blackbaud

Online Marketing Benchmark Study for Nonprofits™

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The face of an organization is determined by its online presence. Whether static web content or a dynamic email campaign, the structure of our digital information is the foundation of the wealth and health of our businesses. In these hard-wrought economic times, it's all the more important to establish a voice that can rise above the fray.

You might already maintain a vibrant web presence, or maybe your efforts to brand, market, and engage have only just begun. No matter where your company stands, online benchmarks offer the opportunity to ensure that you're always moving forward. Rooted in the needs of the nonprofit sector, this report provides a means by which to compare your work to that of your peers. Are you raising enough money? Is your email file working hard enough? Does your content do its job? Is your monthly performance index where it needs to be?

This report — the seventh annual edition of its kind — goes into additional detail about online giving trends than was previously published in Blackbaud's 2012 Charitable Giving Report. This Study specifically analyzes data from nonprofit organizations using the **Luminate Online™** platform. You'll find content that can help you develop a path for the future of your organization: Progress can happen for those who absorb and apply the relevant data within. Responsible data interpretation depends, however, on appropriate context and application. The following outlines a few definitions and caveats that you'll want to consider in using these measures to assess your own work.

PURPOSE OF BENCHMARKS

Benchmarks — or quantifiable measures of progress — are well-established indicators by which a business can better understand its own and or its competitors' performance. They are crucial, even, for analyzing past performance and planning for future success.

To that end, Target Analytics, a division of Blackbaud, Inc., has been benchmarking the fundraising performance of nonprofits for more than 20 years. Moreover, reports by Giving USA, NTEN and M+R Strategic Services all add value to our understanding of how the industry performs and the best practices for various giving channels and fundraising methodologies. The Blackbaud Index also provides a monthly view into both overall and online giving trends in the nonprofit sector.

Nonprofit organizations should use this publication for directional guidance in understanding how the reported key performance indicators compare to their own. It should be stated, however, that reported measures reflect median values and are not comparable to previous years' reporting. As the number of organizations and their sizes change from year to year, so do the median values. Consider the performance measures within as guideposts to success, and engage your staff in interpreting the data and responding with appropriate marketing and fundraising strategies.

CORRELATION VERSUS CAUSATION

Data points that are correlated do not indicate causation. For example, in previous research we've done, survey respondents have self-reported estimates for the value of social engagement. Constituents who "like" an organization on Facebook were estimated by respondents to have a great long-term value. Now if this were really true, we'd cease direct mail, telemarketing, Direct Response Television (DRTV), and email and simply leverage Facebook to raise all our funds. Our lives would be so much simpler. Unfortunately, Facebook likes do not cause donors to give hundreds of incremental dollars. The gifts and social media likes simply correlated to one other in respondents' estimates. This is a basic lesson that must be remembered when it comes to data interpretation.

In this study, we do not argue that organizations that are smaller are more successful in a given industry vertical, but rather that there is a correlation regarding success. Each organization in each vertical is different, as is each year different than the last. Be wary of overdrawing conclusions on data points that seem to be related.

SPECIAL CIRCUMSTANCES

In previous reports there have been exigent events, such as the earthquake in Haiti and Hurricane Katrina, which seemed to shape giving. As a practice, we factor in related giving to these events to better understand how these events affected overall online behavior.

For 2012, we looked at the impact of both general and state elections in America. Clearly, billions of dollars were raised for these elections. Yet, after much gnashing of teeth, we found no negative relationship between political and philanthropic giving: Americans continued their philanthropic donations in spite of impressive amounts of political giving. One might even further examine the increases in some verticals that may have been positively affected by the 2012 election season. Once again, we find that donors in America can distinguish between giving to their favorite charities and to a candidate or issue that they wish to support. One gift does not replace the other.

PRELUDE

This report begets several important points that should anchor your reading and interpretation. More than ever, individual giving is dominated by two channels: direct mail and online. The most effective engagement strategies are those that carefully test and deploy integrated marketing campaigns that leverage the best of both channels. The ubiquity of social media and the explosive growth of mobile engagement do not negate the two anchors of direct mail and email in the constituent experience; this simply complicates integrated marketing.

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We live in a multichannel and multiscreen world. The nonprofit ecosystem is more complex than ever and requires robust business intelligence tools to properly engage constituents. The days of analyzing RFM (recency, frequency, monetary) exclusively and engaging in siloed campaigns are as relevant as stage-coaches and steam engines.

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SUMMARY OF KEY FINDINGS

- This report covers approximately 500 organizations, which sent 4.2 billion emails and raised $1.12 billion in 2012 contributions using the Luminate Online platform.
- Online fundraising continues to grow steadily, driven primarily by recurring donors and repeat donors, which grew 27 percent and 20 percent, respectively.
- Email performance changed dramatically, with open rates remaining consistent from the 2011 report, but click-through and response rates continue to decline. Response rates on appeals had an overall decline of more than 18 percent from the previous year. Declining response rates illustrate a saturated channel with undifferentiated messaging and campaigns. This is present in direct mail, telemarketing, and face-to-face solicitation.
- First-time gifts grew by a modest three percent. Their percentage as a percentage of the total dollars raised online declined — a first for this report.
- Advocacy saw an 8.7 percent increase in actions taken, while those who are advocates that also made a contribution increased 11.9 percent.
- Last year, food banks and organizations with smaller email files outperformed on a median percentage basis other verticals. And we noted strong performance from Canadian organizations. This year, the strongest verticals are higher education, hospitals, hospital foundations, and Jewish organizations. Groups with smaller email housefiles tended to outperform, but not as dramatically as before.

The vertical performance may be explained by the trend of donors becoming more cautious, and giving to charities to which they feel connected. There is a trend for this behavior, particularly with colleges, hospitals, and other similar groups.

The following sections provide greater detail to the data. Please also review the Appendix for additional insights.

PERFORMANCE TRENDS BY VERTICAL, EMAIL FILE TIER, REVENUE BAND, AND CONSECUTIVE YEARS

This study provides separate benchmarks for the nonprofit sector as a whole and for 19 National Taxonomy of Exempt Entitles (NTEE) verticals. Canadian nonprofits are treated as one vertical. Organizations that raise 80 percent of their reported funds through team events are grouped into team events. Nonprofits not in Canada or team events, and with more than one million email addresses, are grouped as national nonprofit mailers. This is an increase from last year's cohort definition, which had a threshold of 750,000 email addresses. All other organizations are classified according to their self-reported NTEE classification.

Furthermore, to be included, an organization had to be on the **Luminate®** platform for three or more years. (Luminate is a product developed by Convio, which is now a Blackbaud company.) Data from other Blackbaud online fundraising tools were not part of this analysis.

The intent is the same as using a median score instead of an average: We are looking to level out outliers caused by new organizations and to preclude the bias that large organizations bring to a study.

In addition, this year we have expanded upon segmentation of results by email band, revenue band, and the number of consecutive years an organization has been interacting online. In reviewing the data, we observe differences in organizational performance depending on the size of an organization, the size of its email universe, and the number of years it has been engaging with constituents online.

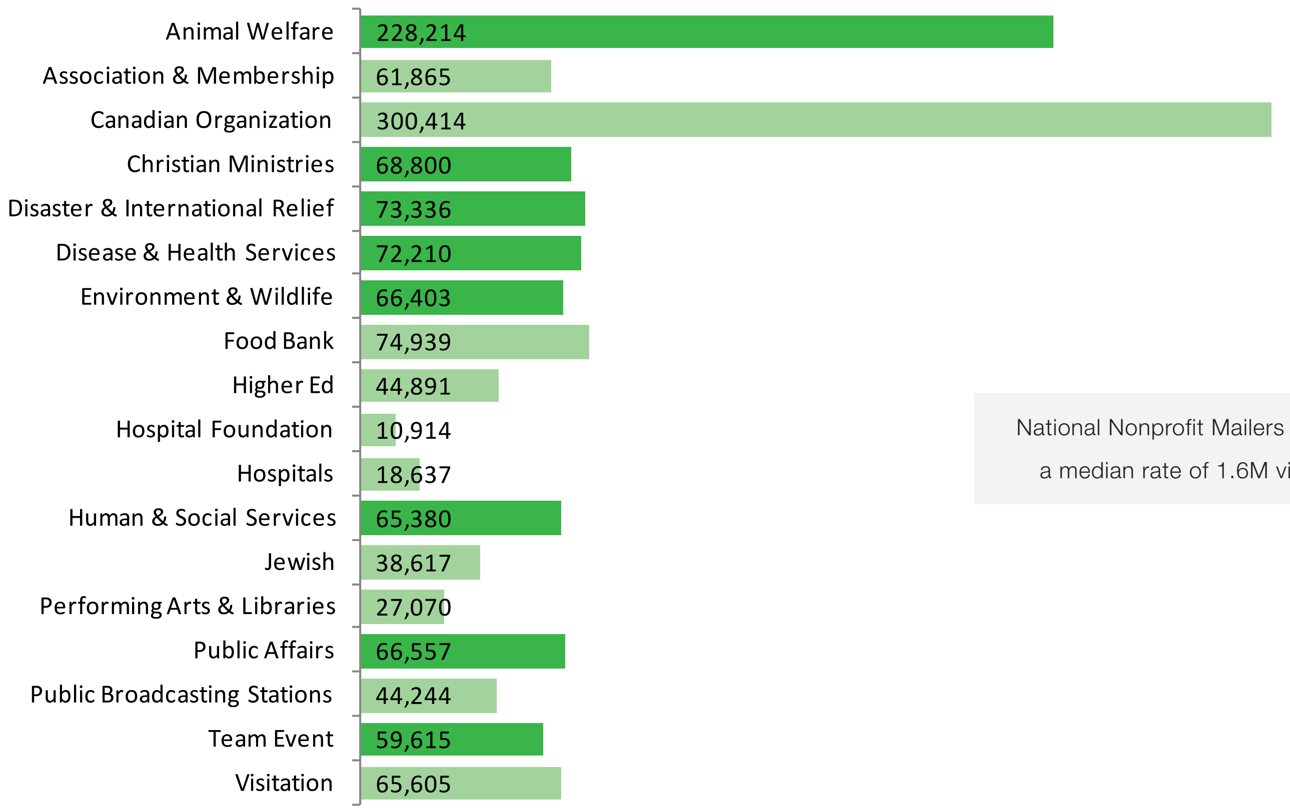
In each section, a portion of the organizations represented may be shown by their relevance given the timeframe indicated or the metric being reviewed. Also, the term "unique" means that each visitor is counted once within a given timeframe. The "n" value of each chart describes the number organizations are included in that metric. For more information, please review the Methodology section of this study.

WEBSITE STATISTICS

Chart 1 shows the median unique website visitors per month for the 238 organizations included in this benchmark. The national nonprofit mailer vertical outperformed all other verticals with a median 1,646,506 monthly visitors. Continuing a trend observed in years past, Canadian and animal welfare verticals outperformed the average median of 66,156 visits annually with 300,414 and 228,214 median visitors, respectively.

The median number of website visitors who leave an email address is 2.04%.

Chart 1 – Unique Website Visitors



National Nonprofit Mailers received a median rate of 1.6M visitors.

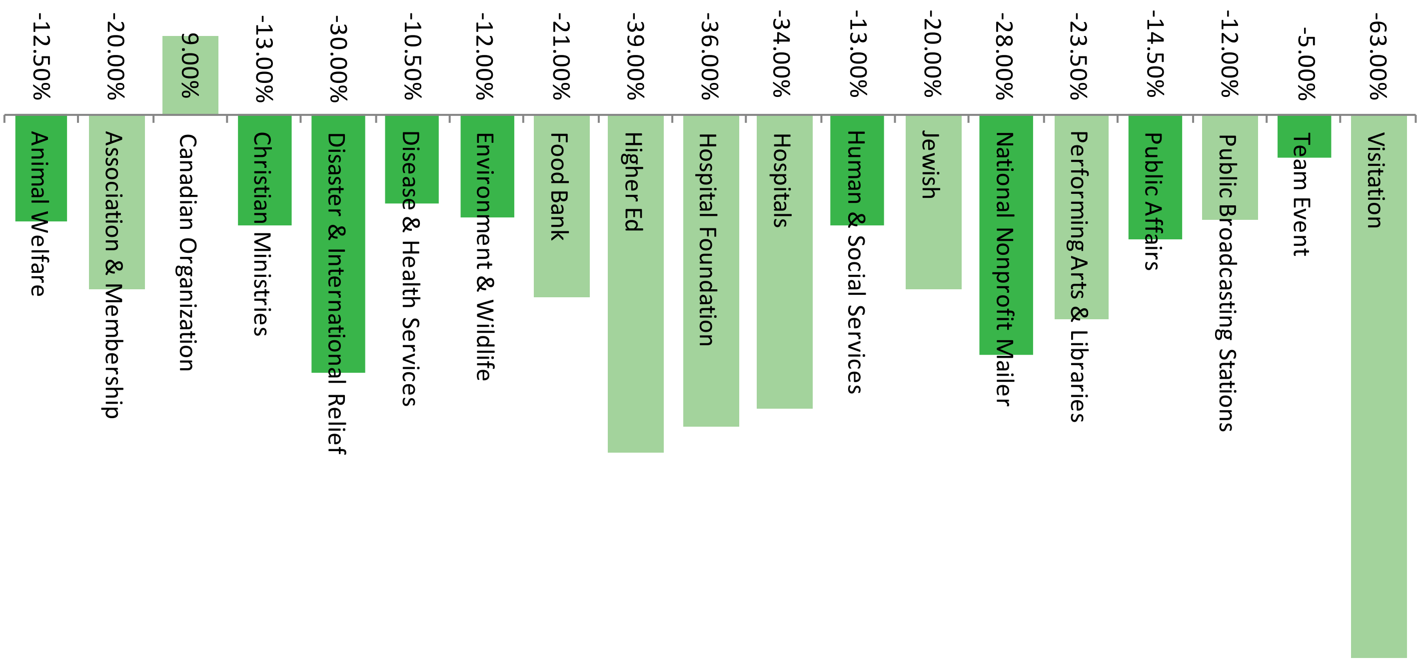
Median unique website visitors per year by vertical

*Light green denotes sample size fewer than 10 organizations.

The data in Chart 2 indicate a new trend in website traffic growth relative to previous years. With the single exception of the Canadian organizations vertical, every vertical experienced a significant decline in web traffic relative to 2011. Median growth in website traffic from 2011 to 2012 was -14 percent.

While this value is contrary to prior years it would be incorrect to strictly compare 2011 to 2012, as different organizations were part of different studies. What to investigate for your organization is whether website visits are trending down or up. And regardless of direction, work to discover what drives that movement.

Chart 2 – Website Traffic Growth

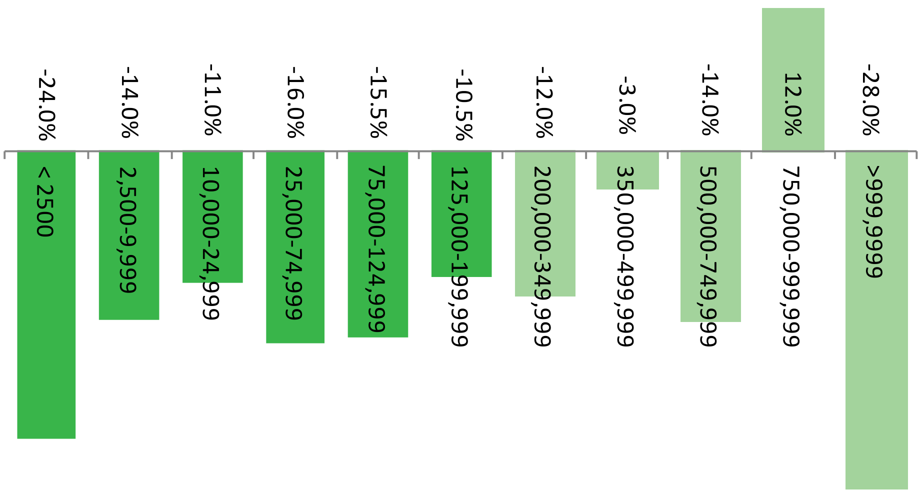


Percent website traffic growth relative to previous years by vertical

*Light green denotes sample size fewer than 10 organizations.

Examining web traffic growth relative to file size also revealed unexpected results. Organizations with smaller file sizes typically correlate to high rates of file growth. Similarly, organizations with large file sizes usually experience the smallest growth rates. While all email tiers showed negative growth rates for 2012, the smallest and largest tiers had the greatest website attrition with median growth rates of -24 percent and -28 percent, respectively. A portion of what accounts for the difference is, we assume, that fewer people are consuming an organization's web content and are instead seeking social media engagement, such as on Facebook and Twitter®.

Chart 3 – Website Traffic Growth by Email File Size



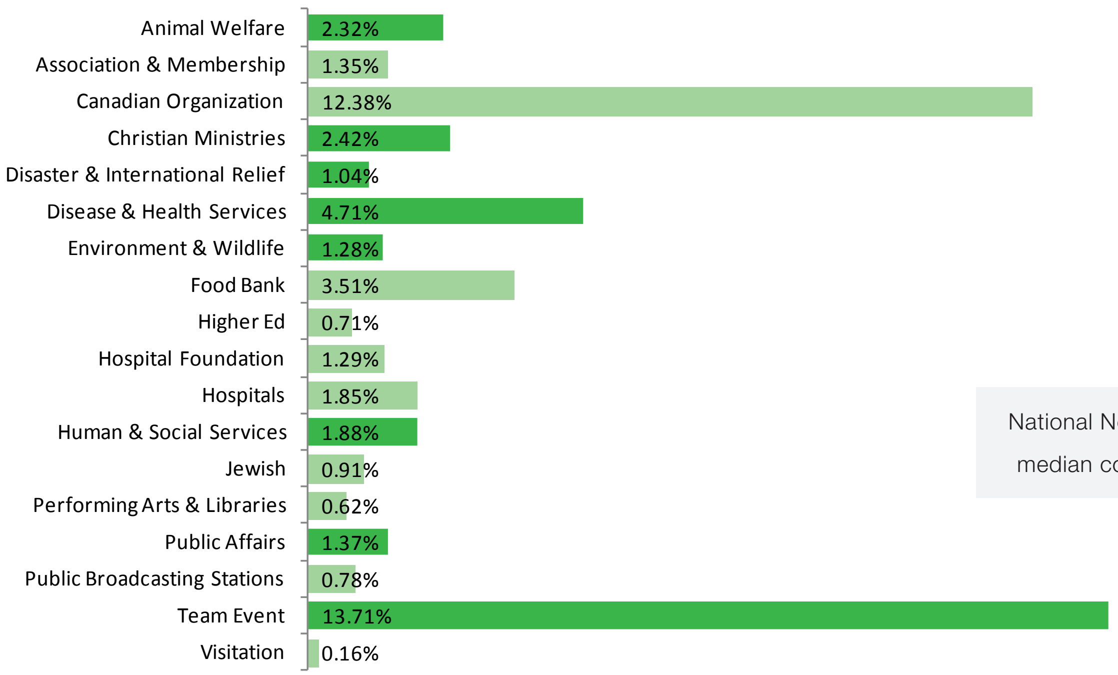
Percent web traffic growth relative to file size

*Light green denotes sample size fewer than 10 organizations.

Registration rate indicates a nonprofit's effectiveness at converting website visitors into registered constituents. This occurs when a constituent voluntarily provides an email address after taking an action.

As shown in Chart 4, the median monthly unique website visitors leaving an email address in 2012 was 2.04 percent, down slightly from the 2011 median of 2.24 percent.

Chart 4 – Website Traffic Conversion Rate



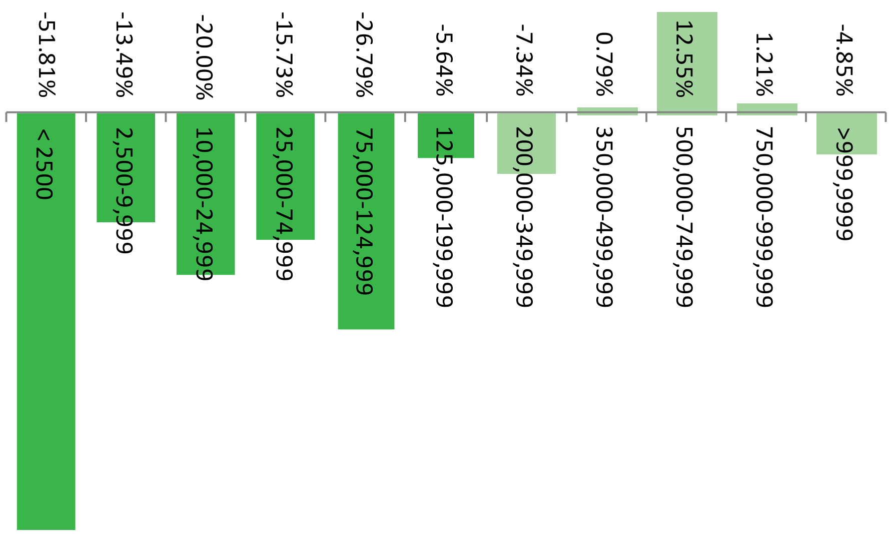
National Nonprofit Mailers received a median conversion rate of 41.29%.

Median monthly unique visitors leaving an email address by vertical

*Light green denotes sample size fewer than 10 organizations.

Website registration rates tend to correlate directly to usable email file sizes. Chart 5 shows this held true for 2012 where organizations with usable email files in excess of 350,000 experienced registration rate growth. Usable email file sizes below 350,000 saw a decline in registration rates in 2012. While organizations that invest in email capture strategies have historically seen stronger growth rates, the decline may signal a broadening effort in third-party email acquisition channels.

Chart 5 – Website Traffic Conversion Rate by Email File Size



Usable email file size correlation to website conversion rates

*Light green denotes sample size fewer than 10 organizations.

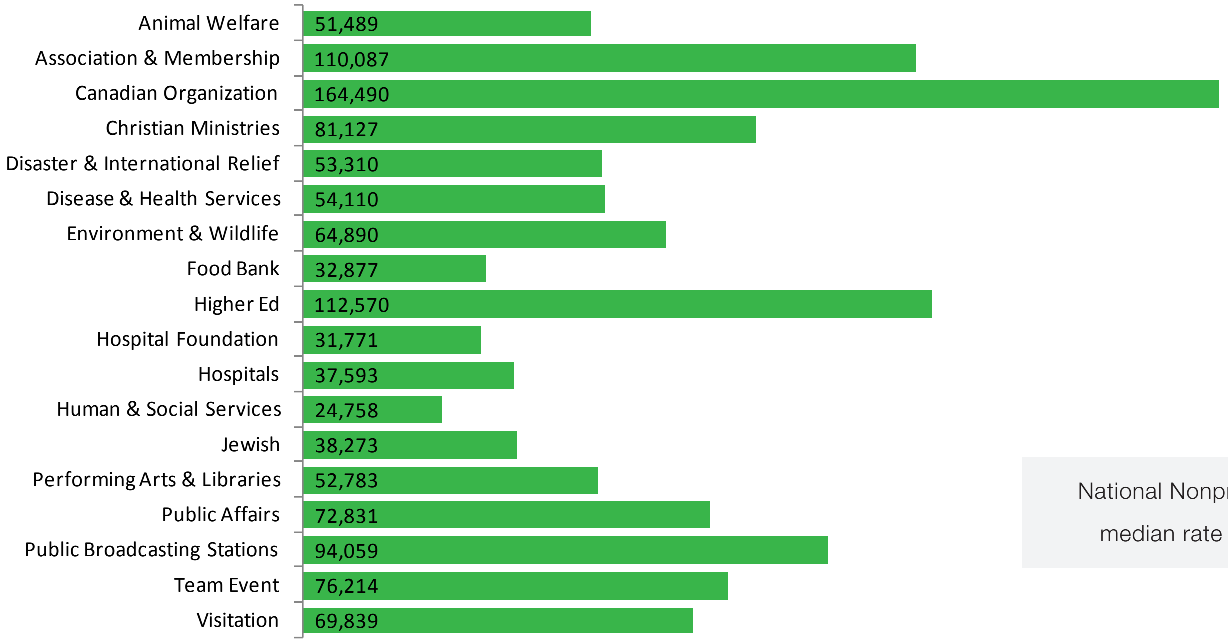
HOUSEFILE

A robust email file is a critical component of any effective online marketing program that raises revenue through emails. Successful organizations acquire new constituents who share in the institution's core values and start out as highly engaged supporters.

