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# THE CONVIO ONLINE MARKETING NONPROFIT BENCHMARK INDEX™ STUDY

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## INTRODUCTION

The online channel continues to be an influential and significant method for nonprofits to fundraise and engage with constituents in a meaningful way. Convio, the leading provider of on-demand constituent engagement solutions for nonprofits, has created the sixth annual *Convio Online Marketing Nonprofit Benchmark Index™ Study* to highlight key online trends and to help nonprofits compare the success of their online programs against their peers.

The *Convio Online Marketing Nonprofit Benchmark Index™ Study* allows nonprofit professionals like you to answer the following questions:

- How much should my organization be raising online?
- What level of engagement and response should I expect from my email file?
- What is the overlap between advocacy and fundraising?
- How well is my monthly giving program performing?

This study analyzes organizations from both the United States and Canada, of all different sizes and across most major nonprofit verticals. To help you find the most useful comparisons, the benchmark data is organized by vertical and email file size.

While benchmarks can be a useful guide, they are not necessarily transferable from one organization to another. It is important to recognize the impact that an organization's mission and strategies may have to drive significantly different results.

This year's study features data from more than 700 organizations in the United States and Canada that used the Convio Luminate Online platform for two consecutive years. That is an overall increase of almost 18 percent in the number of nonprofits from the 2010 study. These organizations collectively raised more than \$1.2 billion in 2011 and have close to 219 million email addresses.

This year, we added an analysis of first time online donors to understand the portion of donors and revenue they represent, their average gift and the growth rate. For this analysis, we excluded donors acquired by Convio TeamRaiser™ peer-to-peer special events, since they represent a very different form of donor acquisition.

We also added an analysis of sustainer giving, to understand the impact of this form of fundraising by vertical. As part of this analysis, we highlight average monthly gift and the growth rate in monthly giving. We are excited about this addition to the study, as we firmly believe that sustainer giving represents a very important strategy for all nonprofits to embrace.

Finally, we invited Mike Johnston, President of hjc Media, a leading fundraising agency in Canada, to review and comment on performance of Canadian nonprofits. You can find his brief on page 42. It is an honor to have Mike as a contributor to this year's study.

## KEY FINDINGS

*The Convio Online Marketing Nonprofit Benchmark Index™ Study* evaluated the results of more than 700 nonprofit organizations in the U.S. and Canada and compiled a series of benchmarks for online constituent engagement.

- **The impact of online fundraising continues with the median growth rate at 15.8 percent.** This compares unfavorably to the 20 percent growth rate achieved in 2010, but is up from the 14 percent achieved in 2008 and 2009. There are two principal factors driving the slowing growth versus 2010. First, the Disaster & International Relief vertical saw a decline as fundraising associated with Haiti relief efforts were a substantial contributor to the growth in 2010. Second, special event fundraising is experiencing slower growth rates. When excluding special events, overall online fundraising comes in at 19.7 percent.
- **The increase in number of gifts was the primary driver of revenue growth.** The median number of online gifts grew 12.6 percent. Food Bank, Hospitals, and Public Broadcasting Station verticals experienced the highest growth rate, with online gift counts increasing more than 25 percent over the previous year.
- **The median donation size increased to \$93.67, a 2 percent increase from 2010.** The top three performing verticals were Higher Education at \$149.65, Hospitals at \$127.80 and Human & Social Services at \$133.92. Verticals experiencing slower growth in median donation size include National Nonprofit Mailer and Animal Welfare.
- **Online giving continues to grow fastest for smaller organizations.** Organizations with 10,000 or fewer email addresses grew by 26.7 percent in median revenue, similar to 2010's growth rate.
- **First time online gifts represented 37 percent of total median online revenue at \$136,625 of a total \$366,572.** This benchmark represents gifts from new online donors that are not necessarily net new donors to the organization. Anecdotally, we have observed that a majority of these new online donors are net new, so the metric represents a good proxy for overall donor acquisition via the online channel and illustrates that online marketing can serve as a strong source of new donor acquisition. There is a slight decline with 2010 first time online gifts totaling \$139,145. Verticals

- that changed the most from 2010 to 2011 were Disaster & International Relief which dropped from 43.7 percent to 36.3 percent, and National Nonprofit Mailer, which dropped from 40 percent to 30.7 percent.
- **Sustainer giving programs are growing very strongly, particularly in Canadian Organization, Food Bank and Public Broadcasting Stations.** Overall average sustainer gift support was \$25,474 in 2011 compared to \$16,100 in 2010, representing a median growth of 38.7 percent. Sustainer giving represented approximately 6.9 percent of overall online revenue in 2011 compared to 5 percent in 2010. Sustainer gifts represented 18.8 percent of all online gifts in 2011 compared to 13.4 percent in 2010.
  - **The average online monthly gift amount was \$31.96.** The vertical that performed the best was Performing Arts at \$63.22 followed by Association & Membership at \$54.33. The lowest monthly gift was Public Broadcasting Stations at \$14.56. The nature of these verticals make monthly giving an obvious option by enabling constituents to purchase monthly subscriptions and having monthly or annual memberships.
  - **Advocacy continues to play a key role in online engagement.** The number of people who have taken at least one online advocacy action grew by 17 percent from a median of 5,261 to 7,456. Those who have made at least one advocacy action represented 12 percent of organization's total email file in 2011 versus 10.3 percent in 2010. The Canadian Organization vertical experienced the greatest gain at 77 percent.
  - **The crossover between advocacy and fundraising has increased.** The percentage of online advocates also making an online donation grew from 6.4 percent in 2010 to 11.9 percent in 2011. This metric indicates that charities are doing a better job at cross-marketing between fundraising and advocacy programs.
  - **Email files continue to grow in high double digits, but at a slower rate than 2010.** The median growth rate was 17 percent compared to 22 percent in 2010. Usable email files, where organizations have a valid, opted-in email address, grew 11.4 percent compared to 13.5 percent in 2010.
  - **Web traffic growth spiked at 11 percent after two years of slow increases.** Most notably, the organizations with less than 25,000 email addresses had the highest web traffic performance, whereas the largest email tier had a growth of only 0.3 percent.
  - **Website traffic registration rates continue to decline for a third year.** The rate at which organizations converted website visitors to their email file was 1.9 percent compared to 2.1 percent in 2010. Interestingly enough, organizations in the 250,000 email tier excelled at conversion with 4.9 percent.

## PERFORMANCE TRENDS BY VERTICAL AND EMAIL FILE TIER

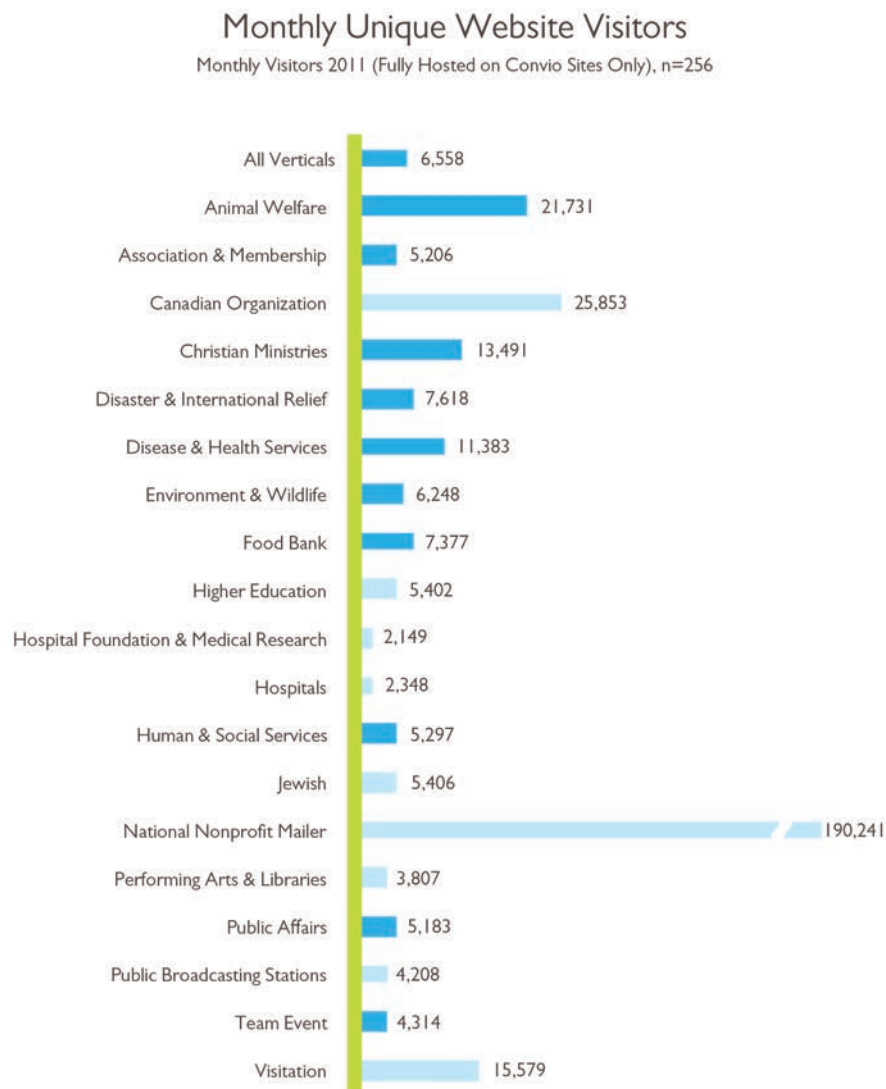
This study provides separate benchmarks for the sector as a whole and for 19 distinct verticals. Canadian nonprofits are treated as one vertical. Organizations that primarily raise funds from peer-to-peer fundraising around special events are grouped into Team Event. Nonprofits (not in the Team Event vertical or Canada) with more than 750,000 email addresses are grouped as National Nonprofit Mailer. All other organizations are classified according to their self-reported NTEE classification.

In addition, benchmarks are also presented by email file tier. Total email file is used as the basis for this grouping. Six distinct email file bands are used ranging from less than 10,000 emails to greater than 250,000.

For each metric in this section, a portion of the 719 study participants may be shown on their relevance given the time frame indicated or the metric being reviewed. For instance, 256 organizations in this study were measured for unique email visitors and 225 have Convio's Advocacy module. The term "unique" means that each visitor is counted only once within a given time period. The "n" value in the header of each chart describes how many organizations are included in a given metric. For more information, please refer to the Methodology section of this study.

## MONTHLY WEBSITE TRAFFIC

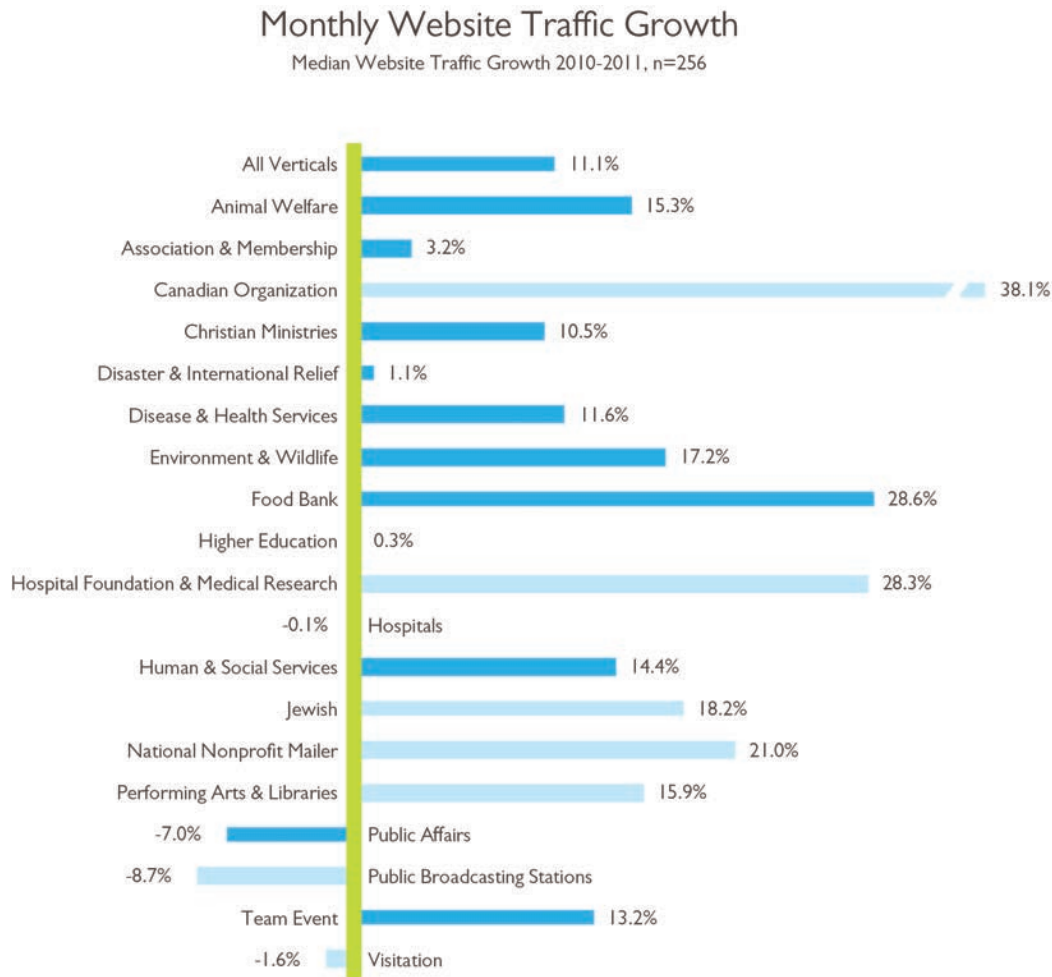
For many constituents, your website is where they are first introduced to your organization and, for first-time visitors, how they begin to engage with your organization. Website traffic continues to be the best source of organic growth of an organization's email files. Chart 1 shows the 256 organizations that constitute this benchmark had a median value of 6,558 unique visitors per month during the 2011 year. Organizations whose websites are hosted on solutions other than Convio are excluded from this metric. Not surprisingly, National Nonprofit Mailer has far higher traffic than other verticals with a median 190,241 monthly unique visitors. Other verticals strongly outperforming the median were the Canadian and Animal Welfare verticals.



\*Light blue denotes sample size fewer than 10 organizations.

Chart 1: Monthly Unique Website Visitors

In Chart 2, we see that website traffic grew by 11.1 percent, up dramatically from 2010's growth of 2 percent. More than 71 percent of the included organizations had a positive increase from 2010. The Canadian, Food Bank and Hospital Foundation & Medical Research verticals lead with respective increases in excess of 38 percent and 28 percent, respectively. This is the first year to include Canadian nonprofits, so we will need to wait until next year to understand this result in year-to-year context.



\*Light blue denotes sample size fewer than 10 organizations.

Chart 2: Monthly Website Traffic Growth



Next the study looks at Web traffic by email file tier. There is generally a negative correlation between email size tier and growth. Organizations with 10,000 or less emails have a 21.2 percent median website traffic growth rate. Organizations at the 250,000+ tier had a median growth rate of just 0.3 percent. This may be partly explained by the fact that smaller email files are often associated with less mature online marketing efforts and therefore have more “low-hanging fruit” to drive growth.

### Monthly Website Traffic Growth by Email File Tier

Median Website Traffic Growth 2010-2011, n=256

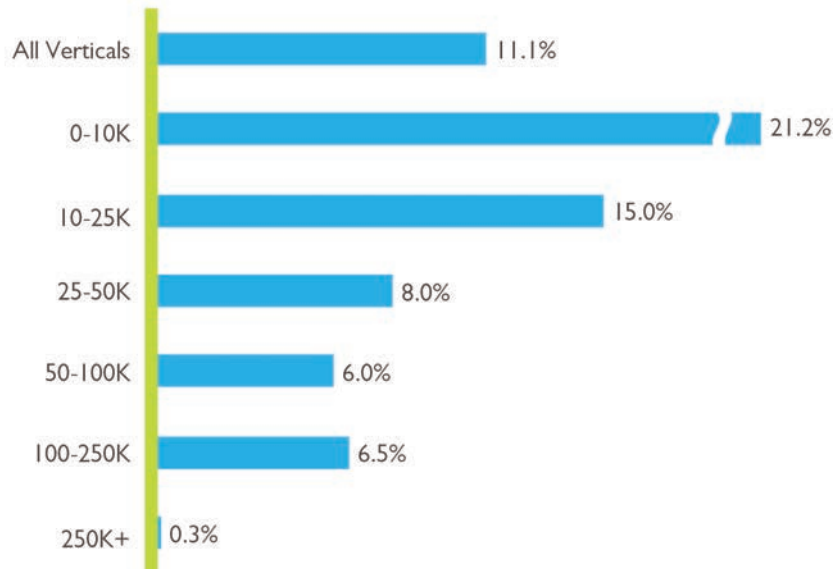


Chart 3: Monthly Website Traffic Growth by Email File Tier

## REGISTRATION RATE

The registration rate illustrates a nonprofit's effectiveness at converting website visitors into registered constituents by the constituent voluntarily providing an email address. This may happen through a person making a contribution, taking an advocacy action, buying a ticket to an event or raffle, purchasing an item at an online store, or by signing up for email updates. The importance of this singular event is that it indicates a level of interest in your organization and now gives you the means to further engage the constituent and cultivate the relationship. This metric excludes email appends or data uploads from offline databases.

