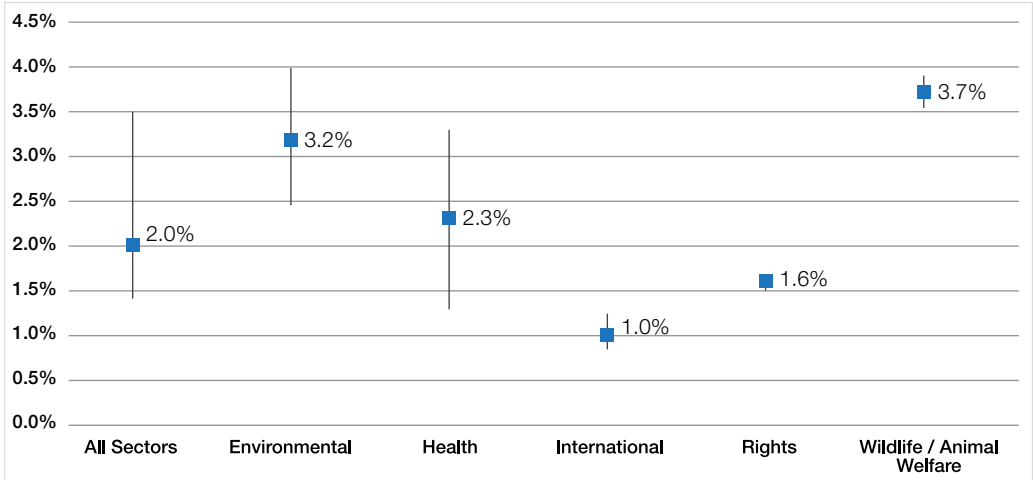
Small and Medium groups saw their open rates decrease on average by 14% in 2010, while the open rate for Large organizations declined by only 5% – likely because already-low open rates left less room to fall.

EMAIL CLICK-THROUGH RATES



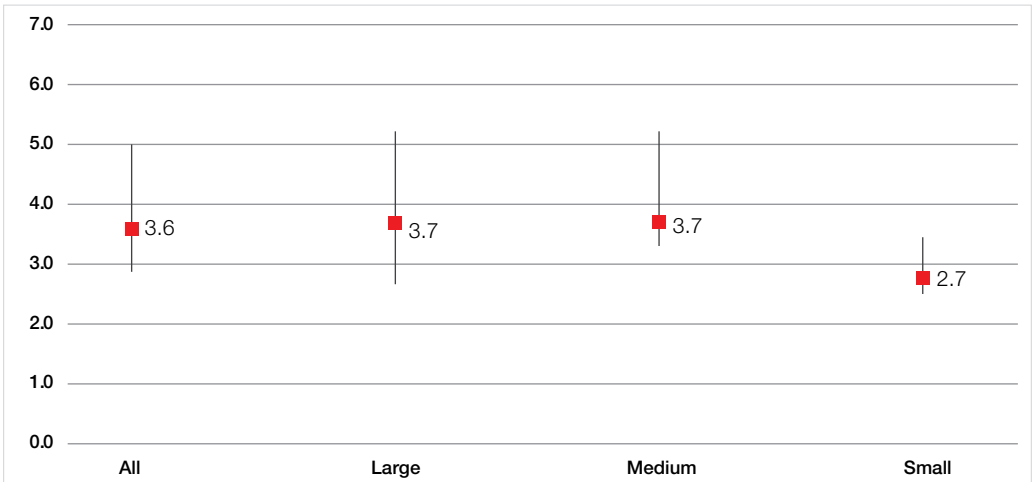
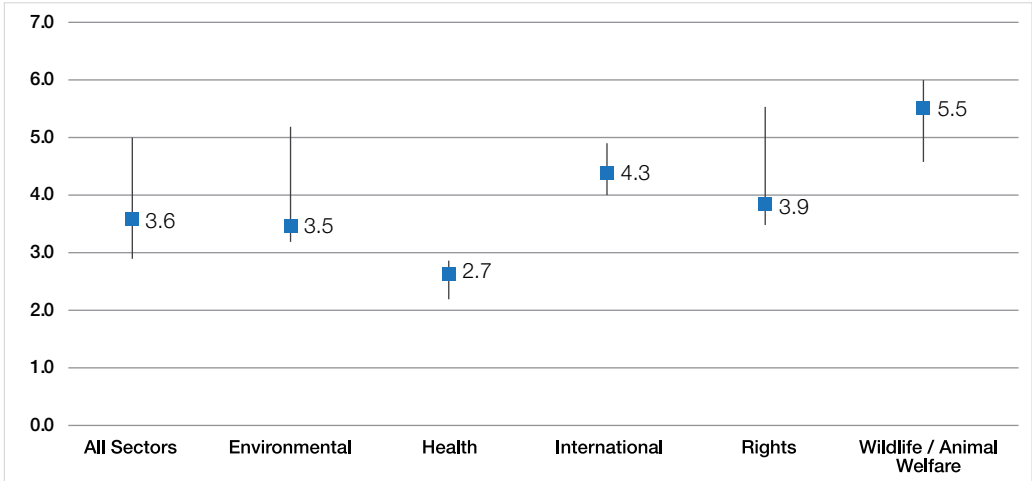
We traditionally see higher click-through rates from organizations whose primary mission is advocacy. This held true for Environmental and Wildlife / Animal Welfare organizations – these sectors had almost twice the click-through rates of others.

EMAIL NEWSLETTER CLICK-THROUGH RATES



In our experience, advocacy actions and items of personal interest tend to result in more click-throughs from newsletters. Accordingly, advocacy-focused Environmental and Wildlife / Animal Welfare groups had the highest click-through rates in this year's study, followed by Health organizations, where many subscribers may have a personal connection. International organizations once again stood out for their low newsletter click-through rates.

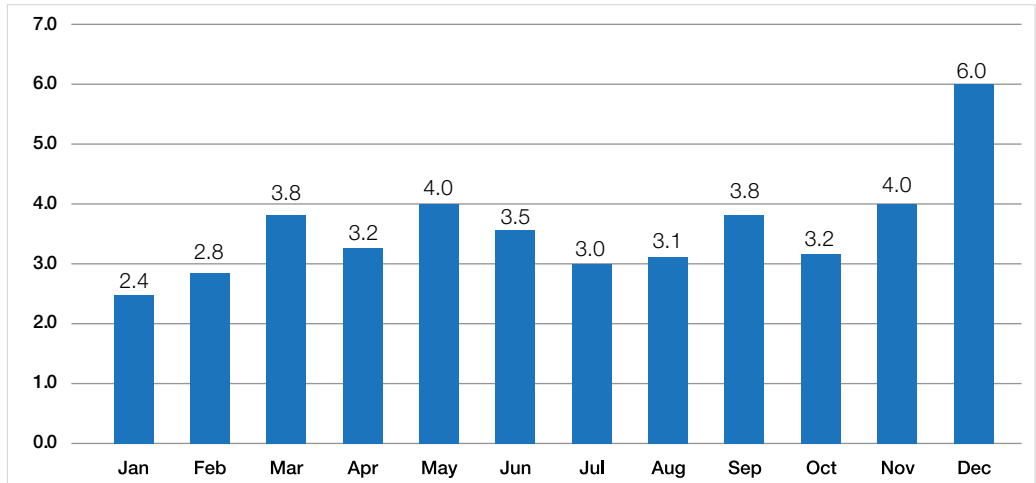
MESSAGE VOLUME: MESSAGES PER MONTH PER SUBSCRIBER



Wildlife / Animal Welfare groups sent the most email per subscriber per month, sending on average one to two additional messages per month compared to the other sectors. International and Rights groups sent slightly more messages per month than the all-sector median, while Health groups sent the fewest messages per month.

Small groups sent on average one fewer message per month than Large and Medium groups, both of which sent 3.7 emails per month to their subscribers.

MESSAGE VOLUME: MESSAGES PER MONTH PER SUBSCRIBER



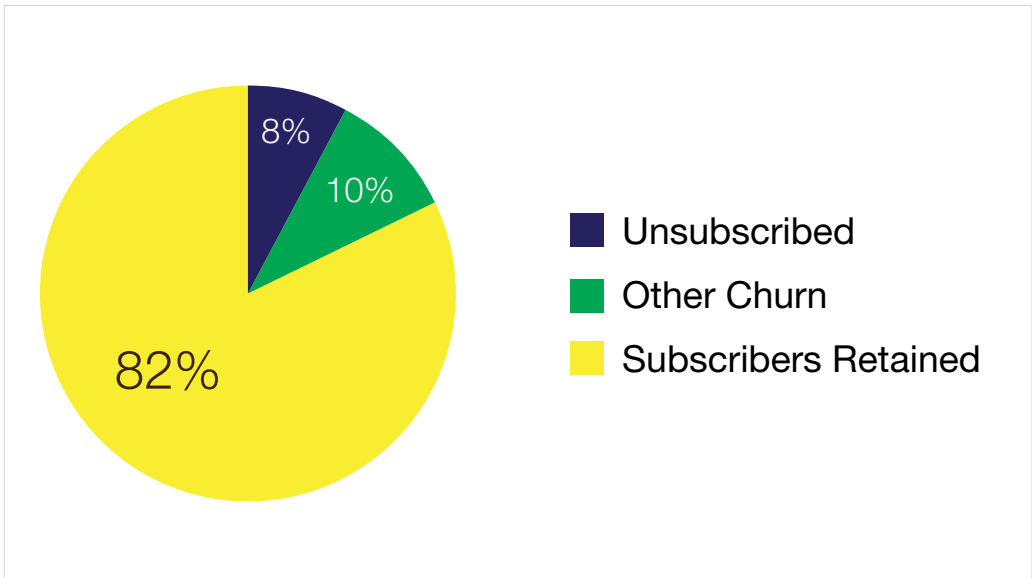
Message volume increased during the end-of-year period, we assume due to end-of-year fundraising. Message volume was also noticeably higher in the spring months and luller in July and August except for the International sector, likely in response to the flooding in Pakistan.