As shown in Chart 6, median total email file size in 2012 was 61,306. Not surprisingly, national nonprofit mailers outperformed the median by several times, while association and membership, Canadian organizations, and higher education outperformed other verticals with median email file sizes each above 100,000 names. Food banks and hospitals experienced the highest overall email file size growth rates in 2012 with 21 percent and 29 percent, respectively. Refer to the summary table in the Appendix so see the calculated medians based on the size of each organization's email file.

"Successful organizations acquire new constituents who share in the institution's core values and start out as highly engaged supporters."

Chart 6 – Total Email File Size

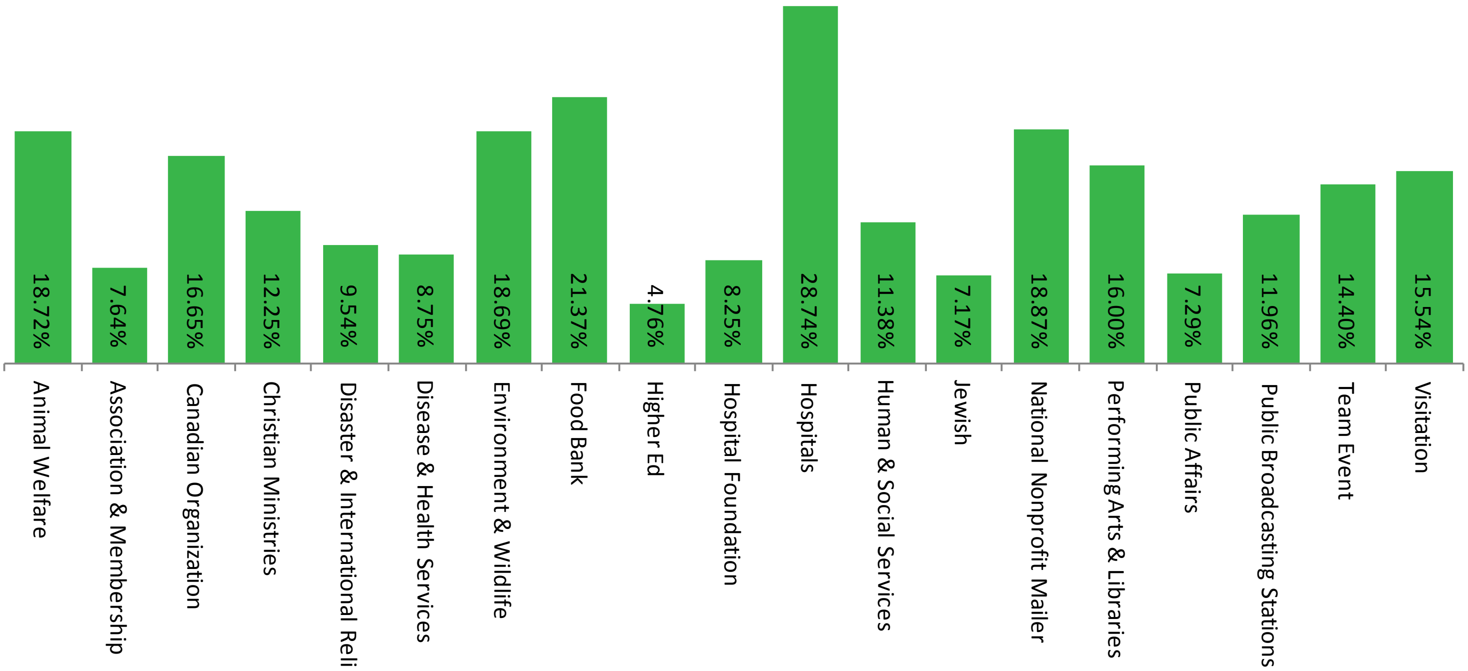


National Nonprofit Mailers had a median rate of 3.3M emails.

Median total email file size by vertical

Chart 7 shows percent change in total email file growth. All verticals experienced positive growth from 2011 through 2012. Median growth rate for all organizations is 12.45 percent. This continued growth is a good sign for online programs, as we do not see any sign of fatigue in attracting new people to the organizations represented in this study.

Chart 7 – Total Email File Growth

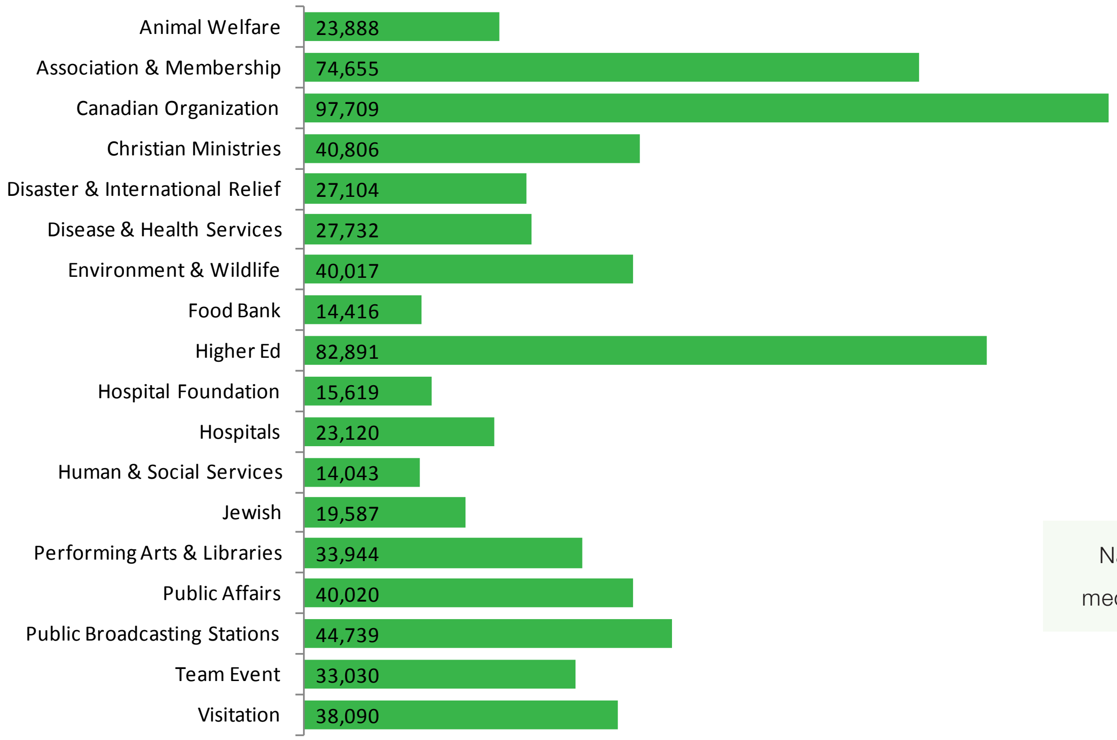


Percent change in total email file size growth by vertical

Adding constituents to an email file is not enough to continue improving online engagement — organizations need to maintain or increase the number of usable email addresses. As we have often read, retention of constituents is critical to being an effective steward of donors.

By "usable," we mean email addresses belonging to those who have opted in to receive email communication, rather than those that are hard-bounced. Chart 8 shows a median usable email file size of 32,135 for all organizations.

Chart 8 - Usable Email File Size

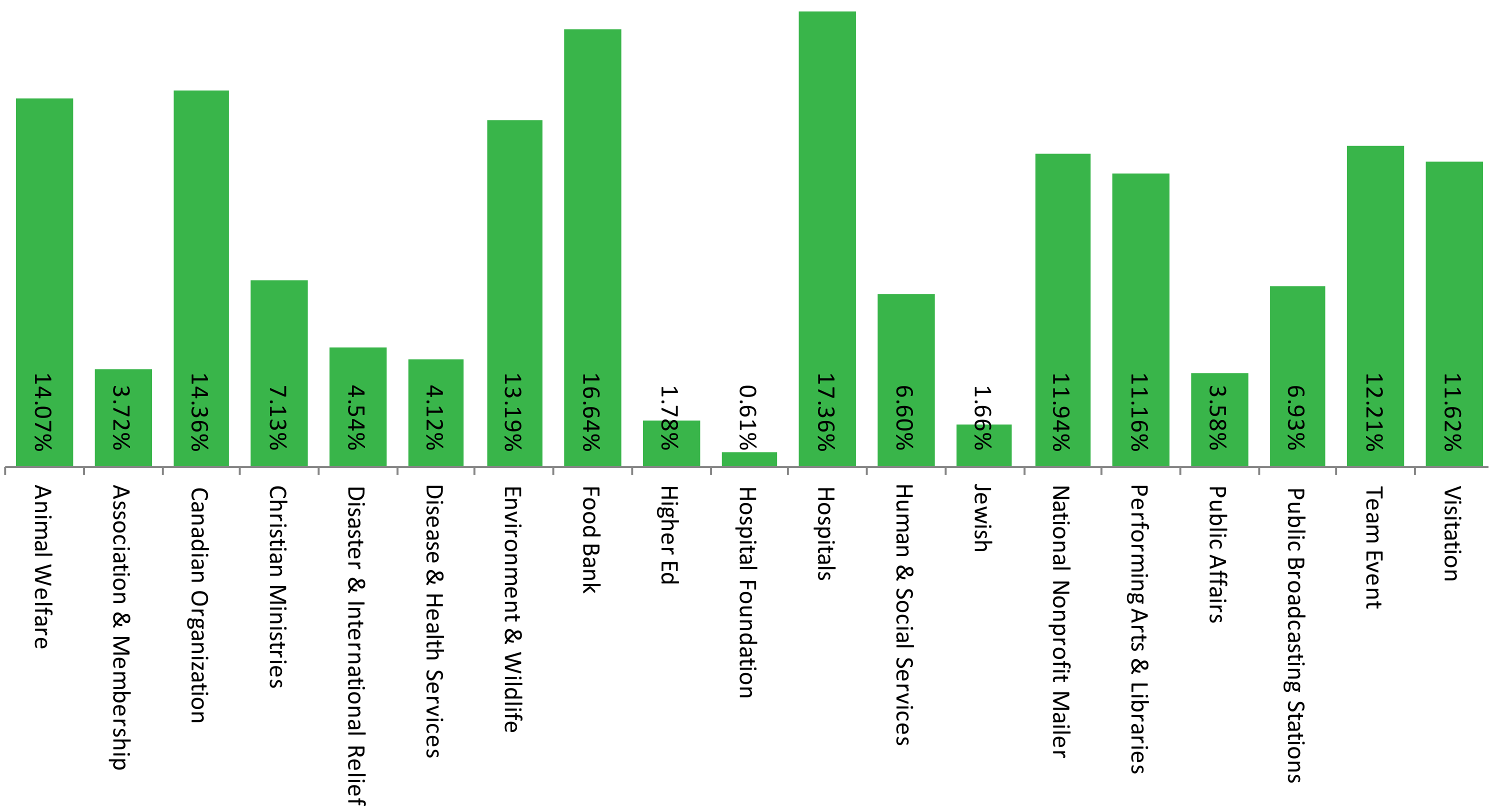


National Nonprofit Mailers had a median usable email file size of 2M.

Median usable email file size by vertical

Chart 9 shows the percent change in usable email from 2011 through 2012. The median change for all organizations is 7.33 percent, which is lower than the growth in all email addresses. List fatigue continues to diminish the total number of usable email addresses, which puts more emphasis on attracting high-quality constituents and building email campaigns that keep them interested and active.

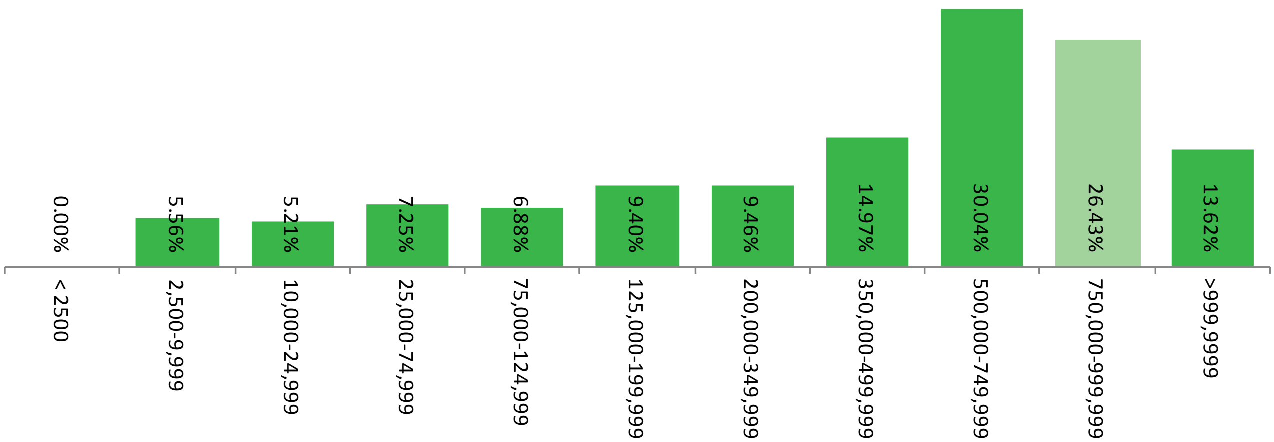
Chart 9 - Usable Email File Size Growth



Percent change in usable email addresses by vertical

Changes in the size of usable email addresses indicate greater improvements among larger organizations, as shown in Chart 10. Growth rates increase as you move from smaller to larger organizations. The one outlier is the >999,999 band, which shows an increase of 13.62 percent. This is likely explained by other metrics showing that larger organizations can more easily demonstrate the impact of a donor's gift and are likely better stewards for donors.

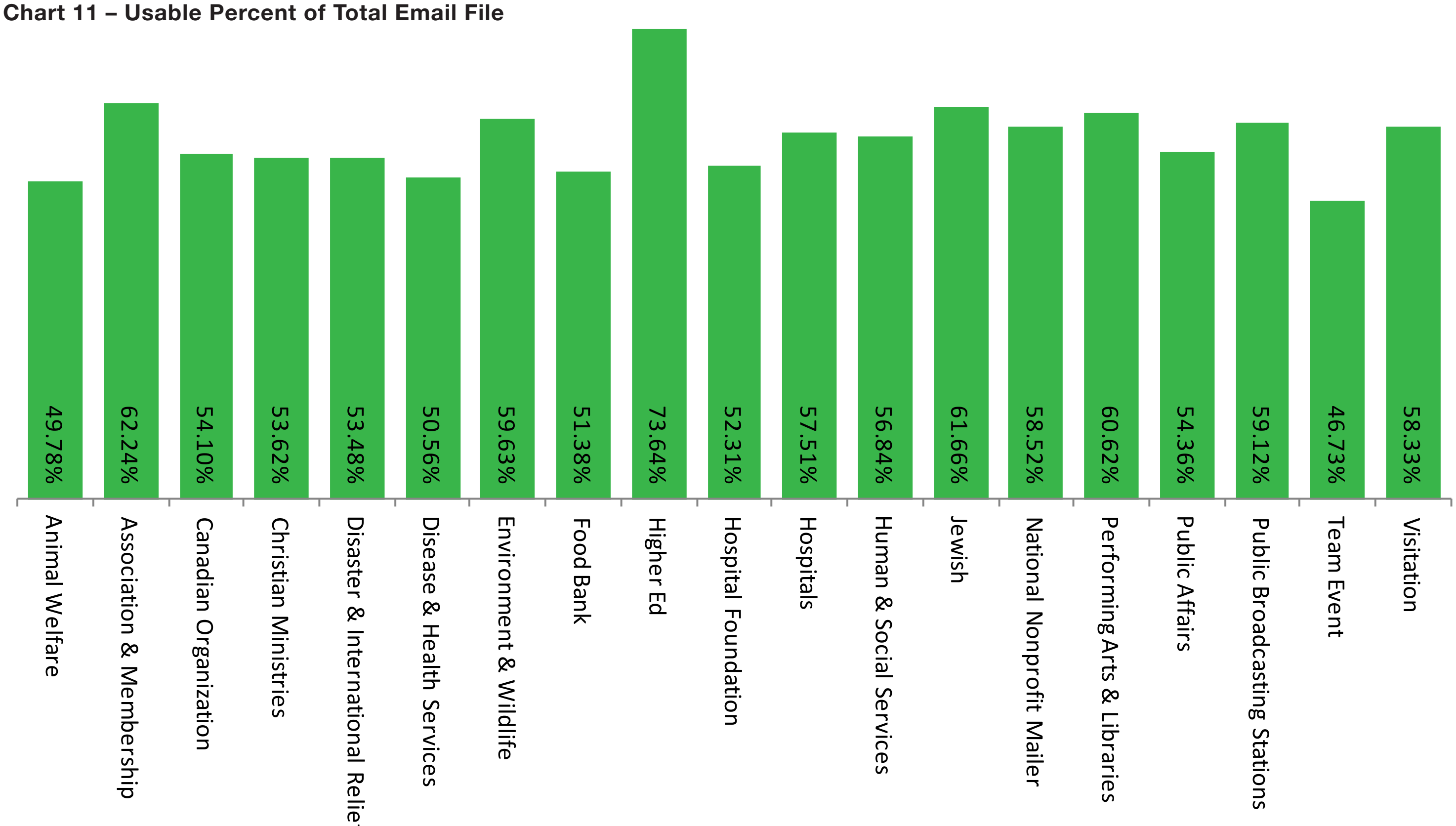
Chart 10 - Usable Email File Size Growth by Organization Size



*Light green denotes sample size fewer than 10 organizations.

A related metric is the proportion of usable file size, shown in Chart 11. Median proportion of usable file size for 2012 is 53.89 percent. Previous iterations of this report have shown that higher education and association and membership verticals outperform the benchmark due to constituencies with high degrees of affinity to an organization. Jewish organizations and performing arts and libraries verticals also showed relatively high usable file percentages. We would suggest that organizations that people choose to join form a natural community and will have more engaged constituents; this metric reflects that.

Chart 11 – Usable Percent of Total Email File



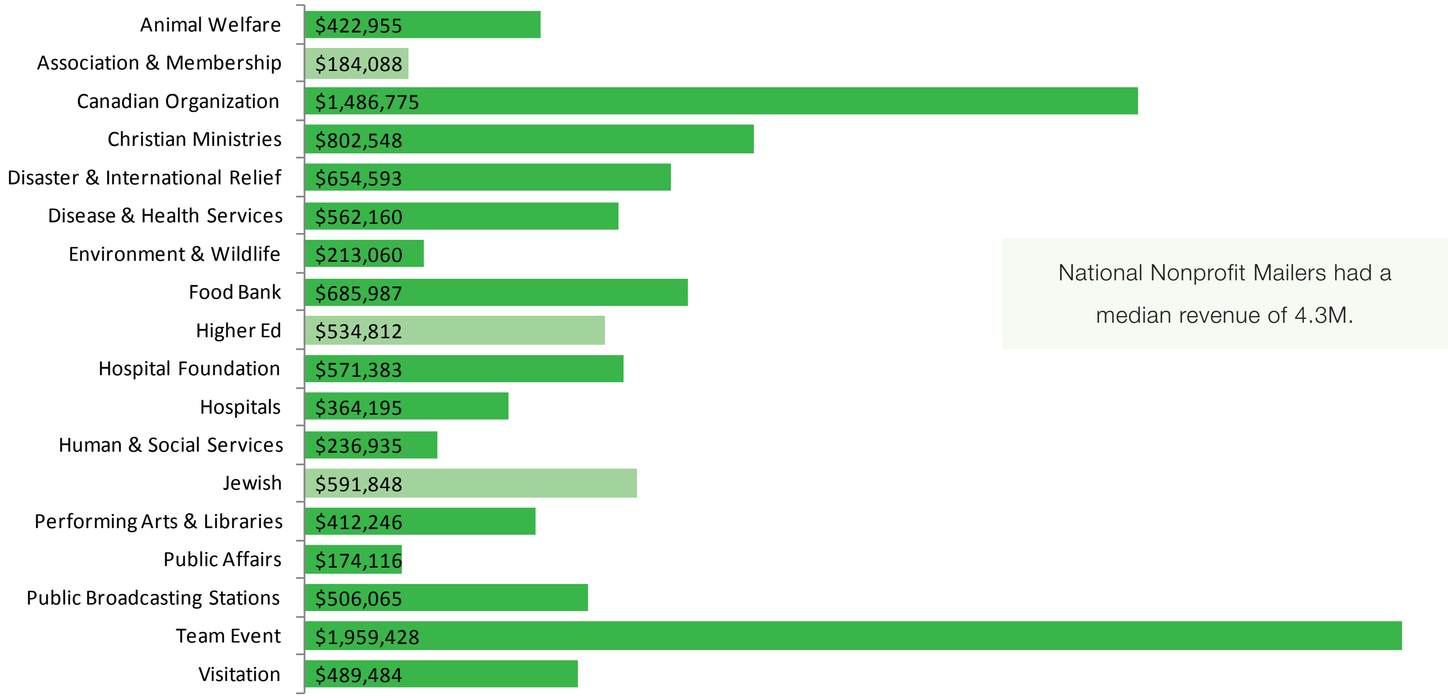
TOTAL FUNDRAISING

ONLINE FUNDRAISING REVENUE GROWTH MEDIANS IN ALL VERTICALS

Median online revenue this year grew by 11.6 percent from 2011. Consistent with the M+R Benchmark and the Blackbaud Index of Online Giving, we have also seen double-digit growth in online giving for the past three years.

There are slight differences in the findings between the Online Marketing Benchmark Study for Nonprofits and Blackbaud's 2012 Charitable Giving Report with regard to online giving growth. These differences are the result of slightly different data sets and reporting methodologies. But they both reinforce that online giving continues to have strong year-over-year growth rates.

