



The Convio Online Marketing Nonprofit Benchmark Index™ Study

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Introduction

For the third consecutive year, Convio — the leading provider of on-demand constituent relationship management software solutions for nonprofits — has created *The Convio Online Marketing Nonprofit Benchmark Index™ Study* to help nonprofit marketers answer the following questions:

- What online marketing metrics should I focus on?
- How is my organization doing?
- What targets should I set for my organization?

The appropriate metrics for evaluating the success of an online marketing program vary depending on the program's primary objective. What should a nonprofit measure when the objective is to raise money, drive website traffic, build its email file, drive response to an appeal, or prompt some other action? Even when managers know what metrics are important and how to measure them, how do they know if their results are good? The only way to do this objectively is to compare their results against those of their peer group.

By knowing how an organization performs against a benchmark of its peers, it can begin to identify which areas of its online marketing program are performing well or are underperforming. This quantitative approach to measuring success gives organizations a framework to continually refine their tactics, improve the effectiveness of their online initiatives, and allocate resources more efficiently.

This year's study uses data compiled from nearly 600 nonprofit organizations and aggregates their results into benchmarks that nonprofit organizations can use to compare their results to those of their peer group. When selecting which organizations to benchmark your results against, there are multiple dimensions that should be considered. However, for most organizations, sharing a common mission can provide the most valid comparison. As such, this study provides separate benchmarks for the nonprofit industry as a whole, as well as for 14 nonprofit industry subgroups, or verticals.

Previous Convio benchmark studies have shown that organizations with large email files perform more like other large organizations than organizations of a similar mission but with smaller email files. This is because online programs of this size often correlate to large organizational infrastructure, budgets, staff, and sophisticated offline fundraising programs. For this study, we chose to designate these organizations with more than 250,000 online constituents, or Major Emailers, as their own segment. These organizations are removed from vertical benchmarks to avoid skewing them excessively.

This year's study also includes the addition of two new verticals for comparison. The first, a "Jewish" vertical, focuses on organizations that provide human services, aid to Israel, and support for issues of importance to Jewish constituents. The second, called Team Events, focuses on organizations that derive more than 80 percent of their total online fundraising from event-based peer-to-peer fundraising such as walks, runs, or bicycle rides. While the vast majority of the Team Event fundraising organizations are health organizations, we felt that the metrics associated with Team Event fundraising-led organizations were markedly different from other health organizations that do not rely on this strategy.

For additional assistance in understanding how your organization is performing and what strategies and tactics can help improve any areas where your performance is below that of your peer group, please contact your Convio Account Manager or Sales Executive about engaging a Convio Interactive Marketing Consultant or a consulting partner from Convio's Fusion Partner Program.

Key Findings

The Convio Online Marketing Nonprofit Benchmark Index Study looked at nearly 600 nonprofit organizations' online marketing results and compiled a series of benchmarks for evaluating fundraising, email, advocacy, and marketing success online. At a macro cross-segment level, this study revealed the following:

- **Positive year-over-year growth in all of the key areas of online success, including online fundraising, email file growth, and website traffic.** This is a noticeable contrast to some reports that indicate offline direct mail-led fundraising growth declined in 2008, especially in the fourth quarter.
- **The fourth quarter of 2008 was a challenging time for many nonprofit organizations.** During this period we saw many donors continued to give, although average gift amounts online declined for many organizations. We also noticed erosion of year-over-year growth for several key online metrics during this period.
- **With the average gift amount unchanged at many organizations, growth in fundraising was driven by an increase in the number of online gifts received by organizations during the fourth quarter of 2008.** This had the effect of driving up total online giving, despite a lower average gift for most organizations.
- **While year-over-year growth rates remain positive, the rate of growth is beginning to show signs of decline as many of these metrics are now growing at a slower rate than in previous years.** This is to be expected with the increased scale of online marketing/fundraising programs. With double-digit growth still present across many key online success metrics, this is not yet an area of concern, but will need to be watched closely in the years ahead.
- **Compared to small and medium sized organizations, large organizations appear to be less impacted by the economy.** Despite having a larger constituent base from which to grow, larger organizations “defied gravity” by outpacing the market from an email file and online revenue growth perspective. This effect was especially prevalent in the Environment & Wildlife and Public Affairs verticals where we saw negative growth for the small and medium sized organizations, but positive growth for larger organizations.
- **Email open rates remain strong across all organization types.** Open rates above 20 percent for both email appeals and email newsletters suggest that nonprofits continue to get their message across successfully, despite increasingly crowded email inboxes.

Aggregate Nonprofit Sector Performance Trends

Introduction

Successful organizations have a plan. Formulating a solid plan requires an understanding not only of where your organization is headed, but also of where the entire sector is headed. New to this year's study is a look at the nonprofit sector from a macro level using a sub-group of over 200 nonprofit organizations that have three years of data as a proxy for the industry.

Sector Online Revenue Trend

Some reports indicate that direct mail fundraising declined in 2008. On the other hand, by examining approximately 200 nonprofit organizations' results, we see that online fundraising is currently in a multi-year growth phase. For the period of 2007 to 2008, organizations in this study saw their online revenue increase from \$207,286 to \$235,334; an increase of 14 percent. With the average online gift of \$67.47 — basically unchanged from 2007 levels — online revenue growth in 2008 was driven by a 14 percent increase in the number of gifts received online. It appears that for 2008, nonprofit organizations continued to grow their online programs as more gifts were received online, even though the average online gift was unchanged.

The good news for online fundraising professionals is that online revenue growth in 2008 is not a one year anomaly. As seen in Chart I, looking at the same organizations over a three-year period, we see that online revenue growth has been positive since 2006. However, as organizations' online programs grow, it is more difficult to maintain double-digit growth rate indefinitely. Chart I shows that the rate of growth of 14 percent from 2007 to 2008, while still positive, decelerated from a growth rate of 26 percent from 2006 to 2007.

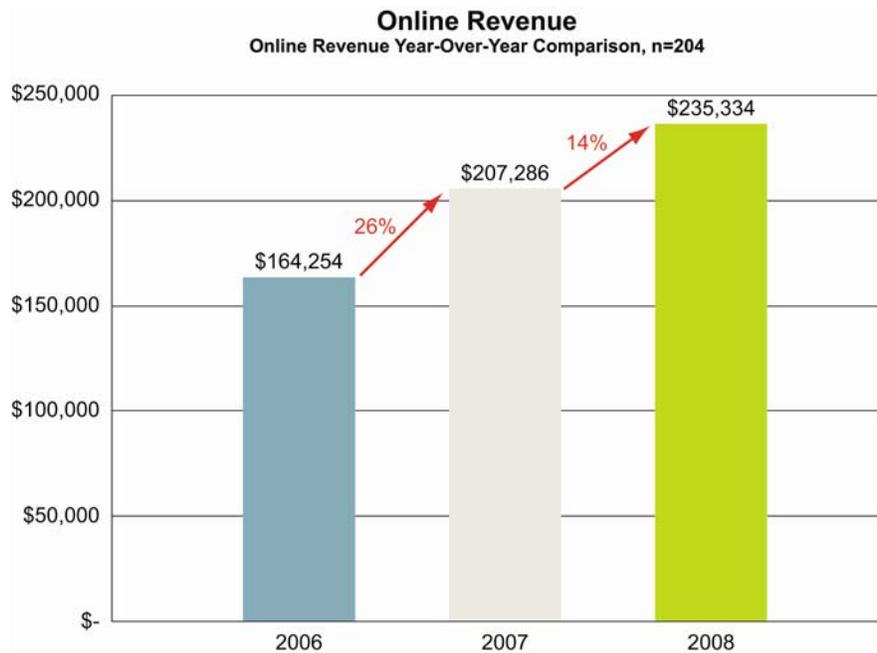


Chart I: Annual Industry Online Revenue Growth

Q4 Deep Dive

Given the heightened concern about the economy starting in the fourth quarter of 2008, we took a closer look at how the final three months of 2008 compared to that same period in previous years. The good news is that despite many organizations having to cut back on their fundraising and outreach efforts during this time, online fundraising actually experienced a three percent growth (see Chart 2), which was much better than the contraction that many were anticipating.

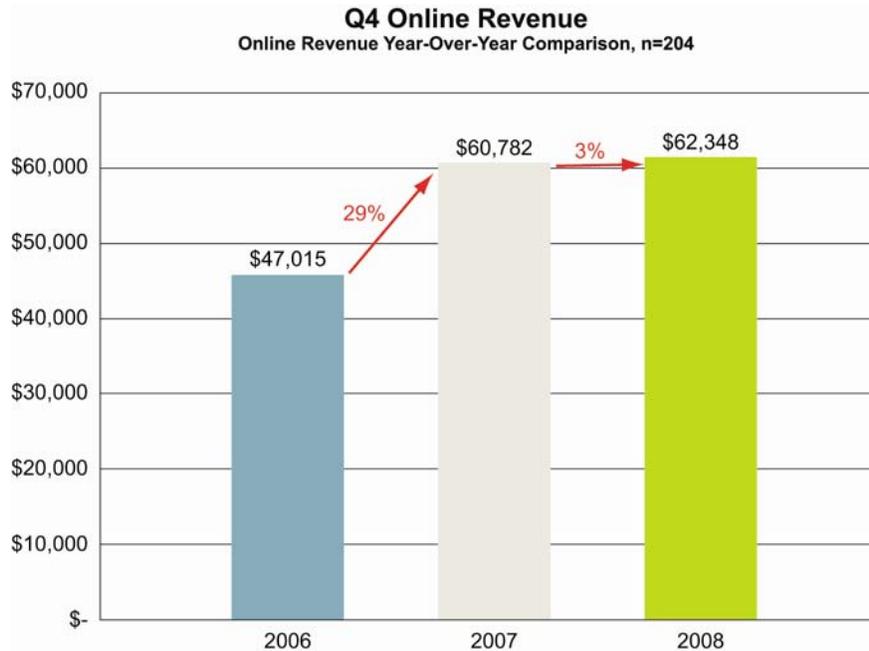


Chart 2: Fourth Quarter Industry Online Revenue Growth

Chart 3 shows that going into the fourth quarter of 2008, online revenue growth was 18 percent above the previous year. Clearly, three percent growth in the fourth quarter, compared to 18 percent growth for the first nine months of the year, indicates that the economy had a significant impact on online fundraising in the final three months of 2008.



Chart 3: First to Third Quarter Industry Online Revenue Growth

Website Traffic Trend

Nonprofits continue to have success driving visitors to their websites on a monthly basis using relevant content and viable offers. In Chart 4, we see that the number of annual unique website visitors grew from 97,925 in 2007 to 117,955 in 2008, representing 20 percent growth. While still in a very strong multi-year growth phase, the rate of growth in website traffic is down from 27 percent growth in 2006-2007 to 20 percent in 2007-2008; this trend is similar to the one that was observed in online revenue growth.

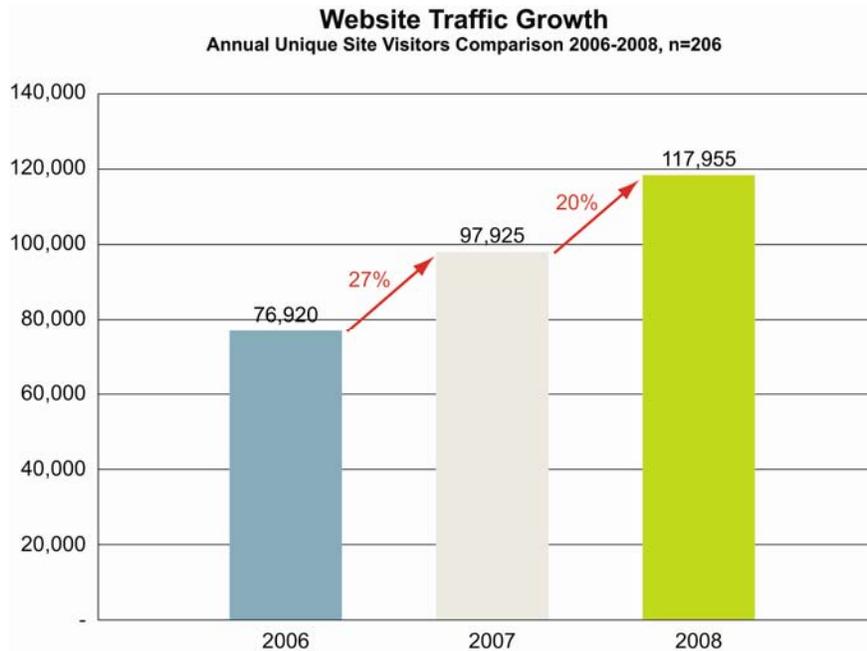


Chart 4: Annual Industry Website Traffic Growth

Email File Trend

In 2008, organizations added 28 percent more new constituents to their email files than in 2007. With a median email file of over 34,736, organizations are having continued success giving their constituents reasons to engage with them online. While email file growth rates remain very robust at 28 percent, they are lower than the 38 percent growth achieved by those same organizations in 2007.

Since most organizations use their website as their primary means of building their email file, there is a strong correlation between website traffic and email file growth. As we saw in Chart 4, the rate of website traffic growth slowed from 27 percent to 20 percent, a net drop of 26 percent. In Chart 5, we see that email file growth slowed from 38 percent to 28 percent, a decline of 26 percent. This decrease suggests that organizations are doing a good job capitalizing upon the growth in website traffic to yield new email addresses, and are becoming less reliant on list uploads, appends, or other “non organic” methods seen in previous studies.