EMAIL LIST SIZE

ANNUAL EMAIL LIST GROWTH AND EMAIL LIST CHURN

The majority of organizations in our study saw their email list grow in 2010. For most nonprofits, the extent of list growth depended most heavily on a combination of spending, effort and the successful seizing of urgent opportunities – not on anything inherent about their starting size or sector. Indeed, list growth by sector and by size varied so widely, with median list growth of 20% and a normal range from 1% to 43%, that we decided against providing the list growth analysis by sector and size.

Email List Churn

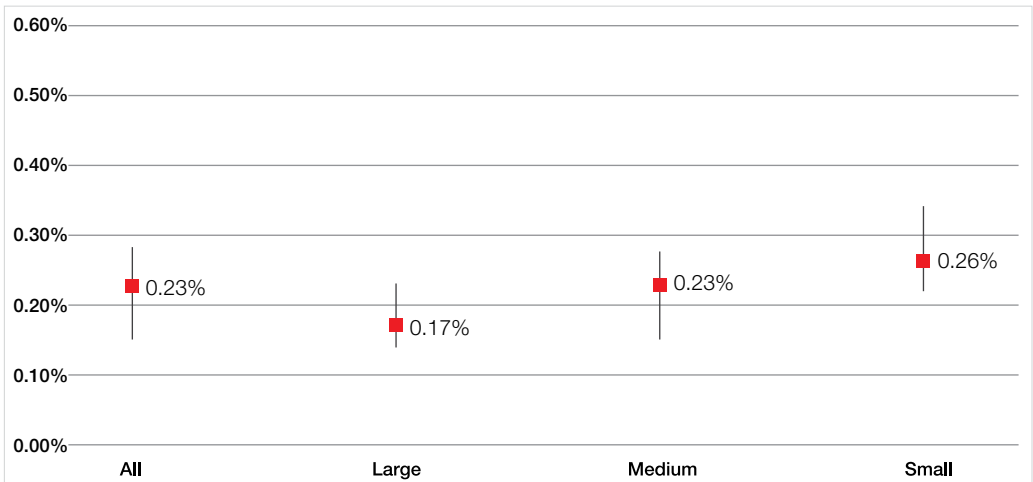
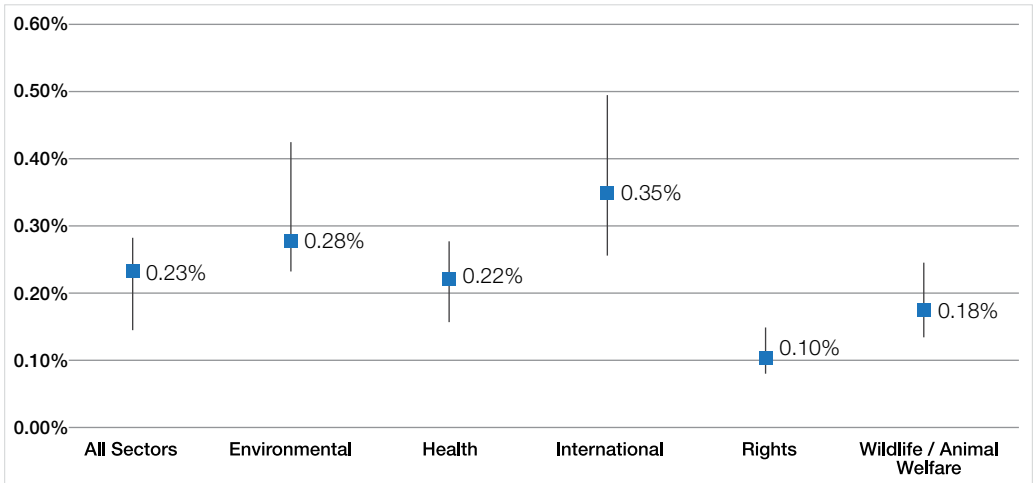


Annual list churn – the rate at which email addresses become unreachable in a year – was 18% in 2010.

To calculate churn, we divided the number of subscribers who became unreachable in a 12-month period by the total number of subscribers in the system during that same period. To be included in the churn metric, study partners were required to track churn each month to account for people who subscribe and unsubscribe from an email list in the same year.

We calculated churn using data from 8 of our nonprofit study partners. We further split this metric into two sources of churn: unsubscribes and email addresses lost for other reasons (spam complaints, addresses bouncing, discontinued email addresses, etc.).

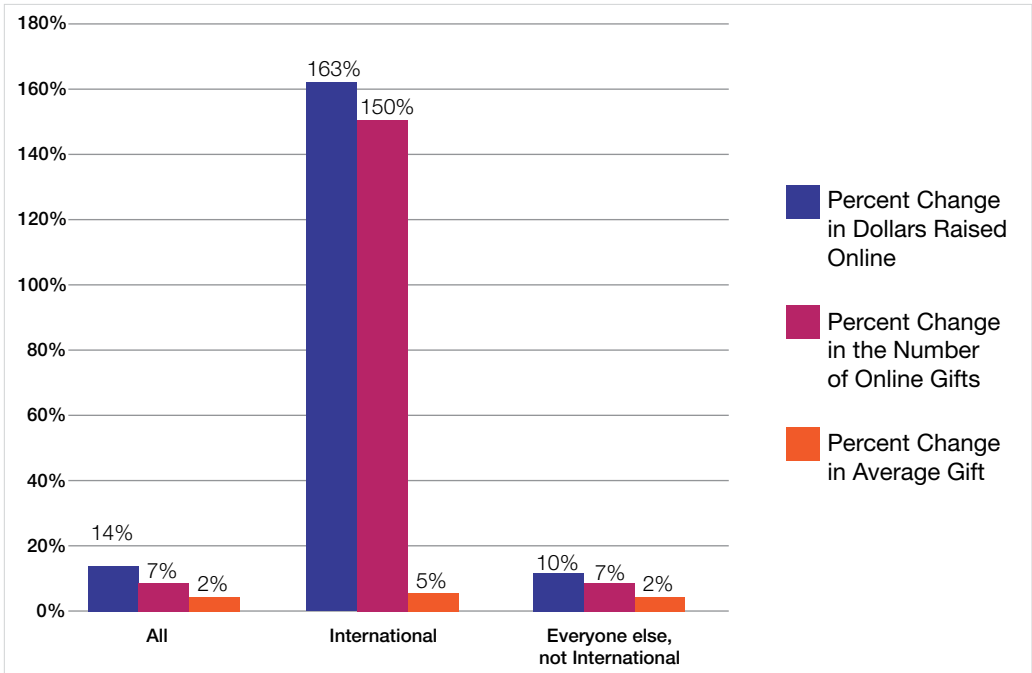
EMAIL UNSUBSCRIBE RATES



Email unsubscribe rates represent the rate at which recipients unsubscribe from specific email messages. Email unsubscribe rates held steady overall from 2009 to 2010. It is important to note that higher unsubscribe rates are often indicative of a highly responsive email file because both responding and unsubscribing indicate that people are opening and reading emails – so an organization with higher unsubscribe rates often also sees higher response rates.

ONLINE FUNDRAISING

CHANGE IN ONLINE GIVING FROM 2009 TO 2010

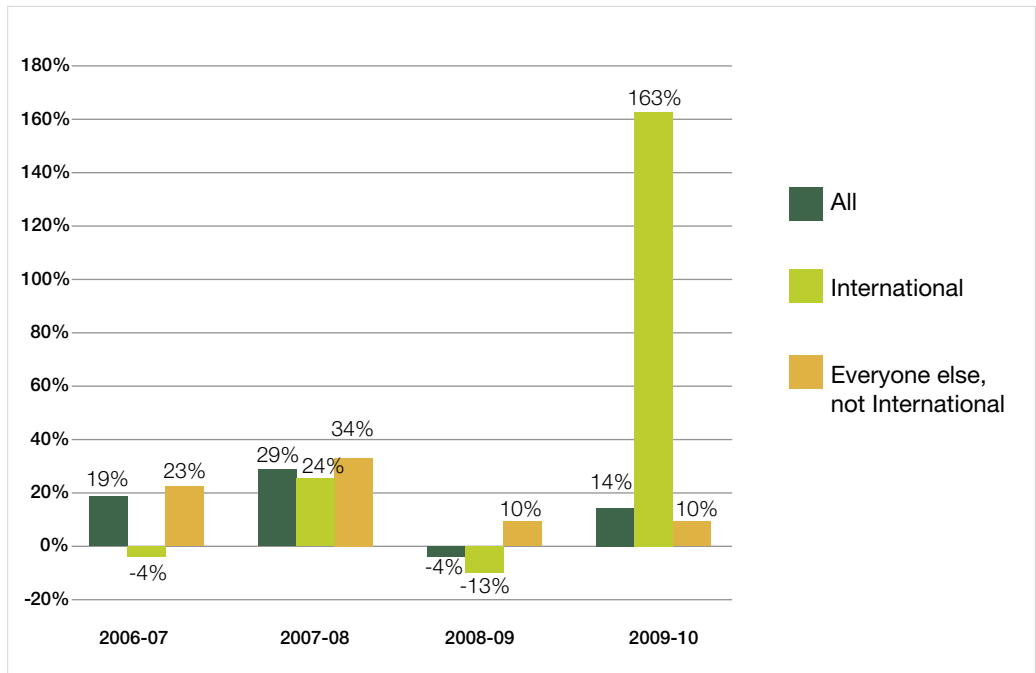


The growth in online fundraising for all sectors except International groups remained slow, reflecting the slow economic recovery. Increases in the number of online gifts drove what growth there was, with average gift amount staying largely the same in 2010 as 2009 on average.