Chart 12 – Total Fundraising Revenue



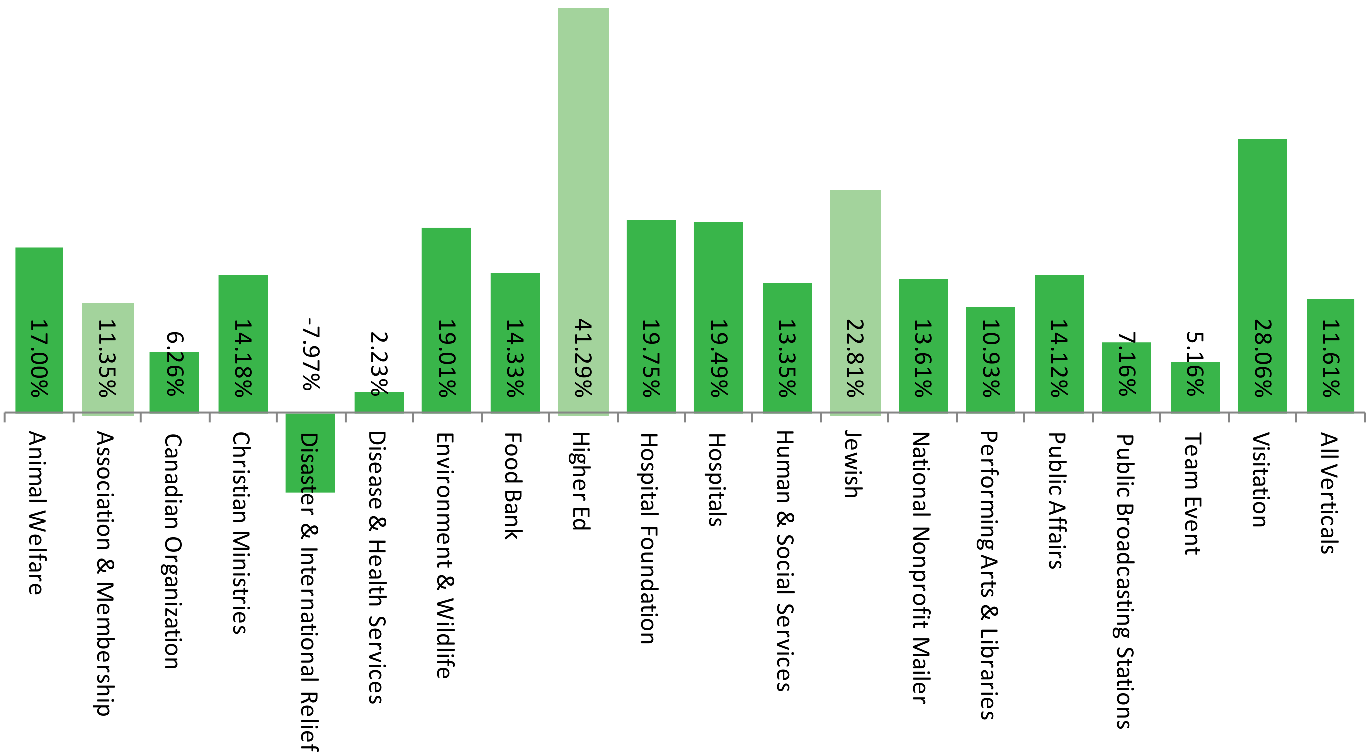
Median fundraising amount by vertical

*Light green denotes sample size fewer than 10 organizations.

Chart 12 shows that the median fundraising amount for 2012 was $467,300. The medians for the national nonprofit mailer ($4.3 million) and Canadian organizations ($1.48 million) surpass the median for all organizations because they do not have limitations on the overall size for those included in each.

Chart 13 shows that the only decrease was the disaster and international relief vertical at -7.8 percent. This is likely due to a decrease in fundraising for emergency assistance following major natural disasters. This is the second year that this vertical has decreased.

Chart 13 – Total Fundraising Revenue Growth by industry



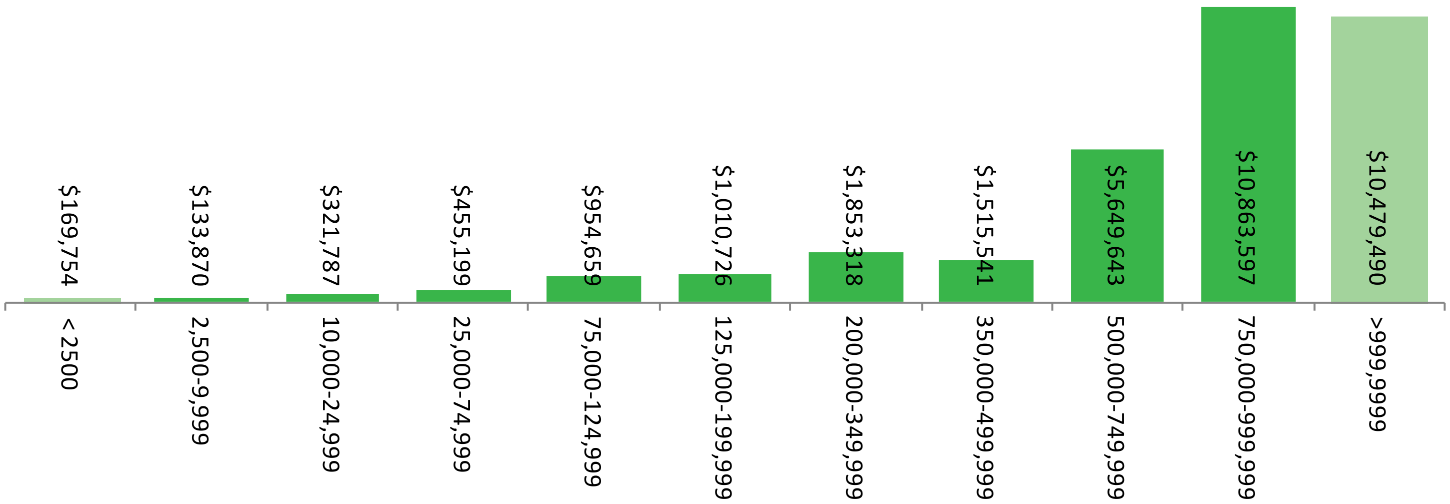
Percent growth of online revenue by vertical

*Light green denotes sample size fewer than 10 organizations.

Understanding the change of fundraising performance is a key goal of this analysis, so we grouped organizations by means other than industry vertical. We wanted to explore whether growth or contraction is visible by assessing commonalities other than industry or cause.

In Chart 14 we look at fundraising growth by grouping organizations based on the size of their email file. Aside from one outlier, the 500,000–749 group, we see that smaller organizations showed greater growth than their larger peers. What we see from other studies and discussions with integrated marketing agencies is that smaller organizations are closer to their supporter bases and again, impact is easier to perceive.

Chart 14 – Total Fundraising Revenue by Organization Size



Based on organizations email file size

*Light green denotes sample size fewer than 10 organizations.

Chart 15 shows fundraising growth by grouping the organizations included in these fundraising metrics by the number of consecutive years they have been fundraising on the Luminate platform.

Organizations completing their third and fourth consecutive years show larger growth than those that have been actively fundraising for three or more consecutive years.

Chart 15 – Total Fundraising Revenue by Consecutive Years Fundraising

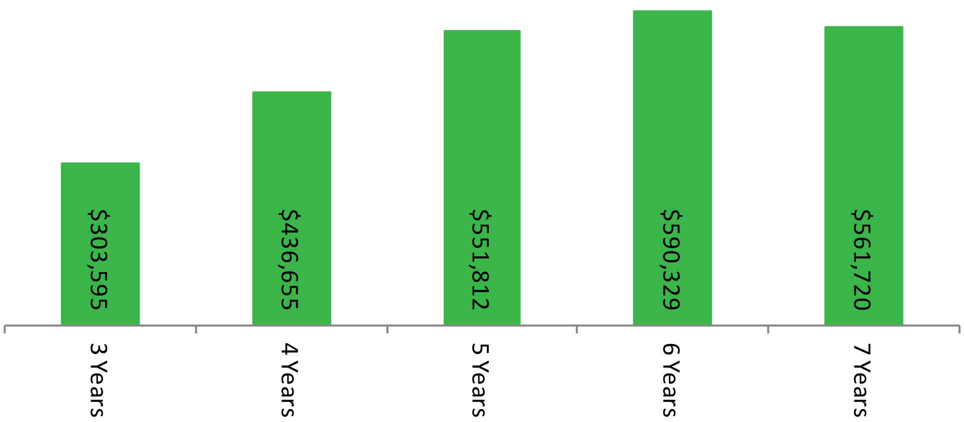


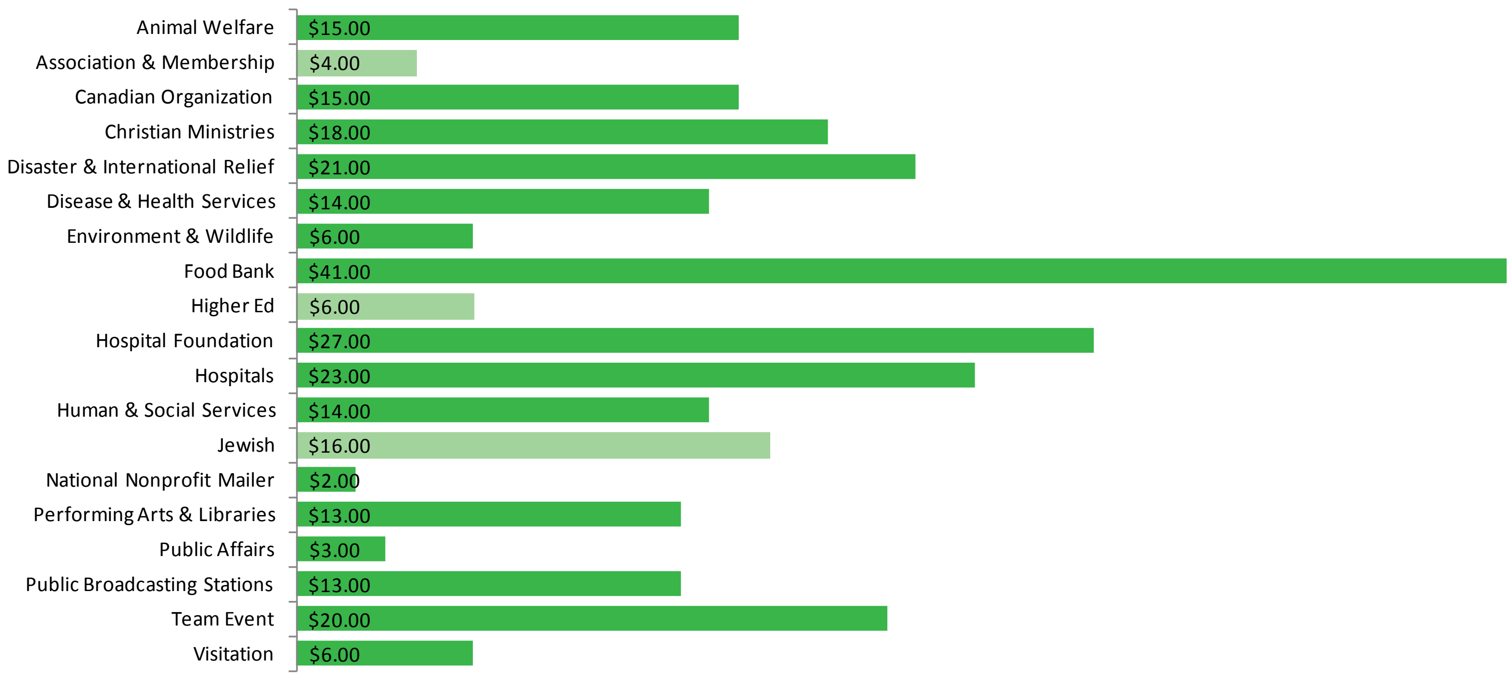
Chart 16 reviews median average online gift by vertical and email tier and shows the median online gift is $89. Verticals with the highest median average gift include higher education, human and social services, and hospitals.

Chart 16 – Average Online Donation

*Light green denotes sample size fewer than 10 organizations.

Chart 17 illustrates that the median amount raised per usable email address per year across verticals is $13, versus $12.48 in the 2012 report and $11.68 in the 2011 report. As last year, the Food Bank vertical achieved three times the median sector-wide benchmark for Revenue per Usable Address.

Chart 17 – Revenue per Usable Address



Median amount raised per usable emal address

*Light green denotes sample size fewer than 10 organizations.

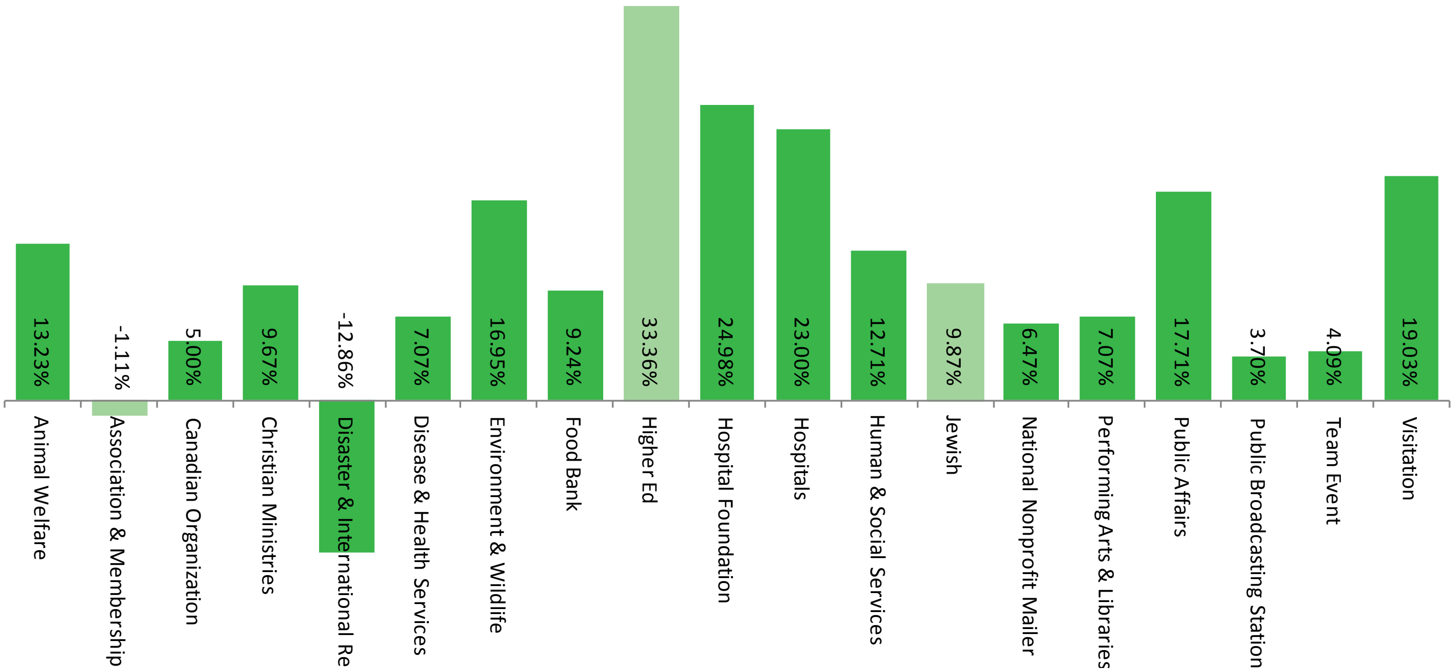
All of the total fundraising metrics are influenced by the types of donations, whether they're one-time donations or monthly sustainer donations, as well as whether the donations are new online or repeat. We need to assess the performance of each of these types of gifts and measure their influence on the total fundraising metrics. Organizations should focus the comparison of their performance to their peers with the following one-time donation metrics.

ONE-TIME DONATIONS

The metrics in this section are calculated by including one-time donations, which excludes monthly sustaining gifts, event-based fundraising, and eCommerce transactions. Each type of transaction has its own distinct performance patterns and can influence total fundraising results.

Growth in total fundraising from one-time donations for all verticals is 10 percent, as shown in Chart 18. Organizations performing below the total median, such as team event, public broadcasting, and Canadian organizations, have programs that focus either on different types of donations or on securing monthly sustaining donors.

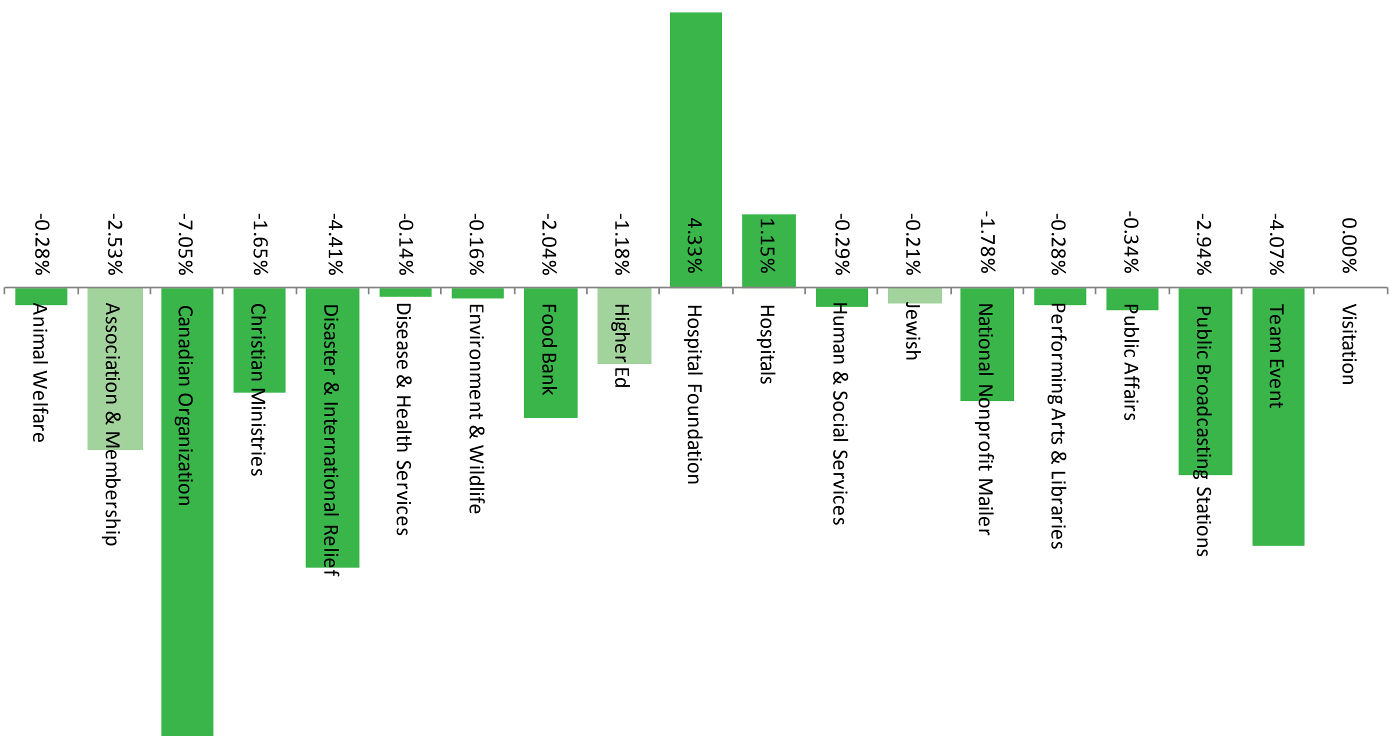
Chart 18 – One-Time Fundraising Growth



*Light green denotes sample size fewer than 10 organizations.

In gauging the impact that one-time donations have on total fundraising, Chart 19 shows the median percentages that one-time donations are of total giving. For all verticals, this was a decrease of about one percent, which suggests that one-time donations do not exclusively power the continued growth of fundraising.

Chart 19 – One-Time Donations, Percent of Total



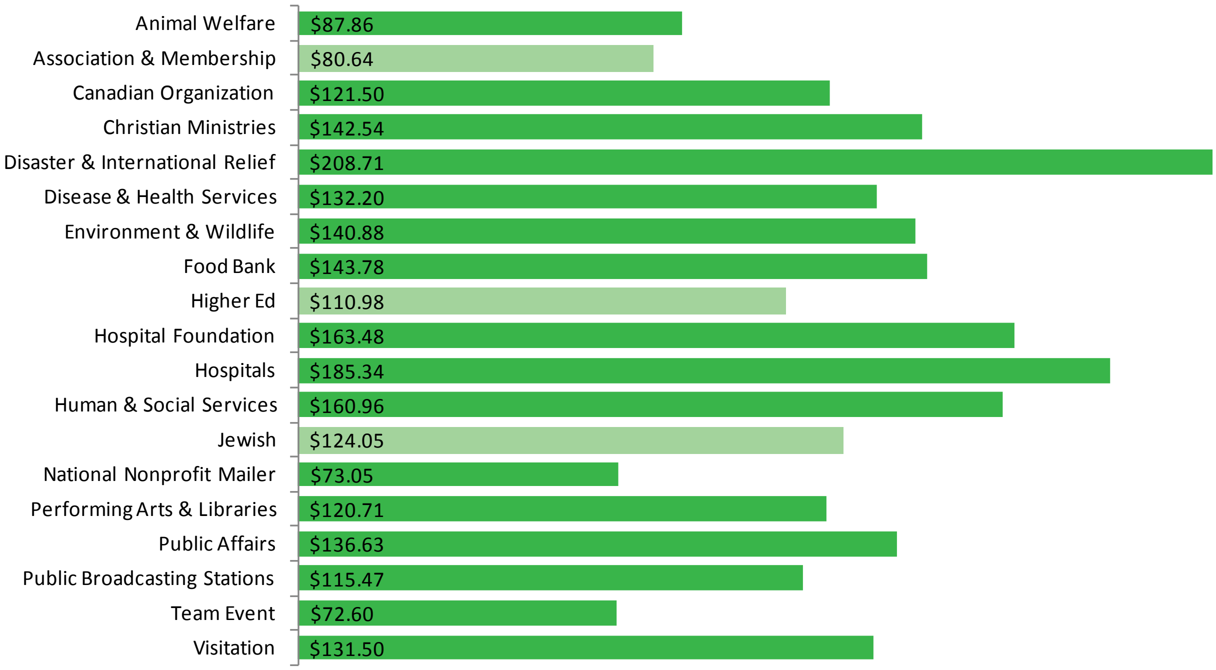
Median percentage of total giving

*Light green denotes sample size fewer than 10 organizations.

Chart 20 focuses on the calculated average donation for one-time donations; the benchmark for all organizations is just over $136. The national nonprofit mailer vertical really stands out for underperforming the total median.

An explanation for this metric could be as simple as large nonprofits not being as relevant to supporters as smaller organizations. A classic donor consideration is where a gift will have the most impact, and local and global-local trump old-school direct-response organizations.