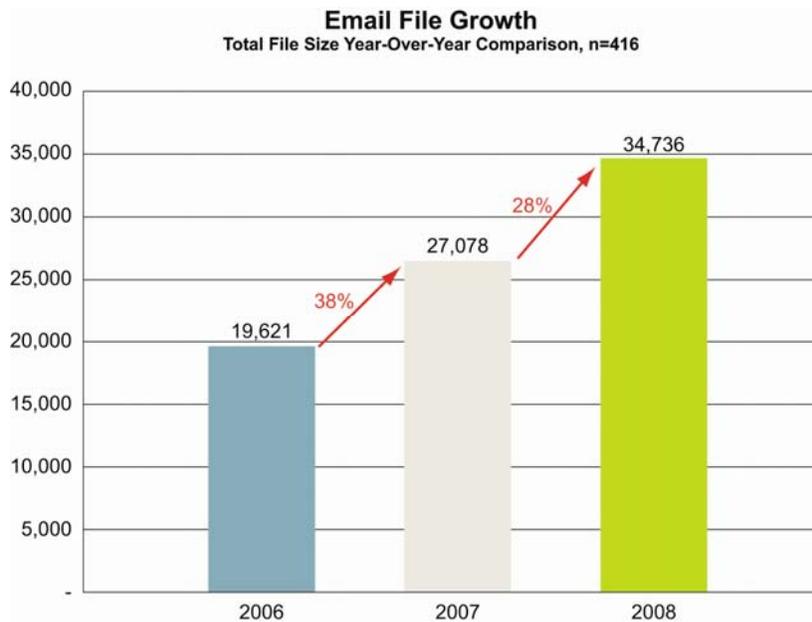


Chart 5: Annual Industry Email File Growth

While many organizations focus on their total email file size, a more important metric is their usable file — the “usable” portion of an organization’s email file, or the portion that is currently opted-in and able to receive communications from the organization. Usable email files continued to grow strongly in 2008. Chart 6 shows a median of 18,951 usable email addresses on file, an 18 percent increase over 2007. This trend is similar to the total email file growth, which at 28 percent, grew slower than the previous year.

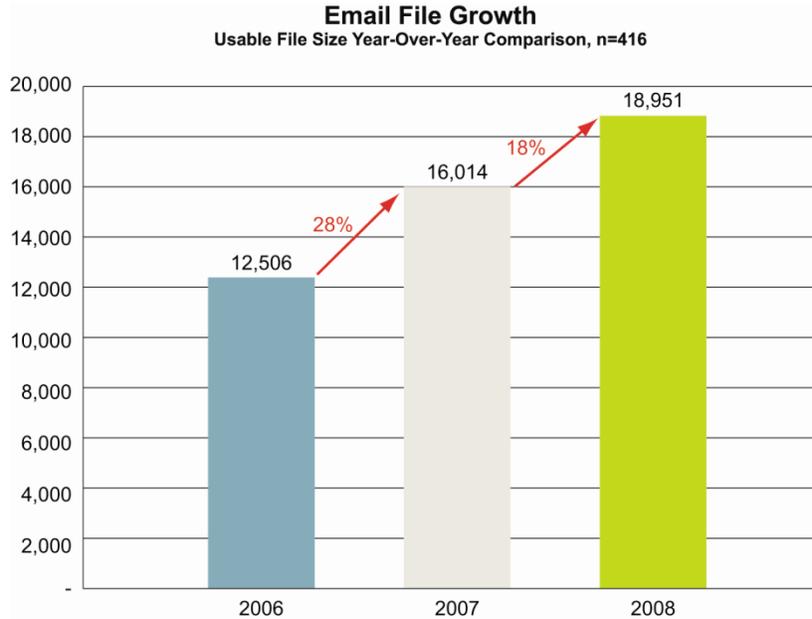


Chart 6: Annual Industry Usable Email File Growth

Nonprofit Vertical Performance Trends

When selecting which organizations to benchmark your results against, there are multiple dimensions that should be considered. We believe that for the majority of organizations, comparing organizations that share a common mission (vertical) — such as all Animal Welfare groups, or all Public Broadcasting Stations — provides the most valid comparison. As such, this study provides separate benchmarks for the industry as a whole, as well as 14 nonprofit industry subgroups, or “verticals”. Now that we have an understanding of how the nonprofit industry is trending at a macro level from online revenue, website traffic, and email file perspective, we need to look at how each vertical is performing.

For each of the metrics in this section, a portion of the 597 study participants may be shown based on their relevance given the time frame indicated, or the metric being discussed. For instance, 389 organizations in this year’s study sent an email newsletter, whereas only 327 sent an online appeal during the year. The “n” value in the title of each chart describes how many organizations are included for that particular metric. For more information, please refer to the Methodology section of this study.

Monthly Website Traffic

For many constituents, your website is their first interaction with your organization. When used effectively, your website can convey the importance of your organization’s mission, help you to register new constituents so you can continue to communicate with them via email and generate desired actions, such as making a donation or signing a petition. Harnessing website traffic is, for most nonprofit organizations, the best tactic for growing their email files. In the seminal research about the online behavior of mid-level and major donors, [The Wired Wealthy Study](#), we learned that 49 percent of online mid-level and major donors will always visit a nonprofit’s website before making a first time gift online or offline.

Chart 7 shows the success that organizations are having driving traffic to their websites, as measured by the median number of unique visitors to their sites per month. What makes the visitor “unique” is that they are only counted once within a given time period — in this case a calendar month — regardless of how many times they visit the website.

Not all of the 597 organizations within this study have their entire website hosted by Convio. Results for any organizations whose website is hosted by solutions other than Convio were not available; therefore, those organizations were excluded from this metric. The 206 organizations in this study that constitute this benchmark had an average of 9,830 unique website visitors per month during the 2008 calendar year. Verticals performing better than the benchmark included Animal Welfare, Public Broadcasting Stations, and Visitation, Performing Arts & Libraries, whose missions have broad appeal.

The Major Emailers, or organizations with email files greater than 250,000, show a median monthly website traffic of 43,629, suggesting a strong correlation between website traffic and email file size.

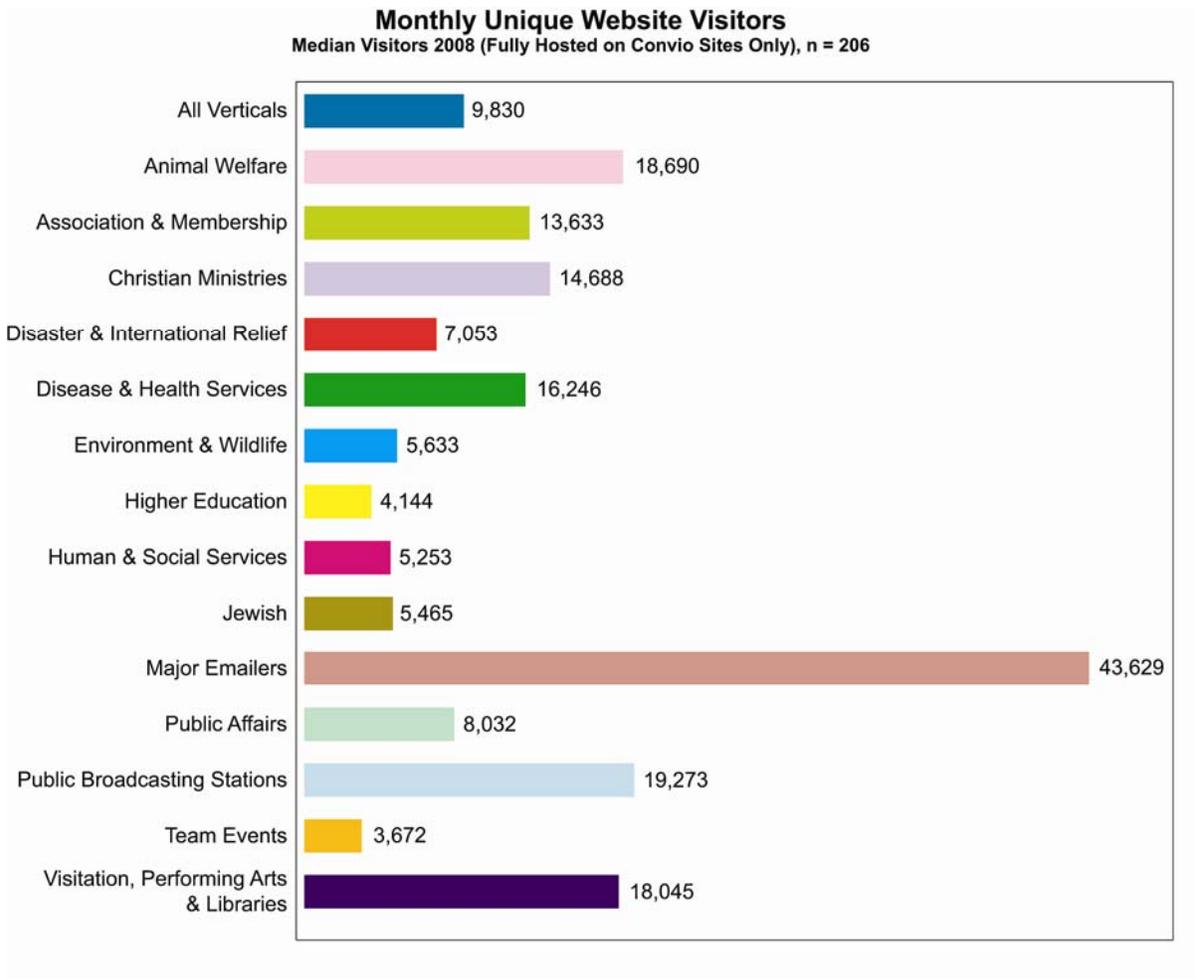


Chart 7: Monthly Website Traffic by Vertical

Comparing these same 206 organizations' average monthly website traffic to the previous year's results, we see in Chart 7 that the year-over-year growth rate for those organizations is 20 percent. At 36 percent, the Association & Membership vertical saw the largest growth rate in annual website traffic in 2008. This increase was driven by two-thirds of the organizations in that vertical experiencing double-digit growth during that period. At 18 percent growth, even Major Emailers with median monthly website traffic of 37,106 in 2007 were able to grow their monthly website traffic to 43,629 in 2008.

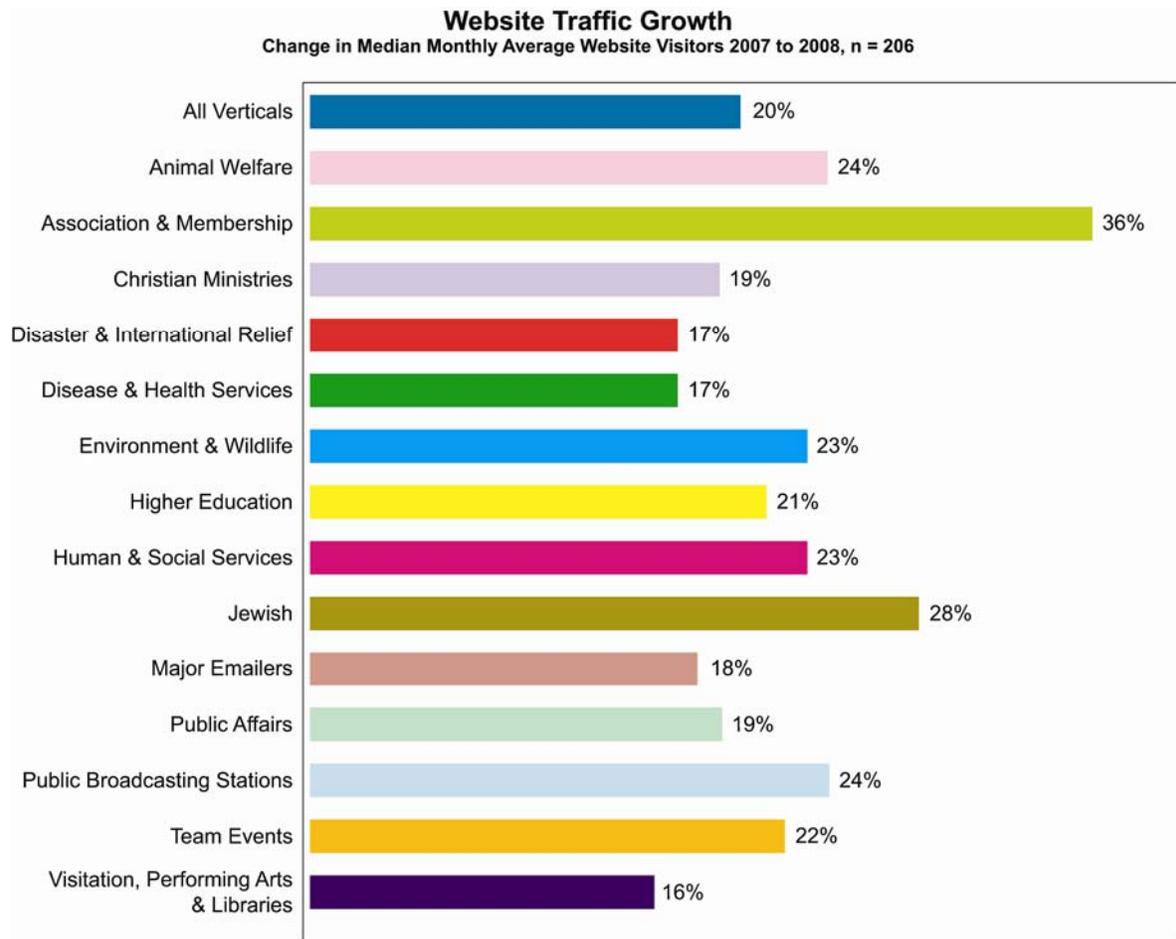


Chart 8: Monthly Website Traffic Growth by Vertical

Registration Rate

The registration rate describes the success that nonprofit organizations have converting website visitors into registered constituents by getting them to voluntarily give their email address. Adding constituents to your email file gives your organization a way to continuously re-engage with them using email.

This metric measures the median percentage of new website visitors who register on the site each month, calculated as the number of new registrants per month divided by total monthly website unique visitors. This includes new people who sign-up for newsletters, sign petitions, make donations, take advocacy actions, buy products/tickets online, etc. This does not include any constituents who were added by the organization's staff via a list upload, data sync with their offline database, or other "non-organic" means. This benchmark is based upon 304 organizations for which Convio hosted their entire website in 2008. Note that while the numerator only includes new people, the denominator includes returning site visitors in the unique visitor count; therefore, the true conversion ratio of new visitors to subscribers is actually higher than the calculated site registration rate.