The International sector saw a huge 163% jump in online revenue, driven by a similarly huge increase in the number of online gifts. This growth was likely due to the high number of international emergencies that took place in 2010. The challenge – and opportunity – for International groups is retaining those donors in 2011.

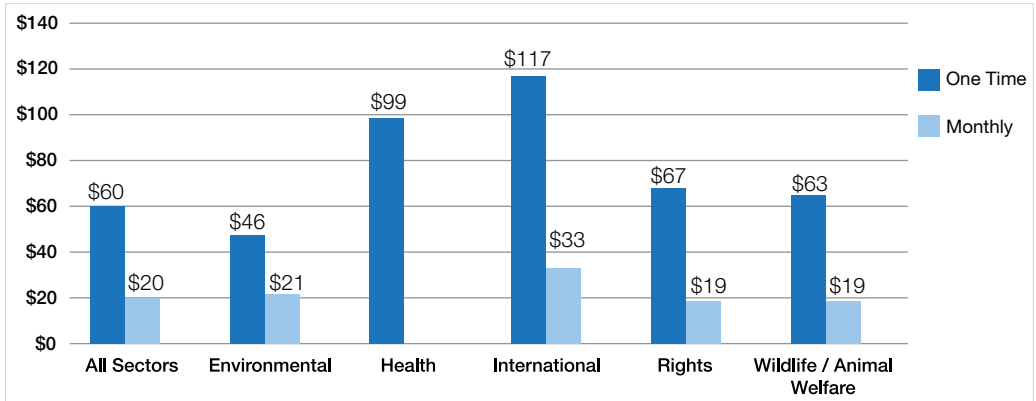
The other nonprofits saw a 10% increase in dollars raised online from 2009 to 2010, the same percentage increase those groups saw from 2008 to 2009. That's slower growth than nonprofits were seeing from 2006 to 2008, prior to the recession.

CHANGE IN DOLLARS RAISED ONLINE FROM 2006 TO 2010



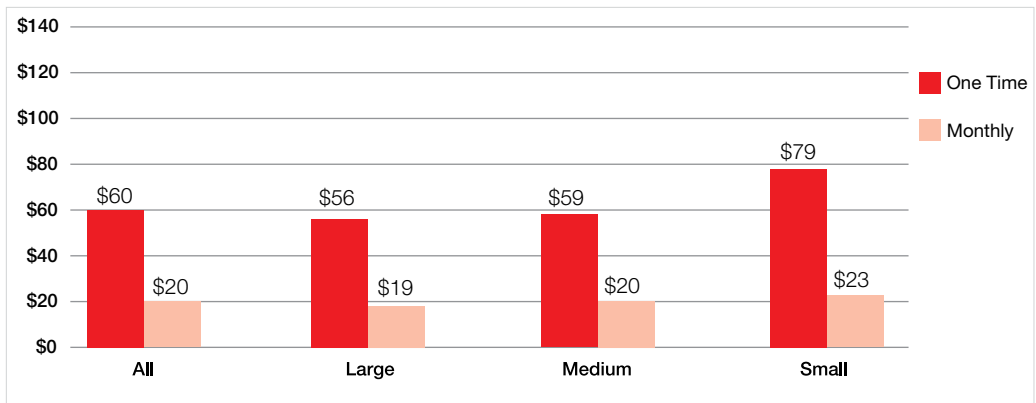
As with all comparative data in this study, this five-year comparison was produced *not* by comparing this report to previous benchmark studies, but instead by compiling the historical results of the nonprofits participating in this year's study who were able to provide five full years of complete online fundraising data.

AVERAGE ONLINE GIFT: ONE-TIME VS. MONTHLY



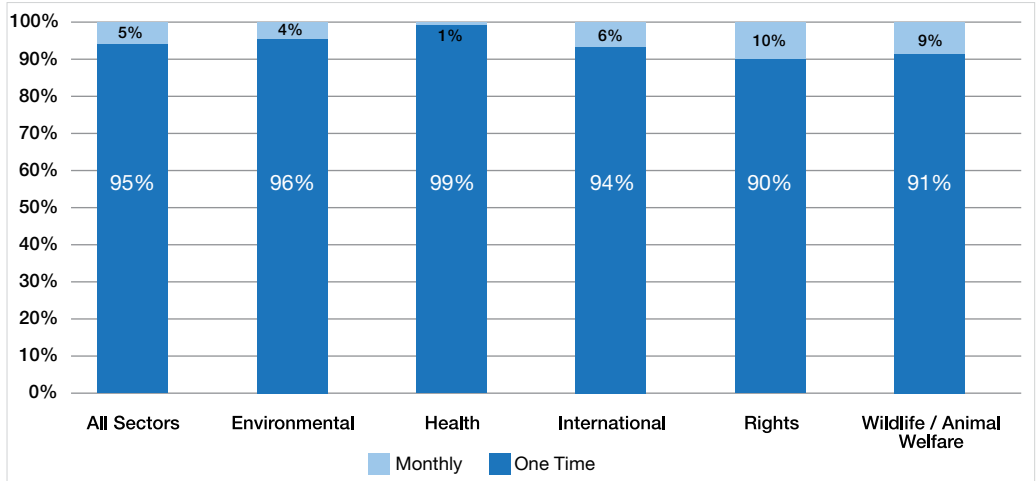
Out of all sectors, International groups saw the highest average gift size for both one-time and monthly donations, likely due to their on-the-ground work in critical disaster areas and the strong impact donors feel they can make with their gift.

Due to a small sample size we did not calculate an average monthly online gift for the Health sector.



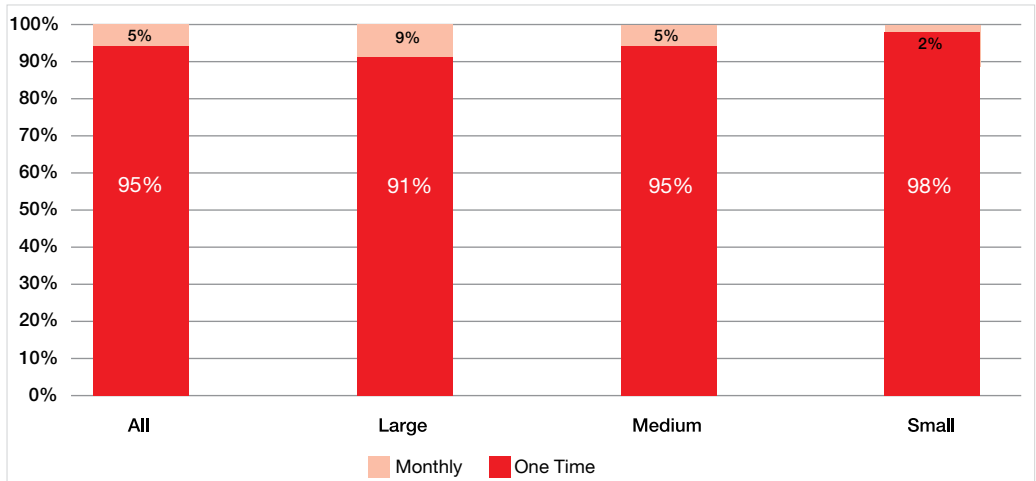
Small groups had a larger one-time and monthly average gift than Large or Medium organizations. This may have been due to a larger proportion of gifts made through these organizations' websites rather than in response to email messaging. Unsolicited online donations tend to have a higher average gift amount than those made in response to an email ask.

ONLINE FUNDRAISING SHARE BY GIFT TYPE: ONE-TIME VS. MONTHLY



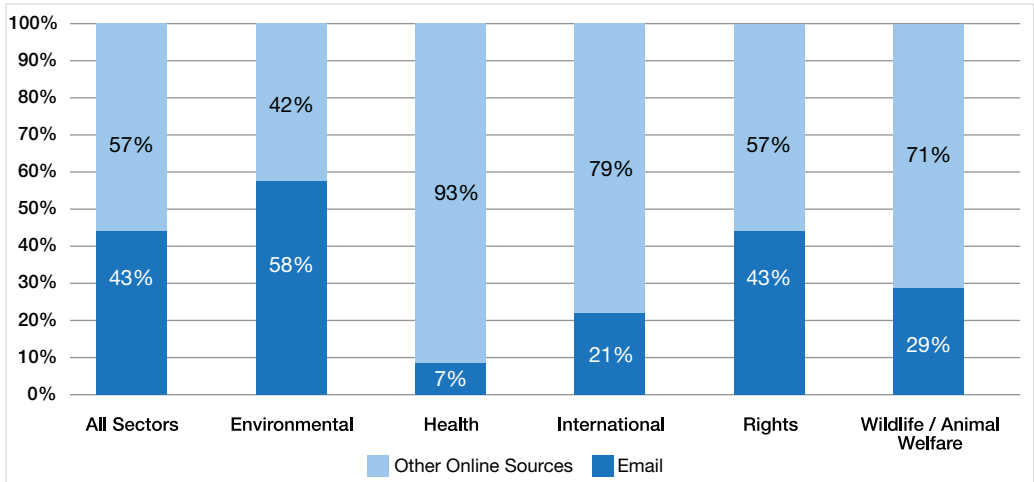
Across all sectors, one-time donations made up 90% or more of all online revenue. One explanation for the larger relative share of monthly giving for the Wildlife / Animal Welfare and Rights sectors is their promotion of monthly giving programs through offline channels, such as Direct Response TV.

It is important to note that the International sector's share of monthly giving was artificially lowered due to the impact of emergencies like the earthquake in Haiti and flooding in Pakistan (which led to huge increases in one-time giving for nonprofits in the International sector).