Chart 4 shows that during 2011, 1.9 percent of monthly unique visitors provided their email addresses to the organization for email updates or by taking an action online. Per previous studies, organizations in the Team Event vertical had very high registration rates, as a large proportion of their website traffic results from people visiting the site to make a donation. National Nonprofit Mailer continues to have high registration rates, as many invest heavily in optimization of their site for conversion.

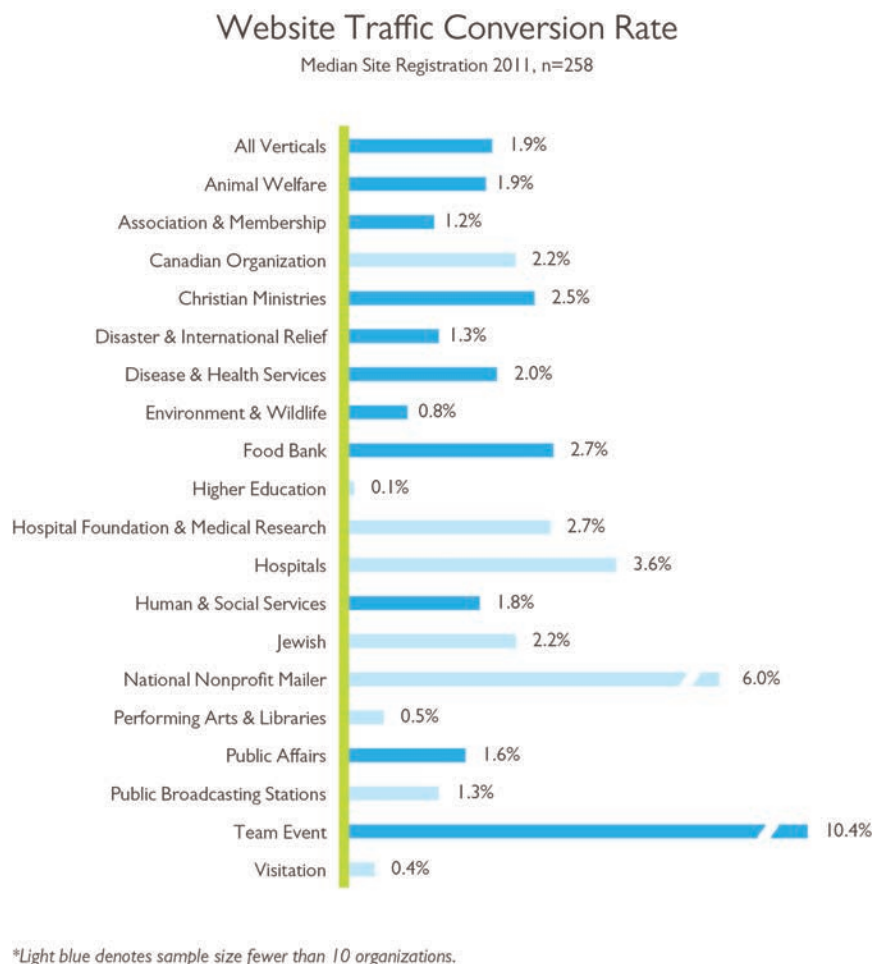


Chart 4: Website Traffic Conversion Rate

In Chart 5 we see registration rate by email file tier. Larger organizations had a profoundly higher registration rate than smaller organizations, by a factor of almost 4:1. One can conjecture that larger organizations have invested more in conversion optimization, and development of registration offers and content.

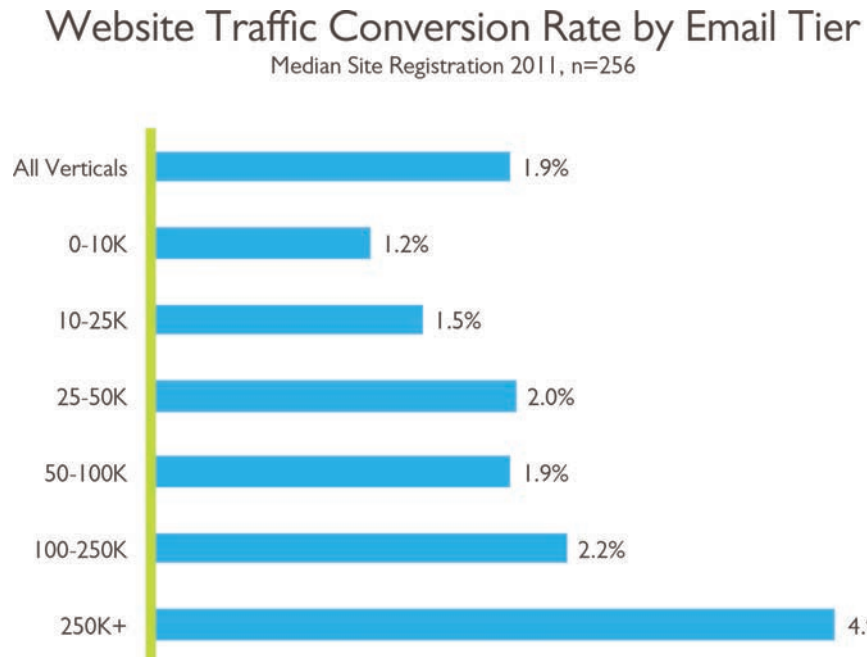


Chart 5: Website Traffic Conversion Rate by Email Tier

## EMAIL FILE SIZE

A key component of any effective online marketing effort is to build and maintain a robust email file. The number of email addresses generally impacts your ability to communicate, cultivate and engage with your constituents. File size often correlates to fundraising success. Additionally, the means by which you acquire an email address also has a large impact on results, as of course does the quality of your email communications.

As you see in Chart 6, the median email file size is 47,794, with the outlier being National Nonprofit Mailer. This is slightly down from the median of 48,701 reported in 2010, but is based on a different cohort of 719 versus 583 organizations.

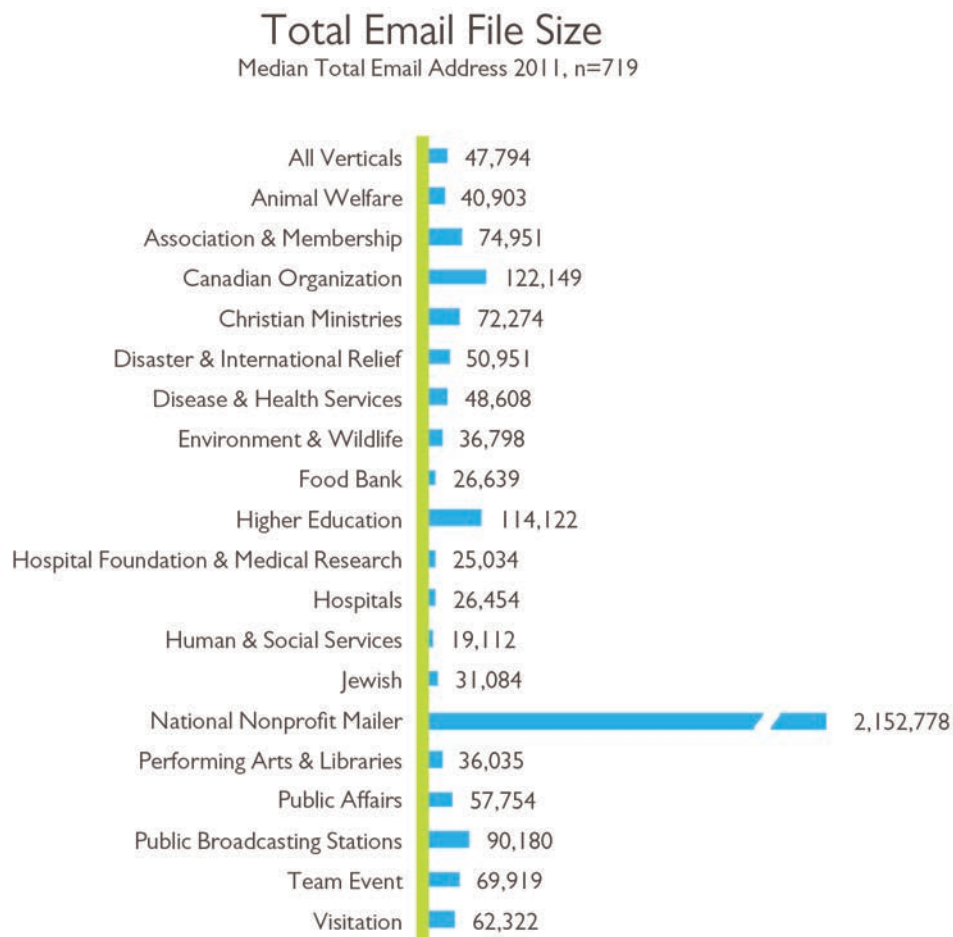


Chart 6: Total Email File Size

While growing your total email file is important, a key related measure of success is the size of your usable email file. By “usable,” we mean those emails that are still subscribed and current, i.e. deliverable. Chart 7 shows a median usable file size of 25,673. This is virtually identical to 2010’s total of 25,572 (again, from a different cohort of 583 versus 719 organizations).

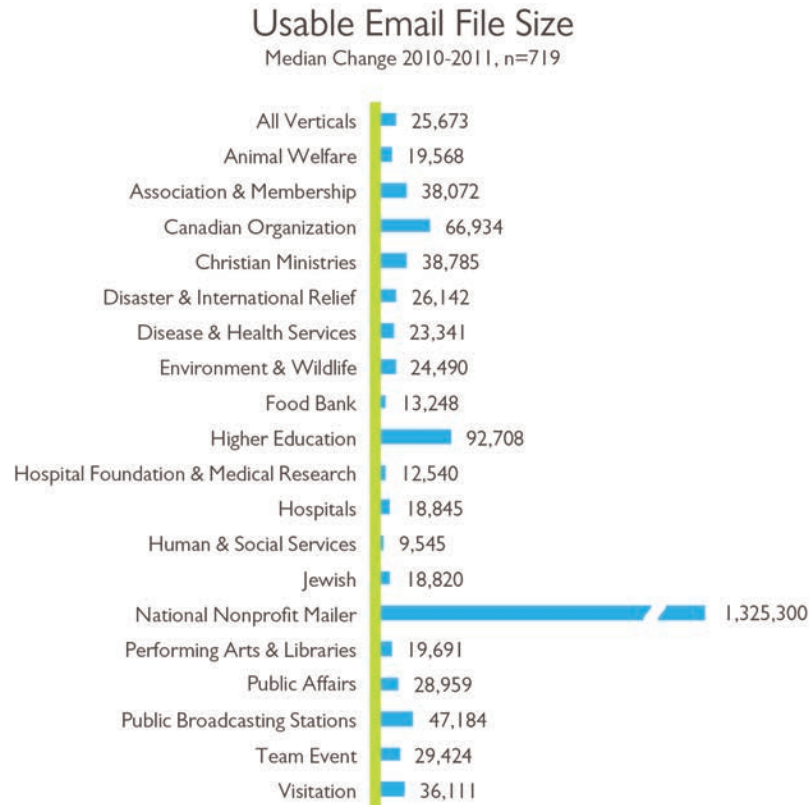


Chart 7: Usable Email File Size

A related metric is the proportion of your file that is usable. Chart 8 shows the percentage this year is again 55.4 percent, which is up relative to 2010 where 54 percent of emails were usable. Once again the Higher Education and Association & Membership verticals lead in the percent usable. As noted in 2010's benchmark, nonprofits in these two verticals benefit from constituents who belong to tribes of constituents having a very close affinity to the organization. Organizations who are thoughtful about matching communication cadence with donor preferences and send content of interest to donors will optimize their performance against this metric.

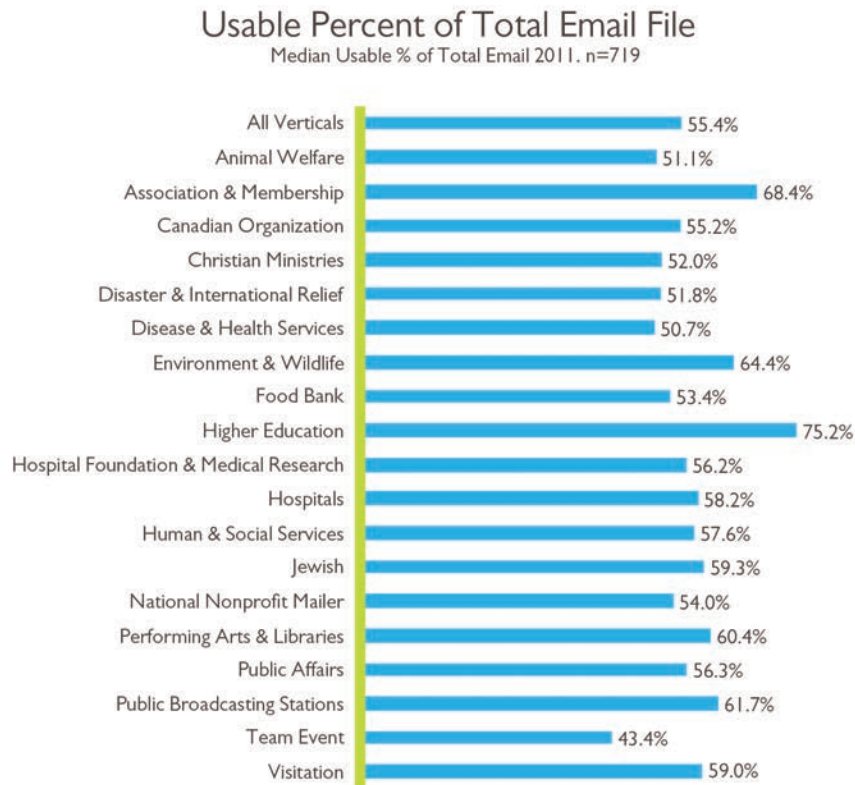


Chart 8: Usable Percent of Total Email File

Email files continue to grow at very healthy rates. Overall median file growth was 17 percent. This does, however, represent a decline from 2010, when the result was 22 percent. Of note, Disaster & International Relief grew in 2011 by a median percentage of 14.7 percent versus 31 percent in 2010 post Haiti. Food Bank remained the strongest growing segment with a growth rate of 30 percent; however, this growth rate was down from the 41 percent achieved in 2010.

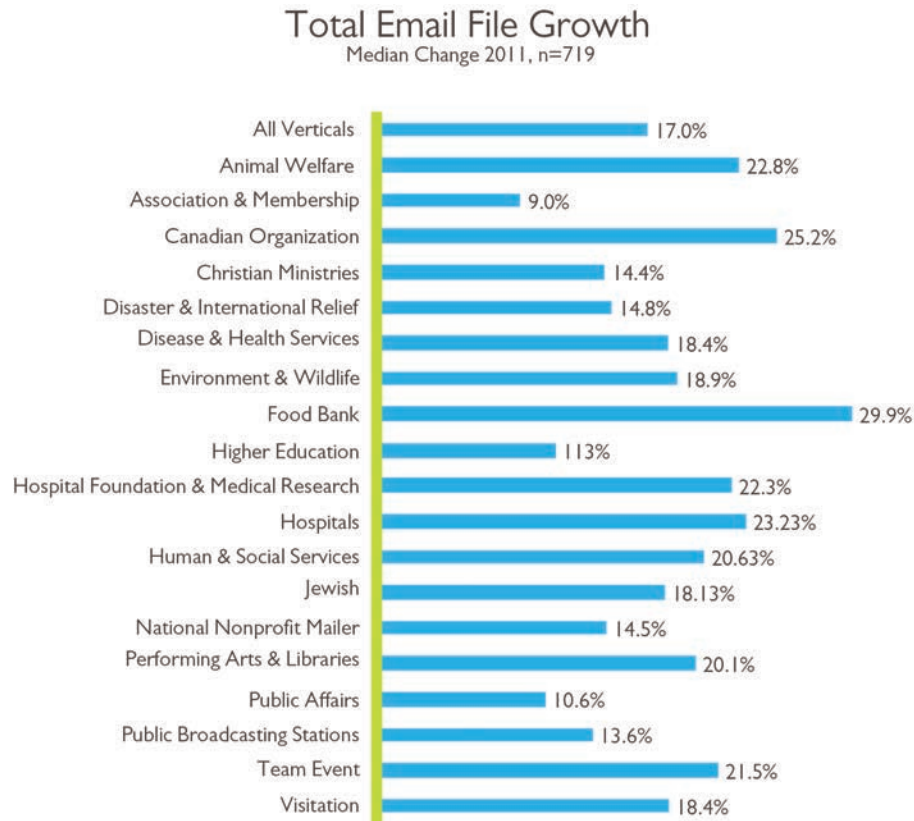


Chart 9: Total Email File Growth

As Chart 10 indicates, email file growth was pretty consistent across email file bands. The fastest growing tier was, surprisingly, organizations with more than 250,000 email addresses.