Chart 9 shows that approximately three percent of monthly unique visitors provided their email addresses to the organization by registering for email updates or taking some other action online. This rate has remained largely unchanged during the three years in which we have studied this metric. The remaining 97 percent of monthly unique visitors have either registered during a prior period or represent an opportunity for the organization to convert them to their email file. Converting website visitors into registered constituents requires an organization to provide compelling reasons to register. The registration rate for the Team Events vertical is nearly six times that of the sector as a whole. This is due to the large number of first time visitors to the organization's website either entering their email address in order to register for an event or making a donation in support of an event participant. As a result, Team Event organizations have a very high number of registrants converting to the email file, but for many of these registered constituents, their engagement with the organization is limited to the event itself.

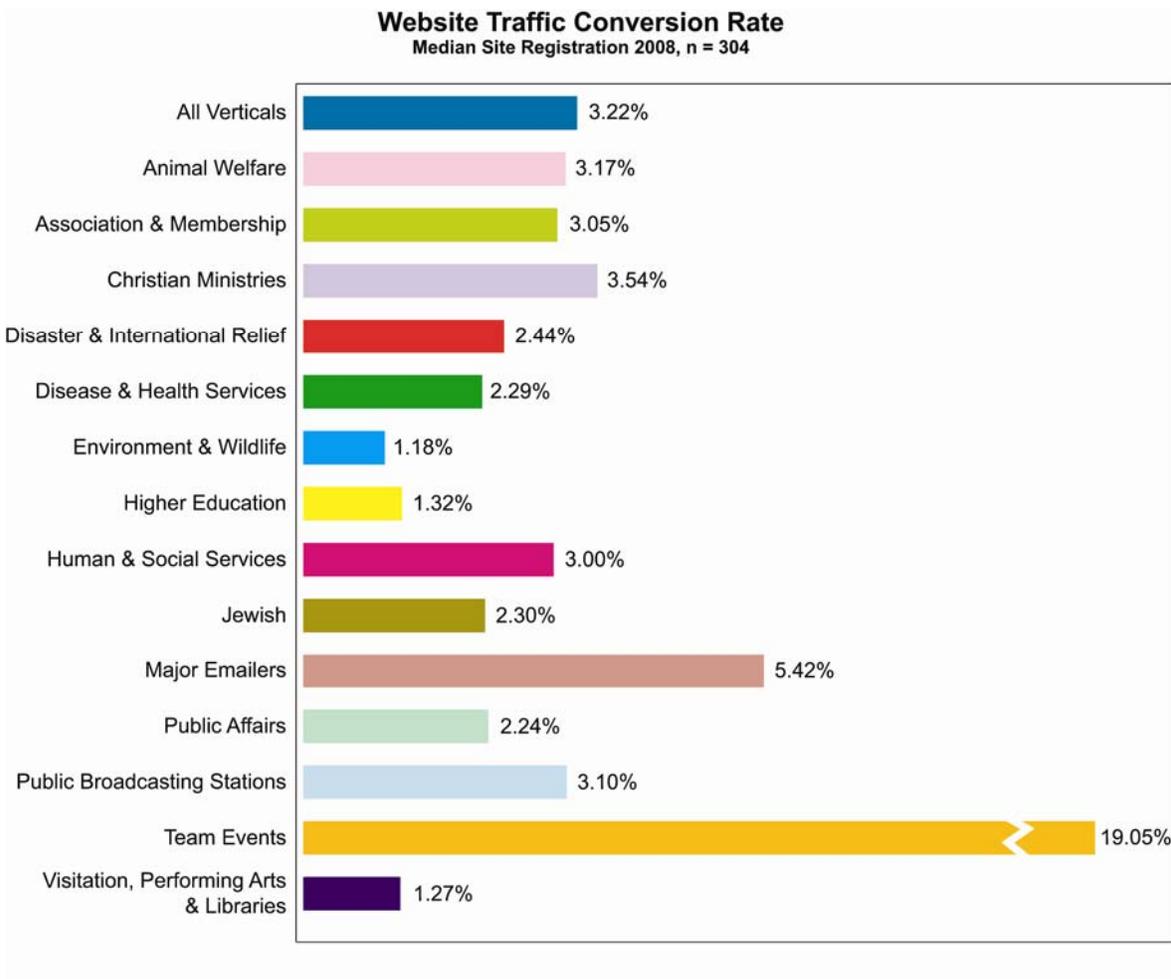


Chart 9: Registration Conversion Rates by Vertical

Email File Size

A key step in any effective online marketing strategy is to build and maintain an email file. This metric measures the total number of constituent email addresses in the Convio Constituent 360™ online database as of December 31, 2008.

The number of email addresses on file has a direct impact on an organization's ability to communicate with, cultivate, and solicit actions from constituents. Generally speaking, the further an organization's communications reach, the more constituents there are available to help them reach their goals — whether that is raising more money, mobilizing more advocates, or simply increasing awareness. However, the quality of relationships and how email addresses were acquired are both very important factors; a large email file alone is not a guarantee of success.

Organizations that have been able to grow email files larger than the median of 34,736 include organizations from the Higher Education, Public Broadcasting Stations, and Visitation, Performing Arts & Libraries verticals. These verticals, which tend to have missions whose appeal is broad, often have compelling reasons for people to opt into their communications, and in some cases have venues or channels which can be utilized to either capture email addresses or to motivate people to go online.

The Major Emailers segment, which we defined as organizations with more than 250,000 email records, had a median file size of 460,826 or more than 13 times the industry average. Even though the Major Emailers are composed of organizations from each of the 13 other verticals, their performance is more like other large organizations than those with similar missions; as such, they were treated separately for the purpose of this study.

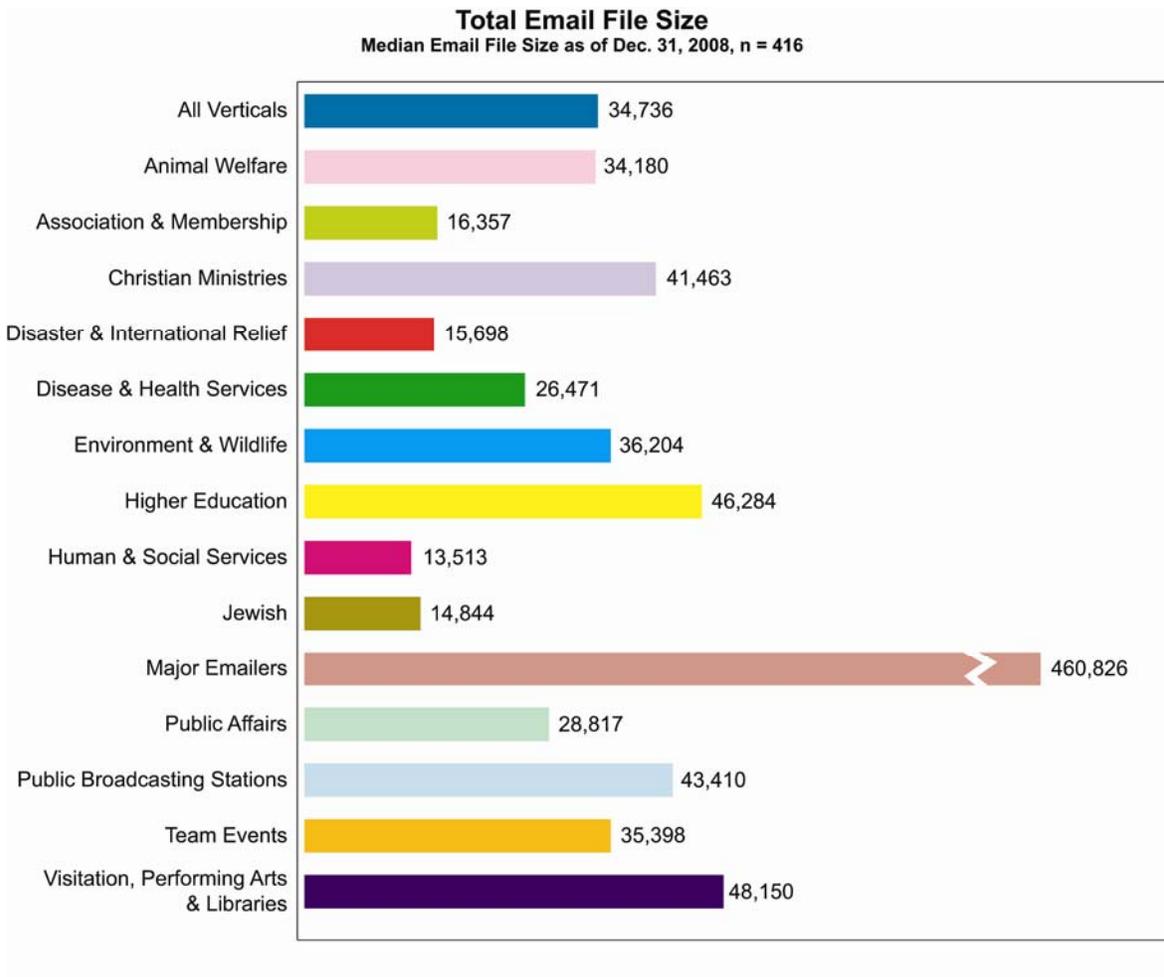


Chart 10: Total Email File Size by Vertical

Although growing a large email file is the first step in creating an effective online marketing program, ongoing success is determined by your organization's ability to continue to communicate with your constituents. Over time, a portion of your email file will become unusable as a result of people opting-out of communications with your organization, or will be lost simply through the natural attrition of people changing their email addresses. What remains is the “usable” portion of the email file, which contains constituent who are currently opted-in to receive email communications from your organization and whose email address is currently valid (meaning that previous attempts to email this address have not reported a “hard bounce” from the constituent’s ISP). Chart 11 shows that the median usable email file size is 18,951.

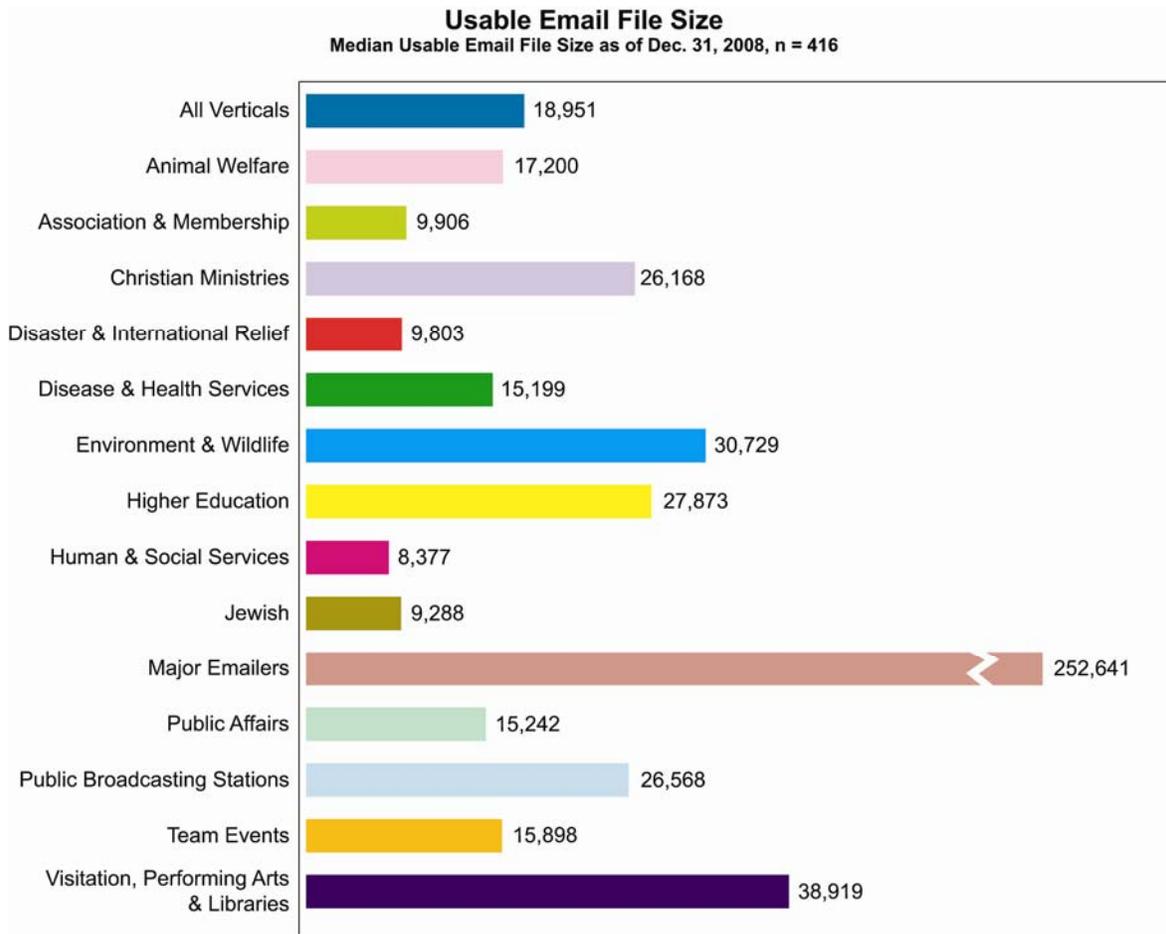


Chart 11: Usable Email File Size by Vertical

In a world of increasing email spam, geographical mobility, and job hopping, the rate of attrition for most nonprofit’s email files will likely increase unless they continue to engage with their constituents and proactively provide ways for constituents to update their email addresses and communication preferences. Chart 12 shows that the percentage of email addresses that are usable at most organizations is 58 percent of their total email file; this means that most organizations are able to engage with approximately three out of every five constituents in their email file.

Those in the Association & Membership and Higher Education verticals have the highest percentage of usable emails on file. This is because they are typically communicating to “closed” communities, such as alumni or members, where their affinity toward the organization is stronger.