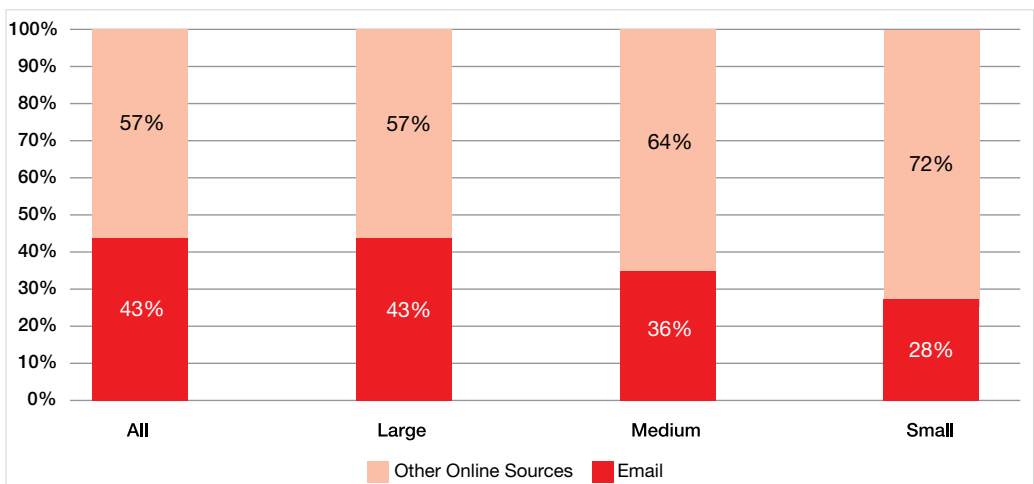
Large organizations had the highest share of revenue from monthly donors – about 9% overall – likely due to their increased investment in these programs.

ONLINE FUNDRAISING SHARE BY SOURCE: EMAIL VS. OTHER ONLINE SOURCES



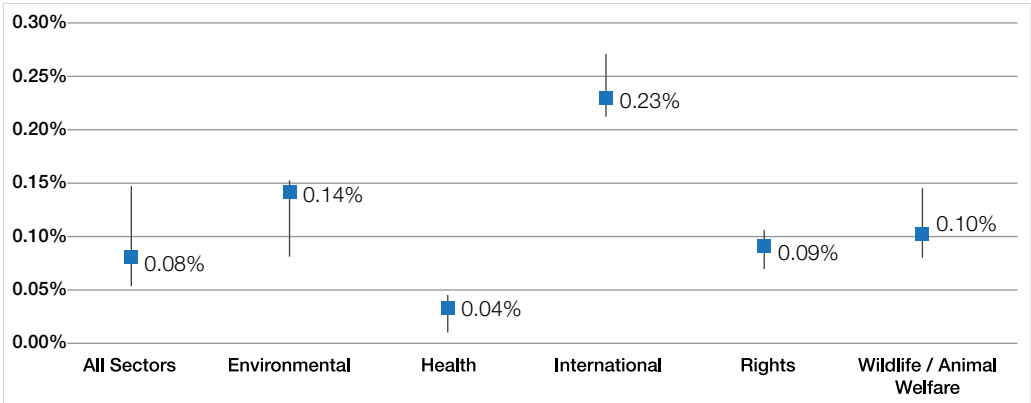
The amount of online revenue resulting from email varied greatly among sectors. The Environmental sector saw more than 50% of their online income generated by email campaigns, while the Health and International sectors saw a much greater percentage driven by non-email online sources.

The Health sector raises money online from large events such as races or walk-a-thons. These types of events tend to be promoted through media channels, an organization's website, and peer-to-peer email messages, rather than email messages from the organization to its supporters.



The percentage of email income varied less between list sizes than sectors, although Small organizations saw a lesser share of income driven by email than Large or Medium groups.

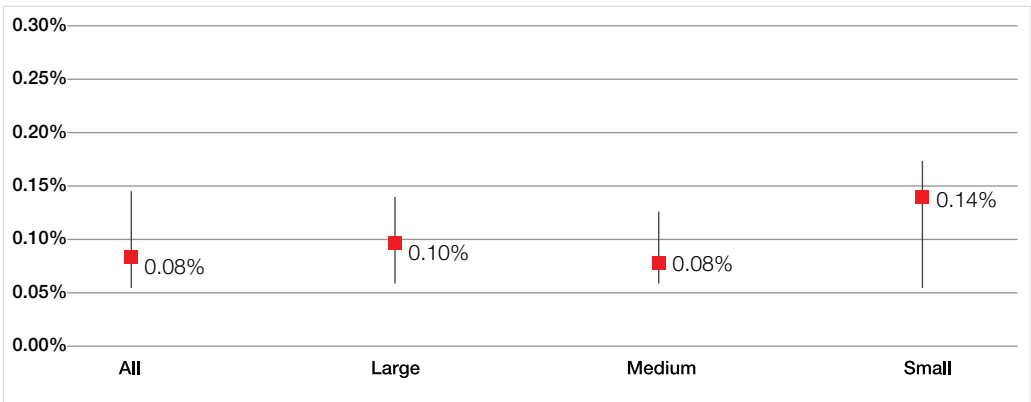
EMAIL FUNDRAISING RESPONSE RATES



This metric is defined as the number of gifts in response to a particular email, divided by the total number of delivered emails.

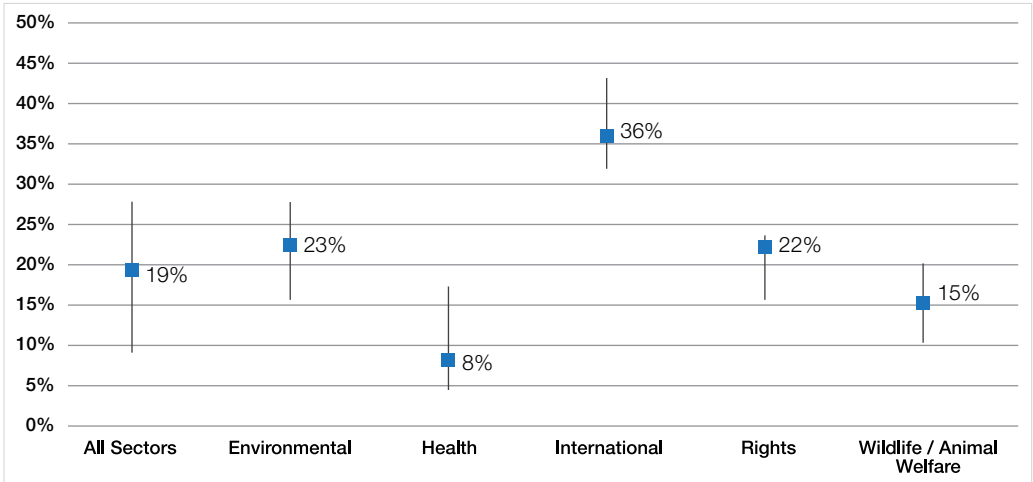
The International sector far out-performed others, with a response rate near triple the median for all sectors – likely due in part to the emergencies in 2010, including the earthquake in Haiti and the floods in Pakistan.

Overall, fundraising response rates dropped 19% from 2009 to 2010. The International sector response rate declined just 3%, while other sectors saw drops ranging from 16% (Environmental) to 29% (Wildlife / Animal Welfare). The Health sector, as in 2009, had a response rate half that of the all-sector median.

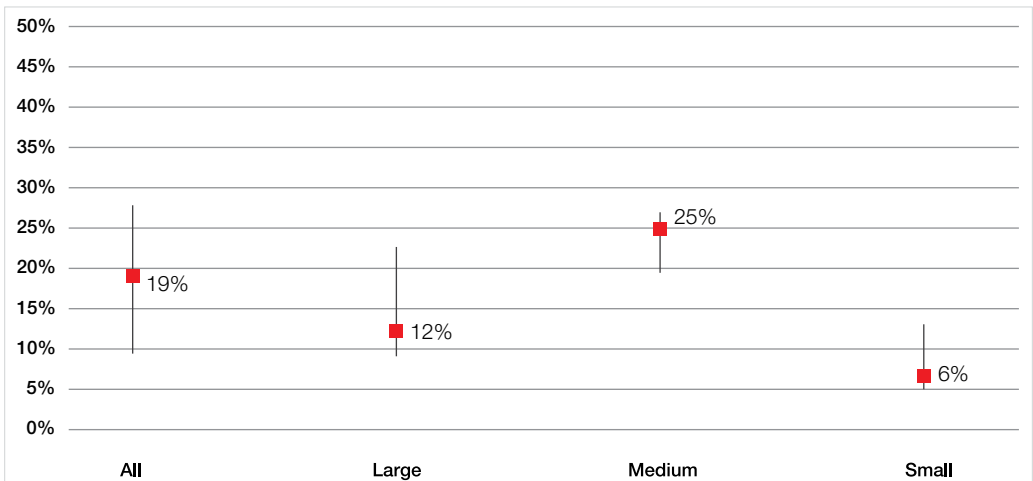


While the Small sector showed higher response rates than either the Medium or Large sectors, it also saw the steepest decline from 2009 to 2010. Fundraising response rates declined by 19% for the Large sector and 20% for the Medium sector between 2009 and 2010, but declined by 36% for the Small sector over the same time period.