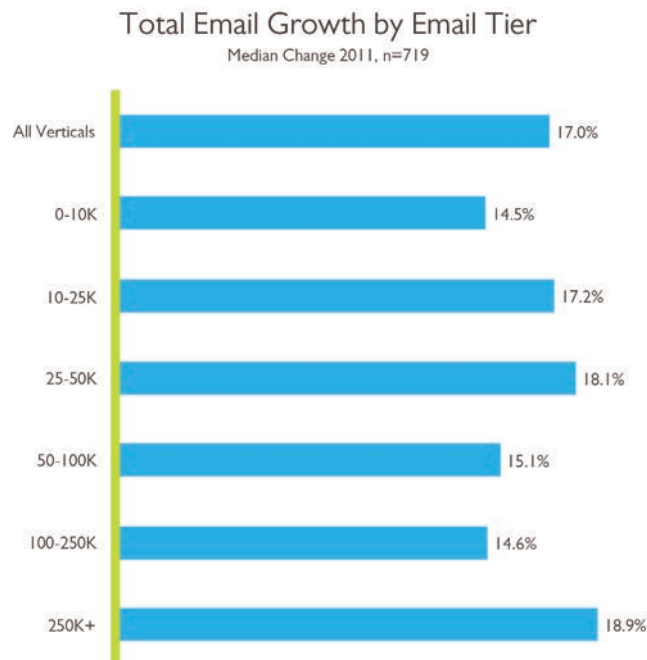


Chart 10: Total Email Growth by Email Tier

## ONLINE REVENUE: FUNDRAISING, GROWTH, AVERAGE GIFTS AND THE VALUE OF A USABLE EMAIL ADDRESS

The revenue measured within this metric includes online contributions, monthly gifts, e-commerce transactions and money raised online to support peer-to-peer events.

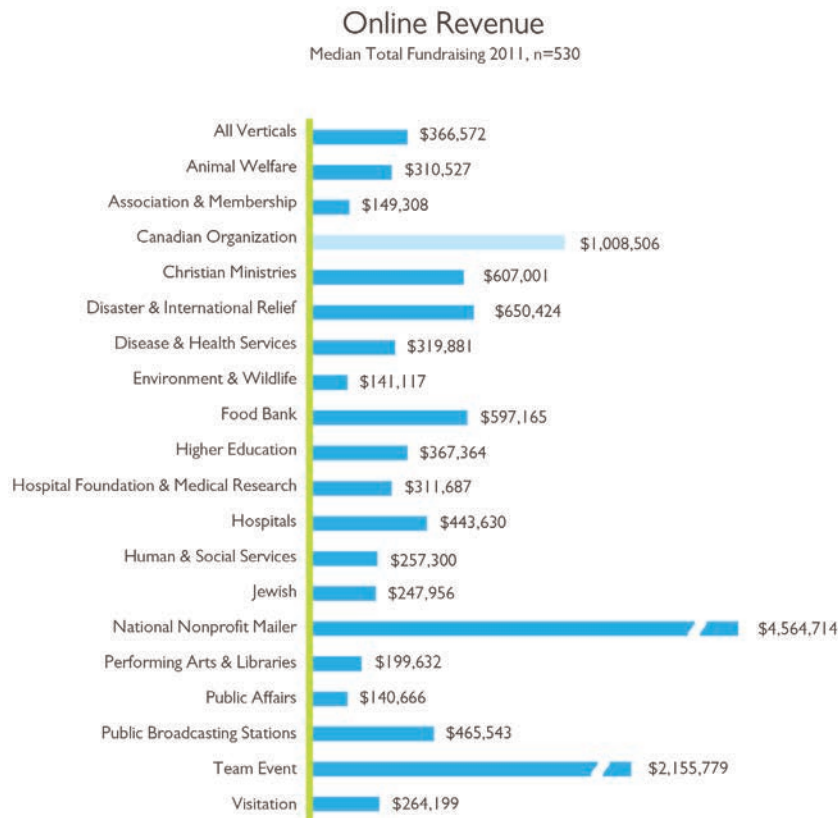
### Influence of Charitable Contributions Supporting Japan's Tsunami, Haiti's Earthquake and Hurricane Katrina.

In 2010's study we reviewed the impact of the funds raised through Convio after the Haiti earthquake where Convio alone processed \$200 million in gifts. While the March earthquake and tsunami in Japan was cataclysmic, the disaster did not nearly match funds raised compared to either Haiti or Katrina. According to the Chronicle of Philanthropy, one month from the respective disasters, donations related to Japan totaled \$246 million compared to \$709 million for Haiti and \$1.4 billion for Katrina. In consequence, funds raised online in association with Japan were dramatically lower than those associated with either Haiti or Katrina. This impacts the overall benchmark, the Disaster & International Relief vertical, and National Nonprofit Mailer vertical, which contains some organizations involved in disaster response.



## Online Revenue

Chart 11 shows that the median amount raised in 2011 was \$366,572. The median for National Nonprofit Mailer was \$4.5 million and the median for Team Event was \$2.15 million.



\*Light blue denotes sample size fewer than 10 organizations.

Chart 11: Online Revenue

Now let us review online revenue by email file tier. Not surprisingly, online revenue correlates with size of email file. The largest three tiers based on total email file size account for more than 50 percent of the sample size when calculating the median overall fundraising totals. The results shown below support this by having these three tiers performing above the overall median benchmark and the smallest three tiers below it. Higher fundraising in the larger organizations can be attributed to their ability to solicit from their very large email lists and leverage their strong national and international brand images.

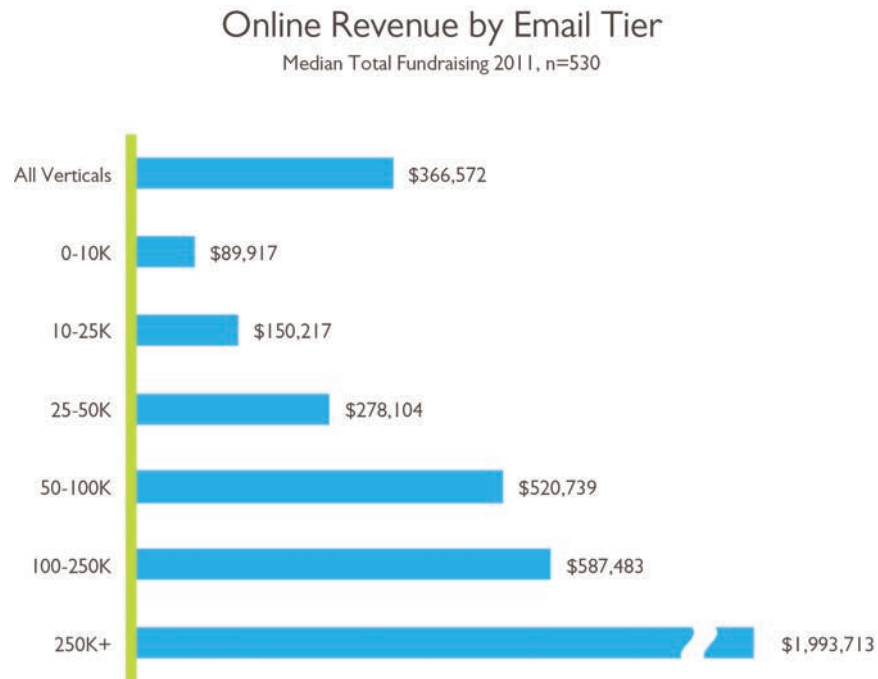


Chart 12: Online Revenue by Email Tier

## Online Revenue Growth

Online revenue increased by 15.8 percent, down from 2010's 20 percent but above 2009's increase of 14 percent. Chart 13 shows the highest rates of revenue growth were in the Hospitals vertical followed by Food Bank at 45.1 percent and 24.2 percent, respectively. One possible explanation for these verticals performing so well is the desire among constituents to support local causes. The only vertical experiencing a decline was Disaster & International Relief. However, National Nonprofit Mailer and Performing Arts & Libraries also saw a big slowing in growth rate. National Nonprofit Mailer as a segment grew 20 percent in 2010 versus 4.1 percent in 2011. Performing Arts & Libraries grew 19 percent in 2010 versus just 1.7 percent in 2011.



\*Light blue denotes sample size fewer than 10 organizations.

Chart 13: Online Revenue Growth

Now let's review online revenue growth according to email tier. Once again, as with 2010, we see that growth is generally stronger in the smaller organizations, in particular those with less than 10,000 email addresses. Many of those organizations have participated in cohort based training programs such as Convio's Go! Program.

Chart 14 shows that online revenue growth was up 26.8 percent for organizations with less than 10K email addresses. We believe that this continued increase is due to factors such as local impact, personal relevancy and training for smaller nonprofits that equips them with best practices.

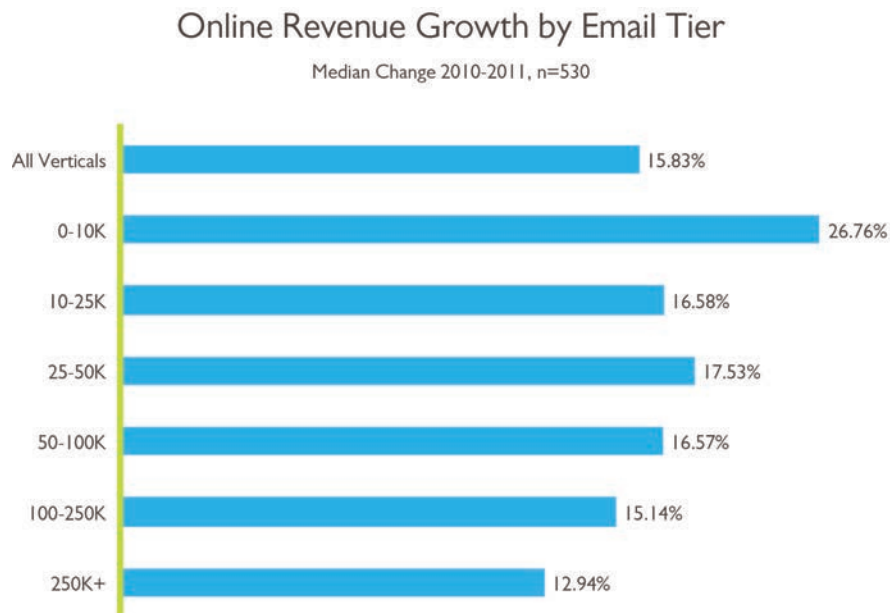
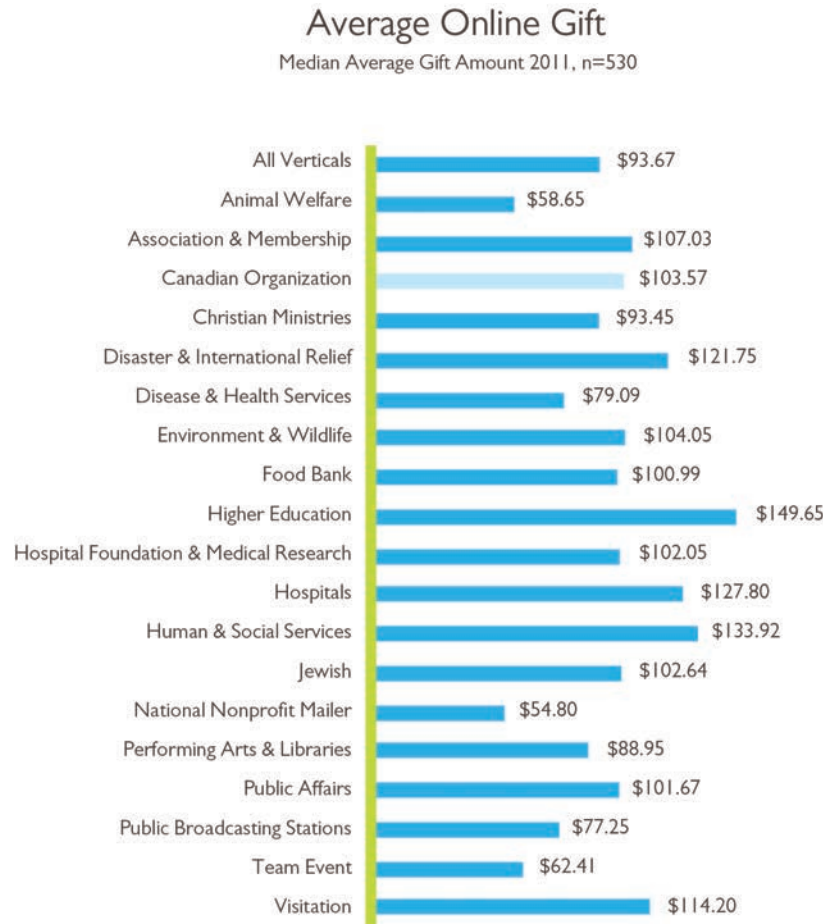


Chart 14: Online Revenue Growth by Email Tier

## Average Online Gift

Chart 15 reviews the median average online gift by vertical and median average online gift by email tier. The median average online gift increased nominally from 2010 to \$93.67. Verticals with the highest median average gift include Higher Education, Human & Social Services and Hospitals. Again, giving is largest where there is impact and/or relevancy to the constituent.



\*Light blue denotes sample size fewer than 10 organizations.

Chart 15: Average Online Gift

In Chart 16 we see average online gift by email tier. The performance of the smaller organizations is very impressive considering two of the three tiers outperformed the median. Conversely, the larger organizations had two of their three tiered groups fall below. We believe that the larger organizations — more mature online fundraising organizations — have incorporated strategies to solicit monthly donations from ongoing sustainer donations and are more aggressive in soliciting multiple donations from their constituents, both of which cause the average gift to decrease but the number of sustaining donors to increase.



Chart 16: Average Online Gift by Email Tier

## First Time Donations

2011 is the first year to include performance metrics on first time donations — there are no comparable metrics in past studies. We are excited to include this metric as it is a proxy for the effectiveness of online marketing as a new donor acquisition channel.

In 2011, the median amount of funds raised from first time online donations was \$136,625 (see Chart 17). National Nonprofit Mailer raised a median of \$1.4 million from first time donations, Team Event raised \$830 thousand and Canadian Organizations raised \$540 thousand. The median amount raised from first time donations in 2010 was \$139,145.

### Online Revenue - First Time Donations

Median Total Fundraising 2011, n=522

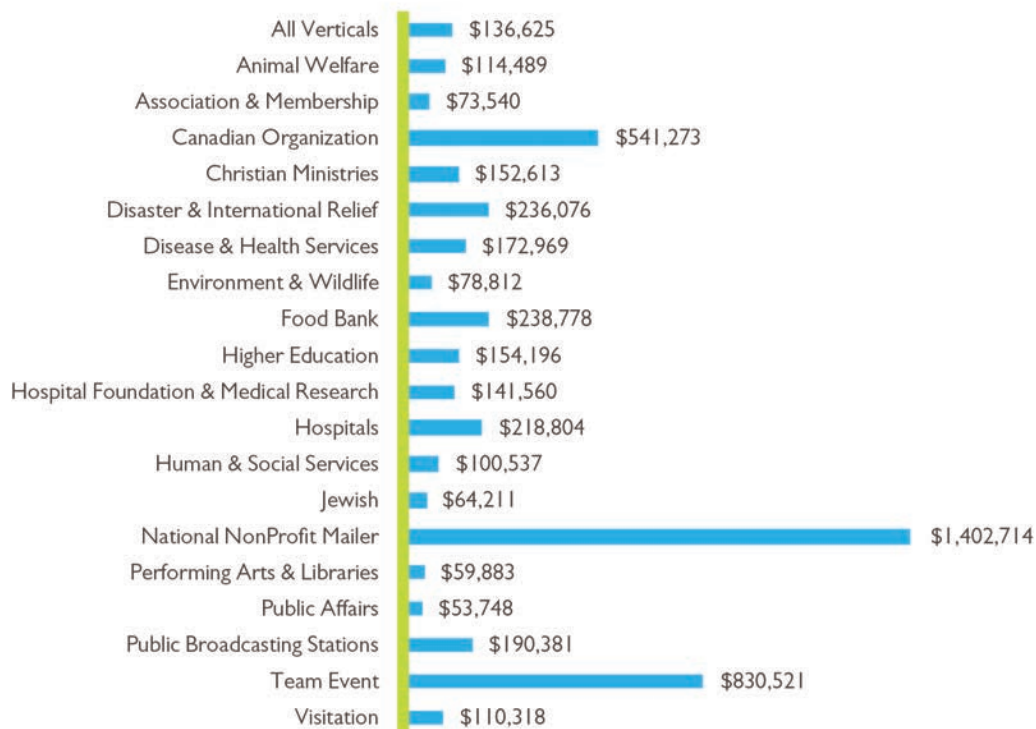
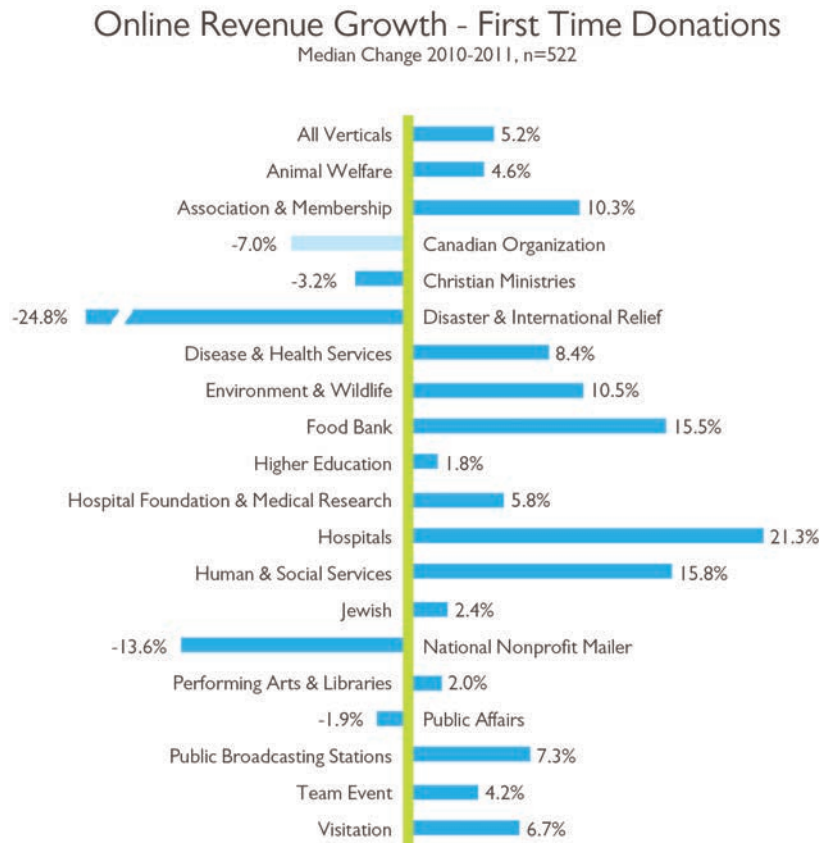


Chart 17: Online Revenue - First Time Donations

When we looked at growth for total fundraising, we saw all but one vertical (Disaster & International Relief) reporting positive growth from 2010 through 2011. Isolating first time donations per Chart 18 shows us a different picture of performance with Disaster & International Relief, Christian Ministries and National Nonprofit Mailer among the groups with the largest decreases. We attribute the difference in these three segments to the overall response to the natural disasters in Haiti and Japan in 2010 and 2011, respectively. While the absolute median value of first time donations decreased slightly, the median growth rate in first time gifts was a positive 5.2 percent. The fastest growing verticals were Hospitals, Human & Social Services and Food Bank.