Chart 20 – One-Time Average Donation



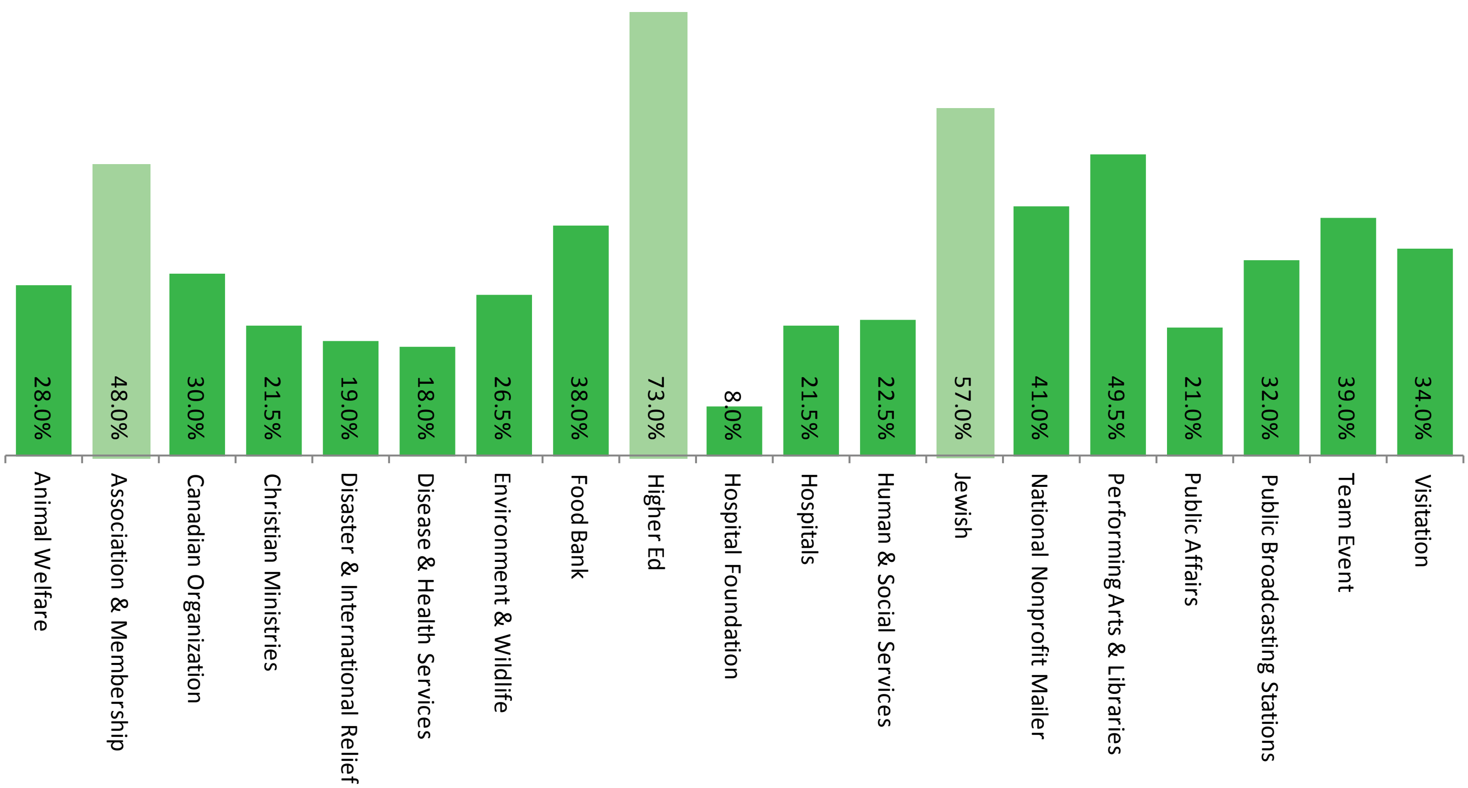
*Light green denotes sample size fewer than 10 organizations.

MONTHLY RECURRING DONATIONS

The metrics in this section are calculated by looking exclusively at monthly recurring transactions. Growth in total fundraising from sustainer donations for all verticals is 27 percent, as shown in Chart 21. The majority of organizations have seen positive growth from 2011 to 2012.

Organizations are now integrating online monthly giving campaigns and DRTV, as well as online and face-to-face campaigns. Some of this growth appears to be a result of integrated marketing campaigns. Additionally, as fast as recurring giving is growing in the online channel, it still trails direct mail and telemarketing. As noted earlier, however, online donation forms are being folded into direct response programs to reduce expenses and improve the business process.

Chart 21 – Sustainer Fundraising Growth

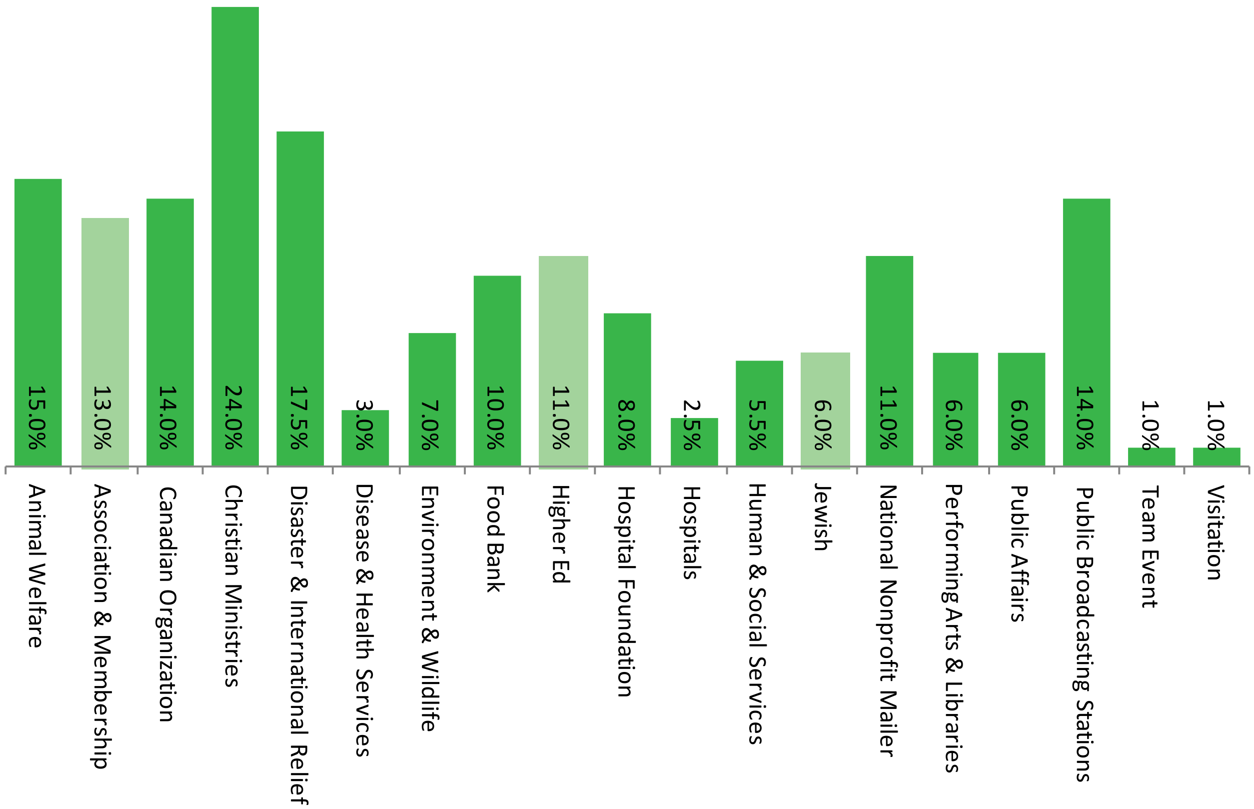


Growth of recurring gift revenue

*Light green denotes sample size fewer than 10 organizations.

Chart 22 shows the percentage of total fundraising comprised of sustainer donations. We see that while there is strong growth in this type of fundraising, it still represents a small percentage of total fundraising. In fact, the percentage almost mirrors the percentage of offline monthly donors as compared to total direct response donors.

Chart 22 – Sustaining Donations, Percent of Total

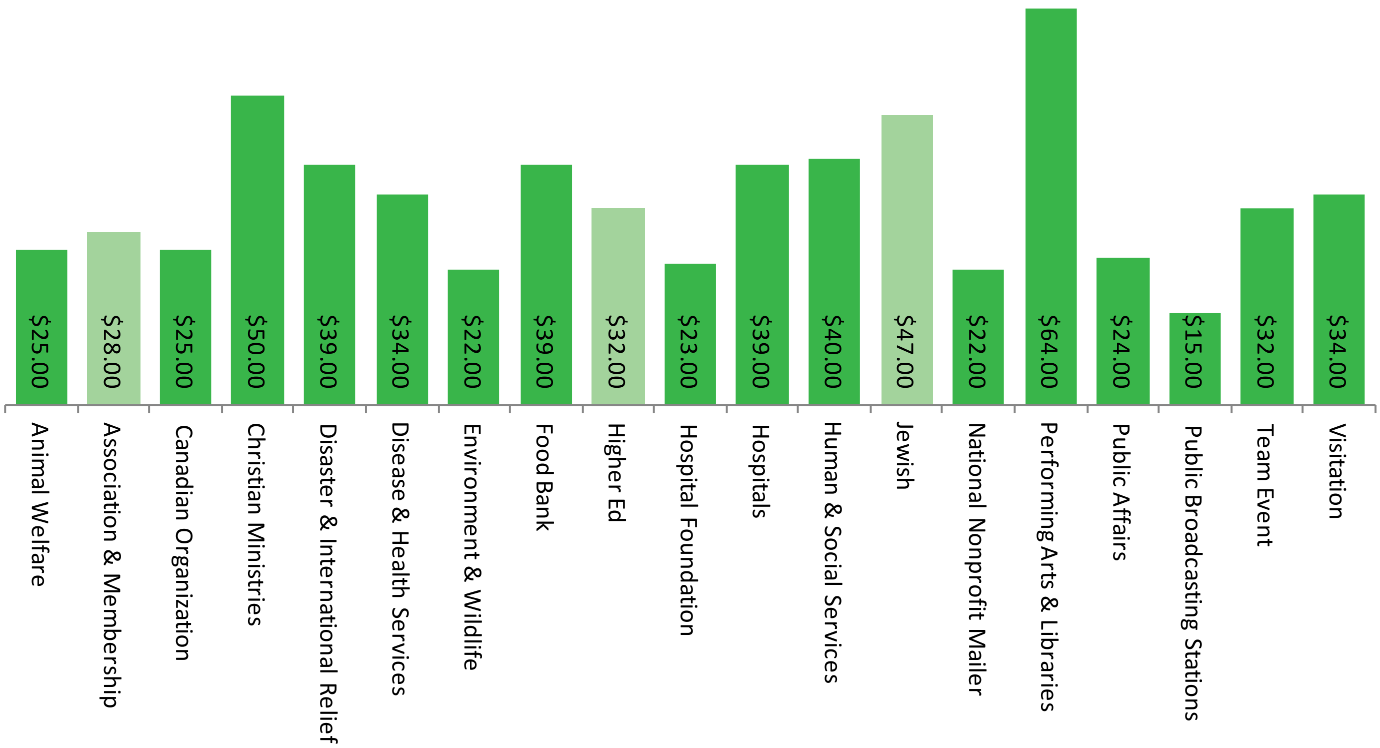


Percentage of total fundraising comprised of monthly recurring donations

*Light green denotes sample size fewer than 10 organizations.

Chart 23 focuses on the calculated average donation for sustaining donations; the benchmark for all organizations is just over $31. Performing arts and libraries and Christian ministries tallied the highest average monthly recurring donation, while public broadcasting stations lagged. Integrating online communications into multichannel marketing and fundraising campaigns can help retain supporters and grow recurring revenue

Chart 23 – Sustainer Average Donation

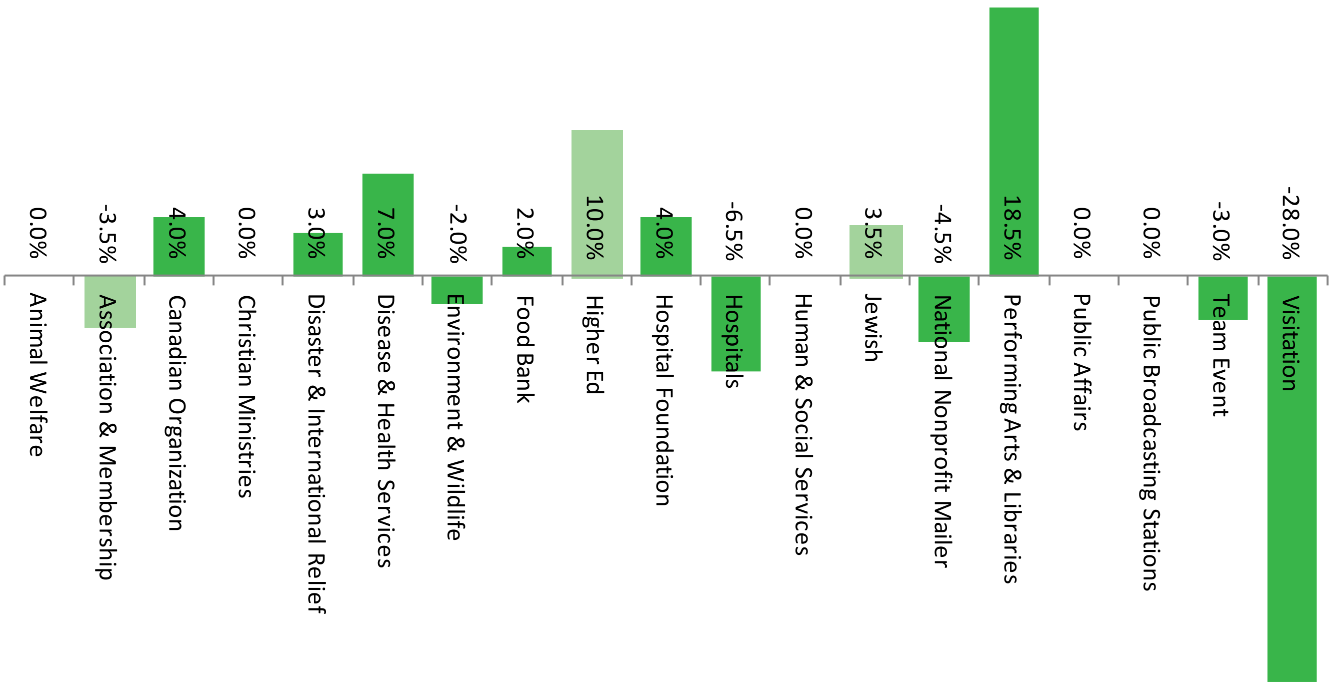


Average monthly recurring donation

*Light green denotes sample size fewer than 10 organizations.

The biggest challenge with sustainer donations is trying to increase the value of existing monthly donors or of the first donation made by new monthly donors. Chart 24 shows that the median percent change in the average donation is 0. Clearly, more attention needs to be focused on upgrading strategies.

Chart 24 – Sustainer Average Donation Change



Median percent change in the avaerage monthly recurring donation

*Light green denotes sample size fewer than 10 organizations.

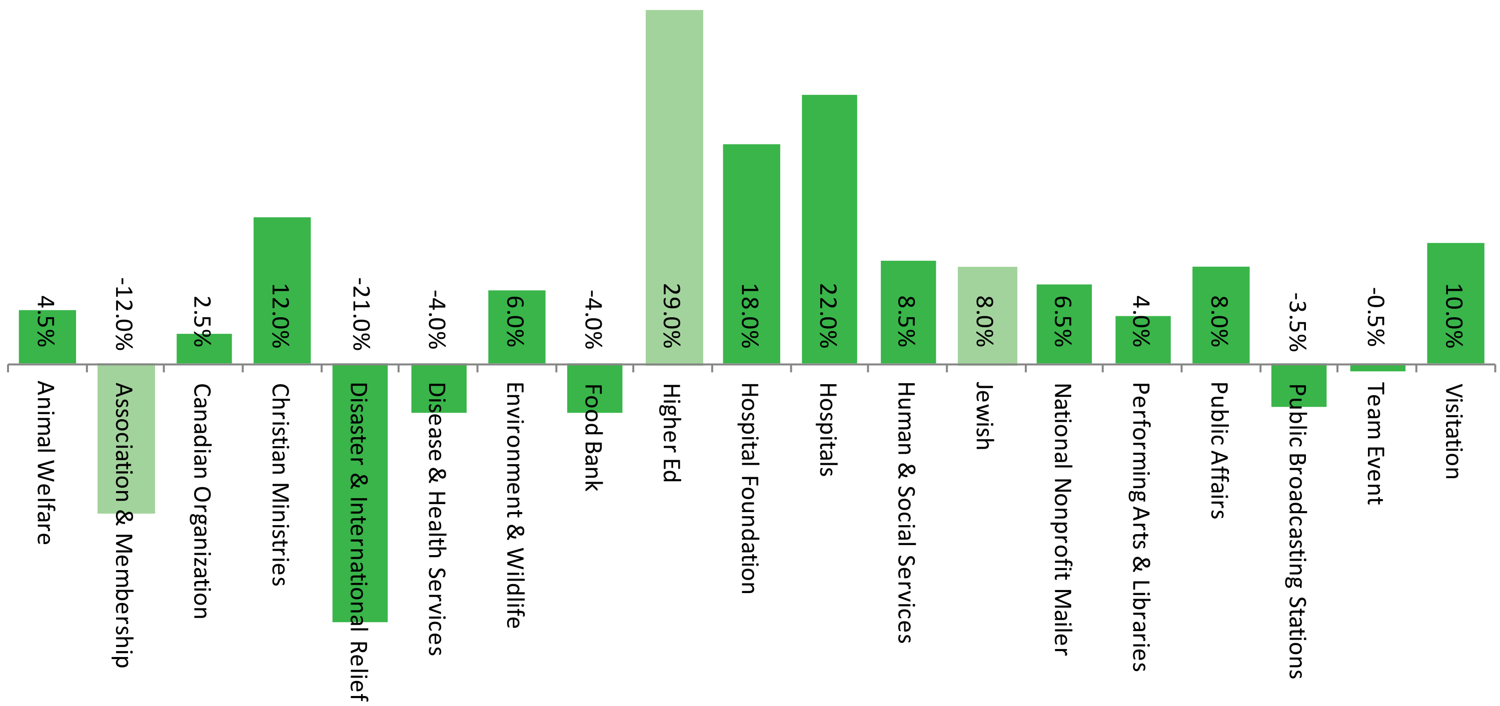
The influence of one-time and sustainer donations on total fundraising derives primarily from the monthly donations program. We report an average donation of $31 for each monthly contribution and, as these programs grow, the total number of contributions at the “lower” amounts increases. When an average donation is computed by dividing total fundraising revenue by total fundraising donations, the denominator is increased in a manner that is disproportionate to the numerator. Therefore, it is our opinion that the best approach is to view a metric, such as average donation, by specific gift type, not just as a total.

FIRST-TIME DONATIONS

The metrics in this section are calculated by looking exclusively at transactions labeled as a donor's first online donation.

Chart 25 shows the growth in first-time fundraising revenue, and we have measured a three percent increase for all verticals. It helps to compare this to the nearly 12 percent increase in total fundraising revenue. Results like this suggest that the other components of online fundraising, such as monthly giving, are growing faster than acquisition.

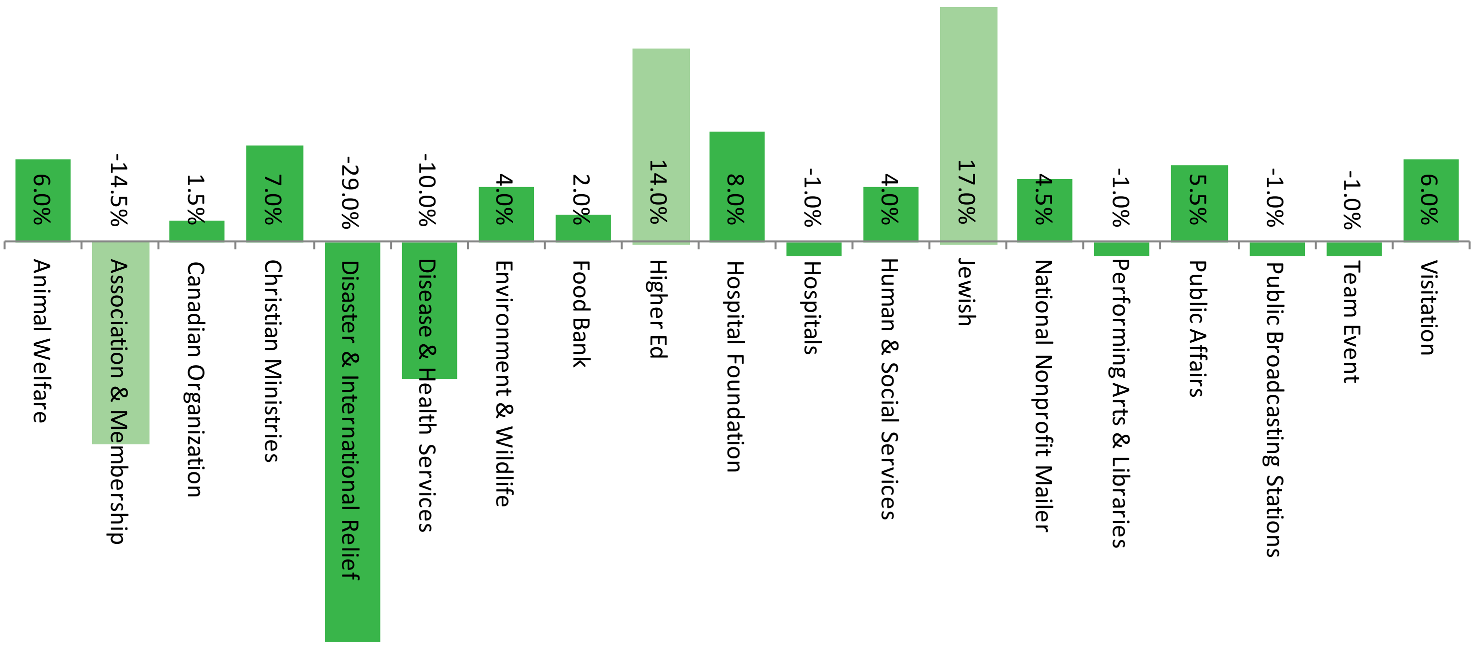
Chart 25 – First-Time Fundraising Growth



*Light green denotes sample size fewer than 10 organizations.

Monitoring the performance of first-time donations is not just a measure for the "here and now." The donors acquired this year are the donors who will be courted for renewal next year, so a reduction in first-time donors in 2012 means fewer potential renewals in 2013 and subsequent win-back donors in the following years. Chart 26 shows that there was very little growth in first-time donations from 2011 to 2012.

Chart 26 – First-Time Fundraising Donation Growth

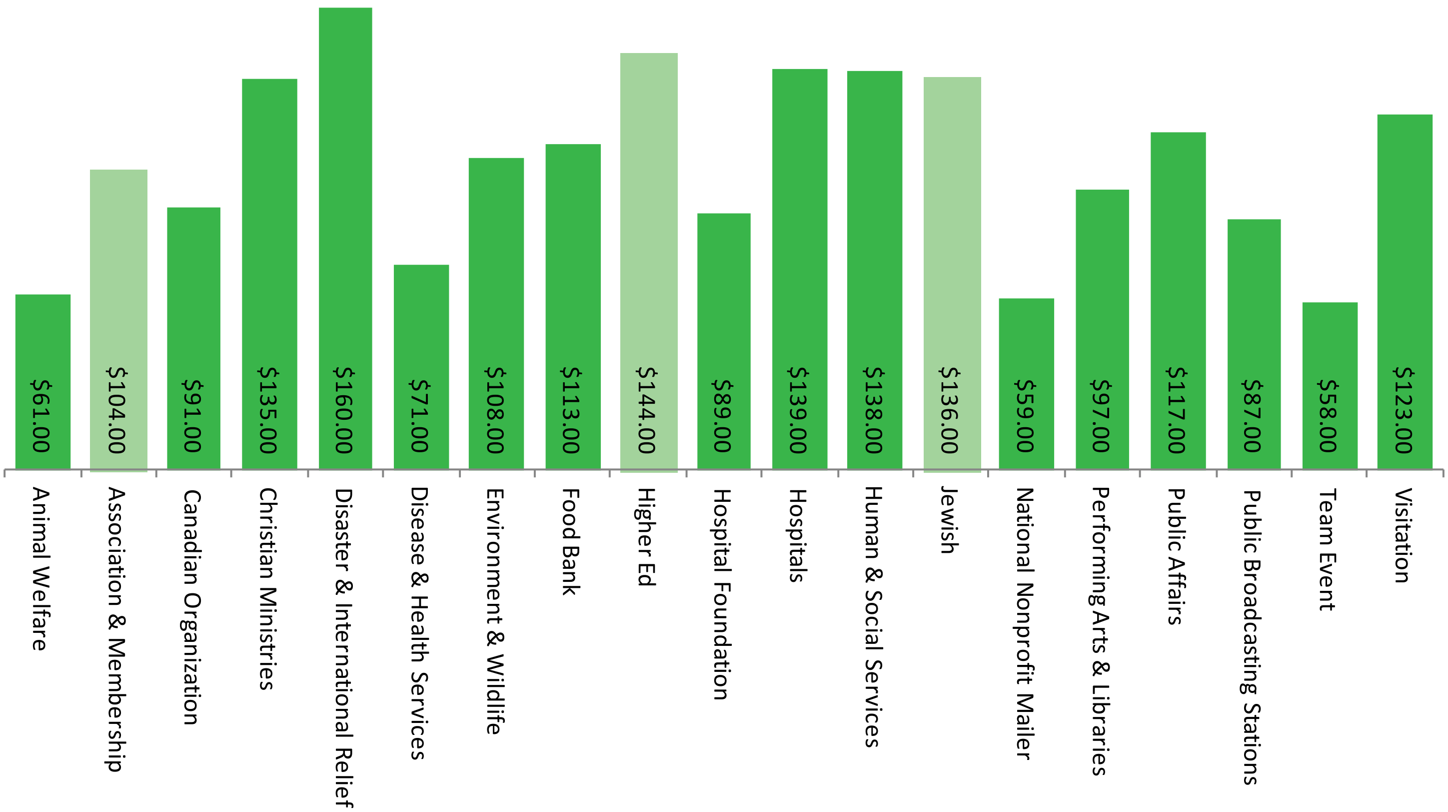


Growth in first time donations

*Light green denotes sample size fewer than 10 organizations.