EMAIL FUNDRAISING PAGE COMPLETION RATES



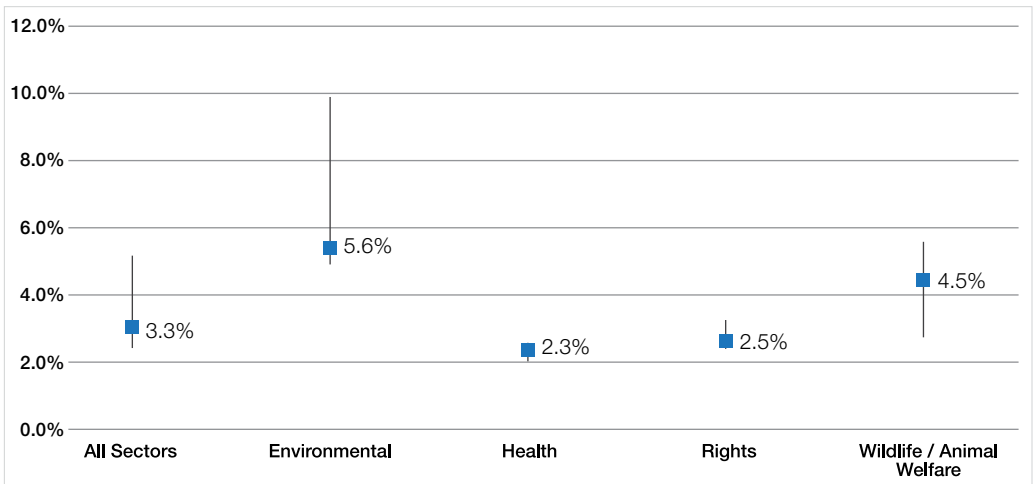
The International sector stood out for its high fundraising page completion rate, while the Health sector had a notably low page completion rate. While the Health sector was on par with other sectors in open and click-through rates, the low page completion rate for Health groups hurt the sector's overall fundraising response rate.



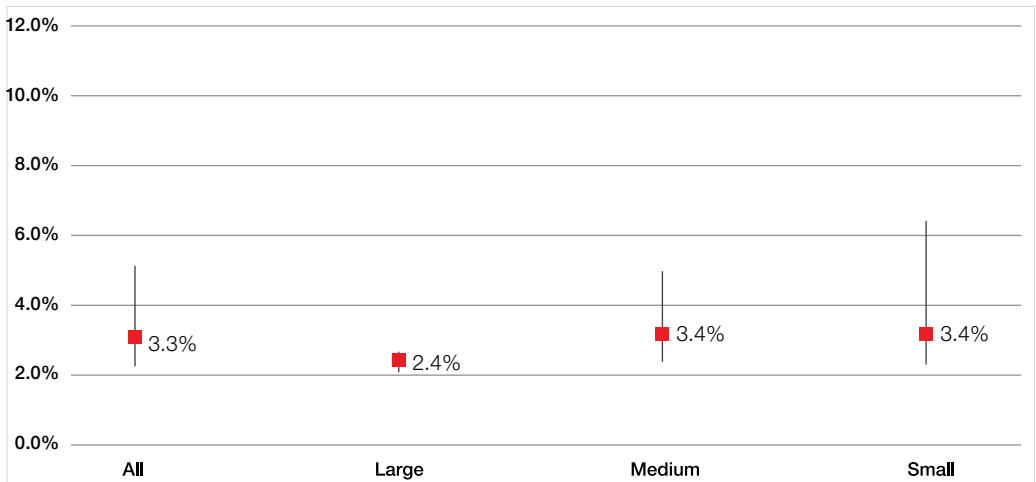
ONLINE ADVOCACY

EMAIL ADVOCACY RESPONSE RATES

Please note that the charts in this section only look at email sent to the full file or a random sample of the full file asking recipients to take a simple online action, such as signing a petition or emailing a legislator. For data about higher-threshold and offline actions, such as making a phone call or attending an event, please see the 2009 eNonprofit Benchmarks study at www.e-benchmarksstudy.com.



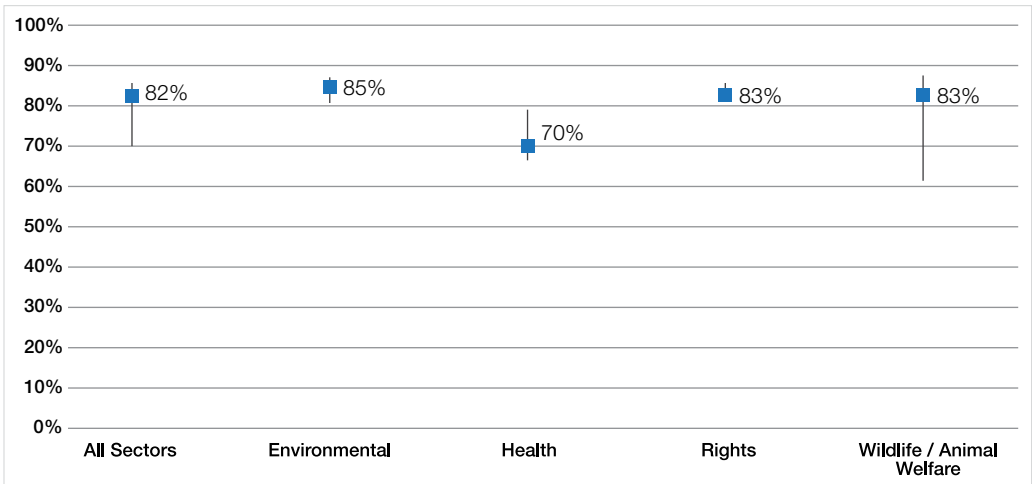
Due to a small sample size we did not calculate a median advocacy response rate for the International sector.



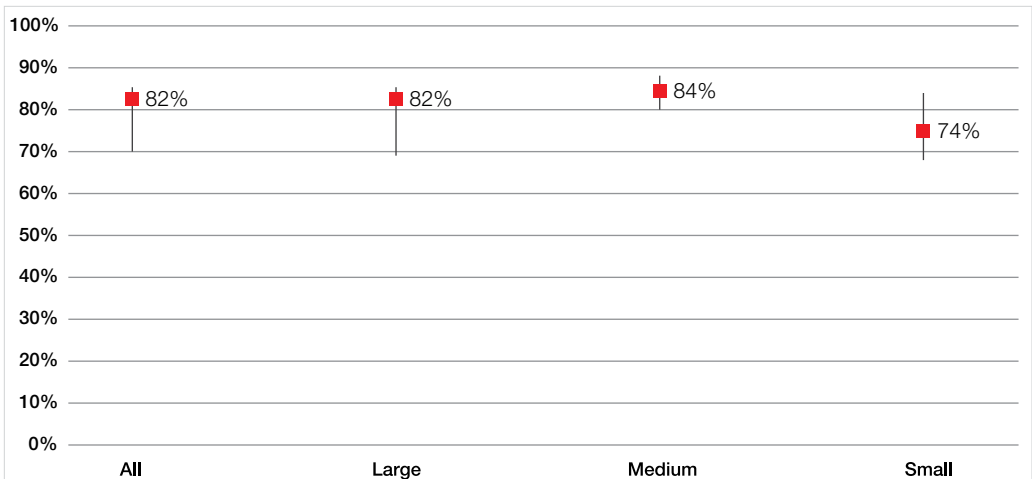
Across all sectors, advocacy response rates declined by 7% from 2009 to 2010.

EMAIL ADVOCACY PAGE COMPLETION RATES

Please note that the charts in this section only look at email sent to the full file or a random sample of the full file asking recipients to take a simple online action, such as signing a petition or emailing a legislator. For data about higher-threshold and offline actions, such as making a phone call or attending an event, please see the 2009 eNonprofit Benchmarks study at www.e-benchmarksstudy.com.

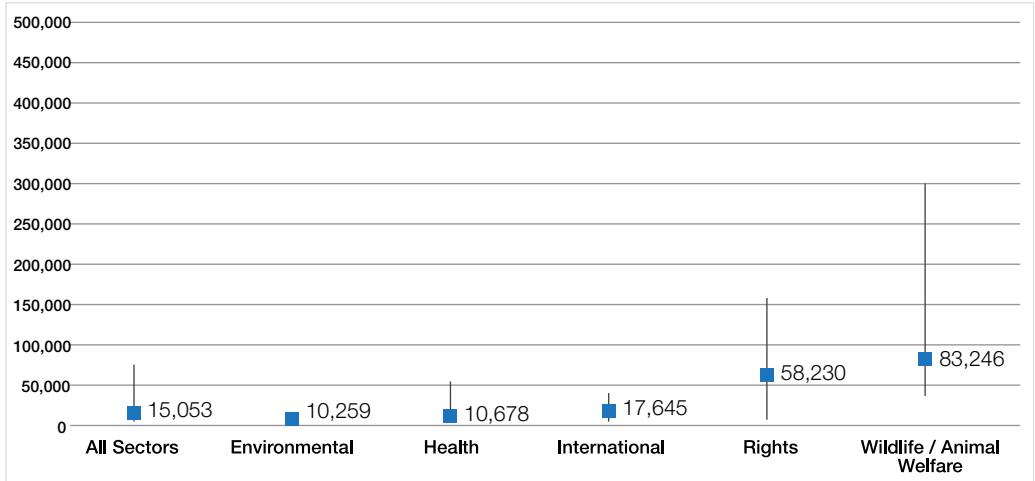


Due to a small sample size we did not calculate a median advocacy page completion rate for the International sector.