\*Light blue denotes sample size fewer than 10 organizations.

Chart 18: Online Revenue Growth - First Time Donations



## First Time Donations' Contribution to Overall Online Fundraising

The contribution of first time donations to overall online fundraising was a median of 37.3 percent. This compared to 43.6 percent in 2010. Three verticals received over 50 percent of online donations from new donations: 55.9 percent for Environment & Wildlife, 54 percent for Disease & Health Services, and 53.7 percent for Canadian Organization. The biggest gainer in this metric was Environment & Wildlife with a whopping 37 percent relative growth from 40.7 percent to 55.9 percent. Other more moderate gainers were Public Broadcasting Stations with 8 percent, Canadian Organization with 6 percent and Visitation with 1 percent. All other verticals saw a decline in this metric, with the sharpest declines in Higher Education (from 56.5 percent to 42 percent) and National Nonprofit Mailer (from 40 percent to 30.7 percent).

### First Time Donations as Percent of Total Donations

Median Percent of Total Donations, n=522

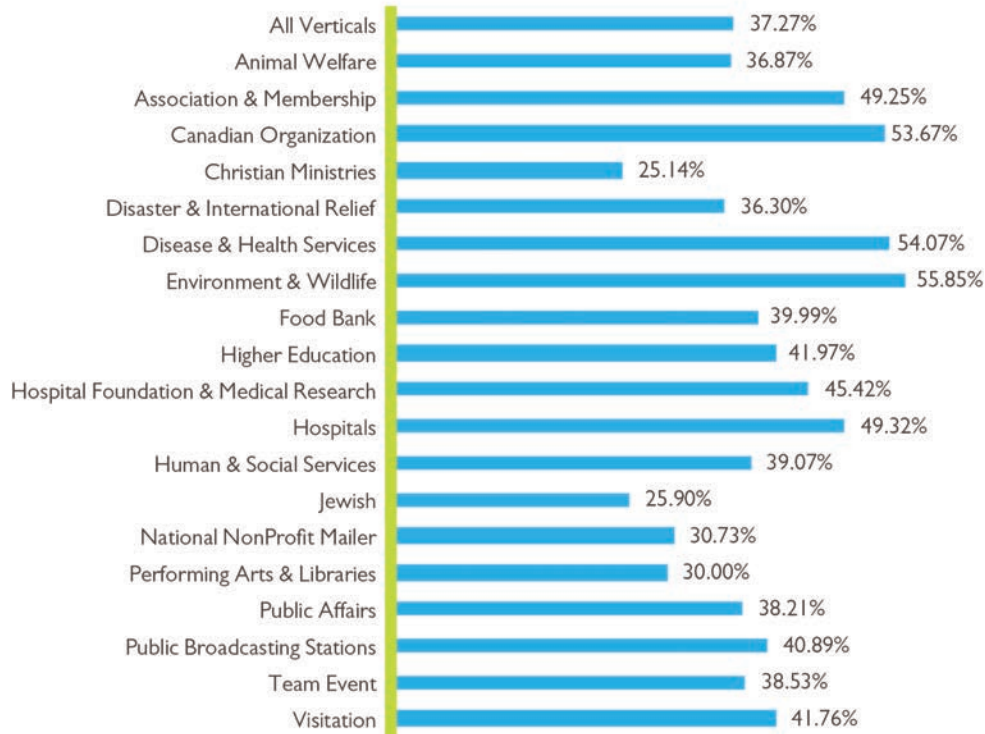


Chart 19: First Time Donations as Percent of Total Donations

## First Time Donations - Average Online Gift

Chart 20 provides a view at the average amount of a donor's first online gift. The median value is \$102.89 which is slightly higher than the overall average gift and is pulled down by the presence of sustaining gifts.

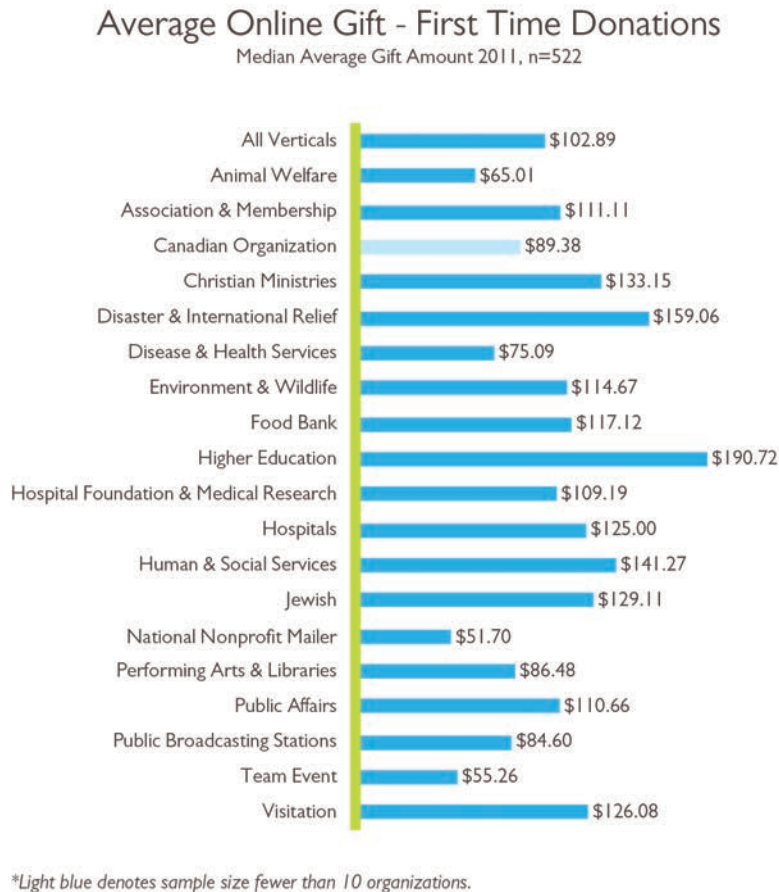


Chart 20: Average Online Gift - First Time Donations

When reviewing average first time online gift by email tier (see Chart 21), we see that large groups with more than 250 thousand email addresses have the smallest average gifts, but, below that, there is a fair amount of consistency. Per Chart 21, most email tiers experienced a modest increase in average first time online gift, with the exception of the 0-10K email file tier.

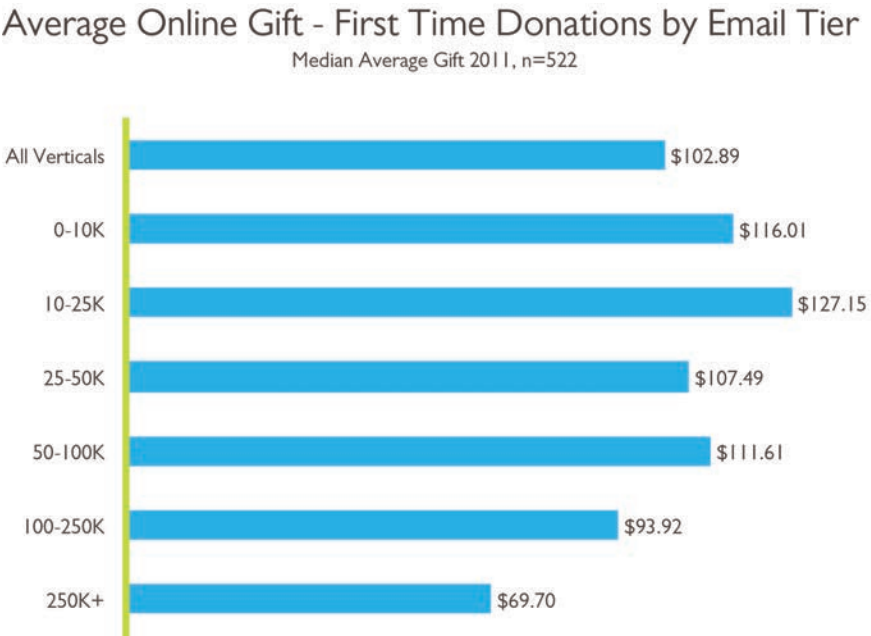


Chart 21: Average Online Gift - First Time Donations by Email Tier

## Sustaining Gifts

Reporting on the performance of sustainer donations is new to the *Convio Online Marketing Nonprofit Benchmark Index™ Study*. We have added this level of reporting to this year's study not only to better understand the impact these types of programs have on overall fundraising performance, but also to see what influence they may have when calculating metrics like average donation amount.

Chart 22 reports a median of online revenue from sustainer donations to be \$25,474. For comparison this is an increase of 38.7 percent (median fundraising was \$16,100 in 2010 for the 473 organizations with sustaining donor programs in each of the last two years). Recurring giving was approximately 5 percent of overall revenue in 2010 and 6.9 percent in 2011.



Chart 22: Online Revenue - Sustainer Donations

The growth in online revenue from sustaining donations is shown below in Chart 23. When you look at the growth for the individual vertical cohorts, you see performance well ahead of the median amount from verticals such as Association & Membership, Performing Arts & Libraries, and Public Broadcasting Stations. These organizations show strong growth as a result of these monthly/installment type donations providing more options to fund membership level contributions in each year. Canadian Organizations have the largest growth at 75 percent. Monthly donation models are much more prevalent in Canada than in the U.S.

These metrics should continue this trend as more and more organizations are adopting this fundraising strategy and ramping up their efforts to increase the number of constituents choosing to make recurring donations as opposed to the more traditional, one-time contribution.

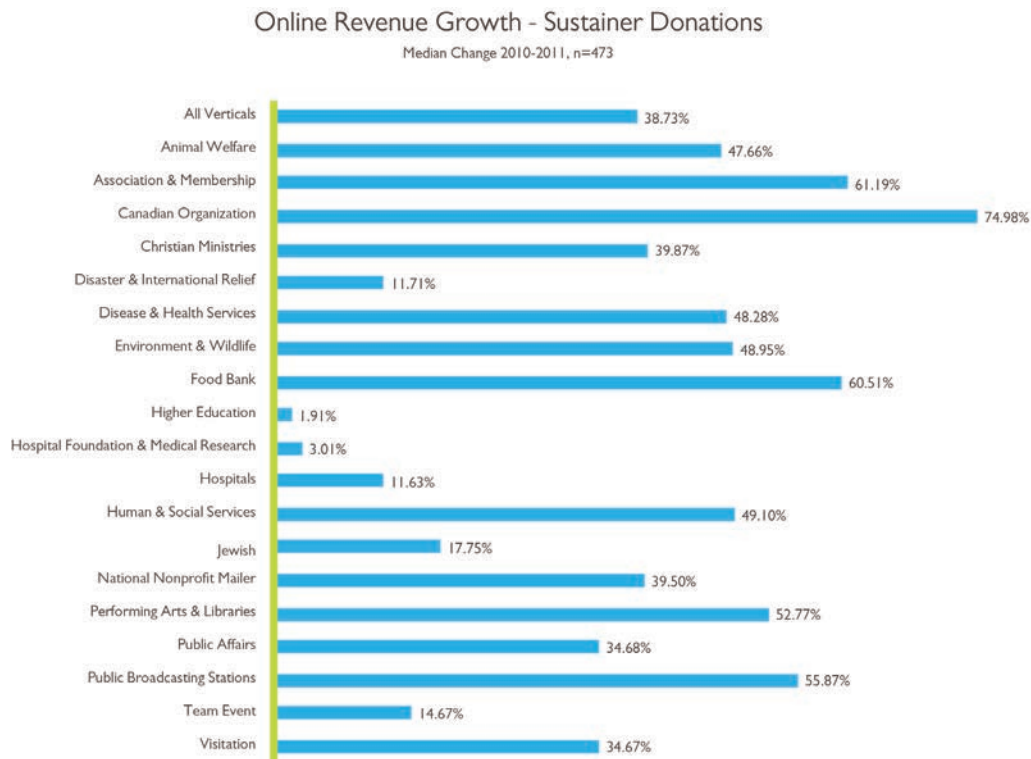


Chart 23: Online Revenue Growth - Sustainer Donations

Next we will look at the influence sustaining donations are having on overall online fundraising by comparing what percent of total online donations were sustaining donations in 2010 versus 2011.

Chart 24 shows the median number of online donations in 2011, and the following chart (Chart 25) provides the median number of sustainer donations in 2011. The median number of overall online gifts in 2010 was 3,128 and 3,479 in 2011. The median number of sustainer gifts in 2010 was 422 and 656 in 2011. The percentage of total donations coming from sustainer programs increased from 12.1 percent to 18.9 percent.