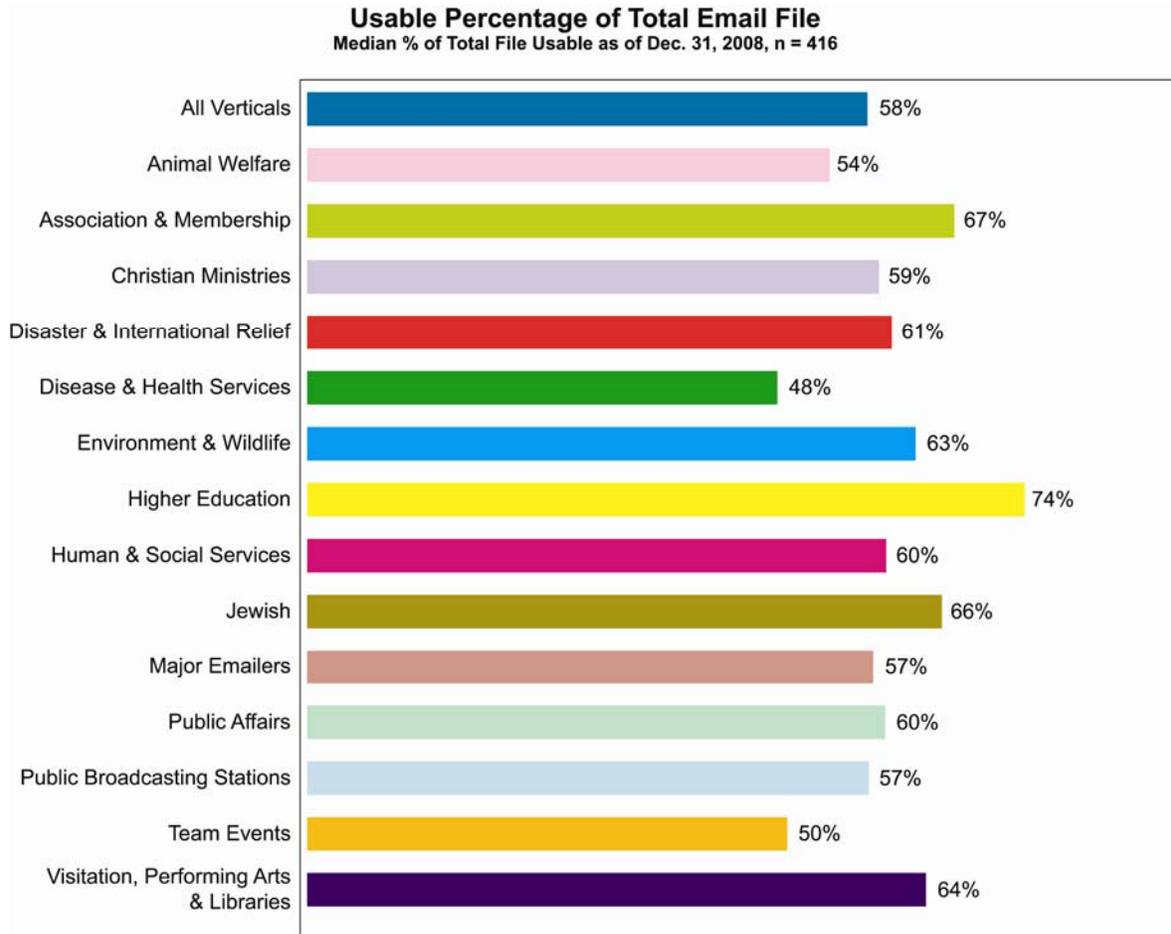


Chart 12: Percentage of Email File Usable by Vertical

Chart 13 shows that for many nonprofit organizations the usable percentage of their email file continues to decrease over time. From 2007 to 2008 the percentage of usable email addresses dropped by three percent, from 61 percent in 2007 to 58 percent in 2008. In other words, the growth rate of organizations' total email files outpaced the growth of their usable file.

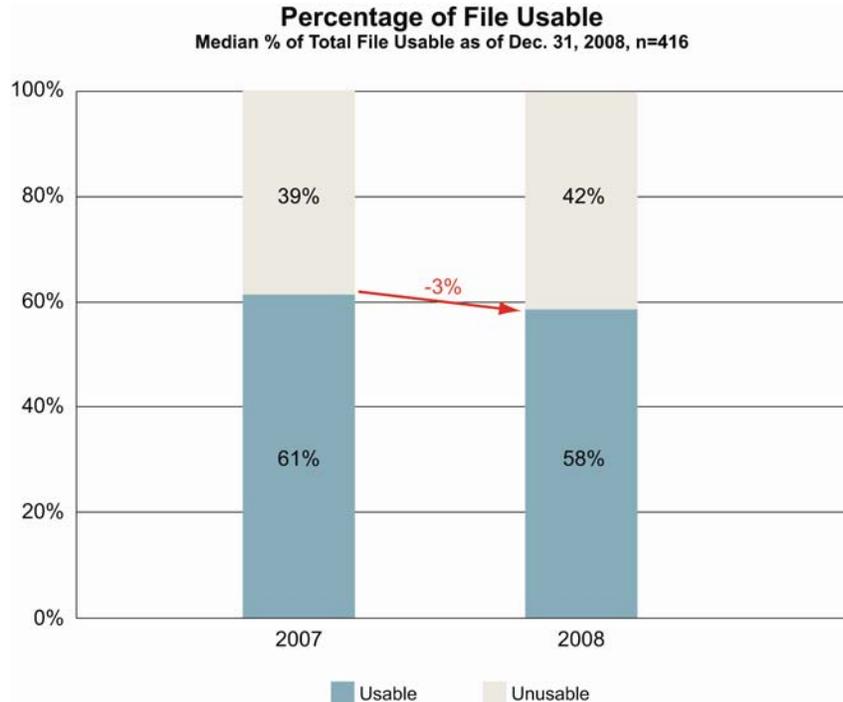


Chart 13: Usable Email File Yearly Comparison

Compared with the previous year, the average total email file growth rate in 2008 was 28 percent. This is eight percent higher than the 20 percent rate of growth in website traffic we saw in Chart 8, suggesting that organizations are growing their lists more effectively than in the past through a combination of offline programs and more efficient website registration programs. In general, organizations have become more proactive in collecting email addresses at events and at their facilities, if appropriate. Some organizations, particularly those in the Major Emailers segment, have also engaged in email appends. An append is a tactic by which an organization pays a third party database company to try and find updated email addresses for any emails that they have that may no longer be usable or to find email addresses for direct mail constituents. For a fee, the nonprofit gains the ability to engage/re-engage with the constituent online.

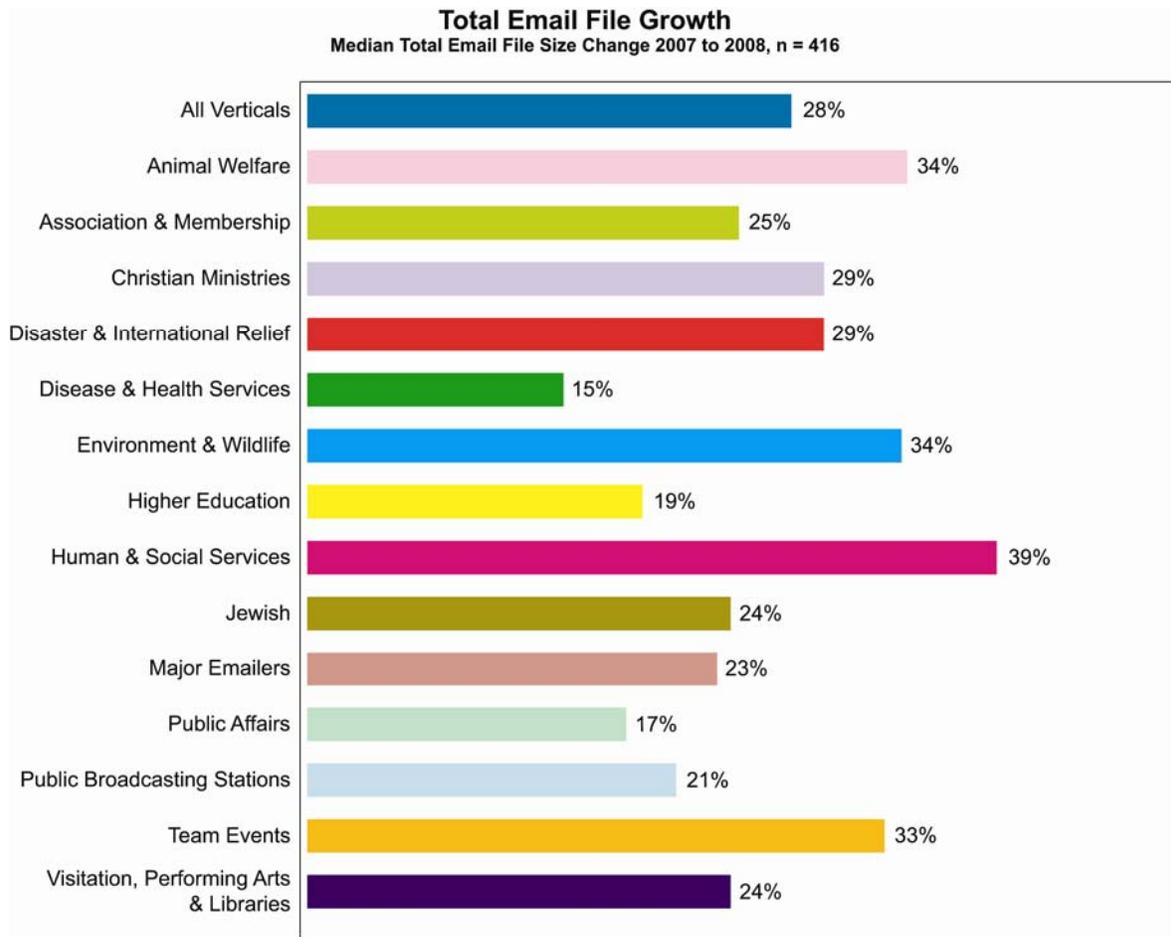


Chart 14: Annual Email File Year-Over-Year Growth by Vertical

Chart 14 shows email file growth by vertical, with Human & Social Services experiencing the fastest year-over-year growth at 39 percent. Many Human & Social Services organizations are relatively new to Internet marketing, and are thus seeing strong gains in file development as they start from a relatively low baseline (a median of 13,513), as shown in Chart 10.

Online Revenue: Fundraising, Growth, Ecommerce, Average Gifts, and Value of an Email Address

The goal of online fundraising is to raise more money at a lower cost than possible through offline fundraising programs alone. These benchmarks measure the total contributions made online over a 12-month period. The total contributions include money raised from “direct” online donations and sustaining gifts, ecommerce store transactions, as well as money raised online to support team-based events using Convio’s TeamRaiser™ product. The metric does not factor in gifts that were made offline by constituents who originated or engaged online. Some organizations are finding that a meaningful proportion of major donors are now originating from the organization’s online marketing efforts. A vast majority of major gifts are still given offline and are not factored into this metric.

Chart 15 shows that the median amount raised for the 12-month period ending December 31, 2008, was \$235,334. On average, organizations in the Christian Ministries, Disaster & International Relief, Public Broadcasting Stations, and Team Events verticals raised more than the All Verticals benchmark. Not surprisingly, Major Emailers raised the most money online with a median of just over \$1.5 million; however, they generally have significant offline marketing programs, budgets, and other resources at their disposal. Once again, Major Emailers were broken out separately for the purposes of this analysis.

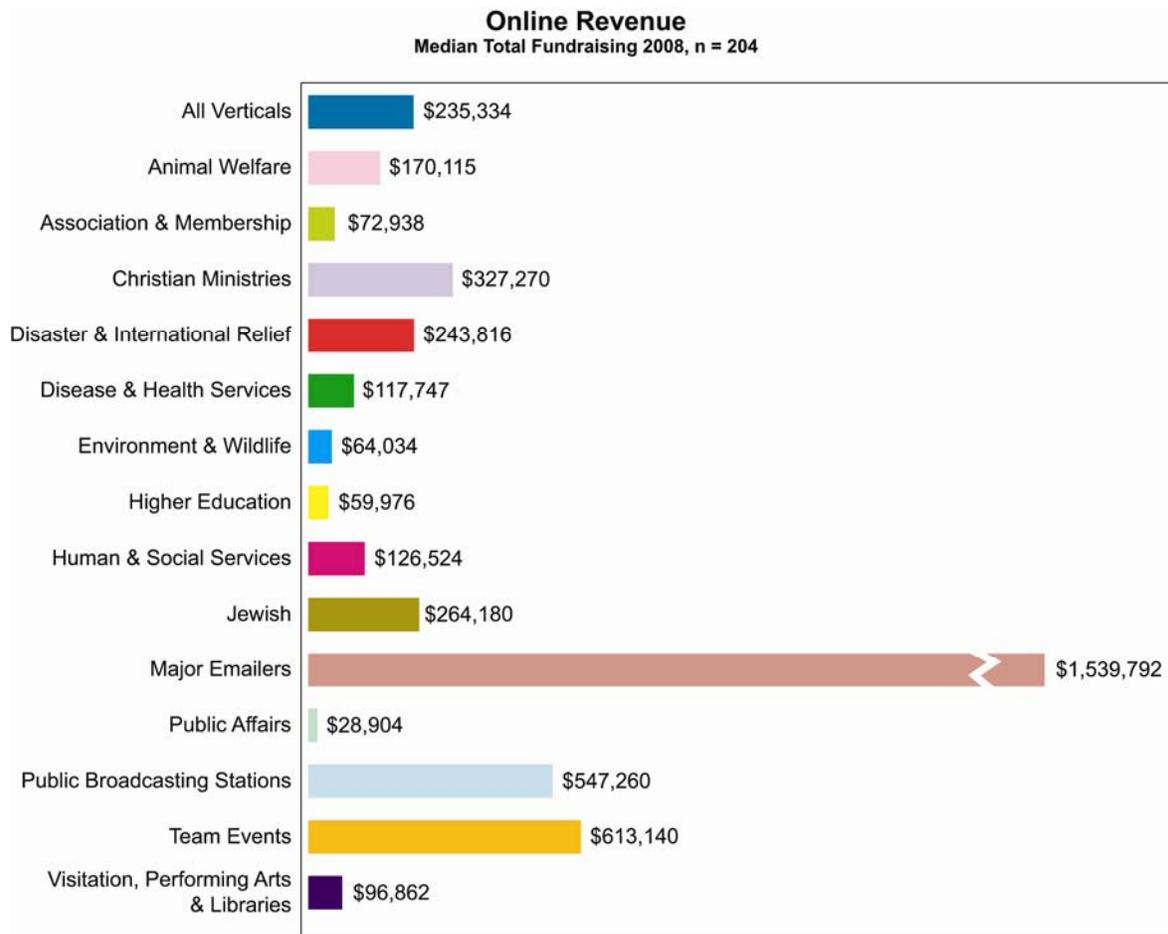


Chart 15: Online Revenue (Fundraising) by Vertical

The 204 organizations in the previous metric were also involved with online fundraising at Convio for the entire previous year. For this group, online revenue grew from \$207,286 in 2007 to \$235,334 in 2008, representing a growth rate of 14 percent. The growth in 2008 was driven by an increase in the median number of gifts received by these organizations.