In Chart 27, we see an average donation of $98 with the team event, national nonprofit mailer, and animal welfare verticals performing well below this median benchmark. This could suggest that the organizations in these verticals are using strategies with lower ask amounts to get donors onboard and then working to upgrade their donor value with subsequent giving.

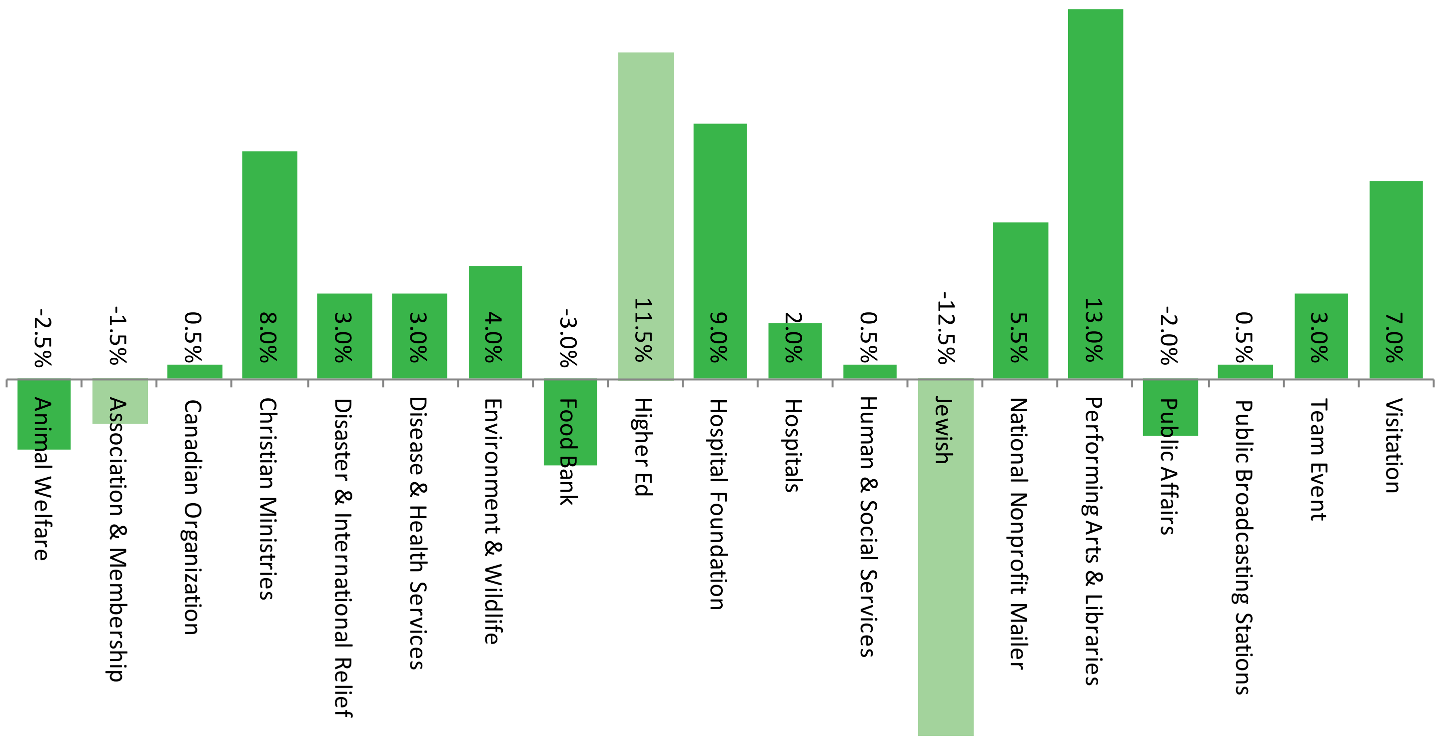
Chart 27 – First-Time Fundraising Average Donation



*Light green denotes sample size fewer than 10 organizations.

There was little change in the average donation amount for first-time donations, as seen in Chart 28. All verticals experienced a two percent increase, and we see performing arts and libraries, higher education, and visitation showing the largest growth in this type of donation.

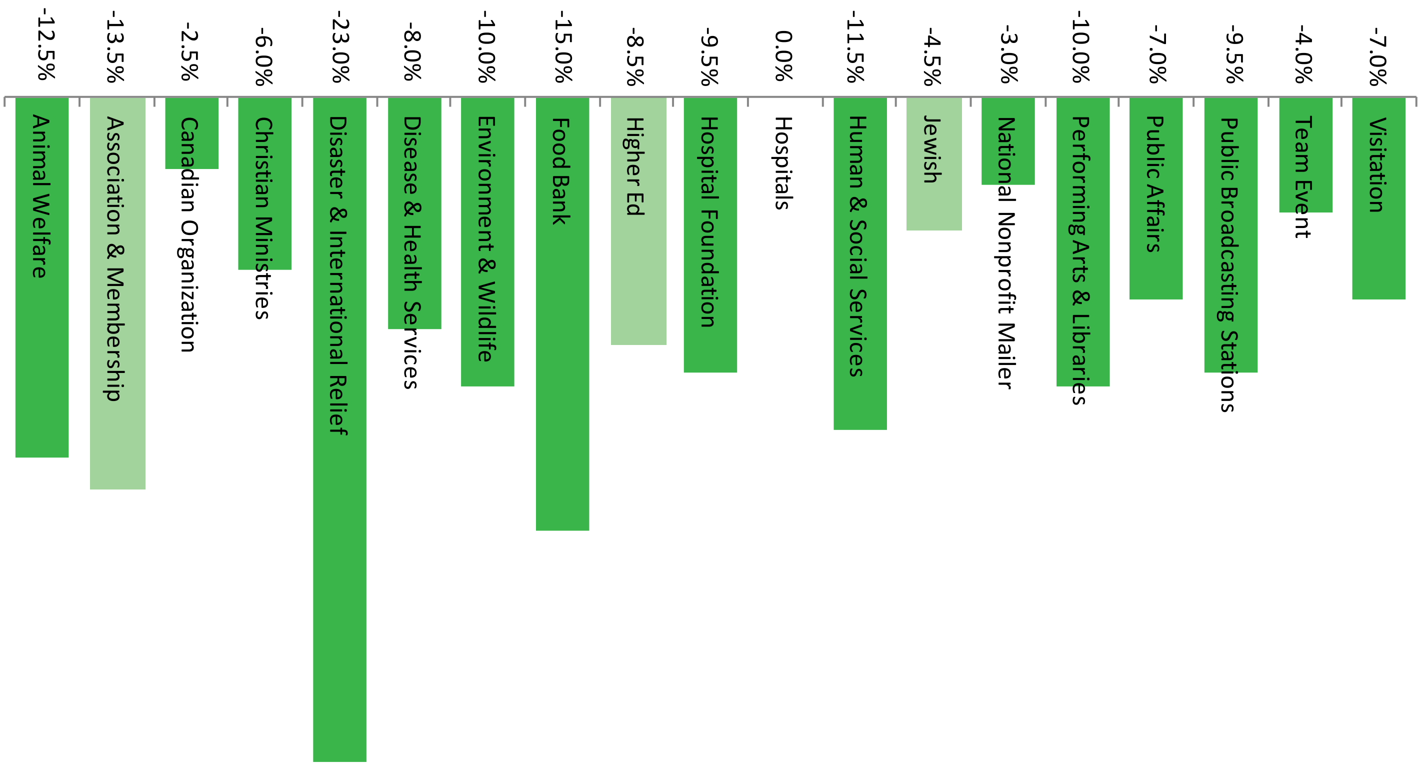
Chart 28 – First-Time Fundraising Average Donation Change



*Light green denotes sample size fewer than 10 organizations.

Chart 29 demonstrates the influence of first-time donor fundraising on the growth of total fundraising. The all verticals calculation shows a decrease of 9 percent. This number by itself can be misleading because a very strong year in renewal or reactivation can skew the calculation, so when evaluating success, take into consideration the success of your other programs as well.

Chart 29 – First-Time Donations, Percent of Total Growth



Percent of total fundraising growth from first time gifts

*Light green denotes sample size fewer than 10 organizations.

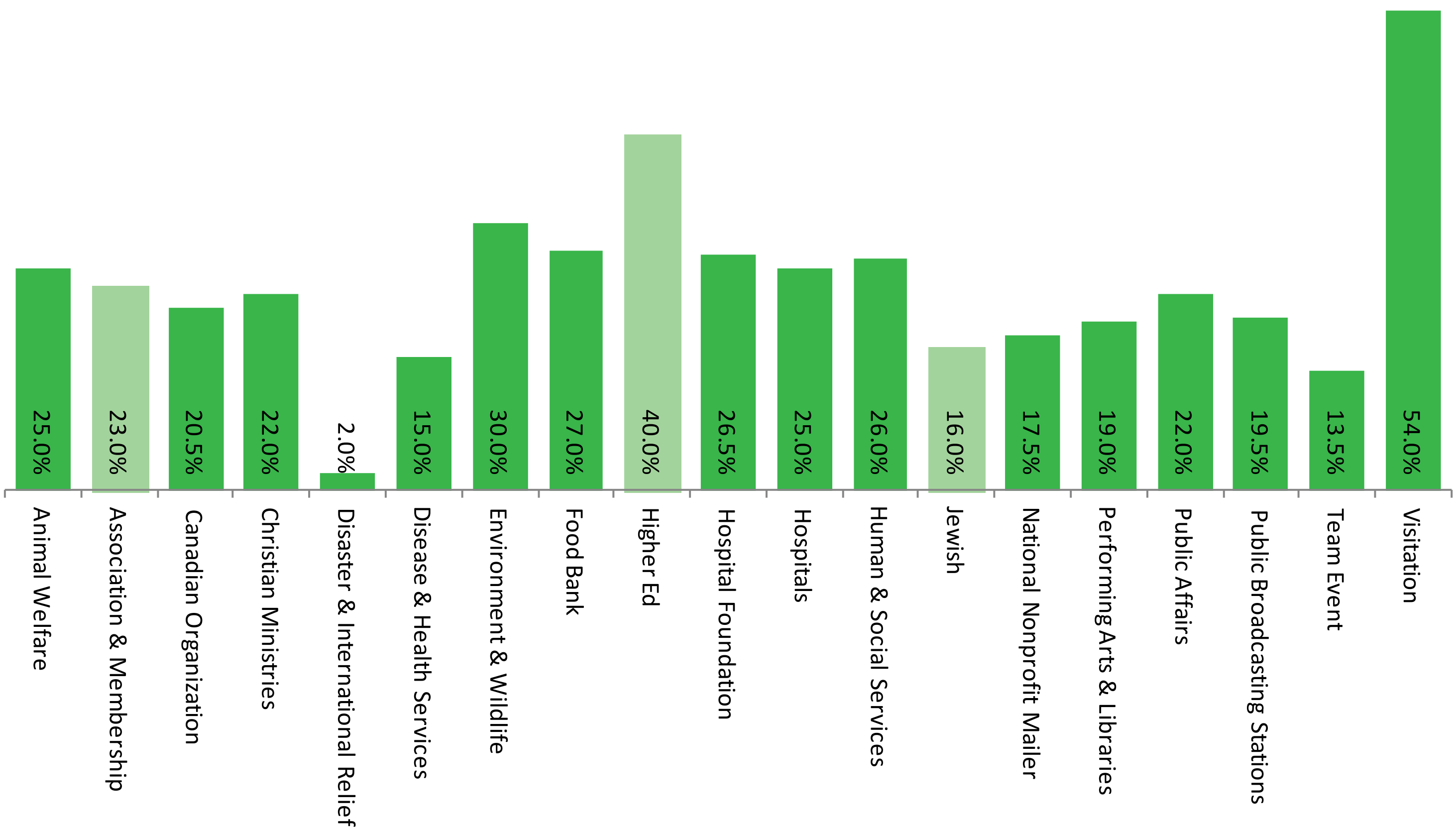
After reviewing all of these first-time donation metrics, we see modest gains from 2011 into 2012, but they are not the type of results that will support near double-digit growth in total fundraising indefinitely. As the number of new donors slows, and as current donors plateau over time, achieving the same level of fundraising success will be difficult. Success is not impossible, but retention and reactivation programs become all the more essential to an organization's growth.

REPEAT DONATIONS

The metrics in this section are calculated by looking exclusively at transactions that are not labeled as a respective donor's first online donation.

Chart 30 shows the growth in fundraising revenue from repeat donations to be 20 percent for all verticals. Compared to the nearly 12 percent increase in total fundraising, we see that overall performance growth has been slowed by the much slower growth in first-time donation revenue.

Chart 30 – Repeat Fundraising Growth

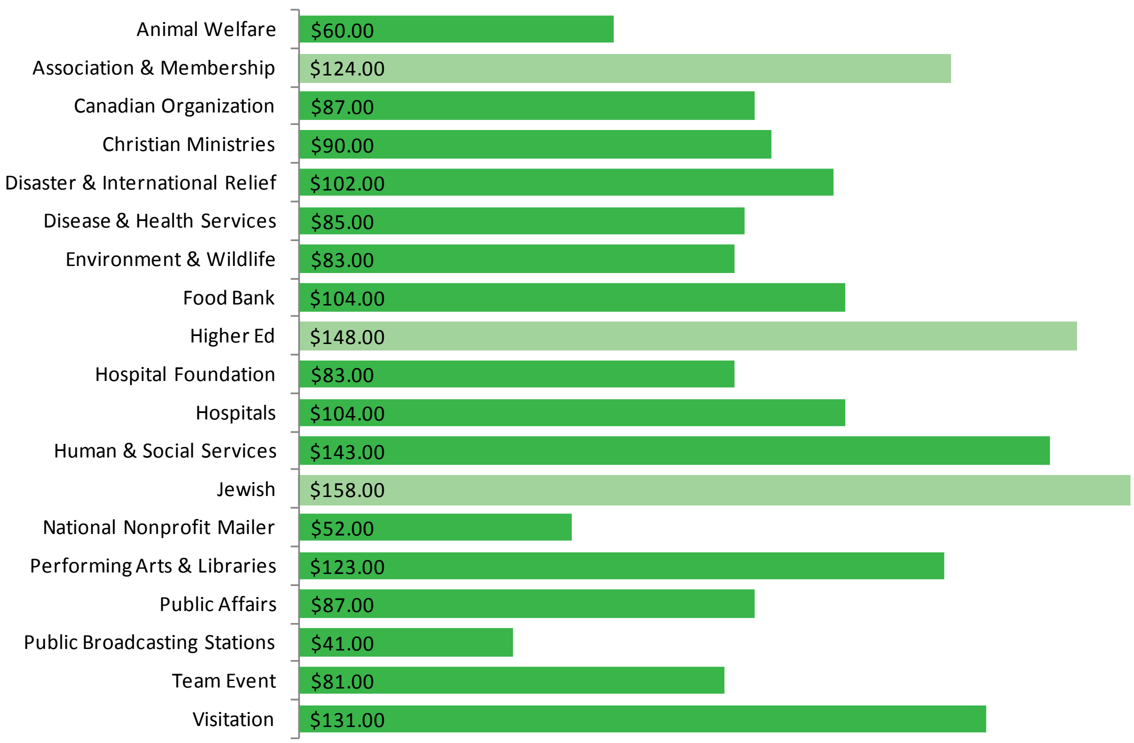


Growth in fundraising revenue from repeat donations

*Light green denotes sample size fewer than 10 organizations.

Chart 31 demonstrates an average donation of $87 for all verticals. It may seem surprising that this average donation amount is lower than the median for first-time donations, but there is a straightforward explanation. The vast majority of first-time donations are one-time donations, and we have already seen the difference in the average value of this type of giving. Repeat transactions can be sustainer donations, eCommerce, and event-based fundraising, all of which have lower average donation amounts.

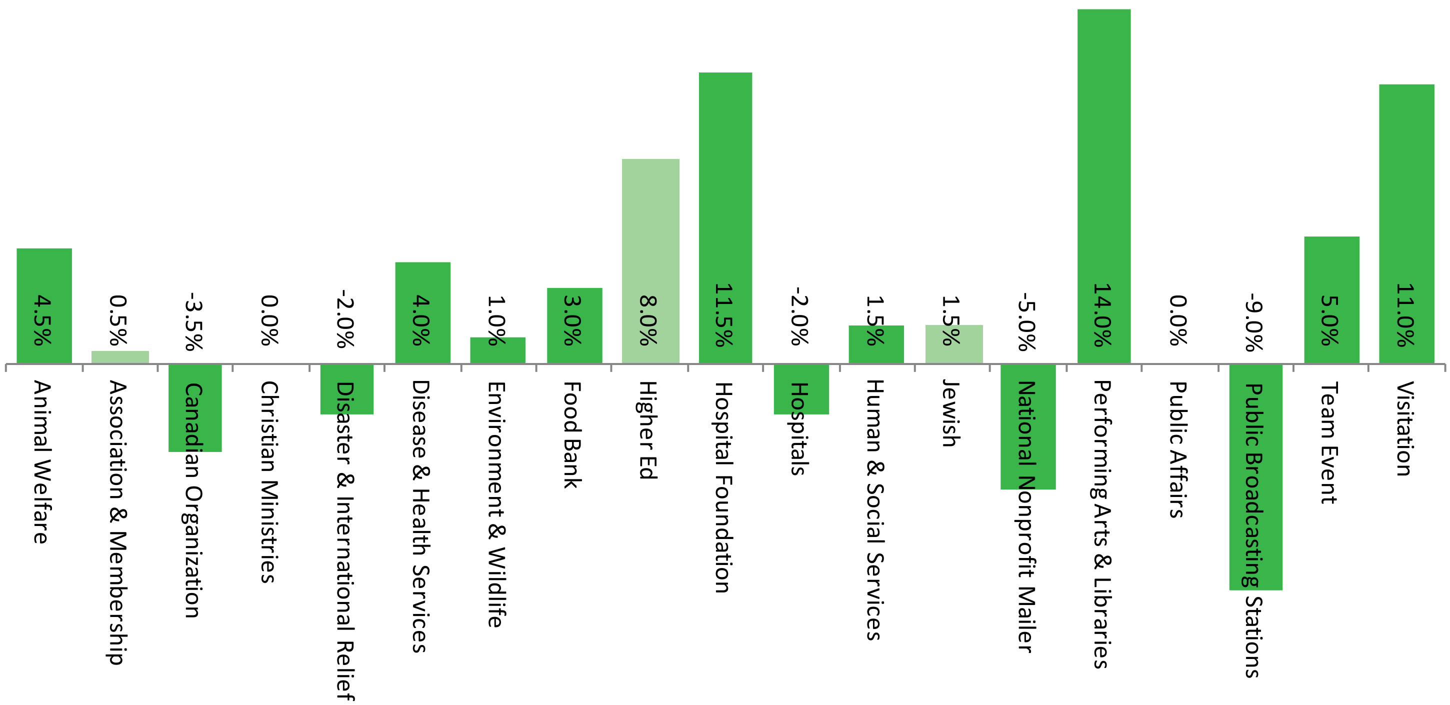
Chart 31 – Repeat Fundraising Average Donation



*Light green denotes sample size fewer than 10 organizations.

We continue to see the strength of these programs, as Chart 32 shows 1.5 percent growth in the average donation amount for all verticals. Loyal donors will help stabilize year-to-year fundraising performance, and organizations can focus on improving acquisition and reactivation to bolster total performance instead of relying on improvements in those areas to maintain previous success.

Chart 32 – Repeat Fundraising Average Donation Change

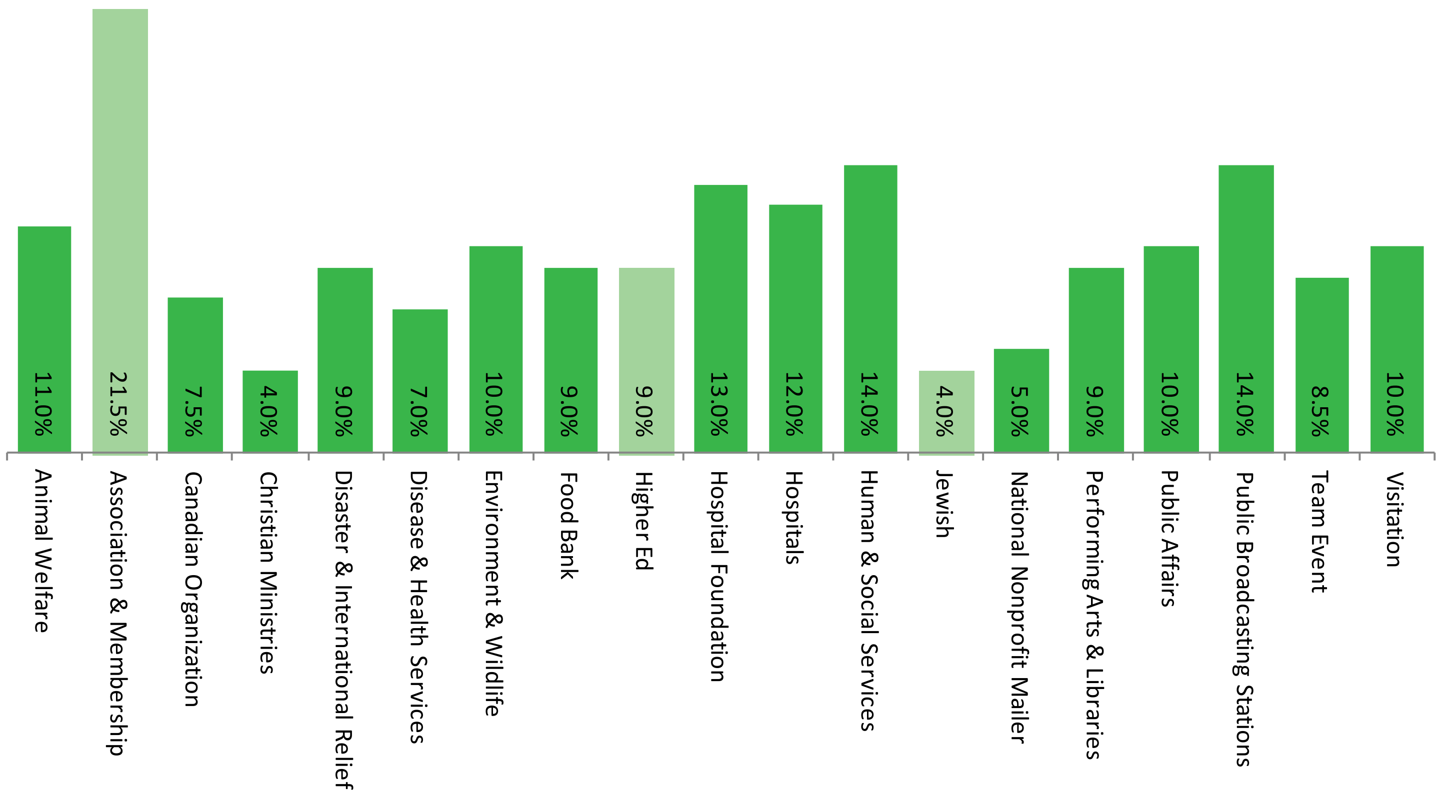


Growth in the average donation amount for repeat donations

*Light green denotes sample size fewer than 10 organizations.