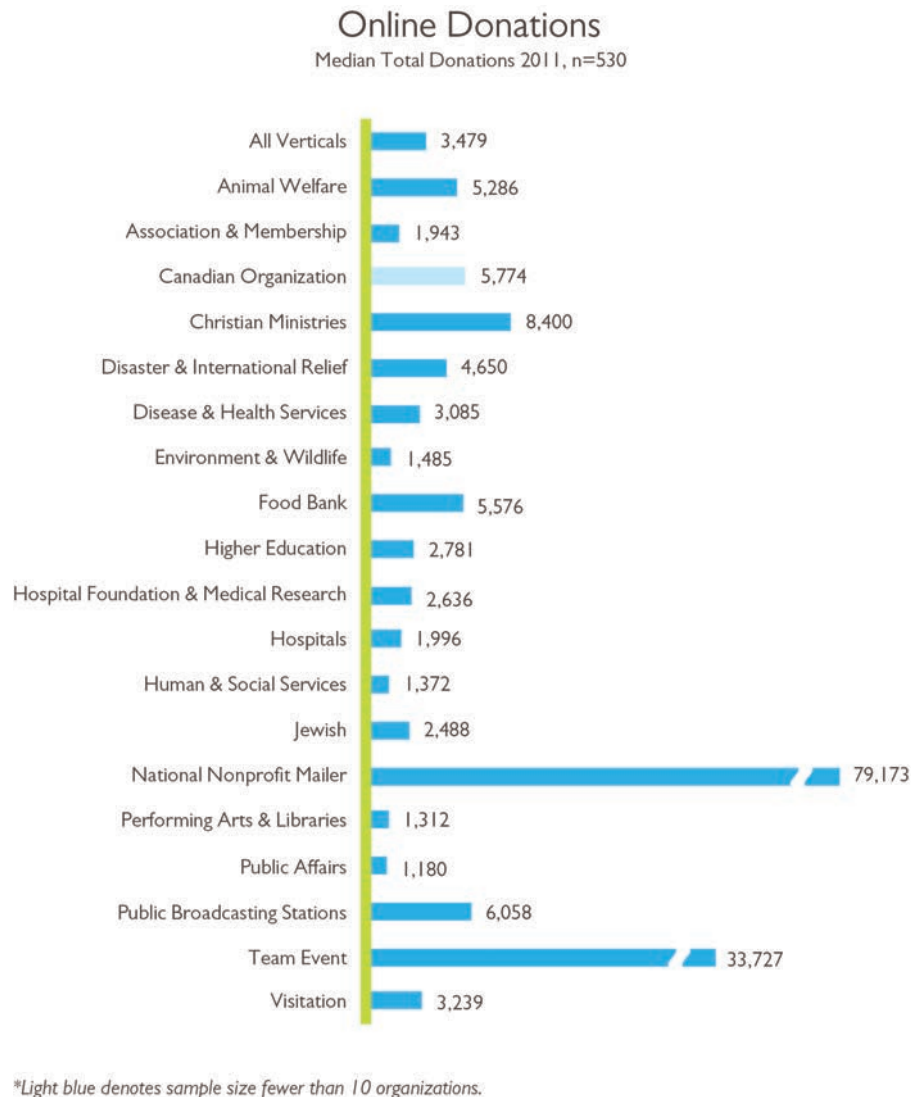


Chart 24: Online Donations

## Online Donations - Sustainer Donations

Median Total Fundraising 2011, n=473

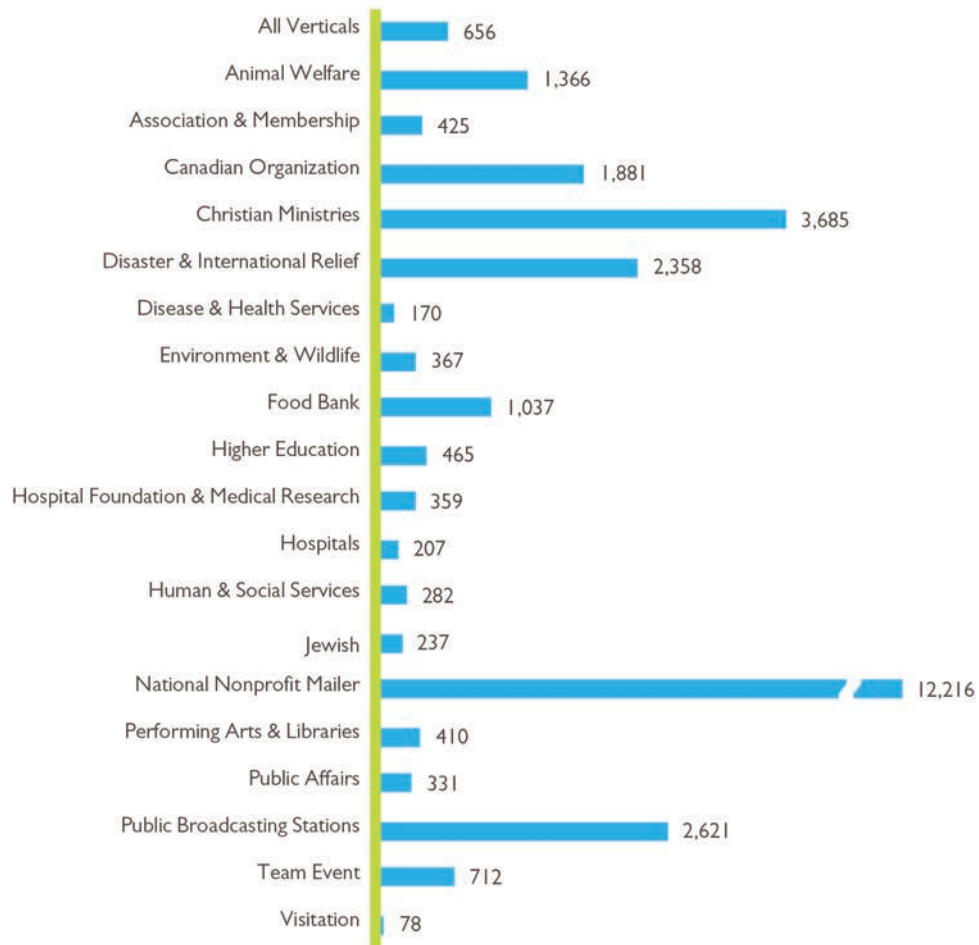
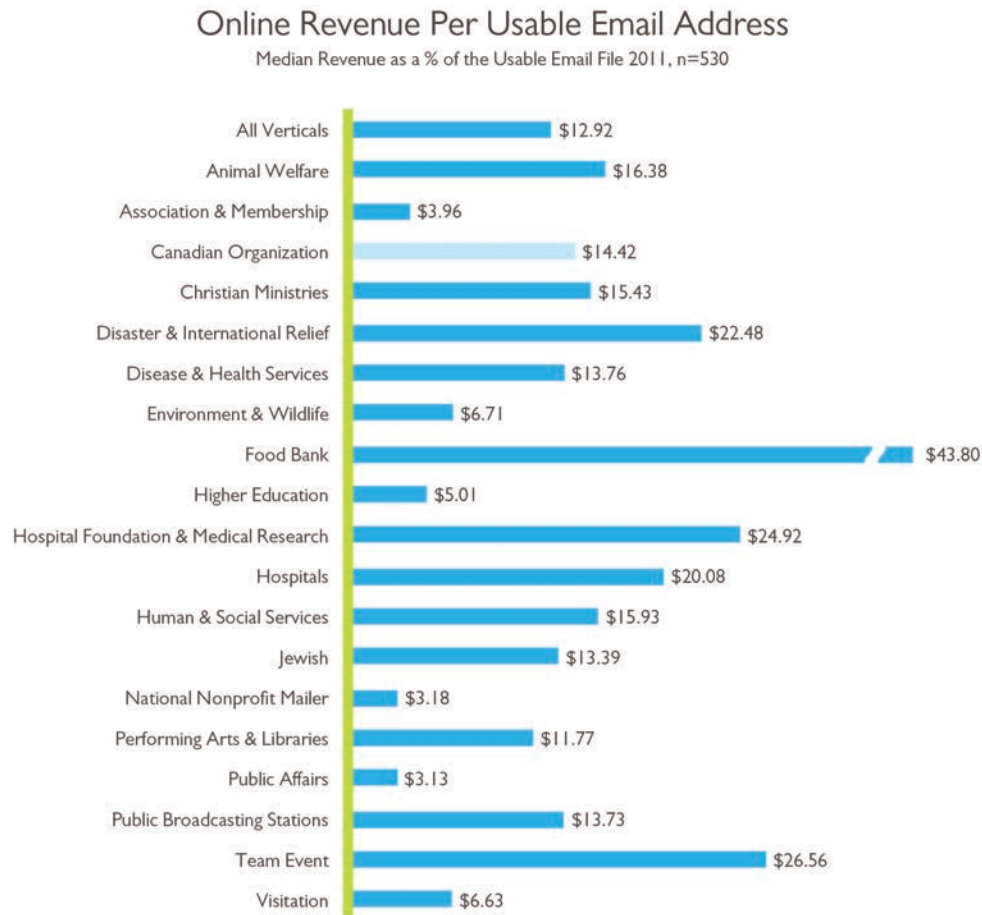


Chart 25: Online Donations - Sustainer Donations

## The Value of a Usable Email Address

Chart 26 shows that the median amount raised per usable email address per year across all verticals is \$12.92 compared to \$12.48 in 2010 and \$11.68 in 2009. This is a small but continued increase as organizations work to maintain the revenue yield on their email addresses. Once again, the Food Bank vertical achieved nearly four times the sector-wide benchmark.



\*Light blue denotes sample size fewer than 10 organizations.

Chart 26: Online Revenue Per Usable Email Address



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

An email appeal's effectiveness can be measured at various stages by three 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 in a given campaign. As an industry benchmark, limited emphasis should be placed on this metric because preview pane and image rendering/blocking issues in email readers can reduce actual open rates. Moreover, the increasing preponderance of email messages being read on mobile devices exacerbates this challenge. According to a report by Knotice, 20 percent of all emails opened in 2011 were on a mobile device, with more than 50 percent of those opens occurring in the fourth quarter. Only 3 percent opened on a mobile device were later opened again on a desktop computer. This makes it challenging to ascertain what true open rates really are. Nevertheless, over time, the open rate metric allows organizations to track major trends as well as variances to their peers' performances.

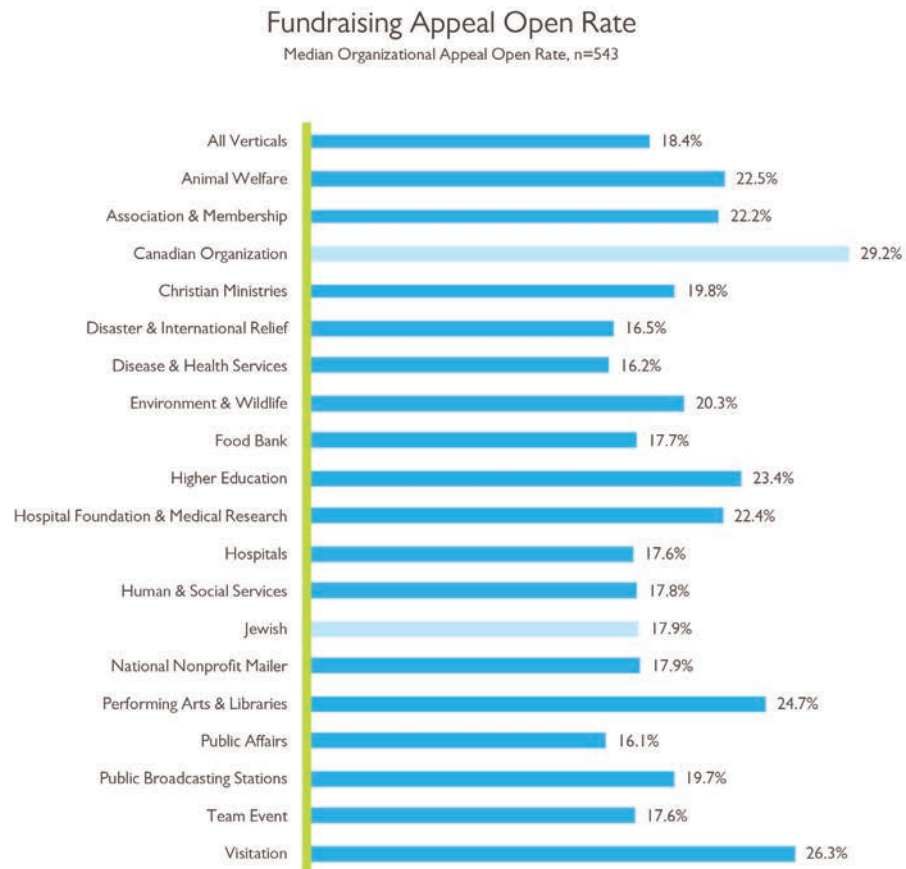
Additionally, differences exist between organizations that send the same type of email messages and can even exist between messages from the same organization. For example, non-donors or constituents not responsive to email can be excluded from select messages which produces varied performance results.

As such, every nonprofit should consider:

- Creating a website and email strategy optimized for mobile devices that enables the viewer to open, click and respond. Engaging skilled staff or consultants experienced in mobile design solutions is advisable for ensuring your strategy is well thought out, implemented and received.
- Maintaining uniform email delivery practices and/or email campaigns to allow easy reference to statistics from unique audience communications.

In calculating the open rate metric, we counted only unique opens. Email communications that were not fundraising solicitations were excluded from the metric.

Chart 27 shows the median open rate for all verticals in 2011 was 18.4 percent, a marginal increase from the 2010 rate of 17.6 percent. The highest vertical performers were Canadian Organization, Visitation and Performing Arts & Libraries.



\*Light blue denotes sample size fewer than 10 organizations.

Chart 27: Fundraising Appeal Open Rate

## EMAIL NEWSLETTERS: OPEN AND CLICK-THROUGH RATES

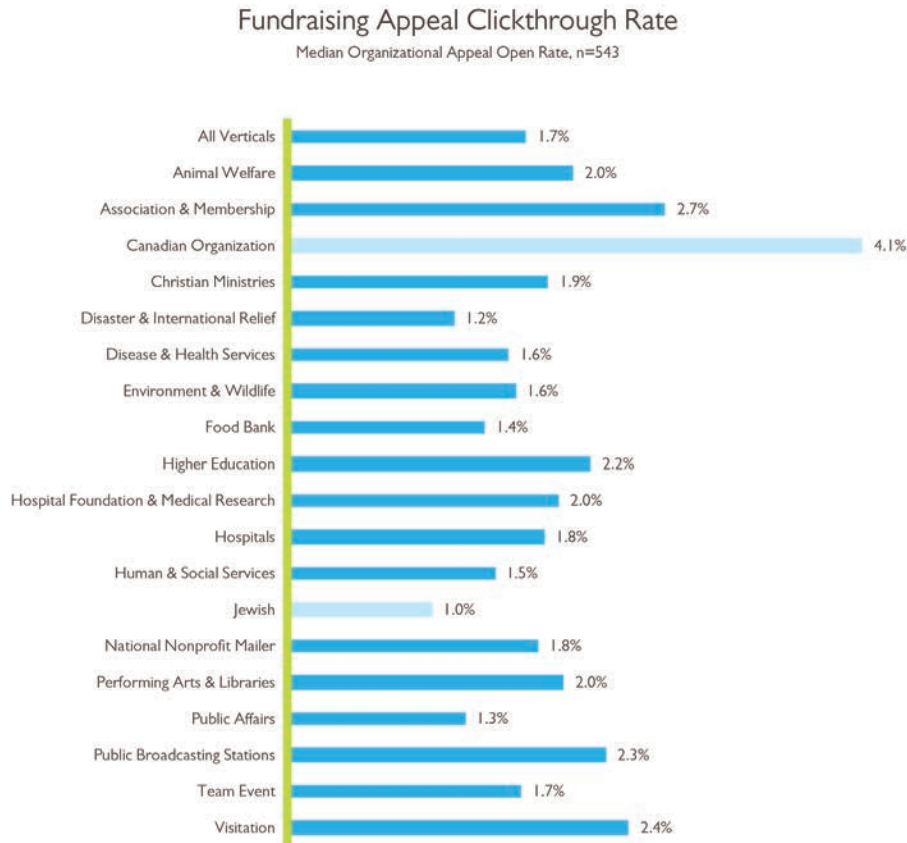
Email newsletters allow you to build and maintain relationships with constituents before asking them for a donation. They are also a cost-effective way to establish and nurture relationships with new constituents, increase engagement and educate supporters about your organization's mission. It is therefore critical that constituents read these important communications.

609 organizations included in this study delivered email newsletters to their online constituents. There were over 1.7 billion individual emails sent from the more than 70,000 configured email newsletters. The median open rate for all organizations was 19 percent, equal to the median open rate in 2010. This clearly indicates good performance of email newsletters; as the frequency of delivery and total recipients increased, so did this performance metric. Canadian Organization, Higher Education and Performing Arts & Libraries had the highest newsletter open rates at 28 percent, 26 percent and 27 percent, respectively.

The median email newsletter click-through rate for this year's study was 3.4 percent, up from 2010's click-through rate of 3.06 percent and 2009's 3.3 percent. This is even more impressive considering the increase in the number of messages being delivered and the ability to improve this particular reporting metric. The Canadian Organization, Higher Education and Performing Arts & Libraries had the highest click-through rates.

## FUNDRAISING APPEAL CLICK-THROUGH RATE

Chart 28 shows click-through rates as a percentage of constituents who clicked on one or more links contained within an email body divided by the number of email messages delivered. The 543 organizations in this study had a median click-through rate of 1.7 percent, essentially consistent with the last two years. Organizations that tend to have strong open rates also have strong click-through rates. The leading verticals were Canadian Organization, Association & Membership and Visitation.



\*Light blue denotes sample size fewer than 10 organizations.

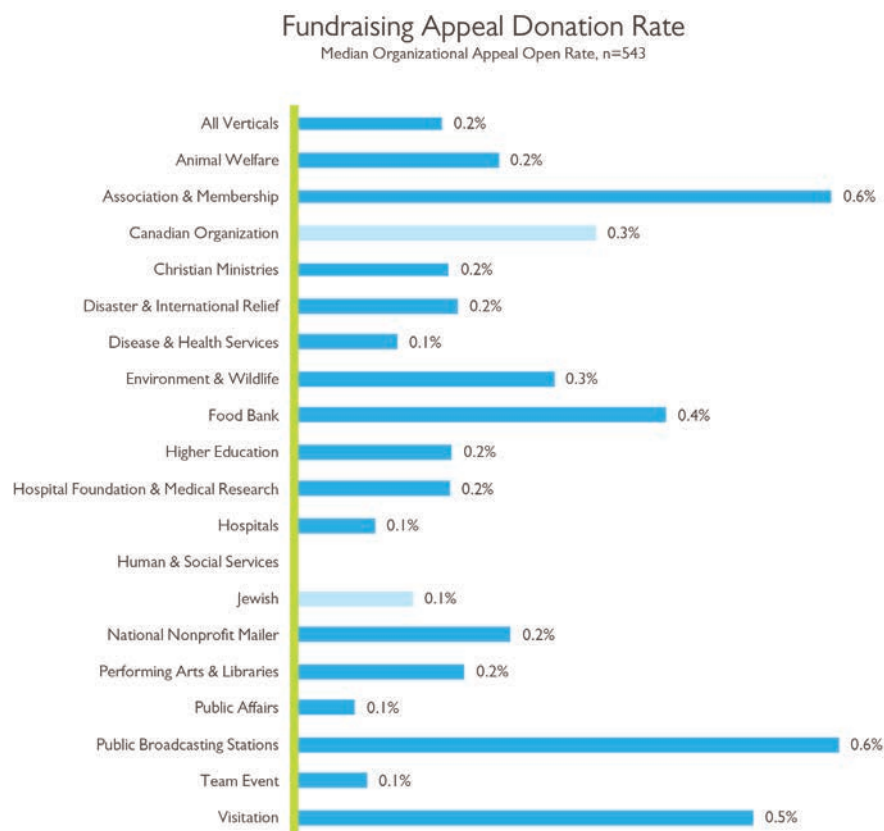
Chart 28: Fundraising Appeal Clickthrough Rate

## FUNDRAISING APPEAL RESPONSE RATE

As with direct mail, one of the key metrics of success is response rate for online campaigns. Chart 29 shows that the median appeal response rate is 0.16 percent, identical to the result in 2010.