The verticals with the highest rate of online revenue growth include Animal Welfare, Human & Social Services, and Jewish. Not all verticals experienced growth from 2007. For instance, the Environment & Wildlife and Public Affairs verticals both experienced negative growth rates at negative eight percent and negative five percent, respectively. However, not all nonprofits within these verticals experienced a declining growth rate. If we include the results of very large environmental and public affairs groups from the Major Emailers vertical, then the growth rate for the Environment & Wildlife benchmark improves from negative eight percent to positive 31 percent, and the Public Affairs benchmark improves from negative five percent to negative one percent. These changes suggest that, in comparison to small and medium sized organizations, the large groups in these verticals had far more success growing online revenue from 2007 to 2008.

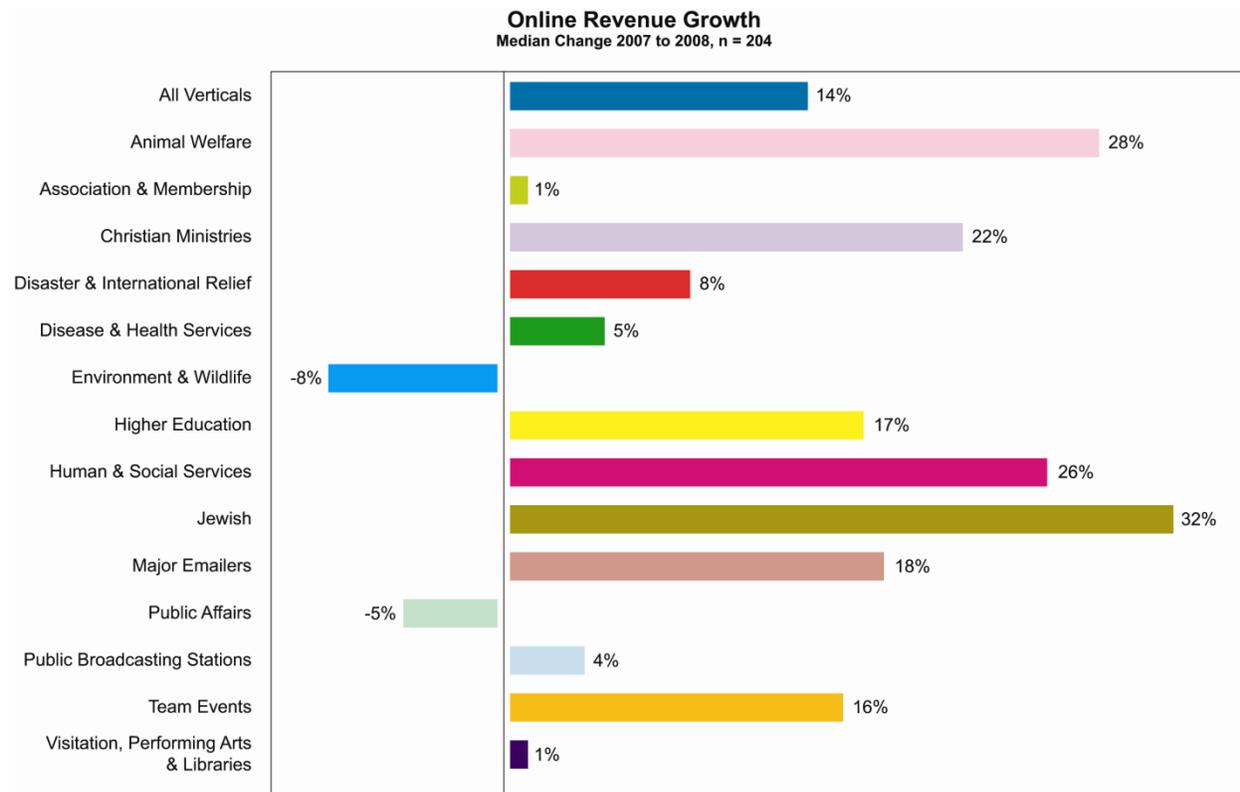


Chart 16: Online Revenue Year-Over-Year Growth Rate by Vertical

Chart 17 shows the average online gift (measured as the sum of all online donations divided by the number of online gifts), which gives us an indication of the average amount each constituent gave. The average gift raised online during the period studied was \$67.47, largely unchanged from 2007's average gift of \$67.51. The Major Emailers and Team Events verticals had the largest number of gifts in this year's study; however, as the Major Emailers' and Team Events' average gifts show (at \$59.91 and \$50.56, respectively), gifts for these verticals tended to be smaller than those in other verticals. Several verticals received average online gifts much higher than the overall benchmark. The Higher Education vertical's average gift was more than double the All Verticals benchmark. The Jewish vertical's average gift was more than six times the overall median. To generalize, groups that are more reliant on mass fundraising techniques, like direct response and a-thon events, see smaller gifts online commensurate with smaller average gifts offline. This is in contrast to groups who are more focused on major and planned gifts from a smaller number of individuals. Another influence on the average online gift is the emergence of sustainer or monthly giving programs. If an organization is successful in building a sustainer program, total revenue increases, but the average online gift actually declines as each separate monthly contribution is counted towards average gift or transaction size.

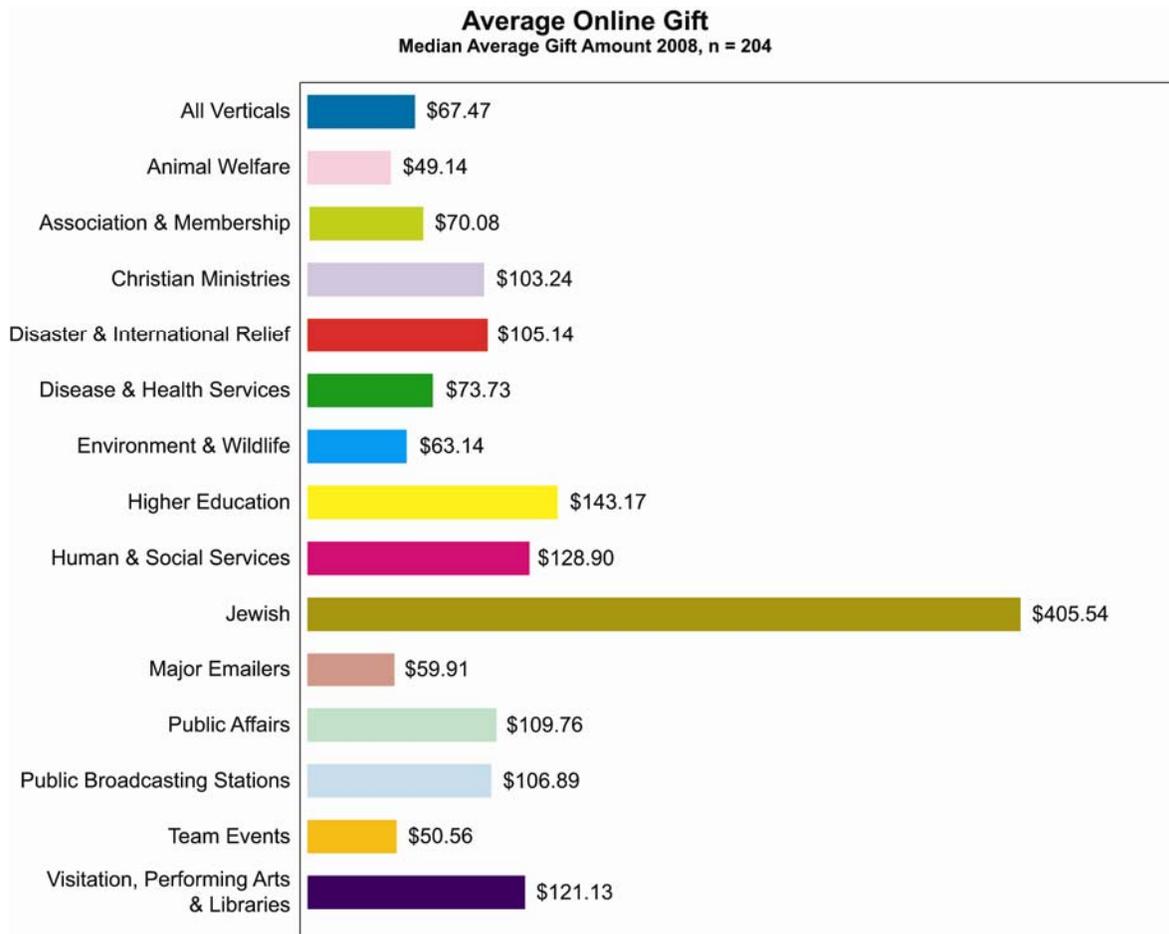


Chart 17: Average Online Gift (Fundraising) by Vertical

In addition to the average online gift, the average dollars raised online annually per email address is another way for nonprofits to gauge how efficiently they are generating online revenue from each online constituent. We know from prior analysis that many online donors are “dual channel” donors — meaning that they give both online and through mail. Offline giving is not included in this metric. Ideally, your organization should try to quantify the total lifetime value of your constituents by including both online and offline revenue. This approach will help you better understand the extent to which communicating with your constituents via multiple channels impacts your organization’s fundraising results.

As a percentage of the total file, the average dollars raised online per email address across sectors is \$6.76. However, as we saw in Charts 11 and 12, roughly half of the email addresses on file are no longer able to be solicited via email. Looking at this same metric again, but this time as a ratio of the usable file, we see in Chart 18 that the average dollars raised online based on only the usable email addresses is \$13.96. Organizations in the Disaster & International Relief vertical achieved a very high online revenue yield per email address in 2008, partly in response to major disasters in China (earthquake), Myanmar (cyclone), and the United States (Hurricanes Ike and Gustav). The value of an email address for this vertical's organizations was approximately double the sector-wide benchmark. The value of an email address within the Team Events vertical is also high, mainly because a large proportion of new email addresses captured are those of friends and family members making a donation to a participant.

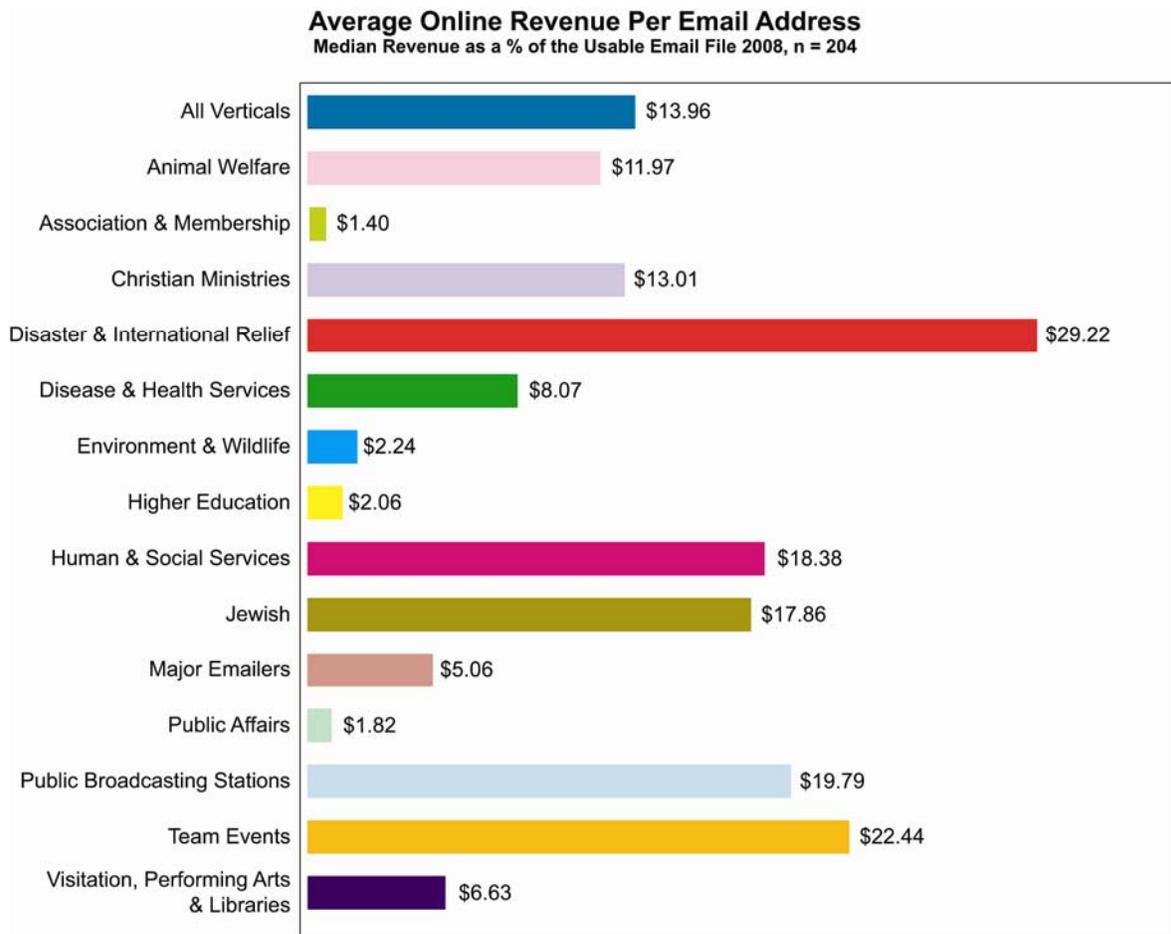


Chart 18: Online Revenue Per Usable Email Address by Vertical

For many organizations, especially in certain verticals such as Christian Ministries, Major Emailers, and Public Broadcasting Stations, ecommerce is deliberately used as a major source of fundraising – either to sell physical items, offer premiums tied to giving levels, or to promote virtual gifts (e.g., adopt an animal). In this case, online revenue comes from a shopping cart as opposed to a donation form. For the 217 participants in this year’s study who are actively employing ecommerce as a fundraising tactic, we see in Chart 19 the incremental revenue being raised by each vertical through ecommerce.