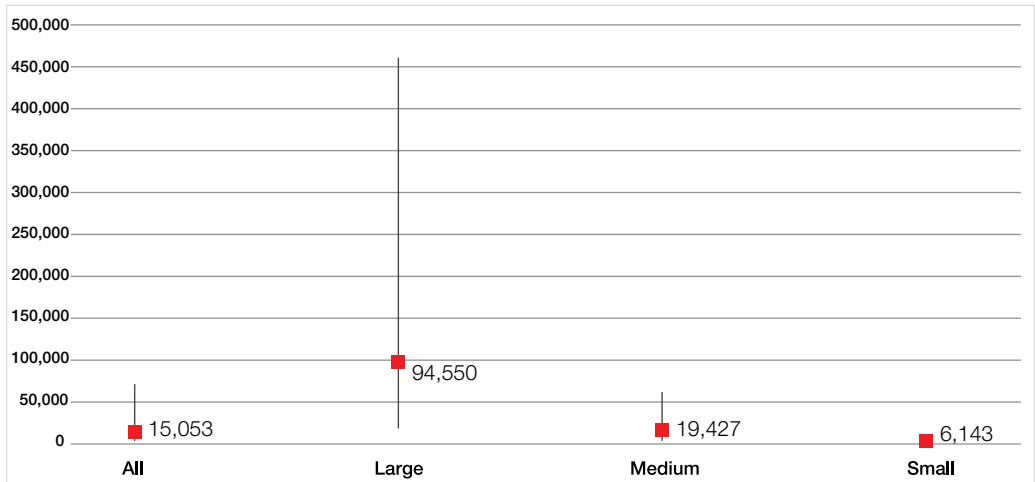


SOCIAL MEDIA

TOTAL FACEBOOK FAN PAGE USERS

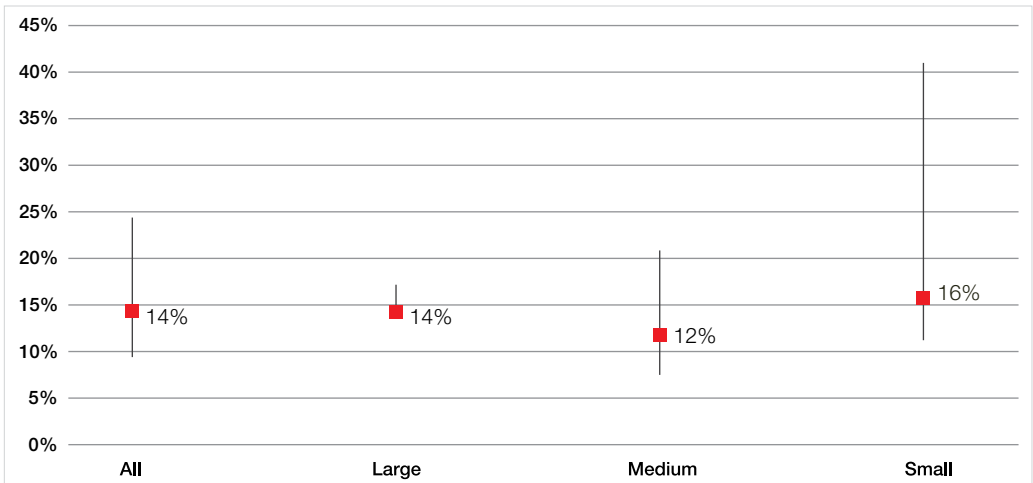
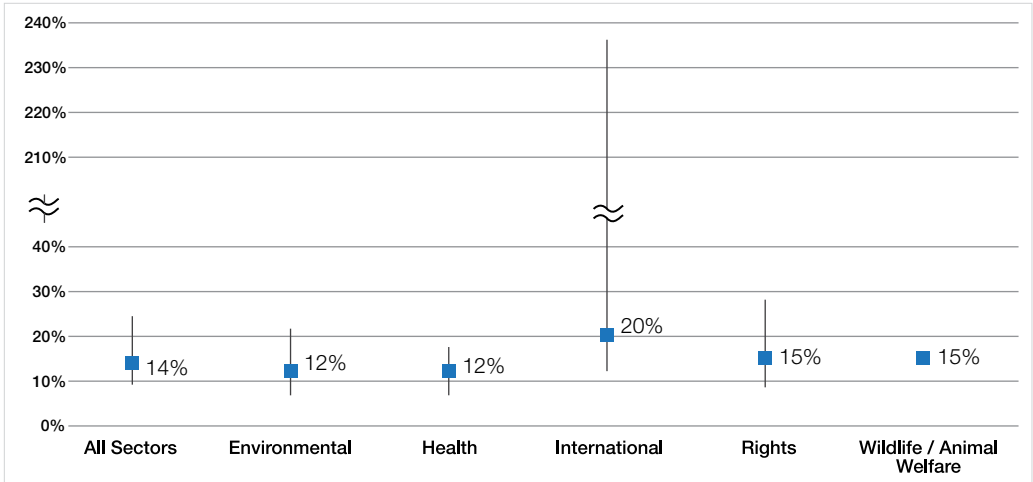


Across all sectors, the average number of Facebook fan page users (people who “like” a nonprofit fan page) at the end of 2010 was 15,053, with the Wildlife / Animal Welfare sector leading the way with an average of 83,246 users.



Large groups had a higher number of users on average than Small or Medium groups. However, we did see a fairly wide range of fan page users, particularly among Large groups. On average, nonprofits had 110 fan page users for every 1,000 email subscribers.

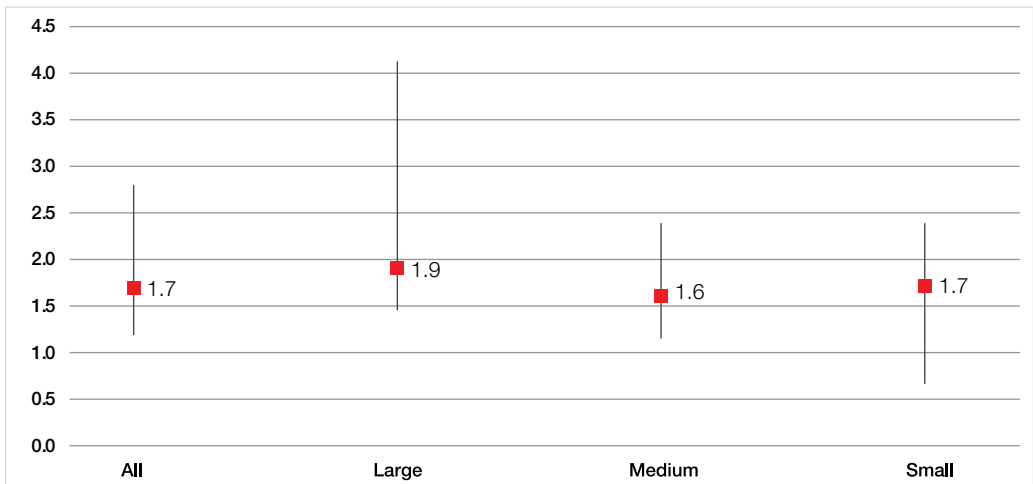
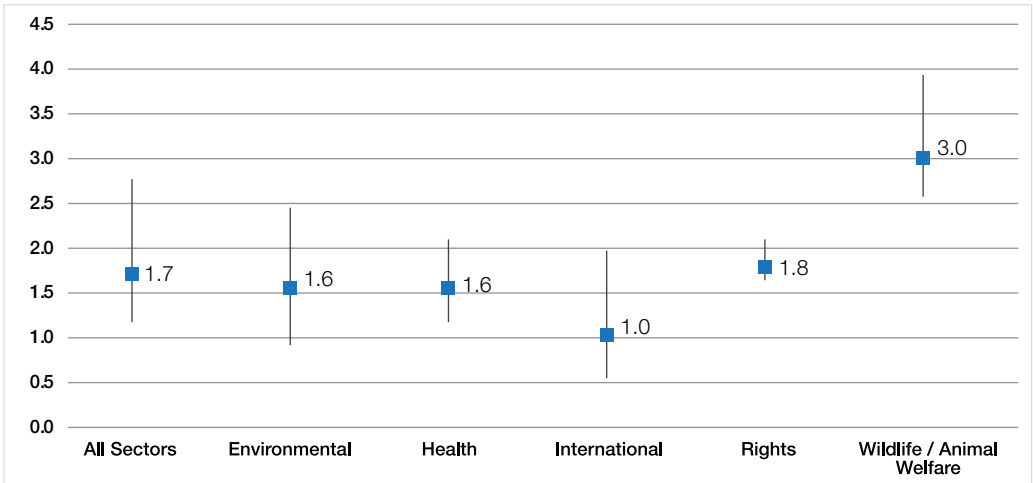
FACEBOOK FAN PAGE MONTHLY GROWTH RATES



On average, the number of Facebook fan page users grew by 14% per month in 2010, although the range of values within each sector varied widely.

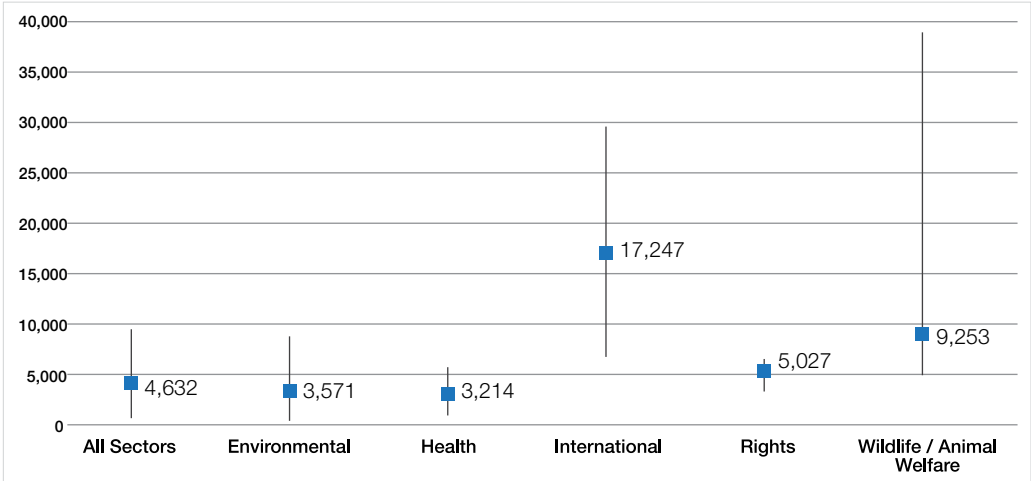
We saw fairly similar median monthly growth rates for Facebook fan pages across list sizes, though there was a wide range of values for each list size. No matter how many email subscribers you have, there is an opportunity to grow your fan page base at a rate similar to that of the Large groups.