The response rate can be influenced by many factors: the audience composition (mix of prospects versus current donors), the degree to which the list has been augmented by appended versus composed of organically acquired emails, the passion around a given issue, the effectiveness of the appeal, and the ease of use of the donation form.

Emails acquired through an email append tend to result in much lower response rates than organically acquired names. A recommended best practice is to test the appended approach with a select number of emails prior to making a big investment and adopt a double opt-in practice to ensure the emails are qualified prospects. The verticals that performed the best are the same as in 2010 and had significantly higher response rates: Food Bank and Public Broadcasting Stations, with response rates of 0.59 percent and 0.60 percent respectively.



\*Light blue denotes sample size fewer than 10 organizations.

Chart 29: Fundraising Appeal Donation Rate

## ADVOCACY

Online advocacy serves three primary purposes: to provide grassroots support for legislative efforts, to recruit new supporters who first engage with the organization via advocacy, and to act as a mechanism to keep existing supporters, including donors, engaged. Of the more than 700 organizations represented in the 2011 study, 225 were engaged in advocacy on the Convio platform. These 225 organizations saw an increase of 17 percent in the number of people who have taken at least one advocacy action, or recorded online advocates. The Canadian Organization vertical saw the highest increase, with a 77 percent gain. The Animal Welfare, Environment & Wildlife and Jewish verticals had increases of almost 30 percent.

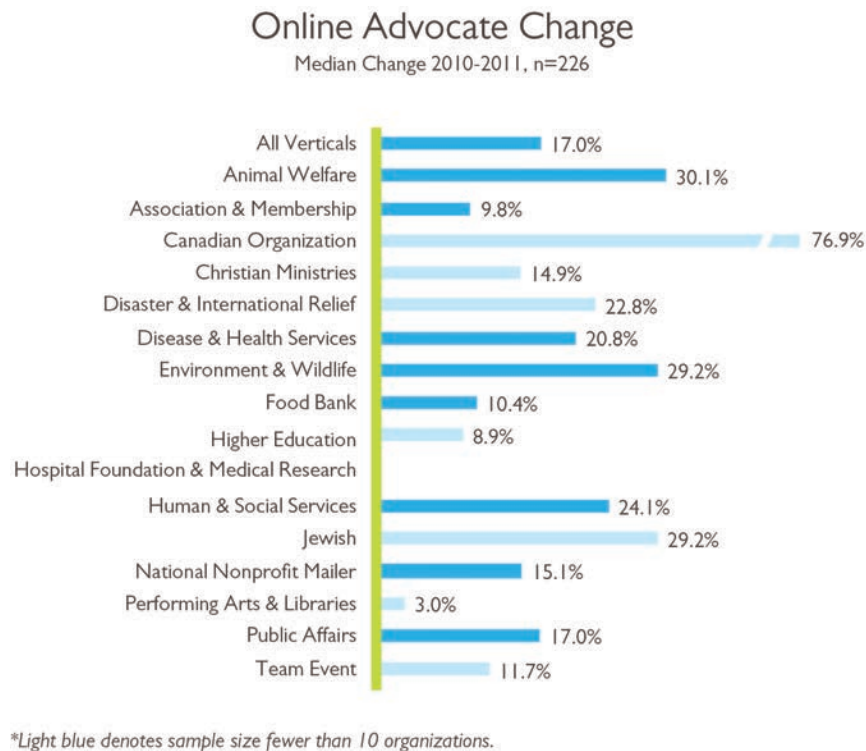


Chart 30: Online Advocate Change

A related metric examines what percentage of an organization's total email file are advocates. As seen in Chart 32, the median rate of participation in advocacy is 12 percent. Verticals with the highest rates of advocacy among their email file include National Nonprofit Mailer, Animal Welfare and Environment & Wildlife. These verticals tend to place a large emphasis on using advocacy as a way to build their overall file. The Canadian Organization vertical, while growing strongly, reports a relatively low advocacy penetration within their total file.

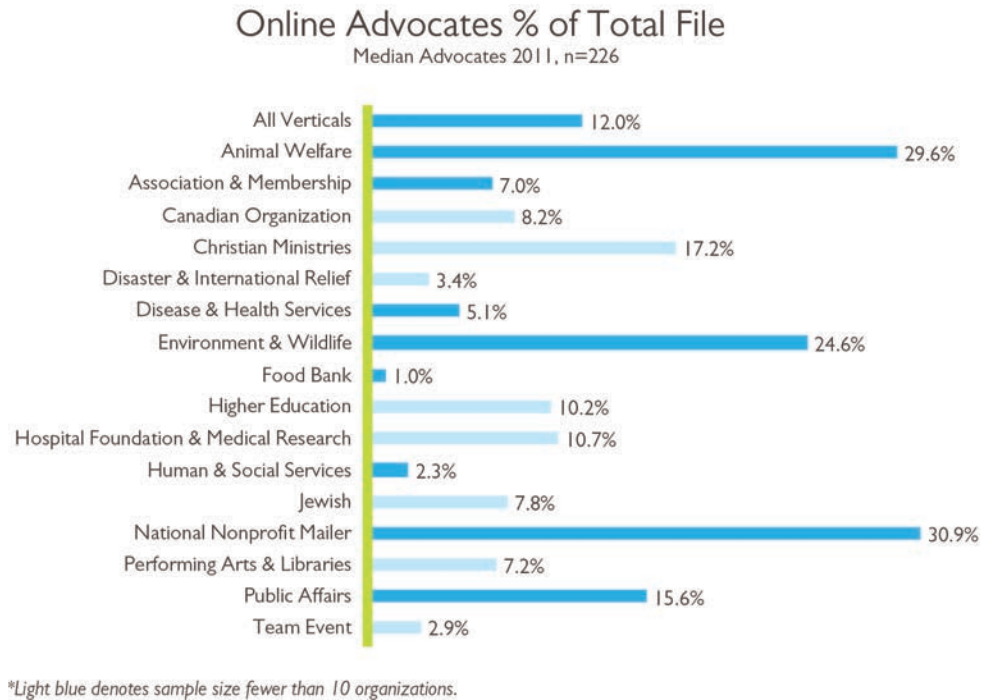


Chart 32: Online Advocates % of Total File

## Advocacy and Fundraising Overlap

Another critical metric is how effectively organizations convert advocates to financial supporters.

Chart 33 shows the median percentage of advocates who donated was 11.9 percent. This has dramatically increased from 6.42 percent in 2010 and 5.97 percent in 2009, illustrating that more nonprofits are investing in cross-marketing. Conversion of advocates to donors was one of the initial efforts in integrated fundraising, fueled by multi-channel campaign research that showed new advocates as some of the most responsive audiences to fundraising appeals.

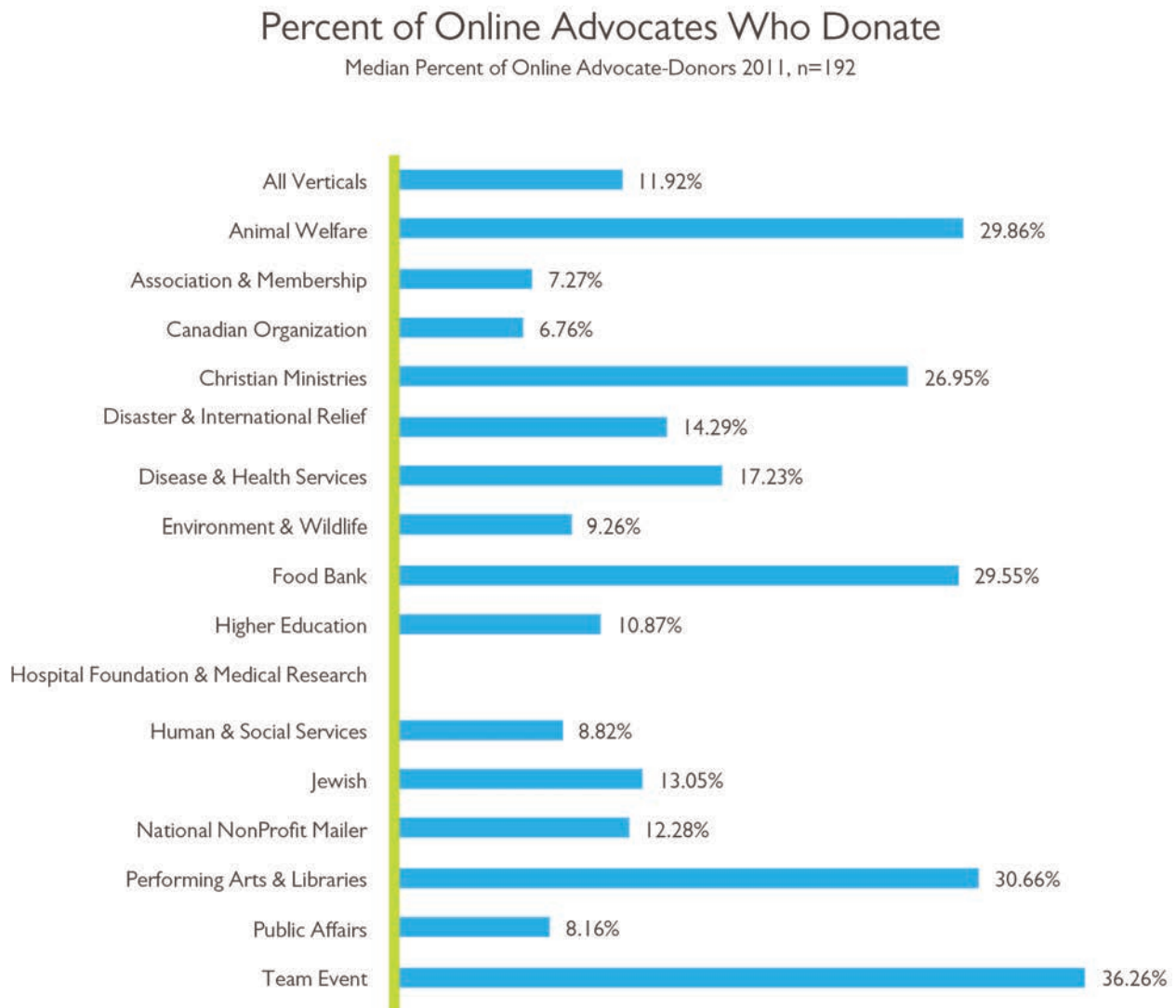


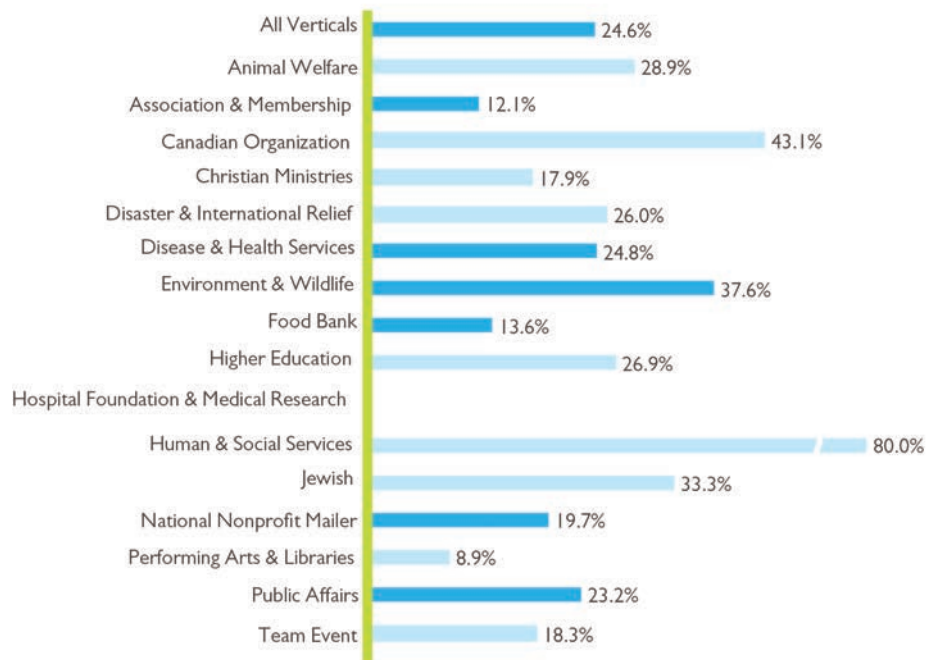
Chart 33: Percent of Online Advocates Who Donate



The median growth rate in the number of online advocates that donate grew 24.6 percent. The verticals with the strongest growth in this metric were Canadian Organization, Environment & Wildlife and Human & Social Services.

### Online Advocates That Donate - Annual Change

Median Change 2010-2011, n=192



\*Light blue denotes sample size fewer than 10 organizations.

Chart 34: Online Advocates That Donate - Annual Change

# A VIEW OF CANADIAN NONPROFITS

By Mike Johnston. CEO, hjc



## INTRODUCTION

Canadians often define themselves by counting the ways that they are unlike Americans. How does this translate to the charitable sector and, most especially, how does this translate in the recent findings of the Convio Online Marketing Nonprofit Benchmark Index™ Study, which gathered Canadian and American online fundraising data together for the first time?

The comparative results point out both striking similarities and obvious differences in charitable online activity in the U.S. and in Canada. This brief analysis offers some top line findings to help your Canadian charitable organization leverage this data for your organization.

When economists are comparing the differences between the U.S. and Canadian economies, we often see broad similarities: reasonably high per capita income; percentage of adults with some level of higher education; and consumer consumption habits.

However, there are differences in our economies that have some parallel in this benchmark data. One of these is the difference in productivity between the two countries, often explained by the significantly higher capital investment of companies in the U.S. Quite simply, companies in the U.S. invest much more in talent, machinery and technology than Canadian companies do, and they reap the increases in productivity.

We believe it is the same in the charitable sector, especially when it comes to investments in talent and technology in the area of online marketing. With this data from the Convio benchmark in hand, we see that there are many opportunities for Canadian nonprofits to expand, grow and improve online. And, we also see where we are already ahead.

## WHERE CAN WE IMPROVE?

### Underdeveloped Advocacy

Our political culture is, by law, and by culture, more conservative. Canadians believe in 'peace, order and good government' and we show it in the way we engage citizens to take action on a variety of issues.

Many political commentators in Canada are writing about the slow, but inevitable change in Canadian political culture. Digital technologies are creating of-the-moment, highly focused online

advocacy campaigns in Canada that are more like the U.S. than our traditional political experience. This shift is in part due to organizations such as Avaaz, LeadNow or Care2 making online advocacy mainstream.

The benchmark numbers reflect this. In Canada, 8.2 percent of our email files are made up of advocates versus the U.S. at 12 percent. We are trailing behind, but, in the last year alone, the count of online advocates increased by 77 percent. We are rapidly moving into online advocacy, a space that up to now has been largely untapped in Canada.



A VIEW OF CANADIAN  
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But we are not doing a great job of getting these advocates to give with only 6.8 percent of those advocates giving donations. In our experience, Canadian organizations have big silos between the advocacy and fundraising teams. Our U.S. counterparts are doing a better job of sending appeals to advocates and vice versa, resulting in better results all around.

There is huge opportunity for Canadian nonprofit organizations to not only do more online in the area of advocacy, but do more in the area of converting advocates to donors — online and offline.

## Lots of Traffic Going Nowhere

The benchmark study highlights the amazing fact that there is a huge growth in website traffic in Canada: 38.9 percent versus 11.1 percent in the U.S.

However, the huge increase in volume with web traffic should see a parallel increase in the conversion of visitors to email subscriber and then to donors. We do not see that kind of increase in the numbers. It is our experience, and proven by these numbers, that many Canadian nonprofit organizations have invested in improved marketing to drive traffic to their websites, but they have not improved the business rules that convert more of those visitors to donors. Simple usability testing, donation form enhancements and email welcome series can go a long way to converting more site visitors to give.