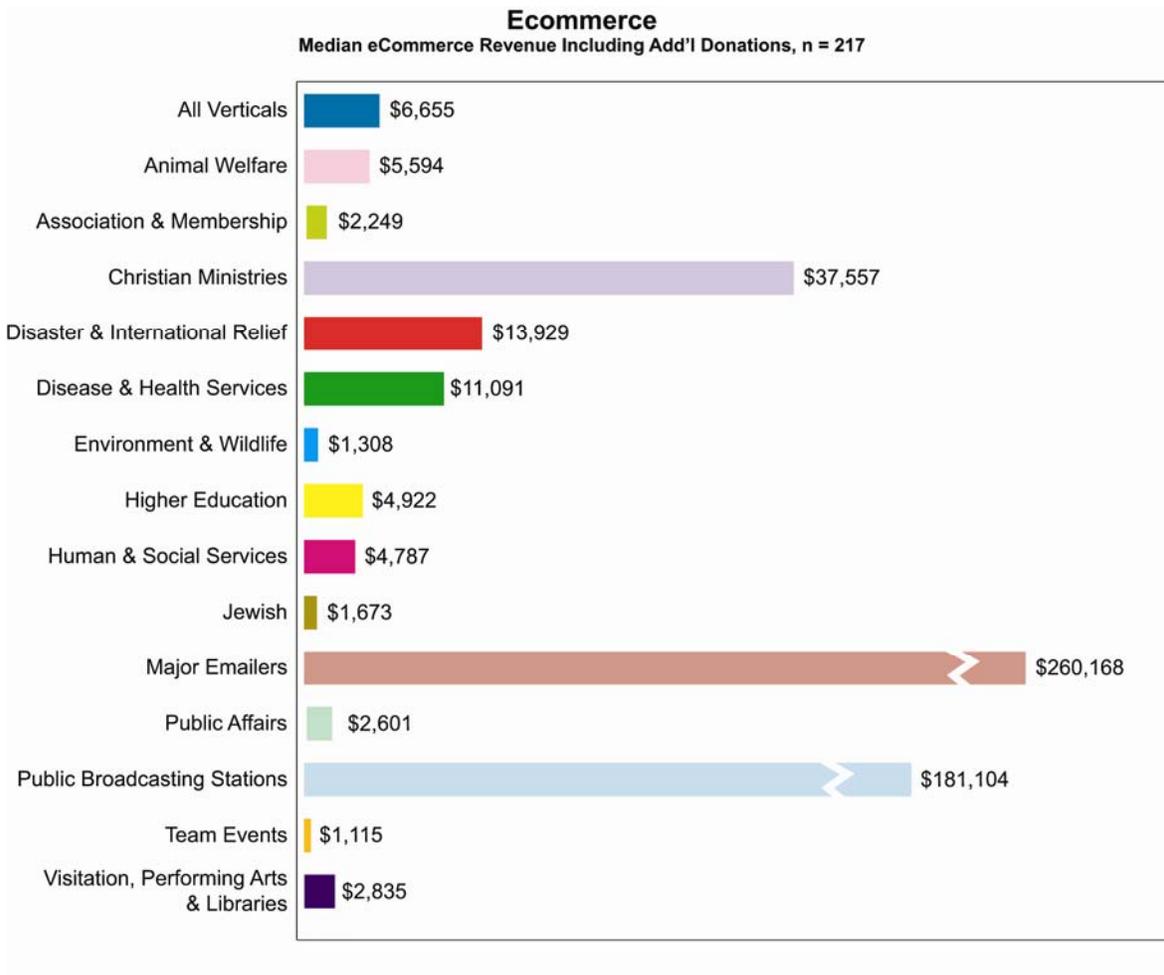


Chart 19: Ecommerce by Vertical

The purchase of a tangible product through an e-store transaction does not preclude organizations from asking their constituents to make an additional donation above and beyond the amount of the product. Some organizations, such as those in the Christian Ministries vertical, have found that this tactic can boost their e-store revenue by five to ten percent.

Fourth Quarter Fundraising

Given the heightened concern about the economy starting in the fourth quarter of 2008, we took a closer look at how the final three months of 2008 compared to the rest of the year by vertical. For the fourth quarter, the median nonprofit raised \$62,348 during the three months ending December 31st, 2008. Not surprisingly, given their size, Major Emailers raised \$670,002 — approximately 11 times the All Verticals benchmark. Compare that to the entire year of fundraising results in Chart 15, where the Major Emailers raised approximately seven times that of the industry. These numbers suggest that, in comparison to small and medium sized organizations, large organizations did a better job weathering the storm in Q4 2008.

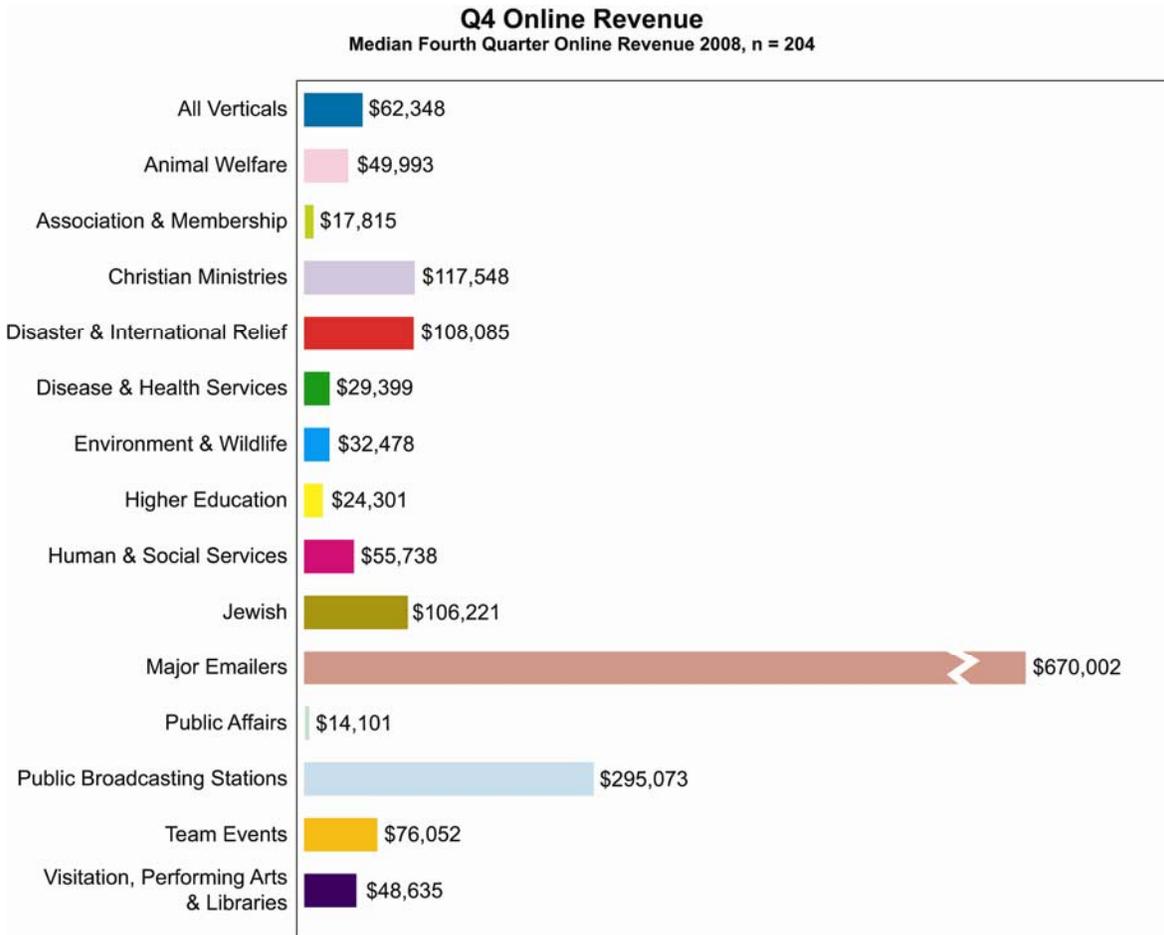


Chart 20: Fourth Quarter Online Revenue by Vertical

Compared to 2007, the average gift in 2008 was flat for the year; however in Q4 2008, the average gift was \$84.51, down six percent from \$90.32 in 2007. Verticals fortunate enough to see an increase in revenue during this period did so by receiving a larger number of gifts throughout the year to offset the negative or flat average gift amounts received.

Historically, at year end, donors give gifts that are 30 percent higher than those made in other quarters. As seen in Chart 21, the average gift in Q4 was \$84.51, compared to gifts averaging around \$65 the rest of the year.

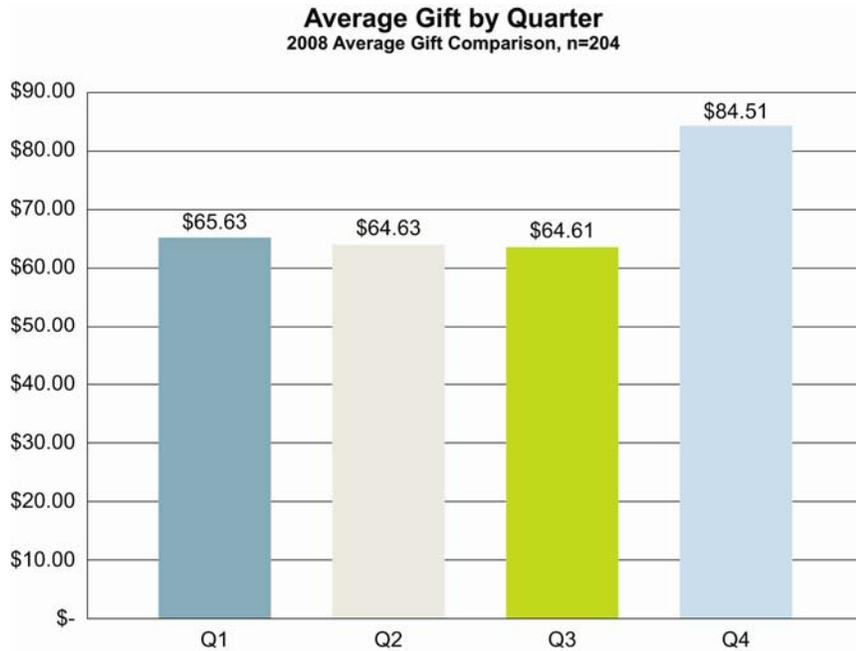


Chart 21: 2008 Average Gift by Quarter

Comparing how organizations fared in the fourth quarter of 2008 to the same quarter 2007, we see that nonprofits actually experienced an overall three percent growth in online revenue compared to the contraction that many were anticipating. Clearly, three percent growth compared to 14 percent growth for the full year indicates that the economy did have a significant impact on online fundraising during that period.

Chart 22 shows that not all verticals experienced positive growth in Q4. In the Disaster & International Relief vertical, for instance, the decline of 25 percent seems to be driven mainly by small and medium sized organizations. Adding back the large Disaster & International Relief organizations' results from the Major Emailer category, we see the Q4 growth rate improve from negative 25 percent to negative 11 percent. While this suggests that organizational size did play a part in the decline, many Disaster & International Relief organizations may simply have been experiencing donor fatigue after a series of major international disasters in the first half of the year, whereas many Public Affairs groups may have been competing with each other for attention during the election season.

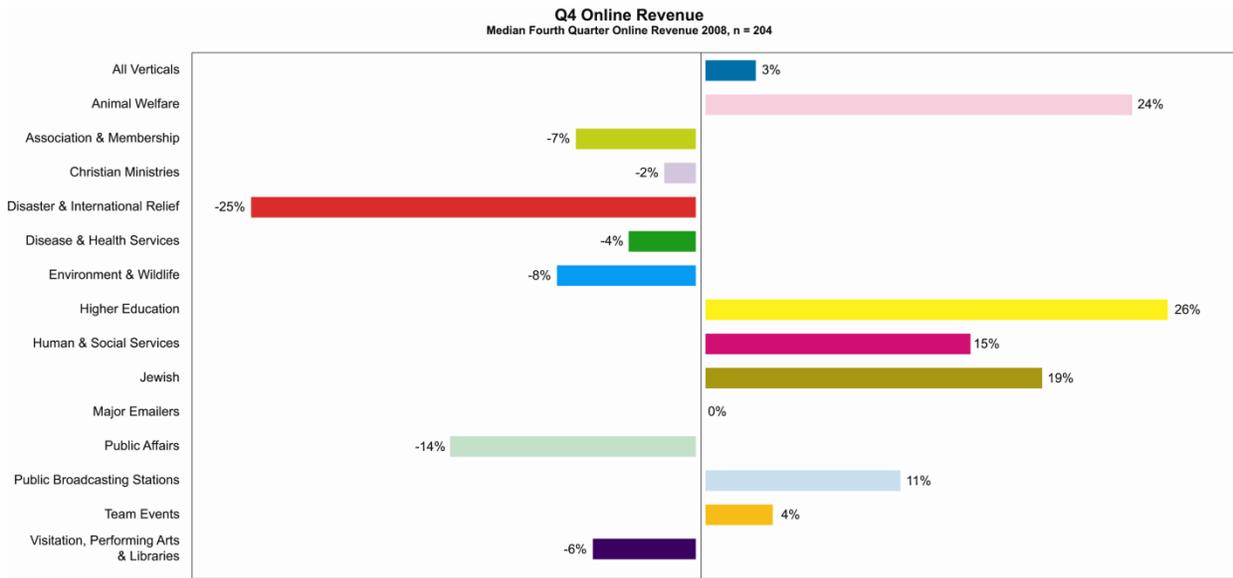


Chart 22: Fourth Quarter Online Revenue Growth by Vertical

Email Appeals: Open Rates, Click-Through Rates, and Response Rates

As opposed to direct mail, telemarketing, and other fundraising channels, email appeals allow nonprofits to solicit constituents for a very low cost. An email appeal's effectiveness can be measured at various stages by looking at the open rate, click-through rate, and donation (or response) rate.