Chart 33 shows the growth of repeat donations as a percentage of total revenue. For all verticals, we see a nine percent increase from 2011 through 2012. Looking back at the same metric for first-time donations, we see that, for some verticals, it appears that this growth comes at the expense of other programs.

Chart 33 – Repeat Donations, Percent of Total Growth



Percentage of total revenue from repeat donations

*Light green denotes sample size fewer than 10 organizations.

There is strong evidence to support our conclusion that there were some good gains made when dealing with retaining donors and reacquiring lapsed donors. We see an increase in the number of donations, increase in the total value of these donations, and an increase in the average donation amount.

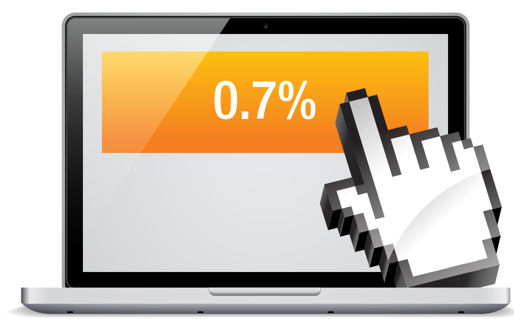
EMAIL APPEALS: OPEN RATES, CLICK-THROUGH RATES, AND RESPONSE RATES

Emails to constituents can be evaluated on three primary metrics: open rate, click-through rate, and response rate. The open rate is the percentage of constituents who view an email divided by the number of emails delivered during a given campaign. Very little emphasis should be placed on this metric, given preview panes, image rendering, and Gmail's "Everything Else" function below the fold of the page.

According to ReturnPath's Q4 Email Intelligence Tool, more than 57 percent of all emails in the fourth quarter were opened on mobile devices. In 2011, about 20 percent of all emails were read on mobile devices. In a single year, email has been turned upside-down with mobile being the predominate paradigm. How many of your campaigns leverage responsive design? How many campaigns recognize the device and size email and donation forms to the device? In calculating the open rate metric, we counted only unique opens.

EMAIL FUNDRAISING APPEALS IN ALL VERTICALS

MEDIAN OPEN RATE



MEDIAN CLICK-THROUGH RATE

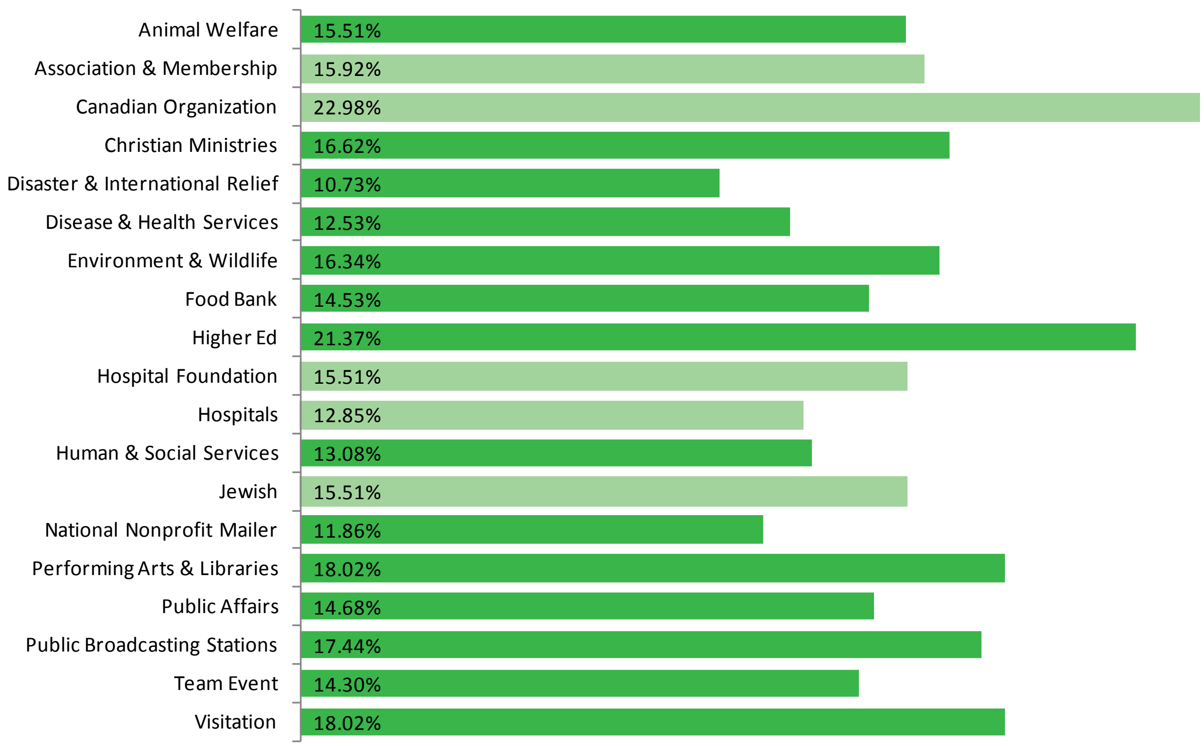
MEDIAN REPONSE RATE

"2011, only about 20 percent of all emails were read on mobile devices. In a single year, email has been turned upside-down with mobile being the predominate paradigm."

— ReturnPath's Q4 Email Intelligence Tool

Chart 34 shows that the median open rate of fundraising emails for all verticals in 2012 was 14.72 percent, a marginal increase from the 2011 rate of 14.34 percent. While last year the highest performing verticals were Canadian, visitation, and performing arts and libraries organizations, this year the best performers were hospital foundations, higher education institutions, and Jewish organizations.

Chart 34 – Fundraising Email Open Rate

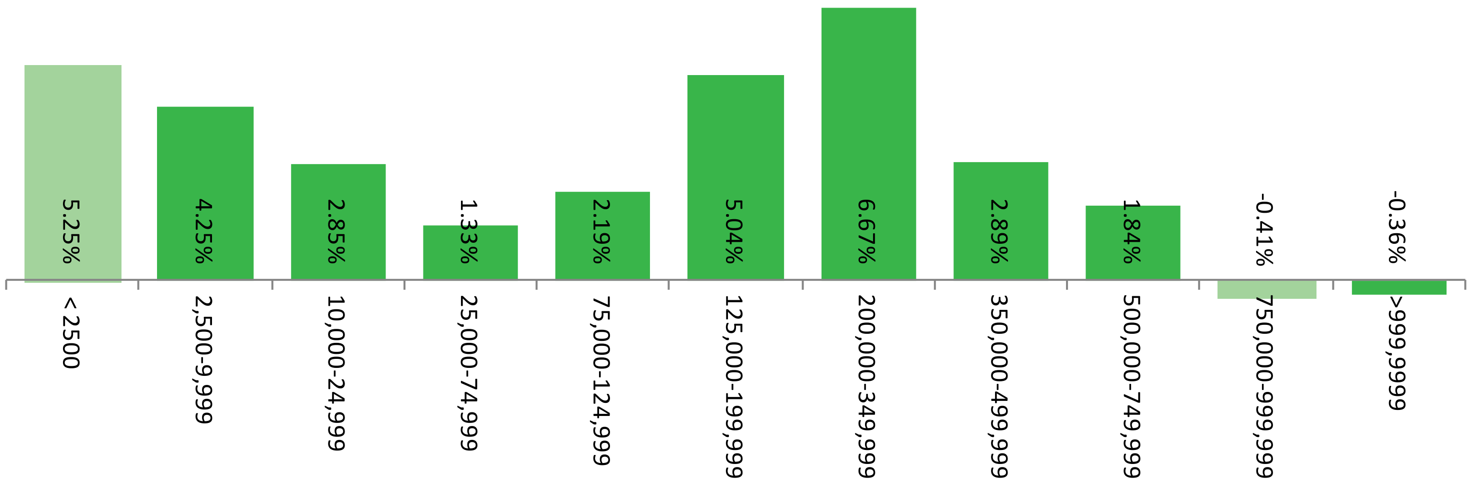


Median open rate

*Light green denotes sample size fewer than 10 organizations.

Chart 35 shows a median open rate change for verticals by usable email addresses. As noted earlier, we are looking to assess the performance differences between smaller and larger email files. This year there were performance differences between usable email bands.

Chart 35 - Fundraising Email Open Rate Change by Organization Size



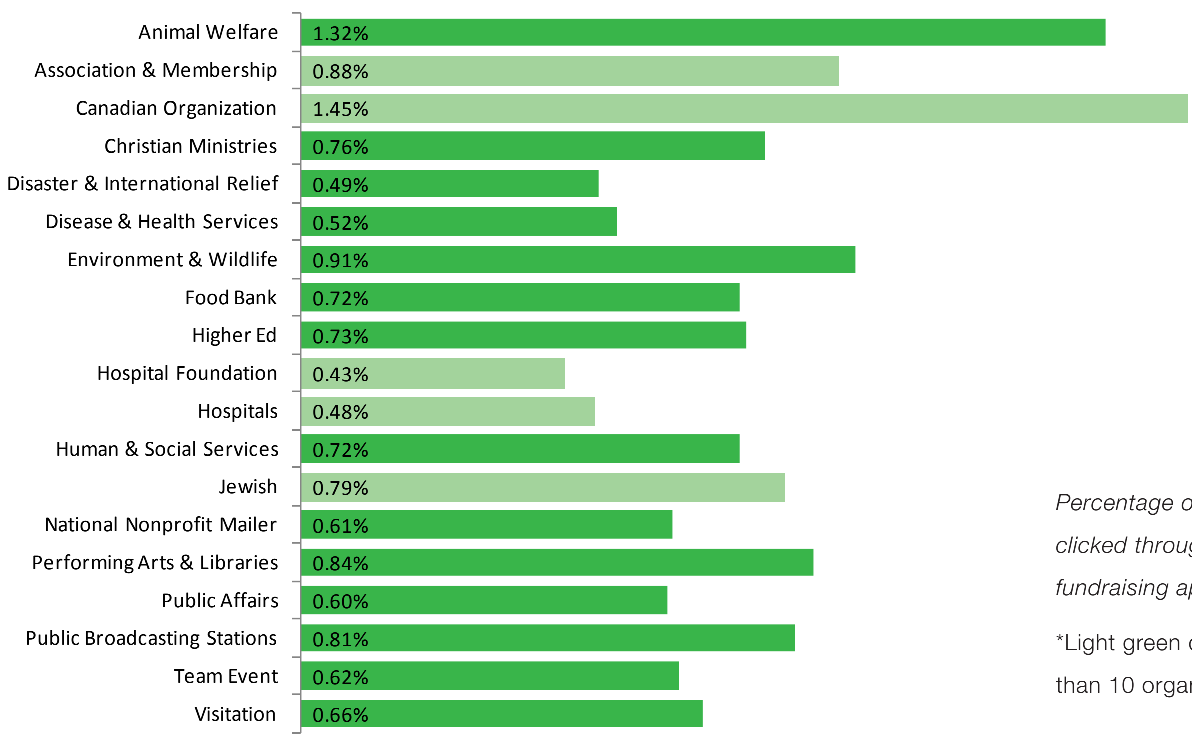
*Light green denotes sample size fewer than 10 organizations.

FUNDRAISING APPEAL CLICK-THROUGH RATES

Chart 36 shows click-through rates as a percentage of constituents who clicked on one or more links contained in an email, divided by the number of email messages delivered. The organizations in the study had a median click-through rate of 0.7 percent, a significant decline from 0.84 percent in 2011.

Organizations that had strong fundraising appeal click-through rates include hospital foundations, with a 14.67 percent increase, and higher education, with a 2.5 percent increase from 2011. At the other end of the spectrum, hospitals and disaster and international relief saw 41.5 percent and 33.82 percent decreases, respectively.

Chart 36 – Percentage Email Click-Through Rate

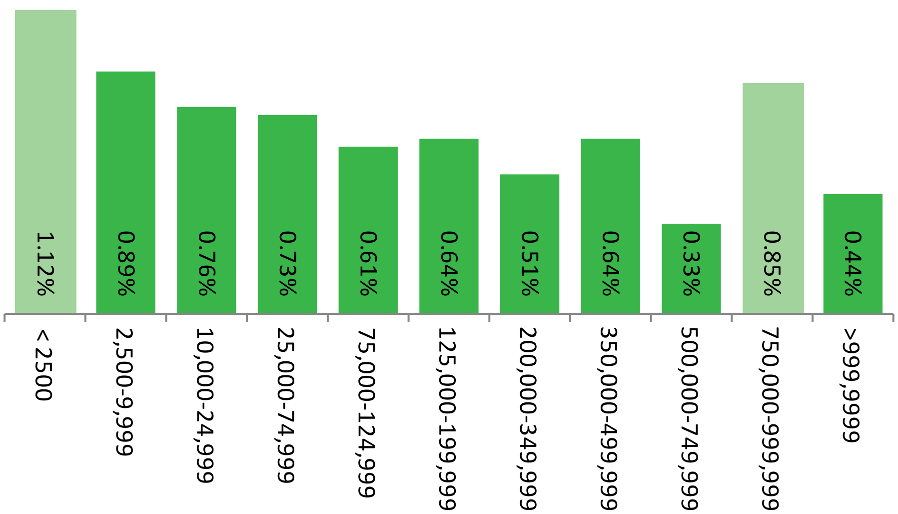


Percentage of constutuents who clicked through one or more links in a fundraising appeal

*Light green denotes sample size fewer than 10 organizations.

Chart 37 shows fundraising appeal click-through rates through usable email address band. All bands except for one show a decline in click-through rates.

Chart 37 – Click-Through Rates for Usable Email Addresses



Click-through rates per usable email addresses in a fundraising appeal

*Light green denotes sample size fewer than 10 organizations.

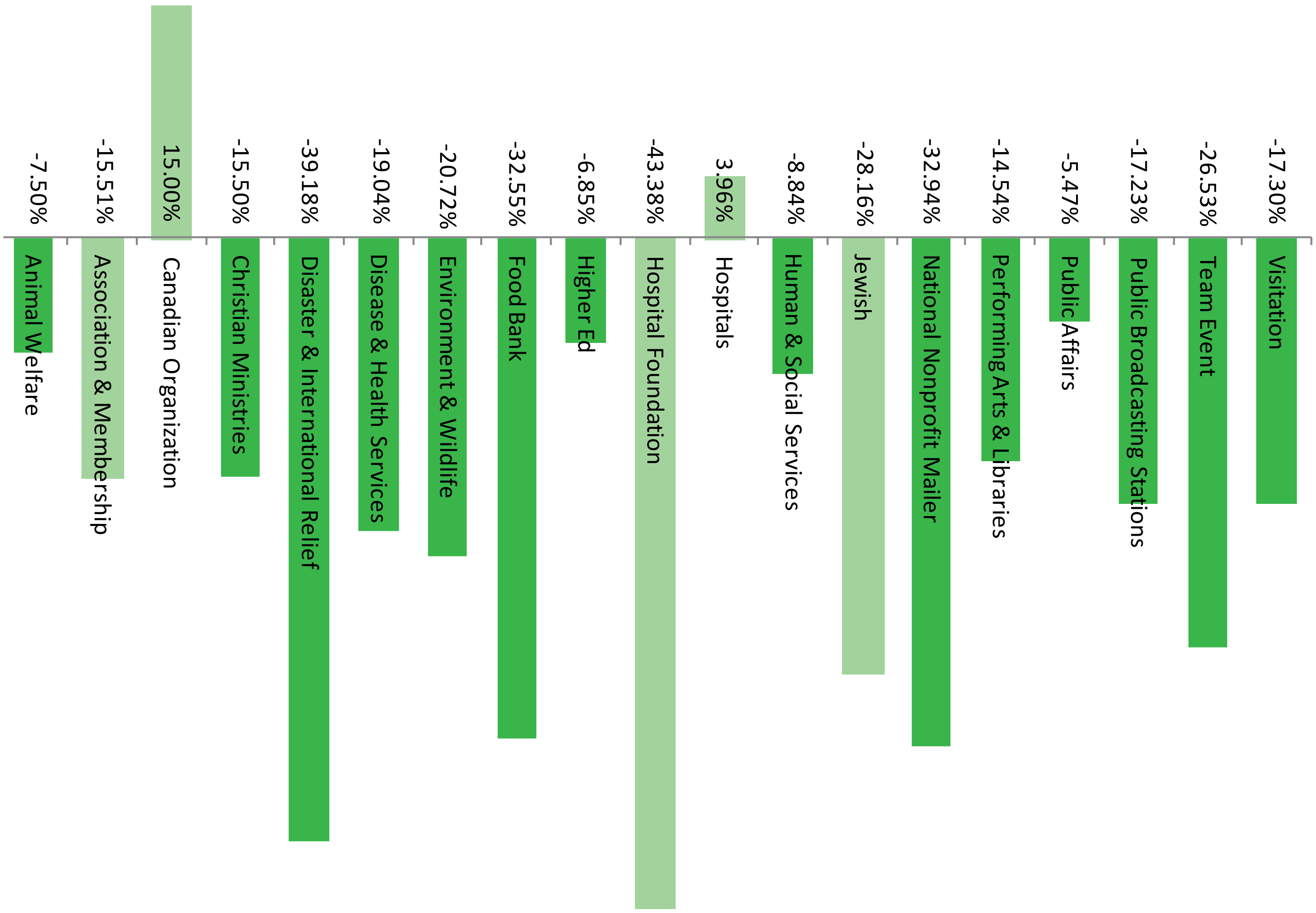
FUNDRAISING APPEAL RESPONSE RATE

As with other direct response channels, key drivers are campaign response rates. Chart 38 shows that the median response rate is 0.5 percent, an 18.77 percent decline from 2011. As we look at the decline after two years of little to no change, it's important to remember that the response rate can be influenced by a variety of factors. They can include audience composition and segmentation schema, contact cadence, and ease of use of the donation form (responsive design reveals its importance once again).

Moreover, emails harvested commercially or acquired through alternate sources do not perform as well as those from a constituent who voluntarily provides a primary email address; this we know thanks to the Network for Good Benchmarking Report. We often launch an email campaign because it's easy, fast, and free, not because it's the preferred fundraising channel for donors.

In 2012, only hospitals had an increase in response rates of 3.96 percent, while many experienced median declines in the double digits.

Chart 38 – Fundraising Appeal Response Rate Change

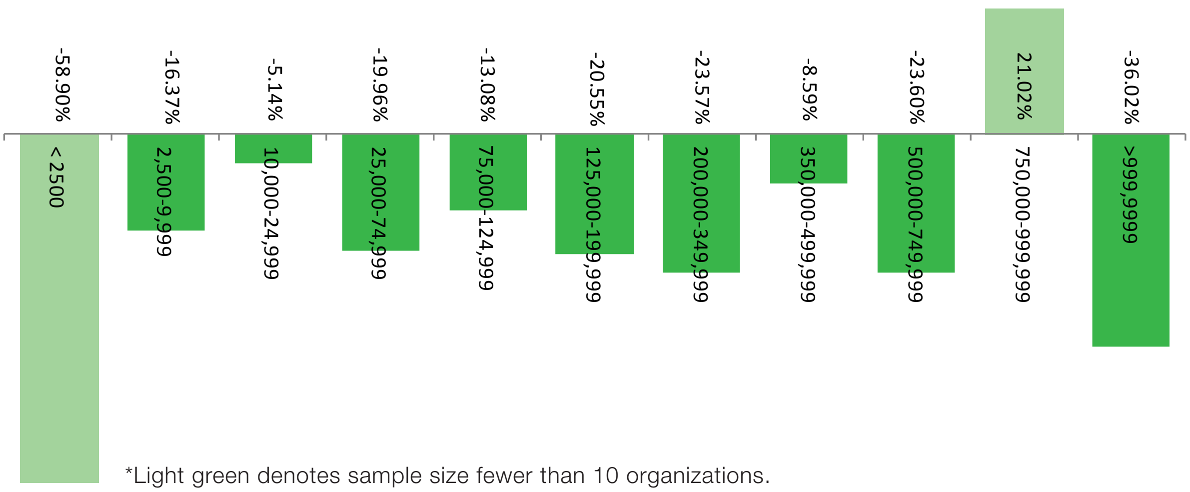


Median fundraising campaign response rates

*Light green denotes sample size fewer than 10 organizations.

Chart 39 examines fundraising appeal response rates by usable email band. There were declines across the board except for the 750,000 – 999,000 band, where there was a 21 percent increase in email response rates from 2011 to 2012.

Chart 39 – Fundraising Appeal Response Rate Change by Organization Size



*Light green denotes sample size fewer than 10 organizations.

ADVOCACY

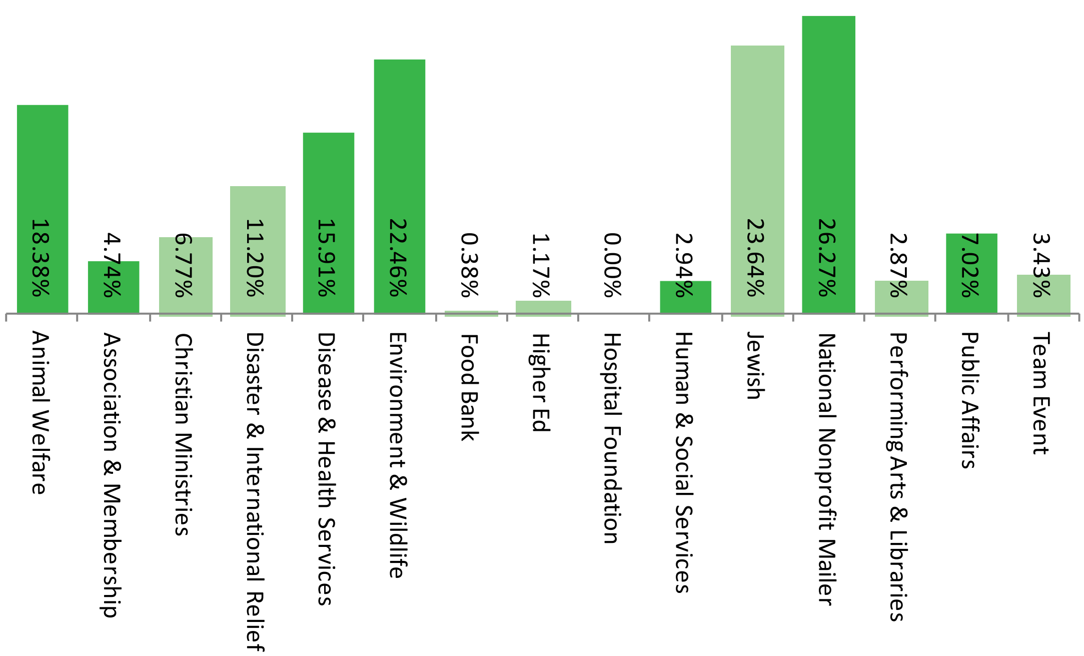
The median percentage of advocates who donate to their cause is 11.98%.