FACEBOOK FAN PAGE DAILY ACTION RATE PER 1,000 USERS

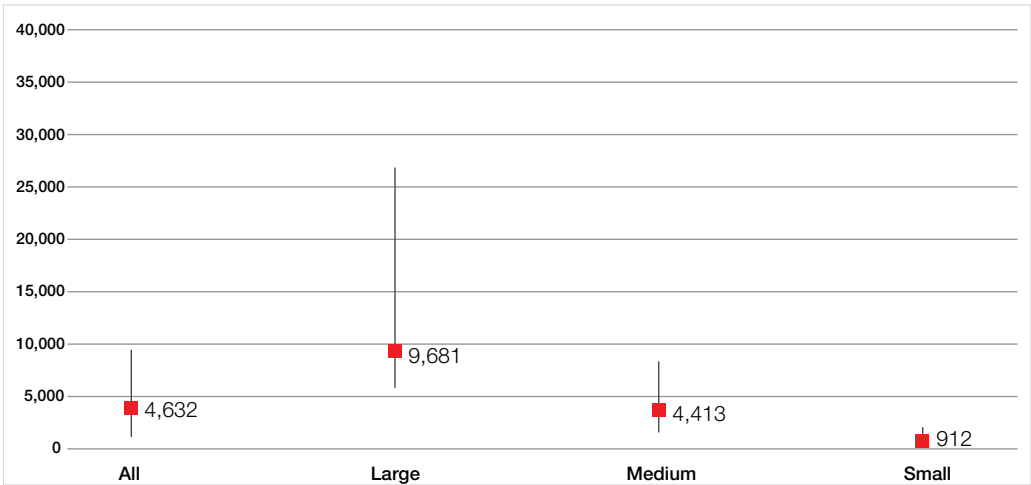


Across all sectors, the Facebook fan page daily action rate – calculated as daily “likes” and comments on a page’s content divided by fan page users – averaged 1.7 actions per 1,000 users. However, Wildlife / Animal Welfare groups had a much higher daily action rate (3.0 actions per 1,000 users) than other sectors.

TOTAL TWITTER FOLLOWERS



The average nonprofit in our study had 4,632 followers and was following an average of 1,758 “tweeps.”



Nonprofits had, on average, 19 Twitter followers for every 1,000 email subscribers. International groups had the highest ratio among the different sectors, with 46 Twitter followers for every 1,000 email subscribers. Small groups had the highest ratio among the different list sizes, with 28 Twitter followers for every 1,000 email subscribers.

TEXT MESSAGING

TEXT MESSAGING BENCHMARKS

Text messaging programs are becoming increasingly common, but they're still far more rare than email marketing programs among nonprofits. Of the 40 participants in this year's study, 10 provided data about their text messaging program. The uses of those programs varied substantially, with some focused on fundraising and others on advocacy or relationship-building.

Metrics for Text Messaging

	25TH PERCENTILE	MEDIAN	75TH PERCENTILE
Text Messaging List Size	7,098	15,742	41,153
Text Messaging List Size as a % of Email List Size	1.6%	1.9%	4.7%
List Growth Rate	33%	89%	159%
Annual Text Messaging List Churn	10%	14%	15%

Growth and Relative Size

Text messaging lists are growing as fast as ever. Growth rates were far above those seen for email, where median growth hit 20%. But, like email growth, the variability was dramatic and, in our experience, linked to the amount of effort invested in collecting mobile numbers and to an organization's ability to leverage major media or organizing moments.

Of course, higher growth rates are more likely when you start with a smaller file – and text messaging lists are still only a fraction of email list sizes. On average, mobile lists are 1.9% the size of the organization's email file.

Mobile Churn

Annual text messaging list churn – the rate at which mobile numbers become unreachable in a year – was 14% in 2010 – lower than the email churn rate. This may be a sign of organizations learning best practices around recruiting and retaining subscribers to their mobile list; an alternate possibility is that organizations didn't send many text messages this year.

GETTING IMMEDIATE RESULTS: AN AARP TEXT MESSAGING EXPERIMENT

Of course, the numbers on the previous page don't really tell you how organizations are *using* their text messaging programs to generate support. Some organizations are focused on mobile fundraising, others on advocacy and generating phone calls, and still others on getting breaking news out quickly. Here's one quick look at a text messaging program in action.

On August 25, 2010, news of Fiscal Responsibility Co-Chairman Sen. Alan Simpson equating Social Security with a "milk cow" was rapidly spreading.

AARP didn't miss a beat. **That same day, the organization launched a text message to roughly 44,000 subscribers**, alerting them to the news and giving them the option to either reply or call in to find out more.

AARP Breaking News: Fiscal Comm member Simpson attacks Social Security recipients. Reply CALL or dial 877-814-7890 to hear more. Msg&DataRatesApplyReplyStop2OptOut

Those that responded heard a recording by an AARP staff member explaining the situation and inviting supporters to press 1 to leave a message for Congress telling them why Social Security matters to them.

More than 80% of those who heard the message went on to record their own. **Within 24 hours, AARP had more than 870 heart-wrenching personal stories from supporters.** The stories continued to roll in until finally 975 had been recorded – a 2.2% response rate, overall. That's not far off the email advocacy benchmarks response rate of 3.3%!

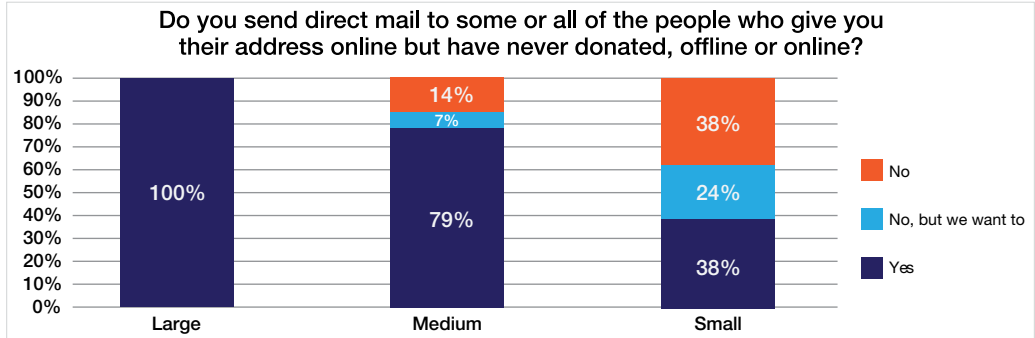
Best of all – the entire effort took minimal time to set up, making it possible for AARP to move quickly on the heels of a big news story and use that moment to generate additional support for Social Security.

With the help of the organization's provider, Mobile Commons, AARP then had the calls sorted by the caller's Congressional district and delivered to the voice boxes of the appropriate members, and retained a district-sorted copy of its own for the next time the fight for Social Security flares up.

MULTICHANNEL COMMUNICATIONS

We asked our study partners to answer a few questions about their organization's use of multichannel communications – that is, how they talk to the same supporter through email, direct mail, telemarketing, and other channels.

So how did the organizations we talked to fare?



First, direct mail programs were widespread. Of our study partners, 87% had a direct mail program in place, and all of the Large organizations we surveyed include at least some online supporters – including those who have never donated – in their direct mail efforts. The same was true for most Medium groups, but for Small organizations, this was not the case.

62% of Small groups did not send direct mail to non-donors who came in online – and only 24% of respondents indicated that they would like to expand their direct mail program to those supporters in the future. However, Small organizations did report extending direct mail efforts to online recruits who were also online donors.

Two-thirds of our study partners reported having telemarketing programs at their organization. Large groups were most likely to have a telemarketing program, while only half of Medium and Small organizations had one.

Fewer than half of organizations with a telemarketing program actually called non-donors whose addresses came from an initial online contact (47%, compared to 85% of organizations who reported using their direct mail program to contact non-donors recruited online).

Organizations were more likely to extend telemarketing efforts to those who had made an online donation. Nearly three-fourths of the organizations we surveyed with a telemarketing program reported doing so.

Finally, the vast majority of organizations in our study – 79% – reported that online and offline acquisition efforts were budgeted separately. Large organizations were most likely to have a combined multichannel acquisition budget, but even among these groups, fewer than half reported using a combined budget.

GLOSSARY OF TERMS

ADVOCACY EMAIL

An email that asks recipients to sign an online petition, send an email to a decision-maker, or take a similar easy-to-perform action. For the purpose of this study, advocacy email does not include harder actions like making a phone call or attending an event. Advocacy email rates were calculated from advocacy emails with a simple action sent to either the full file or a random sample of the full file.

CLICK-THROUGH RATE

Calculated as the number of people who clicked on any trackable link in an email message divided by the number of delivered emails. People who clicked multiple times in one email were only counted once. In other words, if a subscriber clicked on every link in a message 10 times, this was counted the same as if the subscriber had clicked once on a single link.

DELIVERABLE EMAILS

Only the emails that were delivered, not including the emails that were sent and bounced.

FAN PAGE DAILY ACTION RATE, FACEBOOK

Calculated as the number of daily “likes” and comments on a page’s content divided by the number of fan page users.

FULL FILE

All of an organization’s deliverable email addresses, not including unsubscribed email addresses or email addresses to which an organization no longer sends email messages.