The open rate is the percentage of recipients who open (view) a message divided by the number of messages delivered. As an industry benchmark, limited emphasis should be placed on this metric because image rendering and preview pane issues in email readers, in addition to the increasing use of PDAs (Personal Digital Assistants, like BlackBerry®), can skew open rates. Nevertheless, the metric is interesting because it allows organizations to track major trends, as well as variances to their peers' performance. In calculating this metric, we only count "unique opens"; we do not count instances where a recipient opens an email appeal more than once. The segment average for each vertical is seen in Chart 23.

Studying 7,105 separate email fundraising messages from 327 nonprofit organizations during the time period of January 1 – December 31, 2008 revealed an average open rate of 20 percent. This is in contrast to the 14 percent open rate seen in last year's benchmark study. We believe that this difference is due mainly to a change in the methodology for calculating email performance metrics between this year and last year's study. More information is available in the Methodology section of this report.

Email communications whose primary objective was clearly not fundraising in design — such as fundraising event reminders, advocacy alerts, general organization communications, and monthly email newsletters — were excluded from this metric even if their content included a soft ask (an ask for donations somewhere in the communication). The sector-wide average is pulled down by Major Emailers, which send a large proportion of the emails studied and had a median open rate of 15 percent. Some verticals, such as Team Events, achieved an open rate that was higher than the sector-wide benchmark. (Note: Team Event emails include only those emails sent by the organization, and do not include fundraising solicitation emails sent by event participants.)

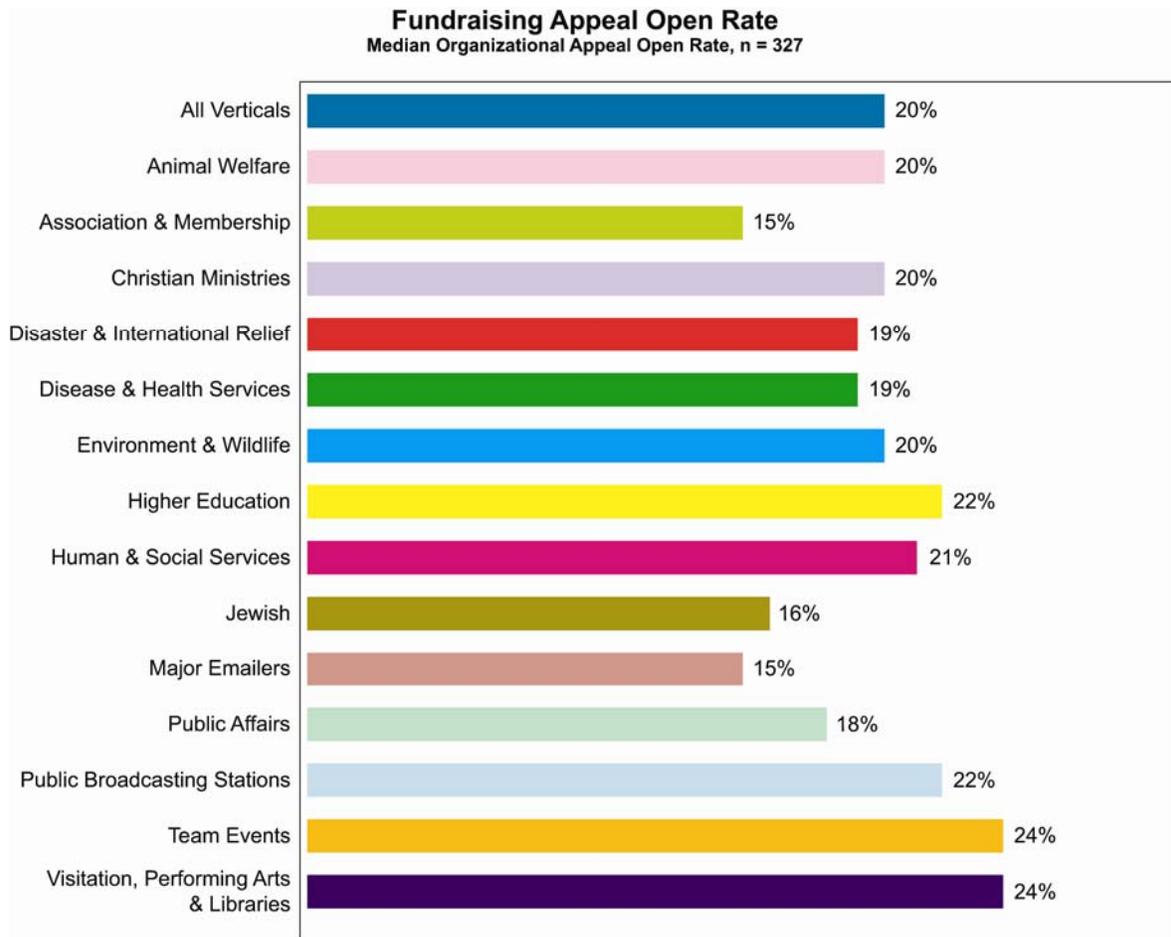


Chart 23: Email Appeal Average Open Rate

The click-through rate is the percentage of recipients who clicked on one or more links contained within the email appeal divided by the number of email appeals delivered. The 7,105 separate email fundraising messages from the 327 organizations in this study during this period had a median click-through rate of 2.07 percent. Organizations from the Animal Welfare, Association & Membership, Christian Ministries, Team Events, and Visitation, Performing Arts & Libraries verticals all had greater than the sector-wide average.

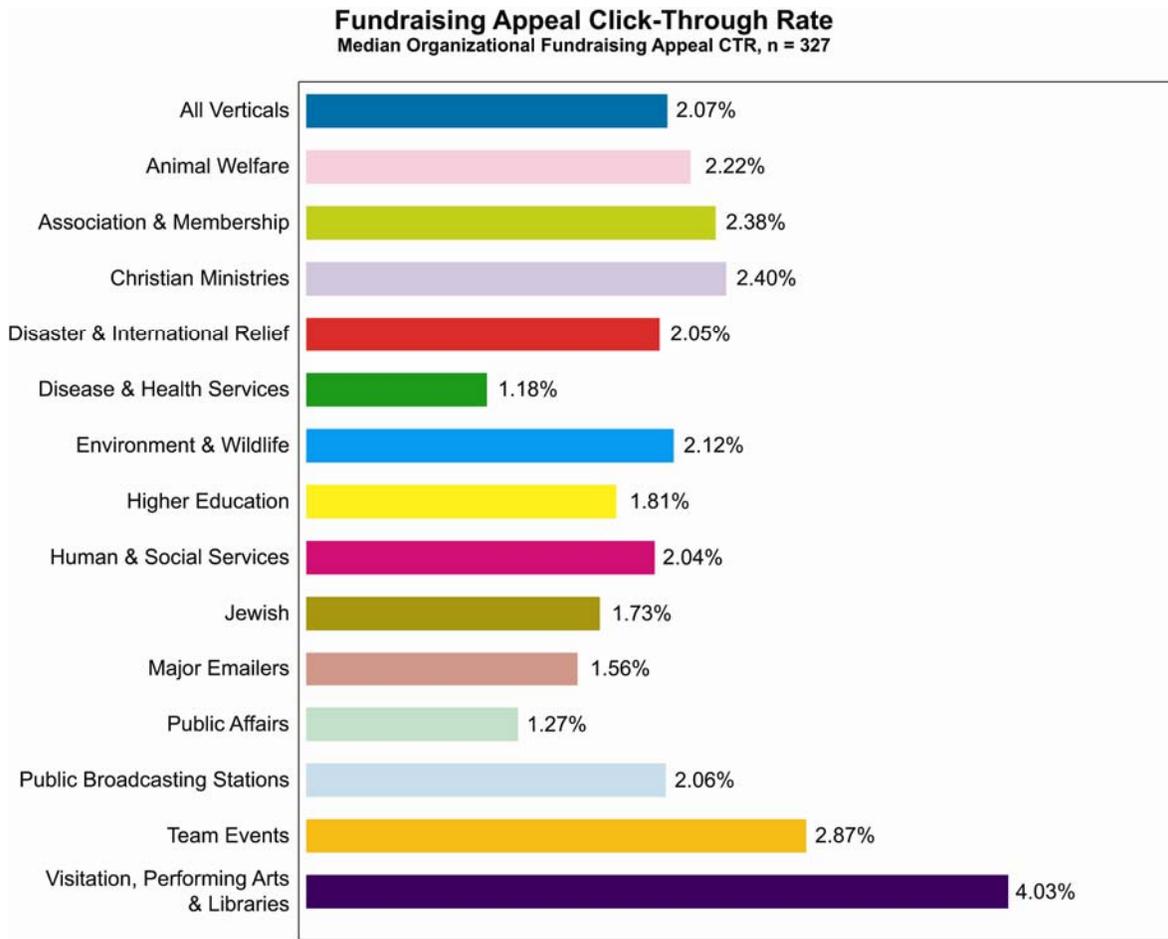


Chart 24: Email Appeal Average Click-Through Rate

The success of an online fundraising appeal is ultimately measured by the proportion of the recipient list that actually makes a donation to the organization, or response rate. Chart 25 shows that the median blended appeal response rate across verticals is 0.13 percent.

The response rate can be influenced by many factors, including the mix of prospects and active donors in the recipient list, and the degree to which the list is composed of “organically” acquired versus appended emails. Appended emails tend to generate much lower open, click-through, and response rates. Appeals sent to lists that consist predominantly of prospects will experience lower response rates than those that consist mainly of existing donors. In this metric, we see a blended response rate, or a response rate for organizations sending email appeals to files that include both prospects and existing donors.

We see the influence of a large donor file in membership-driven organizations — such as those in the Association & Membership and Public Broadcasting Stations verticals — that send appeals to existing members at renewal time. Chart 25 shows that the Public Broadcasting Stations vertical's response rate of 0.45 percent is approximately three times the All Verticals benchmark. Organizations in the Public Affairs and Visitation, Performing Arts & Libraries verticals had lower response rates; these organizations have extremely large files of both prospects and donors that they regularly solicit.

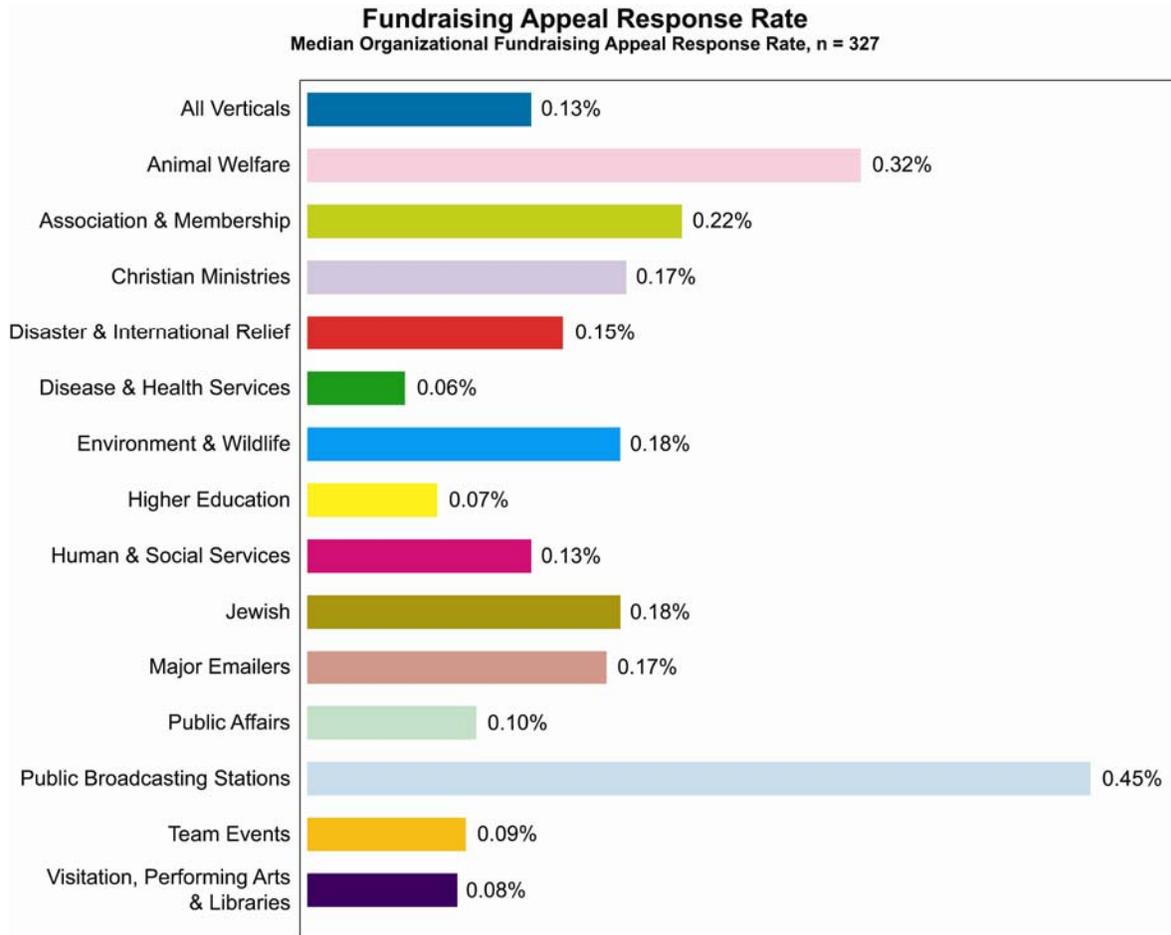


Chart 25: Email Appeal Average Blended Response Rate

Email Newsletters: Open and Click-Through Rates

Email newsletters allow fundraisers to build and maintain relationships with constituents before asking them for a donation. They are also a cost-effective way to build relationships with new constituents, increase engagement, and educate supporters about your organization’s mission. As such, it is critical that constituents read these important communications.