## WHAT ARE WE DOING WELL?

### A Less Cluttered Market

In commercial marketing, it is a much more cluttered environment in the U.S. Whether we are talking about the mail box or in email inbox, the average American receives significantly more mass marketing messages than a Canadian. You can see the resulting lower average email open and response rates. While the U.S. average open rate is 18.4 percent it is 29.2 percent in Canada. The U.S. average response rate is 0.16 percent while it is a robust 0.33 percent in Canada.

We receive a lot less email in Canada so we are more likely to open and respond to what we do get. Canadian nonprofits should take advantage of this fact and not be scared to send out email and marketing messages. We are doing well in the area of email and Canadians are responding to it, so let's see if we can engage more Canadians through this channel.

## Monthly Giving

If there is one area Canadians have figured things out much better than their southern cousins, it is in the area of monthly giving. *The Next Generation of Canadian Giving* study by Convio, Stratcom and hjc showed approximately 100 percent higher uptake of monthly sustainer giving in Canada versus the U.S. In this report, we see that 33 percent of online donations in Canada are monthly/recurring versus 18.8 percent overall across the North American benchmark.



A VIEW OF CANADIAN  
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With that higher uptake, the reader might think that there is less room for growth in online monthly giving. The data does not show that. With a 7.4 percent increase in monthly giving in Canada from 2010 to 2011, there is still more that can be done in growing monthly giving in Canada online.

## CONCLUSION

Canadians are similar to Americans – but different. This is true in many ways, including in the area of digital marketing. In some areas we are outperforming U.S. organizations, in others we are trailing far behind.

Regardless, this has been a year of rapid growth in many areas of digital marketing for Canadian nonprofits. We are starting further behind, but we are finally seeing the need to rapidly expand this area of fundraising.

The only way that Canadian organizations are going to continue to grow in this same way is to invest more in the people and the technology needed to do a good job at cultivation, stewardship and solicitation. Digital marketing cannot be an afterthought.

Keep in mind that studies are only numbers. It is what you do with these numbers that will make your nonprofit organization more effective. Canadian nonprofits have to realize they operate in a digital environment which shows it has equal, if not greater, opportunity than its U.S. counterpart.

We hope this benchmark study will shake fellow Canadians to greater activity online.

## BENCHMARK SUMMARY

During the past few years, the world began to emerge from the greatest financial crisis since the Great Depression and the U.S. pulled back from fighting in multiple wars. As a whole, people are becoming slightly more generous and, among certain verticals, much more generous. This study indicates that people in the U.S. and Canada are making choices to give closer to home and where it is perceived to have more impact on people's lives. The strong growth in Food Bank, Human & Social Services, Hospitals and Higher Education seems to validate this theory. It also implies that National Nonprofit Mailer needs to be increasingly relevant to their constituents' local challenges.

In the last five years as online marketing tools like those offered by Convio have become more widely adopted, online-related staffing levels increased and online marketing best practices became more well-known and more widely practiced. Furthermore, social media has ascended as a viable tool for sourcing, cultivating and retaining supporters, and the proliferation of smart mobile devices means that supporters are even more connected. The net impact is that nonprofits have the opportunity to continue to become more effective and efficient in their marketing.

At Convio, we are proud to have been a part of the successes nonprofits have had so far navigating the online realm and using our tools, but the metrics highlighted in this study would indicate that there is still plenty of room to grow, particularly in areas like monthly giving, website registration rates and the intersection of advocacy with fundraising. The data also suggests that despite the advent of new engagement media like social, traditional email marketing and website interaction remains a viable engagement and fundraising channel as open, click-through and response rates mostly hold course, and email files and web traffic continue to grow in double digit percentages.

### What's New This Year?

This year's study included results from over 700 organizations grouped by the NTEE vertical designations. The exceptions are National Nonprofit Mailers (email files larger than 750,000) and Canadian nonprofits.

Since going by the NTEE vertical designations, a couple cohorts were split from verticals from previous years. First, the vertical Hospitals is separated from Hospital Foundation & Medical Research. Second, the vertical Visitation is separated from the vertical Performing Arts & Libraries.

We also reviewed first-time donations as a way to think about online donor acquisition by vertical.

In addition, this year's study includes sustainer giving to better understand the influence recurring giving has on overall fundraising performance.

Lastly, as online marketing plays a bigger role in the overall marketing mix and more and more constituents traditionally engaged by mail, phone and TV move online, it has become increasingly important to focus on understanding what type of relationship supporters want with the nonprofits they support. This will require a maturation in the practice of integrated marketing — the practice of coordinating which messages constituents receive by channel and ascertaining the preferences of those constituents.

## METHODOLOGY

### Study Participants

Convio is the leading provider of on-demand constituent engagement solutions for more than 1500 nonprofit organizations in North America and the United Kingdom, helping them to maximize the value of every relationship and achieve extraordinary results.

Using the data from over 700 nonprofit organizations' transaction data from the Convio data warehouse 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 non-volunteers. 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 organizations may selectively include or exclude certain sources of online fundraising data such as e-commerce, ticket sales, event registration fees and donation form giving in their definition of online revenue.

The study uses a median as a statistical metric to review performance as basing benchmarks on an average distorts performance and not an average over a period of time. Using median as a statistical metric provides a more accurate measure of performance.

Additionally, this year the study uses NTEE (National Taxonomy of Exempt Entities from the IRS) to define verticals. Nonprofits self-report NTEE classifications, so our categorization by verticals is only as good as the self-reported data. Since NTEE codes do not apply to Canadian nonprofits, we grouped all Canadian organizations as a single vertical. In addition, per previous studies, nonprofits with greater than 750,000 emails were classified in the vertical National Nonprofit Mailer. We believe these organizations behave more similarly to each other than smaller counterparts in their respective NTEE defined verticals.

Making valid comparisons is difficult when the data is volunteered, or when sources are self-selected or normalized to "look better."

As much as we would like to include every Convio client in this study, our overarching objective is to provide nonprofits with the best and most accurate insight into how the industry fared in 2011. As such, we excluded organizations that did not have at least two full years (24 months) of data

on the Convio platform, since 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 Convio and when they deploy additional modules.

## Industry Verticals

Organizations with at least 24 complete months of data 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 any of the advocacy related metrics. Other verticals that were removed from the advocacy-related charts included 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 we call “Christian Ministries”. However, Jewish organizations, while having a 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 Convio studies have shown that organizations with email files of more than 250,000 email addresses 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.

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	Study Participants
Animal Welfare	Regional humane societies and national organizations devoted to animal welfare issues	46
Association & Membership	Organizations whose members have a common professional affiliation	26
Canadian Organization	Organizations located in Canada	10
Christian Ministries	Churches, ministries, and other organizations of various religious affiliations	51
Disaster & 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	40
Disease & 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	67
Environment & Wildlife	Regional and national environmental and conservation organizations	44
Food Bank	Organizations whose mission focuses on advocating and working towards the end of hunger in America.	27
Higher Education	Colleges, universities, and their alumni associations	22
Hospital Foundation, & Medical Research	Organizations that provide teaching and medical research	24
Hospitals	Organizations providing clinical care	19
Human & Social Services	Local, regional, and national organizations that deliver human and social services to people in need	78
Jewish	Organizations that provide human services, aid to Israel, and support for issues of importance to Jewish constituents	14
National Nonprofit Mailer	Organizations from various verticals with more than 250,000 constituent email addresses in their email file	26
Performing Arts & 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	106
Public Broadcasting Stations	Public radio and public television stations	38
Team Events	Organizations that derive at least 80 percent of their online fundraising revenue from team-based fundraising events such as walks, runs, or bicycle rides created to raise money and awareness for the organization	47
Visitation	Organizations such as zoos and aquariums that rely on members and guests visiting their facilities	18
<b>Total 2011 Study</b>		<b>719</b>

Figure 1: Vertical Segment Descriptions



## 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 719 participants based on the number of study participants who employed the tactic in question. For instance, not all study participants used Convio for their online fundraising in 2011; as a result, the Online Fundraising Revenue by Vertical metric contained fewer than 719 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, this data is denoted by displaying their results in a lighter color shade. For more information on the volatility smaller samples can create, please see Appendices A-D.

**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 provide 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 large 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:** For each metric, organizations' results varied widely. Therefore, in addition to the median (50<sup>th</sup> percentile) provided in each chart, which is a single point of reference, percentiles provide a broader context by which organizations can compare their results (see Appendices A-D). By definition, for any given metric, half of all organizations' results will fall in the range between the 25<sup>th</sup> percentile and 75<sup>th</sup> percentile.

**CONVIO CMS:** Performance metrics from email messages that are configured by organizations utilizing 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 2010 or 2011) 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.

## METRICS SUMMARY TABLES BY VERTICAL

	E-Appeals			E-Newsletters		Advocacy	
	E-Appeal Open Rate (Median)	E-Appeal Click-Through Rate (Median)	E-Appeal Response Rate (Median)	E-Newsletter Open Rate (Median)	E-Newsletter Click-Through Rate (Median)	Advocates on File (% of Total)	Advocates Who Donate (% of Advocate File)
Clients Included in This Benchmark ("N" Value)	543	543	543	609	609	226	226
All Verticals	18.42%	1.71%	0.16%	19%	3%	12.00%	9.43%
Animal Welfare	22.49%	2.04%	0.23%	21.84%	4.47%	29.58%	23.83%
Association & Membership	22.17%	2.71%	0.59%	19.04%	3.98%	6.97%	1.16%
Canadian Organization	29.19%	4.12%	0.33%	28.88%	6.40%	8.20%	6.76%
Christian Ministries	19.82%	1.87%	0.17%	21.63%	3.56%	17.22%	26.95%
Disaster & International Relief	16.50%	1.20%	0.18%	18.04%	2.37%	3.43%	12.41%
Disease & Health Services	16.23%	1.58%	0.11%	17.77%	3.59%	5.12%	12.29%
Environment & Wildlife	20.33%	1.63%	0.29%	20.83%	4.13%	24.56%	9.26%
Food Bank	17.73%	1.42%	0.41%	18.61%	2.72%	1.01%	29.55%
Higher Education	23.38%	2.17%	0.17%	26.44%	4.77%	10.24%	4.24%
Hospital Foundation & Medical Research	22.37%	1.95%	0.17%	18.50%	2.32%	10.67%	0.00%
Hospitals	17.55%	1.84%	0.09%	19.77%	2.85%	-	-
Human & Social Services	17.75%	1.49%	0.00%	18.74%	2.79%	2.28%	7.00%
Jewish	17.88%	1.04%	0.13%	19.98%	2.91%	7.81%	13.05%
National Nonprofit Mailer	17.94%	1.80%	0.24%	19.41%	4.02%	30.90%	12.28%
Performing Arts & Libraries	24.69%	1.98%	0.19%	27.46%	4.99%	7.20%	30.66%
Public Affairs	16.11%	1.27%	0.07%	16.86%	2.49%	15.58%	7.21%
Public Broadcasting Stations	19.73%	2.28%	0.60%	18.70%	2.16%	-	-
Team Event	17.64%	1.68%	0.08%	21.12%	4.11%	2.98%	18.58%
Visitation	26.26%	2.44%	0.51%	24.48%	3.14%	-	-

Figure 2: E-Appeals, E-Newsletters and Advocacy Metrics by Vertical

	Online Revenue - First Time Fundraising				Online Revenue - Sustainer Donations			
	Total Annual Online Revenue (Median)	Online Revenue Growth (Median growth Rate of Individual Orgs)	Average Gift (Median)	Average Gift Growth (Median Growth Rate of Individual Orgs)	Total Annual Online Revenue (Median)	Online Revenue Growth (Median growth Rate of Individual Orgs)	Average Gift (Median)	Average Gift Growth (Median Growth Rate of Individual Orgs)
Clients Included in This Benchmark ("N" Value)	530	530	530	530	530	530	530	530
All Verticals	\$136,625	5.16%	\$102.89	2.22%	\$25,474	38.73%	\$31.96	0.54%
Animal Welfare	\$114,489	4.58%	\$65.01	6.54%	\$35,716	47.66%	\$24.33	3.55%
Association & Membership	\$73,540	10.37%	\$111.11	8.57%	\$24,122	61.19%	\$54.33	-4.06%
Canadian Organization	\$541,273	-7.00%	\$89.38	4.98%	\$58,458	74.98%	\$25.45	7.43%
Christian Ministries	\$152,613	-3.17%	\$133.15	-0.23%	\$165,496	39.87%	\$47.29	1.74%
Disaster & International Relief	\$236,076	-24.84%	\$159.06	8.75%	\$110,951	11.71%	\$42.17	-1.73%
Disease & Health Services	\$172,969	8.44%	\$75.09	2.72%	\$8,195	48.28%	\$34.21	3.14%
Environment & Wildlife	\$78,812	10.51%	\$114.67	2.23%	\$10,770	48.95%	\$23.50	-3.51%
Food Bank	\$238,778	15.47%	\$117.12	3.02%	\$45,989	60.51%	\$40.72	4.73%
Higher Education	\$154,196	1.77%	\$190.72	-1.59%	\$24,394	1.91%	\$44.79	4.71%
Hospital Foundation & Medical Research	\$141,560	5.77%	\$109.19	-4.09%	\$9,835	3.01%	\$29.11	-1.81%
Hospitals	\$218,804	21.32%	\$125.00	-2.90%	\$9,259	11.63%	\$34.39	-2.18%
Human & Social Services	\$100,537	15.83%	\$141.27	3.98%	\$12,286	49.10%	\$48.08	-1.61%
Jewish	\$64,211	2.39%	\$129.11	-8.70%	\$6,749	17.75%	\$48.93	1.88%
National Nonprofit Mailer	\$1,402,714	-13.62%	\$51.70	1.64%	\$312,110	39.50%	\$21.73	2.30%
Performing Arts & Libraries	\$59,883	1.99%	\$86.48	-11.75%	\$20,813	52.77%	\$63.22	0.49%
Public Affairs	\$53,748	-1.89%	\$110.66	-4.68%	\$9,757	34.68%	\$26.02	4.29%
Public Broadcasting Stations	\$190,381	7.31%	\$84.60	0.09%	\$39,656	55.87%	\$14.56	-4.13%
Team Event	\$830,521	4.21%	\$55.26	3.45%	\$23,841	14.67%	\$33.61	-2.45%
Visitation	\$110,318	6.69%	\$126.08	4.87%	\$3,760	34.67%	\$42.00	-0.25%

Figure 3: Online Revenue - First Time Fundraising and Online Revenue - Sustainer Donations Metrics by Vertical

	Online Revenue				Online Revenue - Net Event Fundraising			
	Total Annual Online Revenue (Median)	Online Revenue Growth (Median growth Rate of Individual Orgs)	Average Gift (Median)	Average Gift Growth (Median Growth Rate of Individual Orgs)	Total Annual Online Revenue (Median)	Online Revenue Growth (Median growth Rate of Individual Orgs)	Average Gift (Median)	Average Gift Growth (Median Growth Rate of Individual Orgs)
Clients Included in This Benchmark ("N" Value)	530	530	530	530	530	530	530	530
All Verticals	\$366,572	15.83%	\$93.67	1.41%	\$312,600	16.67%	\$107.19	0.70%
Animal Welfare	\$310,527	18.33%	\$58.65	6.38%	\$252,103	22.43%	\$71.33	2.33%
Association & Membership	\$149,308	11.53%	\$107.03	5.73%	\$149,308	11.53%	\$107.03	5.73%
Canadian Organization	\$1,008,506	17.75%	\$103.57	1.41%	\$983,582	17.75%	\$103.57	5.23%
Christian Ministries	\$607,001	20.05%	\$93.45	0.34%	\$606,213	20.05%	\$93.45	-0.90%
Disaster & International Relief	\$650,424	-6.36%	\$121.75	2.24%	\$650,424	-6.36%	\$121.75	2.24%
Disease & Health Services	\$319,881	14.91%	\$79.09	6.40%	\$251,506	15.60%	\$132.31	8.55%
Environment & Wildlife	\$141,117	22.92%	\$104.05	-0.19%	\$141,117	22.92%	\$104.05	-0.19%
Food Bank	\$597,165	24.22%	\$100.99	-2.64%	\$546,848	22.20%	\$104.54	-3.54%
Higher Education	\$367,364	16.22%	\$149.65	2.87%	\$367,364	16.22%	\$149.65	2.87%
Hospital Foundation & Medical Research	\$311,687	16.23%	\$102.05	-3.50%	\$238,247	11.33%	\$134.92	-1.97%
Hospitals	\$443,630	45.18%	\$127.80	-1.48%	\$276,240	41.02%	\$177.42	11.63%
Human & Social Services	\$257,300	23.03%	\$133.92	1.74%	\$230,539	25.35%	\$142.48	0.37%
Jewish	\$247,956	18.31%	\$102.64	1.17%	\$247,956	18.31%	\$102.64	1.17%
National Nonprofit Mailer	\$4,564,714	4.06%	\$54.80	-2.14%	\$3,907,605	4.06%	\$57.45	-1.62%
Performing Arts & Libraries	\$199,632	1.73%	\$88.95	2.12%	\$199,632	1.73%	\$88.95	2.12%
Public Affairs	\$140,666	12.27%	\$101.67	0.52%	\$138,712	12.08%	\$109.08	0.52%
Public Broadcasting Stations	\$465,543	20.77%	\$77.25	-4.79%	\$465,543	20.77%	\$77.25	-4.79%
Team Event	\$2,155,779	8.98%	\$62.41	4.55%	\$204,834	8.58%	\$153.87	-3.82%
Visitation	\$264,199	12.61%	\$114.20	4.30%	\$264,199	12.61%	\$120.17	5.32%