Online advocacy serves multiple purposes: It provides a grassroots voice for an organization's efforts to change public and private policy at the local, state, federal, or global level; recruits new constituents for whom this marks their first engagement with an organization; and acts as a tool to keep supporter bases—including donors — engaged.

We have not differentiated in value between organically acquired and non-organically acquired emails from advocacy action, such as from Care2 or Change.org. There are many studies on this matter that offer a more detailed look into the lifetime value of these advocates. An additional thought regarding advocacy is that it is a form of expression for a particular point of view. In a recent *Wall Street Journal* article, Roger Lowenstein wrote about the value of voice and about the research of Albert O. Hirschman around voice, exit, and loyalty. The difficulty that nonprofits experience in retaining supporters could be explained by a lack of voice, which makes it easy for constituentsto exit.

As we examine in Chart 40, the number of advocates by vertical had a median increase of 8.7 percent, with the strongest performance by national nonprofit mailers with an increase of 26.2 percent, Jewish organizations with an increase of 23.6 percent, and environment and wildlife with an increase of 22.46 percent over 2011.

Chart 40 – Advocate Change

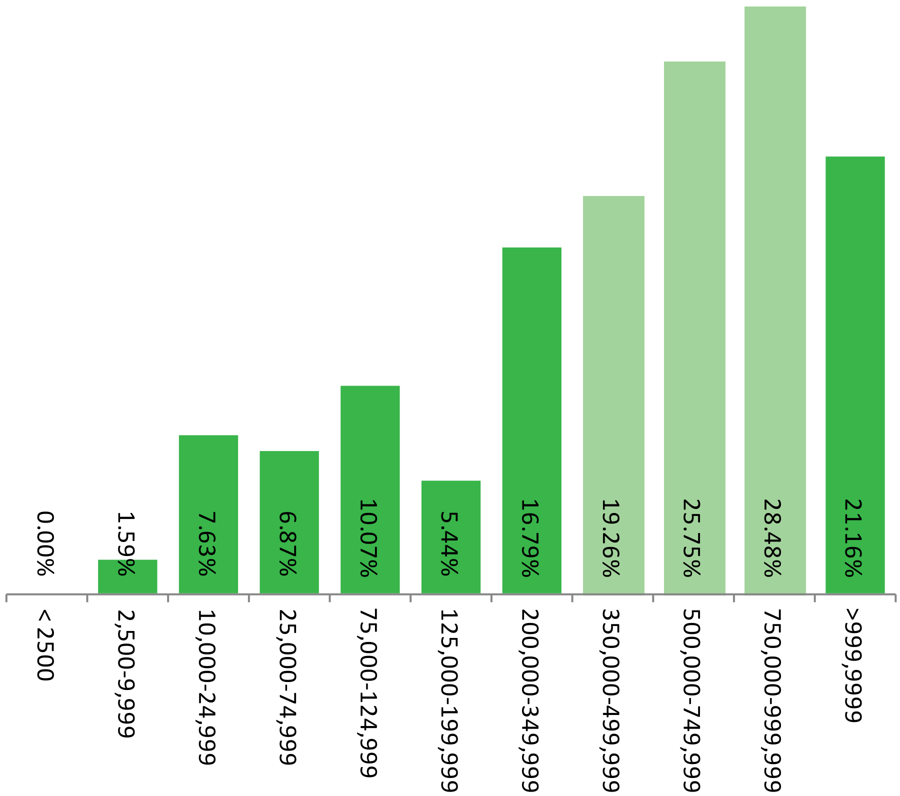


Number of advocates

*Light green denotes sample size fewer than 10 organizations.

As evident in Chart 41, which details usable email band, the largest median change from 2011 to 2012 occurred in organizations larger than 500,000. Organizations with smaller email file sizes experienced, in general, less change.

Chart 41 – Advocate Change by Organization Size



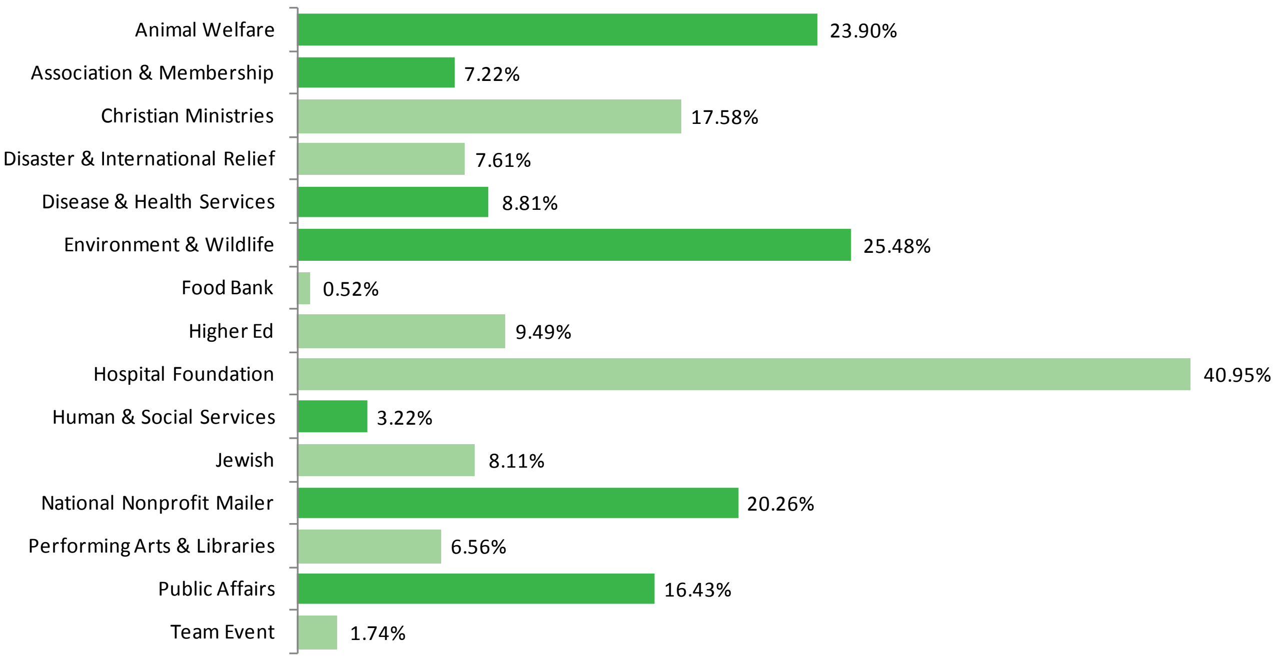
Number of advocate emails by organization size

*Light green denotes sample size fewer than 10 organizations.

Chart 42 examines the percentage of advocates on the entire file and the median change from 2011 to 2012. Once might conjecture that this percentage is growing and that it would map to the prior view of median advocate growth. What is interesting, however, is that while the number of advocates grew, it also declined as a percentage of the entire email base.

In 2012, advocates represented a median of 12.76 percent of the constituent file, a decrease of one percent. This represents a nearly flat to a slight decline overall, except that the Jewish organizations, national nonprofit mailer, and environment and wildlife verticals increased. The conclusion here could be that the overall housefile size grew faster than the number of advocates captured by organizations. Does this change speak to the constituents' perception of the value of advocacy, or to organizations' inability to voice the issues that engage their supporter bases? The decline in advocate engagement is especially surprising considering that 2012 was a presidential election year.

Chart 42 – Advocates Percent of Total



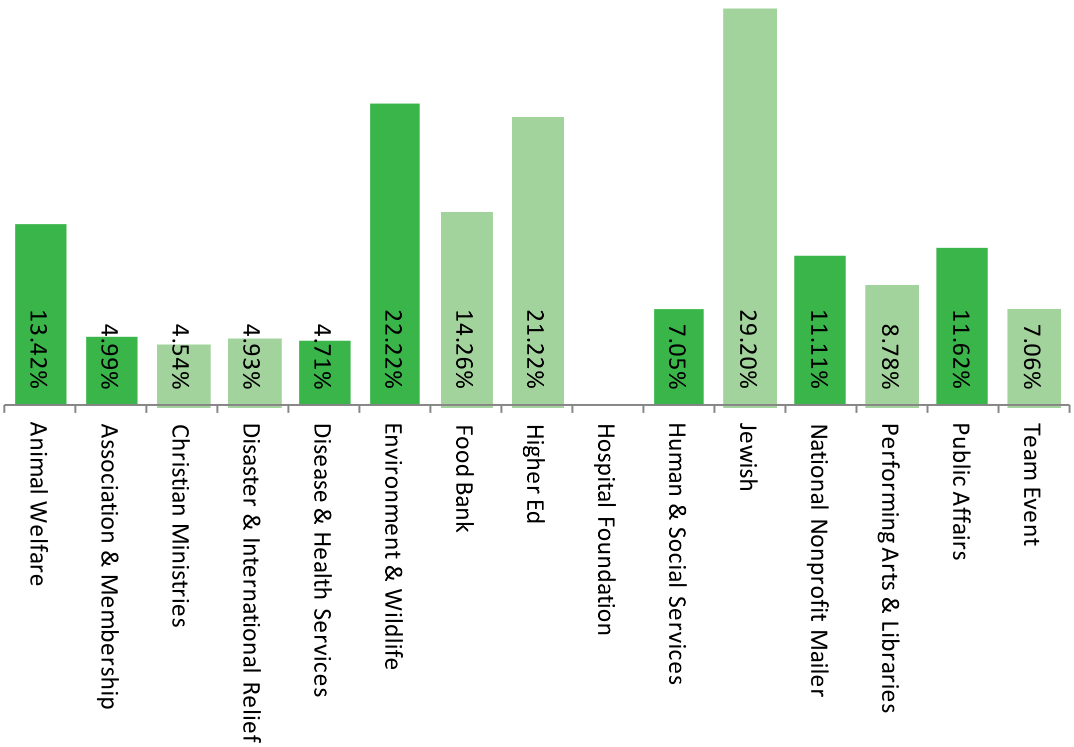
Percentage of advocates within the total email file

*Light green denotes sample size fewer than 10 organizations.

ADVOCACY AND FUNDRAISING OVERLAP: IMPACTS OF INTEGRATED MARKETING

As noted earlier in this report, a critical key performance indicator is how effectively organizations communicate with and cultivate advocates to maximize the conversion ratio. Chart 43 shows the median percentage of advocates who donated online to be 11.98 percent, similar to last year's rate. A median percentage increase similar to last year's increase, however, might be an indication that audience identification and the cultivation of advocates has matured, much like email file growth.

Chart 43 – Advocates Who Donate



Percentage of advocates who donated

*Light green denotes sample size fewer than 10 organizations.

METHODOLOGY

STUDY PARTICIPANTS

Using the transaction data from nearly 700 nonprofit organizations using the Luminate platform allows us to avoid two major sources of research bias common in many studies.

The first, called referral bias, occurs when groups who volunteer to participate in a study often perform differently than nonvolunteers. The second, called measurement bias, occurs when comparing organizations' results from different sources and measuring them in different ways. This can commonly be seen in how different organizations may selectively include or exclude different sources of online fundraising data, such as eCommerce, ticket sales, event registration fees, and donation form giving when defining their online revenue. Making valid comparisons is difficult when the data are volunteered, or when sources are self-selected or normalized to look better.

As much as we would like to include every Blackbaud client in this year's study, our objective is to provide nonprofits the best and most accurate insight into how the industry fared in 2012. As such, we excluded organizations that did not have at least 36 months of data *on the Luminate platform*, as organizations that are newer to online fundraising tend to perform differently than those with more mature online marketing programs. As a result of this exclusion, the number and composition of organizations in our study will always vary slightly depending on when they join Blackbaud and when they deploy additional modules.

WHAT'S NEW THIS YEAR?

This year's study included results from almost 700 organizations grouped by the NTEE vertical designations. The exceptions are national nonprofit mailers (email files larger than 1,000,000) and Canadian nonprofits. We reviewed online fundraising by focusing on multiple types of donations that have their own influence on the overall metrics. They are:

- **Total Fundraising**: Every online financial transaction
- **One-Time Donations**: Traditional email campaign and web form donations, excluding all monthly sustainer transactions and event-based donations
- **Sustainer Donations**: Monthly recurring transactions
- **First-Time Donations**: Donations flagged as a person's first online transaction with the respective organization
- **Repeat Donations**: Comparison of the fundraising metrics for repeat/returning donors and their donations

There are also new angles applied to reviewing the calculated metrics. In the past, results were reported based on groupings by their assigned industry vertical, and we provided some insight on performance based on an organization's size. This year, we have prepared a summary for every metric by the following views:

- **NTEE Assigned Vertical**: Shows how organizations with similar missions compare to one another
- **Organization Size – Valid Email Address Bands**: Allows us to see if growth or contraction is being led by large or small organizations based on the size of the email file
- **Organization Size – Revenue Band**: Groups results based by the level of fundraising in 2012 and lets us assess whether fundraising performance is more or less challenged from 2011 to 2012 based on total revenue received
- **Consecutive Years Fundraising**: Groups organizations based on their tenure with Luminate Online, which provides information on the difference in performance metrics from the newer organizations to the more mature programs

We have provided more reporting metrics, in addition to the different reporting views, and perhaps the most valuable of these metrics are associated with our email metric reporting. These will help organizations assess what falling email performance metrics really mean.

INDUSTRY VERTICALS

Organizations with at least 36 complete months of data on the Luminate platform were combined into groups that we believed to be similar based on a common organizational mission, or vertical, within the nonprofit sector, as described in Figure 1.

There are 20 benchmarks, including an all verticals benchmark, for each of the metrics in this study. The only time a vertical would not be represented in a particular metric would be if no study participants had data for that particular metric. For example, advocacy is a metric that is not as relevant for a public broadcasting station as it might be for a public affairs organization. As a result, none of the public broadcasting stations in this study had results for the advocacy-related metrics. Other verticals that were removed from the advocacy-related charts include hospitals and visitation.

In the NTEE verticals, similar cohorts are combined with other organizations that are believed to perform similarly. For example, the Christian, Catholic, and other religion-affiliated organizations were combined into a common vertical cohort that we call Christian Ministries. Jewish organizations, however, while a having religious component to their mission, were deemed different enough from the Christian Ministries to warrant a separate vertical for comparison.

In other cases, the mission was so narrow that the resulting sample was too small to be statistically significant. Verticals that did not have at least ten similar organizations based on their common mission were excluded from this study.

Previous studies conducted by Convio have shown that larger organizations perform dramatically differently from organizations with smaller email files. This is partly because email files of this size allow these organizations to drive fundraising and advocacy communications to a large number of constituents. We are illustrating the difference of these organizations with a view of performance strictly by organization size.

Organizations that have been able to build email files of this size also tend to have major offline programs, such as direct mail, and increased organizational resources that allow them to achieve higher levels of success. The performance of any benchmark can be significantly skewed by organizations of this magnitude; therefore, they have been broken out into a separate category called national nonprofit mailer.

Vertical	Description	Participants
Animal Welfare	Regional humane societies and national organizations devoted to animal welfare issues	44
Association and Membership	Organizations whose members have a common professional affiliation	20
Canadian Organization	Organizations located in Canada	10
Christian Ministries	Churches, ministries, and other organizations of various religious affiliations	41
Disaster and International Relief	Domestic and international organizations that provide disaster relief, humanitarian relief, aid, and assistance around the world, often in response to a catastrophic event or disaster	42
Disease and Health Services	Organizations that provide information and patient support on particular diseases and disorders, raise money for medical research, and/or are involved in medically related public policy issues	106
Environment and Wildlife	Regional and national environmental and conservation organizations	45
Food Bank	Organizations whose mission focuses on advocating against and working to end hunger in America	23
Higher Education	Colleges, universities, and their alumni associations	23
Hospital Foundation	Organizations that provide teaching and medical research	16
Hospitals	Organizations providing clinical care	15
Human and Social Services	Local, regional, and national organizations that deliver human and social services to people in need	71
Jewish Organizations	Organizations that provide human services, aid to Israel, and support for issues of importance to Jewish constituents	13
National Nonprofit Mailer	Organizations from various verticals with more than 1,000,000 usable email addresses in their email file	22
Performing Arts and Libraries	Organizations such as museums and libraries	16
Public Affairs	Organizations involved in shaping public policy and legislative advocacy at a state or federal level	99
Public Broadcasting Stations	Public radio and public television stations	38
Team Event	Organizations that derive at least 80 percent of their online fundraising revenue from team-based fundraising events such as walks, runs, and bicycle rides created to raise money and awareness for the organization	37
Visitation	Organizations such as zoos and aquariums that rely on members and guests visiting their facilities	16
Total 2013 Study		**697**

OTHER CONSIDERATIONS

SAMPLE SIZE:

Each metric studied included a breakdown of how each of the 19 verticals performed compared with an all verticals benchmark composed of all organizations relevant for that particular metric, as noted by the "n" value, or number of organizations, displayed in the chart title. Some metrics in this study include an "n" value of fewer than 697 participants based on the number of study participants that employed the tactic in question. For instance, not all study participants used Convio for their online fundraising in 2012; as a result, the online fundraising revenue by vertical metric contained fewer than 500 participants. This sometimes created a metric in which there were fewer than 10 organizations with a full set of data for an established vertical. Given the decreased precision resulting from a small sample, these data are denoted in a lighter color shade.

MEDIANS:

Unless otherwise stated, all of the metrics in this study were calculated using the median value. The median is an estimate of the average of a list of numerical values independent of strong outliers. As such, each benchmark represents the point at which half the values lie above the benchmark and half lie below. In the case of an even number of values, where there wasn't a single middle value, the average of the two middle values was used.

METRICS COMPUTATION:

To give a better indication of what a typical nonprofit would have achieved, we first calculated each organization's metrics independently before calculating the median of all organizations' results to derive the benchmark. This provides results that are more indicative of what the average organization could achieve as opposed to the industry average, which can easily be skewed by outliers.

EMAIL WEIGHTING:

Within a given period, some organizations send out more online communications than others. To prevent those organizations' results from having a disproportionate influence on the benchmark results, we weighted each client's aggregated results equally. This was done by averaging each organization's results before taking the median across all organizations in their given vertical to find the vertical benchmark.

VARIABILITY:

Results varied widely for each metric. Therefore, in addition to the median provided in each chart, which is a single point of reference, our additional metric views based on size, fundraising range, and program maturity provide a broader context by which organizations can compare their results (see metric summary tables).

CONVIO CMS:

Performance metrics from email messages that are configured by organizations using Convio CMS were not included in the calculation of website growth and traffic conversion percentages. Therefore any organization that is on Convio CMS (or has converted to Convio CMS at any point in 2011 or 2012) was not included in the calculation of these benchmarks. This will not have any influence on these organizations being included in the fundraising and email performance metrics.

APPENDIX

WEBSITE STATISTICS

WEBSITE TRAFFIC BY VERTICAL	SAMPLE SIZE	UNIQUE VISITORS (CHART 1)	GROWTH (CHART 2)	CONVERSION RATE (CHART 4)
Animal Welfare	18	228,214	-12.50%	2.32%
Association & Membership	9	61,865	-20.00%	1.35%
Canadian Organization	4	300,414	9.00%	12.38%
Christian Ministries	18	68,800	-13.00%	2.42%
Disaster & International Relief	15	73,336	-30.00%	1.04%
Disease & Health Services	39	72,210	-10.50%	4.71%
Environment & Wildlife	10	66,403	-12.00%	1.28%
Food Bank	9	74,939	-21.00%	3.51%
Higher Ed	3	44,891	-39.00%	0.71%
Hospital Foundation	5	10,914	-36.00%	1.29%
Hospitals	1	18,637	-34.00%	1.85%
Human & Social Services	39	65,380	-13.00%	1.88%
Jewish	5	38,617	-20.00%	0.91%
Performing Arts & Libraries	8	27,070	-23.50%	0.62%
Public Affairs	23	66,557	-14.50%	1.37%
Public Broadcasting Stations	5	44,244	-12.00%	0.78%
Team Event	21	59,615	-5.00%	13.71%
Visitation	3	65,605	-63.00%	0.16%
National Nonprofit Mailer	3	1,646,506	-28.00%	41.29%
All Verticals	**238**	**66,156**	**-14.00%**	**2.04%**

WEBSITE TRAFFIC BY ORGANIZATION'S EMAIL FILE SIZE	SAMPLE SIZE	GROWTH (CHART 3)	CONVERSION RATE (CHART 5)
< 2500	10	-24.00%	-51.81%
2,500-9,999	53	-14.00%	-13.49%
10,000-24,999	67	-11.00%	-20.00%
25,000-74,999	52	-16.00%	-15.73%
75,000-124,999	20	-15.50%	-26.79%
125,000-199,999	12	-10.50%	-5.64%
200,000-349,999	8	-12.00%	-7.34%
350,000-499,999	5	-3.00%	0.79%
500,000-749,999	5	-14.00%	12.55%
750,000-999,999	1	12.00%	1.21%
>999,9999	5	-28.00%	-4.85%

HOUSEFILE

EMAIL FILE BY VERTICAL	SAMPLE SIZE	FILE SIZE (CHART 6)	FILE GROWTH (CHART 7)	USABLE FILE SIZE (CHART 8)	USABLE FILE SIZE GROWTH (CHART 9)	USABLE % OF FILE (CHART 11)
Animal Welfare	44	51,489	18.72%	23,888	14.07%	49.78%
Association & Membership	20	110,087	7.64%	74,655	3.72%	62.24%
Canadian Organization	10	164,490	16.65%	97,709	14.36%	54.10%
Christian Ministries	41	81,127	12.25%	40,806	7.13%	53.62%
Disaster & International Relief	42	53,310	9.54%	27,104	4.54%	53.48%
Disease & Health Services	106	54,110	8.75%	27,732	4.12%	50.56%
Environment & Wildlife	45	64,890	18.69%	40,017	13.19%	59.63%
Food Bank	23	32,877	21.37%	14,416	16.64%	51.38%
Higher Ed	23	112,570	4.76%	82,891	1.78%	73.64%
Hospital Foundation	16	31,771	8.25%	15,619	0.61%	52.31%
Hospitals	15	37,593	28.74%	23,120	17.36%	57.51%
Human & Social Services	71	24,758	11.38%	14,043	6.60%	56.84%
Jewish	13	38,273	7.17%	19,587	1.66%	61.66%
Performing Arts & Libraries	16	52,783	16.00%	33,944	11.16%	60.62%
Public Affairs	99	72,831	7.29%	40,020	3.58%	54.36%
Public Broadcasting Stations	38	94,059	11.96%	44,739	6.93%	59.12%
Team Event	37	76,214	14.40%	33,030	12.21%	46.73%
Visitation	16	69,839	15.54%	38,090	11.62%	58.33%
National Nonprofit Mailer	22	3,317,849	18.87%	2,022,744	11.94%	58.52%
All Verticals	**697**	**61,306**	**12.45%**	**32,135**	**7.33%**	**53.89%**

USABLE EMAIL FILE SIZE GROWTH BY ORGANIZATION SIZE (CHART 10)	SAMPLE SIZE	PERCENTAGE
< 2500	18	0.00%
2,500-9,999	127	5.56%
10,000-24,999	161	5.21%
25,000-74,999	176	7.25%
75,000-124,999	66	6.88%
125,000-199,999	44	9.40%
200,000-349,999	35	9.46%
350,000-499,999	20	14.97%
500,000-749,999	17	30.04%
750,000-999,999	6	26.43%
>999,9999	27	13.62%