FUNDRAISING EMAIL

An email that only asks for a donation, as opposed to an email newsletter, which might ask for a donation and include other links. Fundraising email rates were calculated from all fundraising emails, regardless of whether the email went to the full file, a random sample of the file, or a targeted portion of the file.

LIST CHURN

Calculated as the number of subscribers who became unreachable in a 12-month period divided by the sum of the number of deliverable email addresses (or phone numbers, in the case of text messaging list churn) at the end of that period plus the number of subscribers who became unreachable during that period. Study participants were required to track the number of subscribers who became unreachable each month to account for subscribers both joining and leaving an email list during the 12-month period who would otherwise go uncounted.

MONTHLY GIFT

A donation where the donor signs up once to donate on a regular schedule. Also known as a sustainer.

NEWSLETTERS, EMAIL

An email with multiple links or asks, which can include fundraising or advocacy asks. Email newsletter rates were calculated from all email newsletters, regardless of whether the newsletter went to the full file, a random sample of the file, or a targeted portion of the file.

OPEN RATE

Calculated as the number of HTML email messages opened divided by the number of delivered emails. Email messages that bounce are not included.

PAGE COMPLETION RATE

Calculated as the number of people who completed a form divided by the number of people who clicked on the link to get to that form. For the purposes of this study, it was not always possible to use the number of people who clicked on a link to a specific form, so we used the number of unique clicks in the message.

PERCENTILE

The percent of observed values below the named score. 25% of the observations are below the 25th percentile; 75% of the observations are below the 75th percentile. The values between the 25th percentile and 75th percentile are the middle 50% of the observed values and represent the normal range of values.

RANDOM SAMPLE

A segment of the full email file selected at random, such that there would be no reason to expect a different rate than an email sent to the full file.

RESPONSE RATE

Calculated as the number of people who took the main action requested by an email message divided by the number of delivered emails. We only calculated response rates in this study for fundraising emails and for advocacy email with simple asks, such as signing a petition or sending an email to a decision maker. For data about higher-threshold and offline actions, such as making a phone call, responding to a survey, or attending an event, please see the 2009 eNonprofit Benchmarks Study (available for download at www.e-benchmarksstudy.com).

TARGETED EMAIL

A segment of the full email file selected purposefully, such as by geography or past action. For example, emailing people in a city, emailing past donors, emailing past action takers, emailing people who have not taken an action, or emailing people who have not made a donation would all be examples of targeted email.

UNIQUE CLICKS

The number of people who clicked on any trackable link in an email message, as opposed to the number of times the links in an email were clicked. If a subscriber clicked on every link in a message 10 times, this counted as 1 unique click.

UNSUBSCRIBE RATE

Calculated as the number of individuals who unsubscribed in response to an email message divided by the number of delivered emails.

USERS, FACEBOOK

People who “like” a nonprofit Facebook fan page.

STUDY METHODOLOGY

The 2011 eNonprofit Benchmarks Study collected data about email messaging, email list size, fundraising, online advocacy, Facebook, Twitter, and text messaging from 40 U.S.-based national nonprofit organizations for the calendar year of 2010. We analyzed the results of 672 million email messages sent to over 17 million list subscribers; more than 114 million dollars of online donations from over 1.7 million online gifts; and 2.9 million advocacy actions.

The average given for a metric is the median. To calculate the benchmarks metrics reported in this study, we first calculated a metric for each group and then calculated the median across groups, so that no single group had more weight than any other. Each benchmark aggregates data from at least 3 study participants. Not all study participants reported data for every metric.

Study participants provided data about individual email messages sent in 2009 and 2010, including the date the message was launched, the number of email messages sent, the number of delivered emails, the number of email messages opened, the number of unique clicks for a message, the number of actions taken, the number of donations made, the amount donated, and the number of unsubscribes. Study participants coded their individual email messages by type (advocacy, fundraising, newsletter, or other) and further coded each advocacy email by audience (full file, random sample, or targeted). Advocacy rates were calculated from email with a simple online advocacy action sent to the full file or a random sample of the full file. Fundraising and newsletter rates were calculated from all email of that type.

In addition, study participants provided historical data going back to 2005. Study participants also took a survey about how they integrate their online program with their offline fundraising.

Calculating list churn for a year requires data snapshots at regular intervals over the course of the year. Looking at list size and new or lost email addresses only at the beginning and end of the year may not account for subscribers who join during the year and then unsubscribe or become undeliverable before the year ends. Study participants were required to track the number of subscribers who became undeliverable each month to contribute to the list churn metric; 8 study participants met this standard.

Although you may be tempted to compare the results of this year's study with past studies, we want to emphasize that the 2011 study represents just a single snapshot in time. The make-up of the participating nonprofits varies from year to year, and therefore we cannot confidently extrapolate year-over-year trends by placing the two studies side-by-side. At any point in this study where we refer to results from past years, we are using historical data provided by this year's participants to make the comparison.

This year's study segments groups by sector and the size of their deliverable email file. List size groups were determined by looking at the email list size over the course of 2010 and grouping nonprofit participants into three categories, as follows:

- Small - Under 100,000 deliverable email addresses
- Medium - 100,000-500,000 deliverable email addresses
- Large - Over 500,000 deliverable email addresses

The 2011 study participants were segmented by sector as follows:

Environmental

- Alaska Wilderness League
www.alaskawild.org
- Appalachian Mountain Club
www.outdoors.org
- Food & Water Watch
www.foodandwaterwatch.org
- Greenpeace USA
www.greenpeace.org/usa
- League of Conservation Voters
www.lcv.org
- National Parks Conservation Association
www.npca.org
- Rails-to-Trails Conservancy
www.railstotrails.org
- Save The Bay
www.savesfbay.org

Health

- American Diabetes Association
www.diabetes.org
- American Heart Association
www.heart.org
- American Lung Association
www.lungusa.org
- Cystic Fibrosis Foundation
www.cff.org
- Diabetes Hands Foundation
www.diabeteshandsfoundation.org
- Easter Seals
www.easterseals.com
- Fight Colorectal Cancer
www.fightcolorectalcaner.org

- Juvenile Diabetes Research Foundation International (JDRF)
www.jdrf.org
- Susan G. Komen for the Cure Advocacy Alliance
www.komenadvocacy.org

International

- International Rescue Committee
www.rescue.org
- Oxfam America
www.oxfamamerica.org
- Plan International USA
www.planusa.org
- SOS Children's Villages
www.SOS-USA.org
- U.S. Fund for UNICEF
www.unicefusa.org

Rights

- The American Federation of Government Employees (AFGE)
www.afge.org
- American Rights at Work
www.americanrightsatwork.org
- Human Rights Campaign
www.hrc.org
- Iraq and Afghanistan Veterans of America
www.iava.org
- NARAL Pro-Choice America
www.prochoiceamerica.org
- Planned Parenthood Action Fund
www.plannedparenthoodaction.org

- Planned Parenthood Federation of America
www.plannedparenthood.org

Wildlife / Animal Welfare

- Defenders of Wildlife
www.defenders.org
- The Humane Society of the United States
www.humanesociety.org
- IFAW (International Fund for Animal Welfare)
www.ifaw.org
- National Wildlife Federation
www.nwf.org
- National Wildlife Federation Action Fund
www.nwfactionfund.org
- People for the Ethical Treatment of Animals
www.peta.org
- San Diego Zoo Global
www.sandiegozoo.org
- United Animal Nations
www.uan.org
- Wildlife Conservation Society
www.wcs.org

Other

- AARP
www.aarp.org
- Corporate Accountability International
www.StopCorporateAbuse.org
- Faithful America
www.faithfulamerica.org
- Smithsonian Institution
www.si.edu

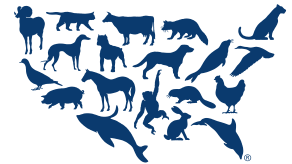
THANK YOU TO OUR NONPROFIT STUDY PARTNERS



get behind a cure.



| Adding *tomorrows* every day.



THE HUMANE SOCIETY OF THE UNITED STATES





dedicated to finding a cure

Oxfam America



LEAGUE OF CONSERVATION VOTERS



Smithsonian Institution



SOS CHILDREN'S VILLAGES



Plan



www.npca.org



rails-to-trails conservancy



	All Sectors	Environmental	Health	International	Rights	Wildlife / Animal Welfare	Large	Medium	Small
Open Rate	13%	16%	12%	13%	10%	14%	12%	13%	17%
	12%	14%	12%	11%	11%	12%	11%	12%	15%
	12%	17%	12%	11%	10%	13%	11%	13%	15%
Click-Through Rate	3.7%	7.1%	3.0%	3.9%	2.8%	5.1%	3.0%	4.0%	4.6%
	0.60%	0.82%	0.47%	0.65%	0.53%	0.82%	0.52%	0.53%	0.85%
	2.0%	3.2%	2.3%	1.0%	1.6%	3.7%	1.6%	3.3%	2.9%
Page Completion Rate	82%	85%	70%	36%	83%	83%	82%	84%	74%
	19%	23%	8%	36%	22%	15%	12%	25%	6%
Response Rate	3.3%	5.6%	2.3%	0.23%	2.5%	4.5%	2.4%	3.4%	3.4%
	0.08%	0.14%	0.04%	0.23%	0.09%	0.10%	0.10%	0.08%	0.14%
Average Gift - One Time	\$60	\$46	\$99	\$117	\$67	\$63	\$56	\$59	\$79
Average Gift - Monthly	\$20	\$21	\$19	\$33	\$19	\$19	\$19	\$20	\$23
Monthly Growth Rate	14%	12%	12%	20%	15%	15%	14%	12%	16%
Actions per 1000 Users	1.7	1.6	1.6	1.0	1.8	3.0	1.9	1.6	1.7

■ Advocacy
■ Fundraising
■ Newsletter