Figure 4: Online Revenue and Online Revenue - Net Event Fundraising Metrics by Vertical

	Website			Email File			
	Monthly Unique Website Visitors (Median)	Website Traffic Growth (Median Growth Rate of Individual Orgs)	Website Traffic Conversion Rate (Median)	Total Email File Size (Median)	Usable Email File Size (Median)	Total Email File Growth (Median Growth Rate of Individual Orgs)	Usable Percentage of Total Email File (Median)
Clients Included in This Benchmark ("N" Value)	256	256	256	719	719	719	719
All Verticals	6,558	11.08%	2.00%	47,794	25,673	17.04%	55.42%
Animal Welfare	21,731	15.25%	1.87%	40,903	19,568	22.80%	51.09%
Association & Membership	5,206	3.21%	1.24%	74,951	38,072	9.04%	68.38%
Canadian Organization	25,853	38.09%	2.24%	122,149	66,934	25.16%	55.16%
Christian Ministries	13,491	10.48%	2.50%	72,274	38,785	14.35%	51.96%
Disaster & International Relief	7,618	1.08%	1.25%	50,951	26,142	14.77%	51.78%
Disease & Health Services	11,383	11.64%	2.34%	48,608	23,341	18.35%	50.74%
Environment & Wildlife	6,248	17.19%	0.83%	36,798	24,490	18.88%	64.42%
Food Bank	7,377	28.60%	2.74%	26,639	13,248	29.92%	53.44%
Higher Education	5,402	0.34%	0.14%	114,122	92,708	11.25%	75.22%
Hospital Foundation & Medical Research	2,149	28.30%	3.04%	25,034	12,540	22.34%	56.21%
Hospitals	2,348	-0.05%	3.56%	26,454	18,845	23.22%	58.23%
Human & Social Services	5,297	14.42%	1.77%	19,112	9,545	20.60%	57.57%
Jewish	5,406	18.15%	2.24%	31,084	18,820	18.10%	59.26%
National Nonprofit Mailer	190,241	20.97%	6.01%	2,152,778	1,325,300	14.46%	53.96%
Performing Arts & Libraries	3,807	15.93%	0.52%	36,035	19,691	20.06%	60.38%
Public Affairs	5,183	-7.04%	1.59%	57,754	28,959	10.61%	56.30%
Public Broadcasting Stations	4,208	-8.66%	1.25%	90,180	47,184	13.58%	61.67%
Team Event	4,314	13.20%	1.19%	69,919	29,424	21.48%	43.37%
Visitation	15,579	-1.57%	0.40%	62,322	36,111	18.39%	58.95%

Figure 5: Website and Email File Metrics by Vertical

## DISCUSSION OF METRICS

We suggest that you use this study to understand why metrics are important, which metrics are important, and which metrics and drivers can have the biggest effect on your online marketing programs. With this understanding as a foundation, you can do your own analysis to serve as the basis for other modeling and return on investment calculations.

The metrics shown in this study are by no means exhaustive. Every organization is unique and has its own organizational strengths, structure, and goals. Because of these attributes, results achieved by one organization may not be attainable by another.

For more information or other analytical support, contact your Convio Account Manager or Sales Executive about engaging a Convio Interactive Marketing Consultant.

## SUCCESS STORIES

Convio clients have a history of success online, often sharing lessons learned and best practices with other nonprofit organizations. We invite you to read more about the success that organizations have had using Convio online marketing solutions, fundraising, and advocacy software and services. These success stories and the results of this year's benchmark study might help you develop ideas and programs to improve your organization's results. Please visit [www.convio.com/our-clients](http://www.convio.com/our-clients).

## JOIN THE DISCUSSION: CONNECTION CAFE BLOG AND ONLINE CONVIO CLIENT COMMUNITY

On Convio's blog, Connection Café and in the Online Convio Client Community, you will find ongoing discussions and ideas related to this year's benchmark study and other industry trends and issues of importance to nonprofit organizations. Connection Café is open to the public, whereas client community is accessible only to clients and partners. Please visit [www.connectioncafe.com](http://www.connectioncafe.com) and [community.customer.convio.com](http://community.customer.convio.com) to join the discussion.



## APPENDIX A: 25<sup>TH</sup>, 50<sup>TH</sup> AND 75<sup>TH</sup> PERCENTILE VALUES FOR ADVOCACY

	E-Appeals			E-Newsletters		Advocacy	
	E-Appeal Open Rate (Median)	E-Appeal Click-Through Rate (Median)	E-Appeal Response Rate (Median)	E-Newsletter Open Rate (Median)	E-Newsletter Click-Through Rate (Median)	Advocates on File (% of Total)	Advocates Who Donate (% of Advocate File)
Clients Included in This Benchmark ("N" Value)	543	543	543	609	609	226	226
All Verticals	18.42%	1.71%	0.16%	19%	3%	12.00%	9.43%
Animal Welfare	22.49%	2.04%	0.23%	21.84%	4.47%	29.58%	23.83%
Association & Membership	22.17%	2.71%	0.59%	19.04%	3.98%	6.97%	1.16%
Canadian Organization	29.18%	4.12%	0.33%	28.88%	6.40%	8.20%	6.76%
Christian Ministries	19.82%	1.87%	0.17%	21.63%	3.56%	17.22%	26.95%
Disaster & International Relief	16.50%	1.20%	0.18%	18.04%	2.37%	3.43%	12.41%
Disease & Health Services	16.23%	1.58%	0.11%	17.77%	3.59%	5.12%	12.29%
Environment & Wildlife	20.33%	1.63%	0.29%	20.83%	4.13%	24.56%	9.26%
Food Bank	17.73%	1.42%	0.41%	18.61%	2.72%	1.01%	29.55%
Higher Education	23.38%	2.17%	0.17%	26.44%	4.77%	10.24%	4.24%
Hospital Foundation & Medical Research	22.37%	1.95%	0.17%	18.50%	2.32%	10.67%	0.00%
Hospitals	17.55%	1.84%	0.09%	19.77%	2.85%	-	-
Human & Social Services	17.75%	1.49%	0.00%	18.74%	2.79%	2.28%	7.00%
Jewish	17.88%	1.04%	0.13%	19.98%	2.91%	7.81%	13.05%
National Nonprofit Mailer	17.94%	1.80%	0.24%	19.41%	4.02%	30.90%	12.28%
Performing Arts & Libraries	24.69%	1.98%	0.19%	27.46%	4.99%	7.20%	30.66%
Public Affairs	16.11%	1.27%	0.07%	16.86%	2.49%	15.58%	7.21%
Public Broadcasting Stations	19.73%	2.28%	0.60%	18.70%	2.16%	-	-
Team Event	17.64%	1.68%	0.08%	21.12%	4.11%	2.98%	18.58%
Visitation	26.26%	2.44%	0.51%	24.48%	3.14%	-	-

## APPENDIX B: 25<sup>TH</sup>, 50<sup>TH</sup> AND 75<sup>TH</sup> PERCENTILE VALUES FOR EMAIL FILE

	Website			Email File			
	Monthly Unique Website Visitors (Median)	Website Traffic Growth (Median Growth Rate of Individual Orgs)	Website Traffic Conversion Rate (Median)	Total Email File Size (Median)	Usable Email File Size (Median)	Total Email File Growth (Median Growth Rate of Individual Orgs)	Usable Percentage of Total Email File (Median)
Clients Included in This Benchmark ("N" Value)	256	256	256	719	719	719	719
All Verticals	6,558	11.08%	2.00%	47,794	25,673	17.04%	55.42%
Animal Welfare	21,731	15.25%	1.87%	40,903	19,568	22.80%	51.09%
Association & Membership	5,206	3.21%	1.24%	74,951	38,072	9.04%	68.38%
Canadian Organization	25,853	38.09%	2.24%	122,149	66,934	25.16%	55.16%
Christian Ministries	13,491	10.48%	2.50%	72,274	38,785	14.35%	51.96%
Disaster & International Relief	7,618	1.08%	1.25%	50,951	26,142	14.77%	51.78%
Disease & Health Services	11,383	11.64%	2.34%	48,608	23,341	18.35%	50.74%
Environment & Wildlife	6,248	17.19%	0.83%	36,798	24,490	18.88%	64.42%
Food Bank	7,377	28.60%	2.74%	26,639	13,248	29.92%	53.44%
Higher Education	5,402	0.34%	0.14%	114,122	92,708	11.25%	75.22%
Hospital Foundation & Medical Research	2,149	28.30%	3.04%	25,034	12,540	22.34%	56.21%
Hospitals	2,348	-0.05%	3.56%	26,454	18,845	23.22%	58.23%
Human & Social Services	5,297	14.42%	1.77%	19,112	9,545	20.60%	57.57%
Jewish	5,406	18.15%	2.24%	31,084	18,820	18.10%	59.26%
National Nonprofit Mailer	190,241	20.97%	6.01%	2,152,778	1,325,300	14.46%	53.96%
Performing Arts & Libraries	3,807	15.93%	0.52%	36,035	19,691	20.06%	60.38%
Public Affairs	5,183	-7.04%	1.59%	57,754	28,959	10.61%	56.30%
Public Broadcasting Stations	4,208	-8.66%	1.25%	90,180	47,184	13.58%	61.67%
Team Event	4,314	13.20%	1.19%	69,919	29,424	21.48%	43.37%

## APPENDIX C: 25<sup>TH</sup>, 50<sup>TH</sup> AND 75<sup>TH</sup> PERCENTILE VALUES FOR ONLINE REVENUE

	Online Revenue											
	Total Annual Online Revenue (Median)			Online Revenue Growth (Median)			Average Gift (Median)			Online Revenue per Usable Email Address (Median)		
	25th Percentile	50th Percentile (Median)	75th Percentile	25th Percentile	50th Percentile (Median)	75th Percentile	25th Percentile	50th Percentile (Median)	75th Percentile	25th Percentile	50th Percentile (Median)	75th Percentile
	530			530			530			530		
All Verticals	\$127,644	\$366,572	\$1,142,932	-1.40%	15.83%	32.62%	\$64	\$94	\$134	\$4	\$13	\$27
Animal Welfare	\$170,698	\$310,527	\$573,434	12.77%	18.33%	31.61%	\$53	\$59	\$72	\$10	\$16	\$23
Association & Membership	\$123,801	\$149,308	\$406,304	-3.04%	11.53%	26.74%	\$83	\$107	\$217	\$2	\$4	\$20
Canadian Organization	\$395,766	\$1,008,506	\$1,369,748	-1.21%	17.75%	25.18%	\$52	\$104	\$175	\$8	\$14	\$33
Christian Ministries	\$227,219	\$607,001	\$1,397,499	-2.59%	20.05%	33.40%	\$74	\$93	\$167	\$8	\$15	\$33
Disaster & International Relief	\$405,167	\$650,424	\$1,997,096	-28.33%	-6.36%	7.39%	\$101	\$122	\$174	\$11	\$22	\$50
Disease & Health Services	\$119,766	\$319,881	\$1,126,485	-1.98%	14.91%	31.11%	\$69	\$79	\$122	\$4	\$14	\$30
Environment & Wildlife	\$84,342	\$141,117	\$479,731	2.88%	22.92%	41.61%	\$72	\$104	\$125	\$4	\$7	\$11
Food Bank	\$235,299	\$597,165	\$1,221,275	19.82%	24.22%	37.39%	\$88	\$101	\$120	\$36	\$44	\$51
Higher Education	\$161,049	\$367,364	\$660,970	-6.62%	16.22%	38.79%	\$96	\$150	\$171	\$4	\$5	\$8
Hospital Foundation & Medical Research	\$60,847	\$311,687	\$631,990	1.72%	16.23%	25.22%	\$74	\$102	\$142	\$11	\$25	\$36
Hospitals	\$147,675	\$443,630	\$790,302	14.81%	45.18%	60.59%	\$95	\$128	\$145	\$9	\$20	\$36
Human & Social Services	\$97,687	\$257,300	\$446,062	11.61%	23.03%	42.31%	\$96	\$134	\$170	\$7	\$16	\$28
Jewish	\$47,440	\$247,956	\$1,191,388	1.33%	18.31%	36.24%	\$95	\$103	\$172	\$5	\$13	\$22
National Nonprofit Mailer	\$2,136,587	\$4,564,714	\$8,726,101	-21.16%	4.06%	14.66%	\$42	\$55	\$83	\$2	\$3	\$11
Performing Arts & Libraries	\$117,326	\$199,632	\$577,453	-4.31%	1.73%	19.08%	\$75	\$89	\$117	\$9	\$12	\$22
Public Affairs	\$57,768	\$140,666	\$470,970	-20.00%	12.27%	30.79%	\$60	\$102	\$147	\$1	\$3	\$8
Public Broadcasting Stations	\$289,985	\$465,543	\$1,295,278	11.69%	20.77%	37.91%	\$50	\$77	\$109	\$7	\$14	\$21
Team Event	\$635,917	\$2,155,779	\$12,425,267	-1.98%	8.98%	21.01%	\$53	\$62	\$67	\$17	\$27	\$42
Visitation	\$112,340	\$264,199	\$593,562	-3.68%	12.61%	27.52%	\$79	\$114	\$129	\$5	\$7	\$8

## APPENDIX D: 25<sup>TH</sup>, 50<sup>TH</sup> AND 75<sup>TH</sup> PERCENTILE VALUES FOR WEBSITES

	Website								
	Monthly Unique Website Visitors (Median)			Website Traffic Growth (Median)			Website Traffic Conversion Rate (Median)		
	25th Percentile	50th Percentile (Median)	75th Percentile	25th Percentile	50th Percentile (Median)	75th Percentile	25th Percentile	50th Percentile (Median)	75th Percentile
	256			256			256		
All Verticals	2,635	6,558	18,728	-2.79%	11.08%	28.11%	0.89%	2.00%	4.86%
Animal Welfare	8,163	21,731	26,709	7.56%	15.25%	20.76%	0.84%	1.87%	2.96%
Association & Membership	1,673	5,206	8,130	-8.69%	3.21%	14.07%	0.47%	1.24%	3.93%
Canadian Organization	11,127	25,853	46,589	20.97%	38.09%	58.62%	0.96%	2.24%	6.93%
Christian Ministries	4,225	13,491	38,454	-0.70%	10.48%	39.68%	1.92%	2.50%	5.84%
Disaster & International Relief	5,702	7,618	12,157	-11.85%	1.08%	26.99%	0.76%	1.25%	1.84%
Disease & Health Services	3,564	11,383	24,119	-0.44%	11.64%	25.04%	1.28%	2.34%	7.09%
Environment & Wildlife	3,933	6,248	10,918	3.50%	17.19%	36.15%	0.72%	0.83%	3.94%
Food Bank	3,913	7,377	8,999	18.93%	28.60%	40.82%	1.47%	2.74%	3.59%
Higher Education	3,348	5,402	6,318	-6.54%	0.34%	6.17%	0.10%	0.14%	0.17%
Hospital Foundation & Medical Research	1,700	2,149	3,963	-18.28%	28.30%	33.39%	1.50%	3.04%	5.59%
Hospitals	2,348	2,348	2,348	-0.05%	-0.05%	-0.05%	3.56%	3.56%	3.56%
Human & Social Services	2,595	5,297	16,939	4.03%	14.42%	28.64%	0.91%	1.77%	3.17%
Jewish	3,109	5,406	15,340	-1.91%	18.15%	53.18%	0.84%	2.24%	8.20%
National Nonprofit Mailer	190,241	190,241	190,241	20.97%	20.97%	20.97%	3.58%	6.01%	8.45%
Performing Arts & Libraries	1,768	3,807	29,335	8.69%	15.93%	18.63%	0.37%	0.52%	1.24%
Public Affairs	1,960	5,183	10,617	-28.95%	-7.04%	6.99%	0.88%	1.59%	3.59%
Public Broadcasting Stations	2,448	4,208	17,762	-8.79%	-8.66%	5.33%	0.75%	1.25%	1.75%
Team Event	1,685	4,314	16,398	4.98%	13.20%	29.92%	7.54%	11.19%	17.92%
Visitation	12,149	15,579	16,479	-7.15%	-1.57%	3.91%	0.32%	0.40%	0.65%

## ABOUT CONVIO

Convio is a leading provider of on-demand constituent engagement solutions that enable nonprofit organizations to maximize the value of every relationship. With Convio constituent engagement solutions, nonprofits can more effectively raise funds, advocate for change and cultivate relationships with donors, activists, volunteers, event participants, alumni and other constituents. Convio offers two open, cloud-based constituent engagement solutions: Convio Common Ground CRM® for small- and mid-sized nonprofits and Convio Luminate™ for enterprise nonprofits. Headquartered in Austin, Texas with offices across the United States and United Kingdom, Convio serves more than 1,500 nonprofit organizations globally. Convio is listed on the NASDAQ Global Market under the symbol CNVO. For more information visit [www.convio.com](http://www.convio.com).

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