TOTAL FUNDRAISING

	SAMPLE SIZE	REVENUE (CHART 12)	GROWTH (CHART 13)	AVERAGE ONLINE DONATION (CHART 16)	PER USABLE EMAIL ADDRESS (CHART 17)
Animal Welfare	36	$422,955	14.58%	$58.50	$15.00
Association & Membership	8	$184,088	6.02%	$98.00	$4.00
Canadian Organization	10	$1,486,775	2.60%	$85.00	$15.00
Christian Ministries	35	$802,548	12.94%	$92.00	$18.00
Disaster & International Relief	33	$654,593	-7.08%	$121.00	$21.00
Disease & Health Services	61	$562,160	-2.21%	$73.00	$14.00
Environment & Wildlife	37	$213,060	20.33%	$91.00	$6.00
Food Bank	21	$685,987	13.39%	$98.00	$41.00
Higher Ed	9	$534,812	18.21%	$150.00	$6.00
Hospital Foundation	10	$571,383	9.81%	$110.50	$27.00
Hospitals	13	$364,195	8.57%	$146.00	$23.00
Human & Social Services	50	$236,935	7.73%	$134.00	$14.00
Jewish	8	$591,848	31.38%	$95.00	$16.00
Performing Arts & Libraries	13	$412,246	8.03%	$93.00	$13.00
Public Affairs	59	$174,116	13.49%	$114.00	$3.00
Public Broadcasting Stations	30	$506,065	21.63%	$63.50	$13.00
Team Event	24	$1,959,428	0.83%	$65.50	$20.00
Visitation	13	$489,484	16.10%	$118.00	$6.00
National Nonprofit Mailer	18	$4,310,181	14.48%	$52.00	$2.00
All Verticals	**488**	**$467,300**	**8.48%**	**$89.00**	**$13.00**

BY ORGANIZATION SIZE (CHART 14)	SAMPLE SIZE	AMOUNT
< 2500	3	$169,754
2,500-9,999	71	$133,870
10,000-24,999	100	$321,787
25,000-74,999	138	$455,199
75,000-124,999	51	$954,659
125,000-199,999	37	$1,010,726
200,000-349,999	28	$1,853,318
350,000-499,999	16	$1,515,541
500,000-749,999	17	$5,649,643
750,000-999,999	4	$10,863,597
>999,9999	23	$10,479,490

BY CONSECUTIVE YEARS FUNDRAISING (CHART 15)	SAMPLE SIZE	AMOUNT
3 Years	127	$303,595
4 Years	114	$436,655
5 Years	86	$551,812
6 Years	65	$590,329
7 Years	96	$561,720

ONE-TIME DONATIONS REVENUE

ONE-TIME REVENUE BY VERTICAL	SAMPLE SIZE	GROWTH (CHART 18)	% OF TOTAL (CHART 19)	AVG DONATION (CHART 20)
Animal Welfare	36	13.23%	-0.28%	$87.86
Association & Membership	8	-1.11%	-2.53%	$80.64
Canadian Organization	10	5.00%	-7.05%	$121.50
Christian Ministries	35	9.67%	-1.65%	$142.54
Disaster & International Relief	33	-12.86%	-4.41%	$208.71
Disease & Health Services	61	7.07%	-0.14%	$132.20
Environment & Wildlife	37	16.95%	-0.16%	$140.88
Food Bank	21	9.24%	-2.04%	$143.78
Higher Ed	9	33.36%	-1.18%	$110.98
Hospital Foundation	10	24.98%	4.33%	$163.48
Hospitals	13	23.00%	1.15%	$185.34
Human & Social Services	50	12.71%	-0.29%	$160.96
Jewish	8	9.87%	-0.21%	$124.05
Performing Arts & Libraries	13	7.07%	-0.28%	$120.71
Public Affairs	59	17.71%	-0.34%	$136.63
Public Broadcasting Stations	30	3.70%	-2.94%	$115.47
Team Event	24	4.09%	-4.07%	$72.60
Visitation	13	19.03%	0.00%	$131.50
National Nonprofit Mailer	18	6.47%	-1.78%	$73.05
All Verticals	**488**	**10.00%**	**-0.89%**	**$128.01**

ONE-TIME REVENUE BY EMAIL FILE SIZE	SAMPLE SIZE	GROWTH	% OF TOTAL	AVG DONATION
< 2500	3	36.99%	0.91%	$224.23
2,500-9,999	71	13.23%	-0.23%	$156.06
10,000-24,999	100	15.96%	-0.54%	$142.46
25,000-74,999	138	11.46%	-1.09%	$143.51
75,000-124,999	51	5.71%	-1.15%	$109.62
125,000-199,999	37	7.53%	-0.08%	$97.24
200,000-349,999	28	-3.42%	-2.51%	$84.01
350,000-499,999	16	5.34%	-4.21%	$72.28
500,000-749,999	17	14.78%	-1.33%	$93.93
750,000-999,999	4	36.66%	3.69%	$31.26
>999,9999	23	5.33%	-1.47%	$77.32

ONE-TIME REVENUE BY ORGANIZATION REVENUE SIZE	SAMPLE SIZE	GROWTH	% OF TOTAL	AVG DONATION
1-99,999	75	6.35%	-1.04%	$109.38
100,000-249,999	95	13.21%	-0.07%	$141.55
250,000-499,999	87	8.13%	-1.16%	$137.86
500,000-999,999	73	11.26%	-1.18%	$117.33
1,000,000-1,999,999	79	8.77%	-1.15%	$137.99
2,000,000-2,999,999	21	16.59%	-0.98%	$102.49
3,000,000+	58	7.11%	-3.01%	$118.57

ONE-TIME REVENUE BY CONSECUTIVE YEARS REPORTING	SAMPLE SIZE	GROWTH	% OF TOTAL	AVG DONATION
3_Consecutive_Years	127	13.62%	-0.38%	$124.07
4_Consecutive_Years	114	10.18%	-1.40%	$136.87
5_Consecutive_Years	86	6.59%	-1.22%	$121.03
6_Consecutive_Years	65	9.93%	-0.41%	$132.59
7_Consecutive_Years	96	8.23%	-0.96%	$126.08

MONTHLY RECURRING DONATIONS

SUSTAINER REVENUE BY VERTICAL	SAMPLE SIZE	GROWTH (CHART 21)	% OF TOTAL (CHART 22)	AVG DONATION (CHART 23)	AVG DONATION CHANGE (CHART 24)
Animal Welfare	36	28.00%	15.00%	$25.00	0.00%
Association & Membership	8	48.00%	13.00%	$28.00	-3.50%
Canadian Organization	10	30.00%	14.00%	$25.00	4.00%
Christian Ministries	35	21.50%	24.00%	$50.00	0.00%
Disaster & International Relief	33	19.00%	17.50%	$39.00	3.00%
Disease & Health Services	61	18.00%	3.00%	$34.00	7.00%
Environment & Wildlife	37	26.50%	7.00%	$22.00	-2.00%
Food Bank	21	38.00%	10.00%	$39.00	2.00%
Higher Ed	9	73.00%	11.00%	$32.00	10.00%
Hospital Foundation	10	8.00%	8.00%	$23.00	4.00%
Hospitals	13	21.50%	2.50%	$39.00	-6.50%
Human & Social Services	50	22.50%	5.50%	$40.00	0.00%
Jewish	8	57.00%	6.00%	$47.00	3.50%
Performing Arts & Libraries	13	49.50%	6.00%	$64.00	18.50%
Public Affairs	59	21.00%	6.00%	$24.00	0.00%
Public Broadcasting Stations	30	32.00%	14.00%	$15.00	0.00%
Team Event	24	39.00%	1.00%	$32.00	-3.00%
Visitation	13	34.00%	1.00%	$34.00	-28.00%
National Nonprofit Mailer	18	41.00%	11.00%	$22.00	-4.50%
All Verticals	**488**	**27.00%**	**8.00%**	**$31.00**	**0.00%**

SUSTAINER REVENUE BY ORANIZATION EMAIL SIZE	SAMPLE SIZE	GROWTH	% OF TOTAL	AVG DONATION	AVG DONATION CHANGE
< 2500	3	8.50%	-28.00%	$85.00	-14.00%
2,500-9,999	71	22.00%	0.00%	$38.00	-4.00%
10,000-24,999	100	29.50%	7.00%	$32.00	0.00%
25,000-74,999	138	26.50%	17.00%	$32.00	0.00%
75,000-124,999	51	27.00%	10.00%	$25.00	4.00%
125,000-199,999	37	13.00%	0.00%	$26.00	0.00%
200,000-349,999	28	45.50%	28.00%	$24.00	0.00%
350,000-499,999	16	48.00%	25.00%	$22.00	0.00%
500,000-749,999	17	38.50%	14.00%	$32.00	3.00%
750,000-999,999	4	21.50%	1.00%	$22.00	4.00%
>999,9999	23	45.00%	20.00%	$22.00	-3.00%

SUSTAINER REVENUE BY ORGANIZATION REVENUE	SAMPLE SIZE	GROWTH	% OF TOTAL	AVG DONATION	AVG DONATION CHANGE
1-99,999	75	17.50%	13.00%	$25.00	1.50%
100,000-249,999	95	12.00%	0.00%	$31.00	0.00%
250,000-499,999	87	32.00%	22.00%	$29.00	0.00%
500,000-999,999	73	27.00%	9.00%	$30.00	0.00%
1,000,000-1,999,999	79	30.00%	13.00%	$34.00	3.00%
2,000,000-2,999,999	21	52.00%	19.00%	$26.00	0.00%
3,000,000+	58	29.50%	12.00%	$34.00	0.00%

SUSTAINER REVENUE BY CONSECUTIVE YEARS REPORTING	SAMPLE SIZE	GROWTH	% OF TOTAL	AVG DONATION	AVG DONATION CHANGE
3_Consecutive_Years	127	33.00%	2.00%	$27.00	0.00%
4_Consecutive_Years	114	26.00%	13.50%	$34.00	0.00%
5_Consecutive_Years	86	25.00%	22.00%	$30.00	2.00%
6_Consecutive_Years	65	27.00%	9.00%	$30.00	0.00%
7_Consecutive_Years	96	22.00%	10.50%	$31.00	2.00%

FIRST TIME DONATIONS

FIRST TIME REVENUE BY VERTICAL	SAMPLE SIZE	GROWTH (CHART 25)	DONATION GROWTH (CHART 26)	AVG DONATION (CHART 27)	AVG DONATION CHANGE (CHART 28)	% OF GROWTH (CHART 29)
Animal Welfare	36	4.50%	6.00%	$61.00	-2.50%	-12.50%
Association & Membership	8	-12.00%	-14.50%	$104.00	-1.50%	-13.50%
Canadian Organization	10	2.50%	1.50%	$91.00	0.50%	-2.50%
Christian Ministries	35	12.00%	7.00%	$135.00	8.00%	-6.00%
Disaster & International Relief	33	-21.00%	-29.00%	$160.00	3.00%	-23.00%
Disease & Health Services	61	-4.00%	-10.00%	$71.00	3.00%	-8.00%
Environment & Wildlife	37	6.00%	4.00%	$108.00	4.00%	-10.00%
Food Bank	21	-4.00%	2.00%	$113.00	-3.00%	-15.00%
Higher Ed	9	29.00%	14.00%	$144.00	11.50%	-8.50%
Hospital Foundation	10	18.00%	8.00%	$89.00	9.00%	-9.50%
Hospitals	13	22.00%	-1.00%	$139.00	2.00%	0.00%
Human & Social Services	50	8.50%	4.00%	$138.00	0.50%	-11.50%
Jewish	8	8.00%	17.00%	$136.00	-12.50%	-4.50%
Performing Arts & Libraries	13	4.00%	-1.00%	$97.00	13.00%	-10.00%
Public Affairs	59	8.00%	5.50%	$117.00	-2.00%	-7.00%
Public Broadcasting Stations	30	-3.50%	-1.00%	$87.00	0.50%	-9.50%
Team Event	24	-0.50%	-1.00%	$58.00	3.00%	-4.00%
Visitation	13	10.00%	6.00%	$123.00	7.00%	-7.00%
National Nonprofit Mailer	18	6.50%	4.50%	$59.00	5.50%	-3.00%
All Verticals	**488**	**3.00%**	**0.00%**	**$98.00**	**2.00%**	**-9.00%**

FIRST TIME REVENUE BY ORGANIZATION EMAIL FILE SIZE	SAMPLE SIZE	GROWTH	DONATION GROWTH	AVG DONATION	AVG DONATION CHANGE	% OF GROWTH
< 2500	3	-3.00%	17.00%	$139.00	-18.00%	-17.00%
2,500-9,999	71	4.00%	-2.00%	$128.00	2.00%	-9.00%
10,000-24,999	100	6.00%	1.00%	$112.00	0.50%	-13.00%
25,000-74,999	138	4.00%	3.00%	$109.00	4.00%	-7.50%
75,000-124,999	51	-3.00%	0.00%	$71.00	3.00%	-10.00%
125,000-199,999	37	1.00%	0.00%	$83.00	-1.00%	-8.00%
200,000-349,999	28	-2.50%	-11.00%	$95.00	-0.50%	-8.00%
350,000-499,999	16	-1.00%	-1.00%	$57.00	-2.00%	-15.00%
500,000-749,999	17	6.00%	-1.00%	$81.00	2.00%	-10.00%
750,000-999,999	4	12.00%	3.50%	$54.00	0.50%	-3.00%
>999,9999	23	3.00%	2.00%	$55.00	5.00%	-5.00%

FIRST TIME REVENUE BY ORGANIZATION REVENUE	SAMPLE SIZE	GROWTH	DONATION GROWTH	AVG DONATION	AVG DONATION CHANGE	% OF GROWTH
1-99,999	75	-4.00%	-13.00%	$98.00	-1.00%	-9.00%
100,000-249,999	95	6.00%	0.00%	$110.00	5.00%	-10.00%
250,000-499,999	87	4.50%	1.50%	$108.00	5.00%	-9.00%
500,000-999,999	73	4.00%	1.00%	$105.00	0.50%	-10.00%
1,000,000-1,999,999	79	4.00%	4.00%	$86.00	1.00%	-9.00%
2,000,000-2,999,999	21	2.00%	-4.00%	$69.00	6.00%	-9.00%
3,000,000+	58	-1.50%	-5.00%	$84.00	3.00%	-7.50%

FIRST-TIME REVENUE BY CONSECUTIVE YEARS REPORTING	SAMPLE SIZE	GROWTH	DONATION GROWTH	AVG DONATION	AVG DONATION CHANGE	% OF GROWTH
3_Consecutive_Years	127	8.00%	4.00%	$100.00	2.00%	-8.00%
4_Consecutive_Years	114	1.00%	1.00%	$107.00	3.00%	-10.00%
5_Consecutive_Years	86	1.00%	1.50%	$97.00	1.00%	-9.00%
6_Consecutive_Years	65	-5.00%	-3.00%	$99.00	4.00%	-10.00%
7_Consecutive_Years	96	5.00%	-6.00%	$92.00	5.00%	-8.00%

REPEAT DONATIONS

REPEAT DONATION REVENUE BY VERTICAL	SAMPLE SIZE	GROWTH (CHART 30)	AVG DONATION (CHART 31)	AVG DONATION CHANGE (CHART 32)	% OF GROWTH (CHART 33)
Animal Welfare	36	25.00%	$60.00	4.50%	11.00%
Association & Membership	8	23.00%	$124.00	0.50%	21.50%
Canadian Organization	10	20.50%	$87.00	-3.50%	7.50%
Christian Ministries	35	22.00%	$90.00	0.00%	4.00%
Disaster & International Relief	33	2.00%	$102.00	-2.00%	9.00%
Disease & Health Services	61	15.00%	$85.00	4.00%	7.00%
Environment & Wildlife	37	30.00%	$83.00	1.00%	10.00%
Food Bank	21	27.00%	$104.00	3.00%	9.00%
Higher Ed	9	40.00%	$148.00	8.00%	9.00%
Hospital Foundation	10	26.50%	$83.00	11.50%	13.00%
Hospitals	13	25.00%	$104.00	-2.00%	12.00%
Human & Social Services	50	26.00%	$143.00	1.50%	14.00%
Jewish	8	16.00%	$158.00	1.50%	4.00%
Performing Arts & Libraries	13	19.00%	$123.00	14.00%	9.00%
Public Affairs	59	22.00%	$87.00	0.00%	10.00%
Public Broadcasting Stations	30	19.50%	$41.00	-9.00%	14.00%
Team Event	24	13.50%	$81.00	5.00%	8.50%
Visitation	13	54.00%	$131.00	11.00%	10.00%
National Nonprofit Mailer	18	17.50%	$52.00	-5.00%	5.00%
All Verticals	**488**	**20.00%**	**$87.00**	**1.50%**	**9.00%**

REPEAT DONATION REVENUE BY ORGANIZATION EMAIL FILE SIZE	SAMPLE SIZE	GROWTH	AVG DONATION	AVG DONATION CHANGE	% OF GROWTH
< 2500	3	21.00%	$162.00	1.00%	-14.00%
2,500-9,999	71	13.00%	$105.00	5.00%	9.00%
10,000-24,999	100	23.50%	$94.00	2.50%	10.00%
25,000-74,999	138	18.00%	$91.00	1.00%	9.00%
75,000-124,999	51	16.00%	$74.00	2.00%	11.00%
125,000-199,999	37	16.00%	$75.00	5.00%	13.00%
200,000-349,999	28	14.50%	$71.00	-2.00%	10.50%
350,000-499,999	16	23.00%	$67.00	-2.00%	11.50%
500,000-749,999	17	24.00%	$78.00	5.00%	11.00%
750,000-999,999	4	6.50%	$46.00	4.50%	5.50%
>999,9999	23	14.00%	$55.00	-4.00%	6.00%

REPEAT DONATION REVENUE BY ORGANIZATION REVENUE	SAMPLE SIZE	GROWTH	AVG DONATION	AVG DONATION CHANGE	% OF GROWTH
1-99,999	75	7.00%	$89.00	-1.00%	13.00%
100,000-249,999	95	19.00%	$102.00	3.00%	13.00%
250,000-499,999	87	23.00%	$91.00	1.00%	8.00%
500,000-999,999	73	19.00%	$83.00	0.00%	11.50%
1,000,000-1,999,999	79	20.00%	$81.00	3.00%	8.00%
2,000,000-2,999,999	21	16.00%	$83.00	0.00%	7.00%
3,000,000+	58	17.50%	$82.00	0.50%	8.00%

REPEAT DONATION REVENUE BY CONSECUTIVE YEARS REPORTING	SAMPLE SIZE	GROWTH	AVG DONATION	AVG DONATION CHANGE	% OF GROWTH
3_Consecutive_Years	127	25.00%	$88.00	0.00%	12.00%
4_Consecutive_Years	114	18.00%	$93.00	2.00%	9.00%
5_Consecutive_Years	86	14.50%	$83.00	3.00%	11.00%
6_Consecutive_Years	65	20.00%	$88.00	0.00%	8.00%
7_Consecutive_Years	96	12.50%	$80.00	2.00%	7.00%

EMAIL APPEALS: OPEN RATES, CLICK-THROUGH RATES, AND RESPONSE RATES

FUNDRAISING APPEAL EMAIL	SAMPLE SIZE	OPEN RATE (CHART 34)	% CLICK-THROUGH RATES (CHART 36)	RESPONSE RATE CHANGE (CHART 38)
Animal Welfare	25	15.51%	1.32%	-7.50%
Association & Membership	7	15.92%	0.88%	-15.51%
Canadian Organization	5	22.98%	1.45%	15.00%
Christian Ministries	23	16.62%	0.76%	-15.50%
Disaster & International Relief	26	10.73%	0.49%	-39.18%
Disease & Health Services	50	12.53%	0.52%	-19.04%
Environment & Wildlife	37	16.34%	0.91%	-20.72%
Food Bank	15	14.53%	0.72%	-32.55%
Higher Ed	11	21.37%	0.73%	-6.85%
Hospital Foundation	5	15.51%	0.43%	-43.38%
Hospitals	7	12.85%	0.48%	3.96%
Human & Social Services	40	13.08%	0.72%	-8.84%
Jewish	6	15.51%	0.79%	-28.16%
Performing Arts & Libraries	11	18.02%	0.84%	-14.54%
Public Affairs	47	14.68%	0.60%	-5.47%
Public Broadcasting Stations	22	17.44%	0.81%	-17.23%
Team Event	12	14.30%	0.62%	-26.53%
Visitation	10	18.02%	0.66%	-17.30%
National Nonprofit Mailer	19	11.86%	0.61%	-32.94%
All Verticals	**378**	**14.72%**	**0.70%**	**-18.77%**

FUNDRAISING APPEAL EMAIL BY ORGANIZATION SIZE	SAMPLE SIZE	OPEN RATE CHANGE (CHART 35)	USABLE EMAIL CLICK-THROUGHS (CHART 37)	RESPONSE RATE CHANGE (CHART 39)
< 2500	1	5.25%	1.12%	-58.90%
2,500-9,999	53	4.25%	0.89%	-16.37%
10,000-24,999	71	2.85%	0.76%	-5.14%
25,000-74,999	101	1.33%	0.73%	-19.96%
75,000-124,999	39	2.19%	0.61%	-13.08%
125,000-199,999	31	5.04%	0.64%	-20.55%
200,000-349,999	27	6.67%	0.51%	-23.57%
350,000-499,999	14	2.89%	0.64%	-8.59%
500,000-749,999	13	1.84%	0.33%	-23.60%
750,000-999,999	5	-0.41%	0.85%	21.02%
>999,9999	23	-0.36%	0.44%	-36.02%

ADVOCACY

NUMBER OF ADVOCATES	SAMPLE SIZE	CHANGE (CHART 40)	% OF TOTAL (CHART 42)	% OF DONORS (CHART 43)
Animal Welfare	11	18.38%	23.90%	13.42%
Association & Membership	13	4.74%	7.22%	4.99%
Christian Ministries	8	6.77%	17.58%	4.54%
Disaster & International Relief	8	11.20%	7.61%	4.93%
Disease & Health Services	22	15.91%	8.81%	4.71%
Environment & Wildlife	26	22.46%	25.48%	22.22%
Food Bank	8	0.38%	0.52%	14.26%
Higher Ed	4	1.17%	9.49%	21.22%
Hospital Foundation	2	0.00%	40.95%	
Human & Social Services	10	2.94%	3.22%	7.05%
Jewish	3	23.64%	8.11%	29.20%
Performing Arts & Libraries	3	2.87%	6.56%	8.78%
Public Affairs	67	7.02%	16.43%	11.62%
Team Event	6	3.43%	1.74%	7.06%
National Nonprofit Mailer	16	26.27%	20.26%	11.11%
All Verticals	207	8.72%	12.76%	11.98%
Team Event	12	14.30%	0.62%	-26.53%
Visitation	10	18.02%	0.66%	-17.30%
National Nonprofit Mailer	19	11.86%	0.61%	-32.94%
All Verticals	**378**	**14.72%**	**0.70%**	**-18.77%**

ADVOCATE CHANGE BY ORGANIZATION SIZE (CHART 41)	SAMPLE SIZE	
< 2500	1	5.25%
2,500-9,999	53	4.25%
10,000-24,999	71	2.85%
25,000-74,999	101	1.33%
75,000-124,999	39	2.19%
125,000-199,999	31	5.04%
200,000-349,999	27	6.67%
350,000-499,999	14	2.89%
500,000-749,999	13	1.84%
750,000-999,999	5	-0.41%
>999,9999	23	-0.36%

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About Blackbaud

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