In calculating this benchmark, we reviewed 389 organizations that sent weekly, monthly, bi-monthly, or quarterly email newsletters during the period of January 1 – December 31, 2008. The median open rate for the 17,193 email newsletters studied was 23 percent. Email newsletters from organizations within the Higher Education and Visitation, Performing Arts & Libraries verticals had the highest newsletter open rates at 28 percent. As noted in the email appeal open rate metric, the email newsletter open rate of 23 percent in All Verticals is higher than the 15 percent open rate seen in last year’s study. Once again, we believe that this is due mainly to changes in methodology.

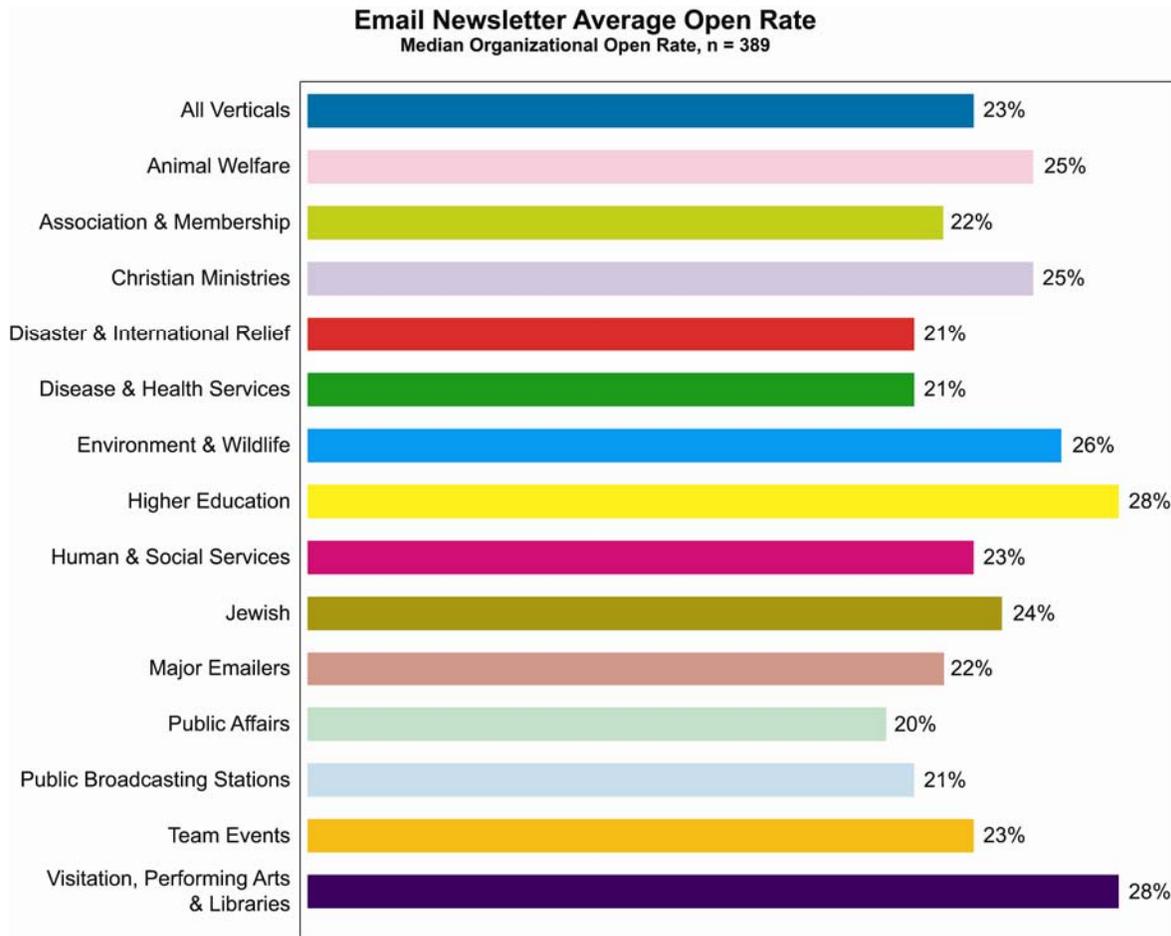


Chart 26: Email Newsletter Average Open Rate

At 3.96 percent, the average email newsletter click-through rate is double that of email appeals, showing constituents' willingness to click items have a lower level of commitment than a fundraising ask. Email newsletters from organizations in the Environment & Wildlife vertical had the highest click-through rate at 6.36 percent, followed by Animal Welfare and Christian Ministries, both over five percent.

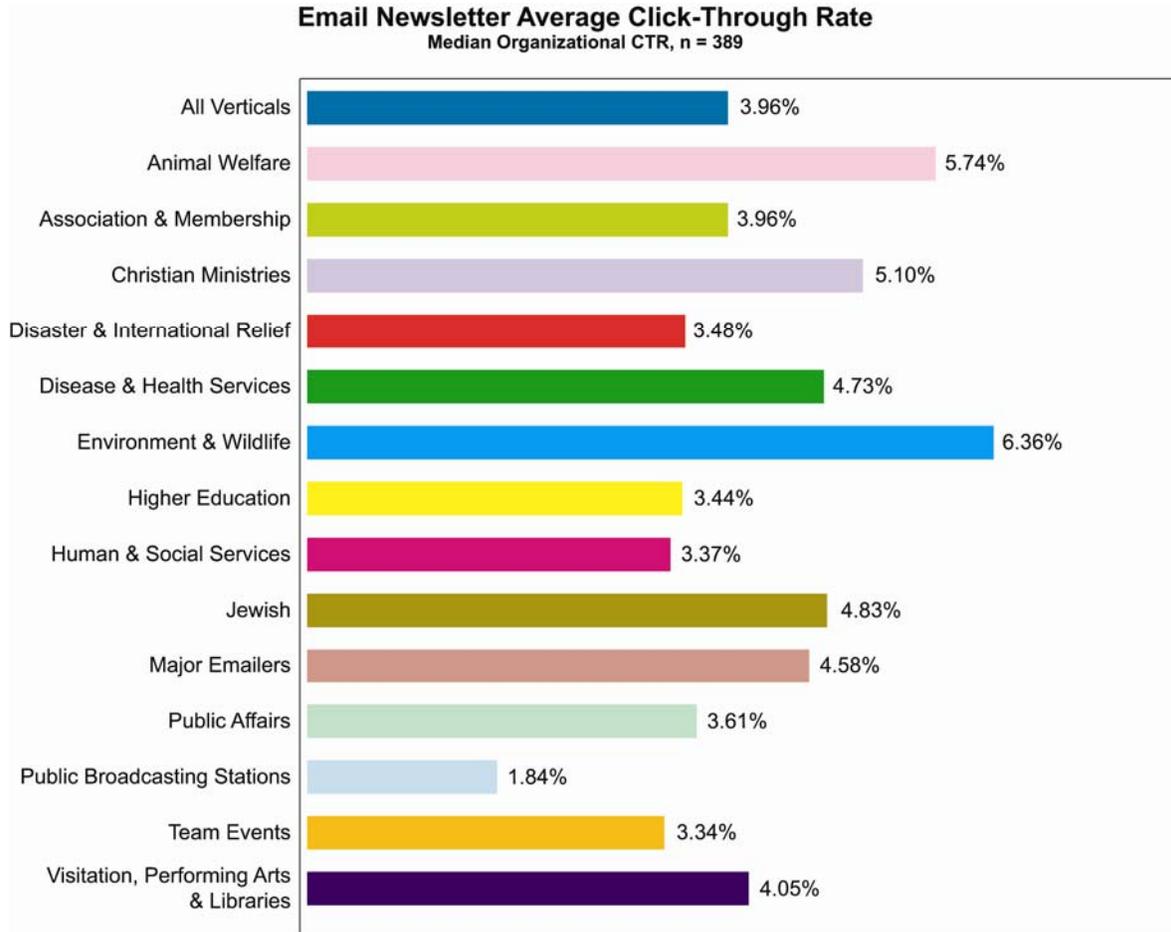


Chart 27: Email Newsletter Average Click-Through Rate

Advocacy

Online advocacy allows nonprofit organizations to build and mobilize a loyal network of constituents ready to support the issues most important to their organizations. Of the 597 study participants, 136 were engaged in Convio Advocacy during the period of January 1 – December 31, 2008. Verticals such as Environment & Wildlife and Public Affairs are traditionally heavy users of advocacy because this tactic promotes their missions or causes; other verticals, such as Public Broadcasting Stations generally do not use advocacy.

Chart 28 shows that of those organizations active in advocacy, 4.65 percent of constituents on their email file have taken at least one advocacy action. For some verticals, such as Environment & Wildlife, as much as 12 percent of their constituents have engaged in advocacy. (Note: Outside of the Major Emailers vertical, no study participants from the Higher Education, Public Broadcasting Stations, or Disaster & International Relief verticals engaged in advocacy during this period.)

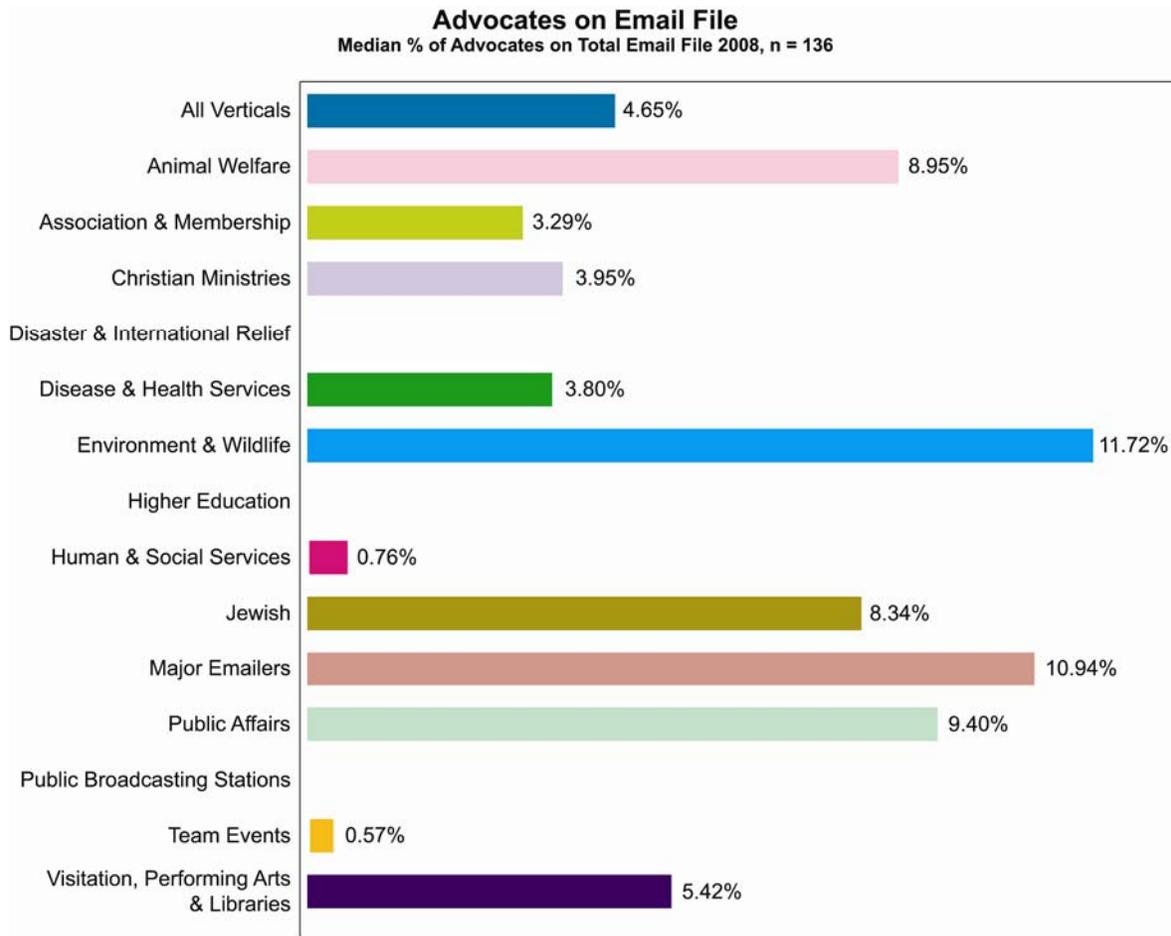


Chart 28: Advocates on Email File

Another important metric is how effectively organizations convert loyal advocates to financial supporters of their organizations. Chart 29 shows that 5.87 percent of online activists have also supported these organizations financially online. This metric does not factor in activists who have made a gift offline, but not online. For some verticals, such as Animal Welfare, this metric is almost three times the industry average, which suggests that online advocacy, in addition to advancing an organization’s mission, can be a significant source of prospects for fundraising. Organizations are becoming increasingly sophisticated at converting activists to donors, but much potential still remains.

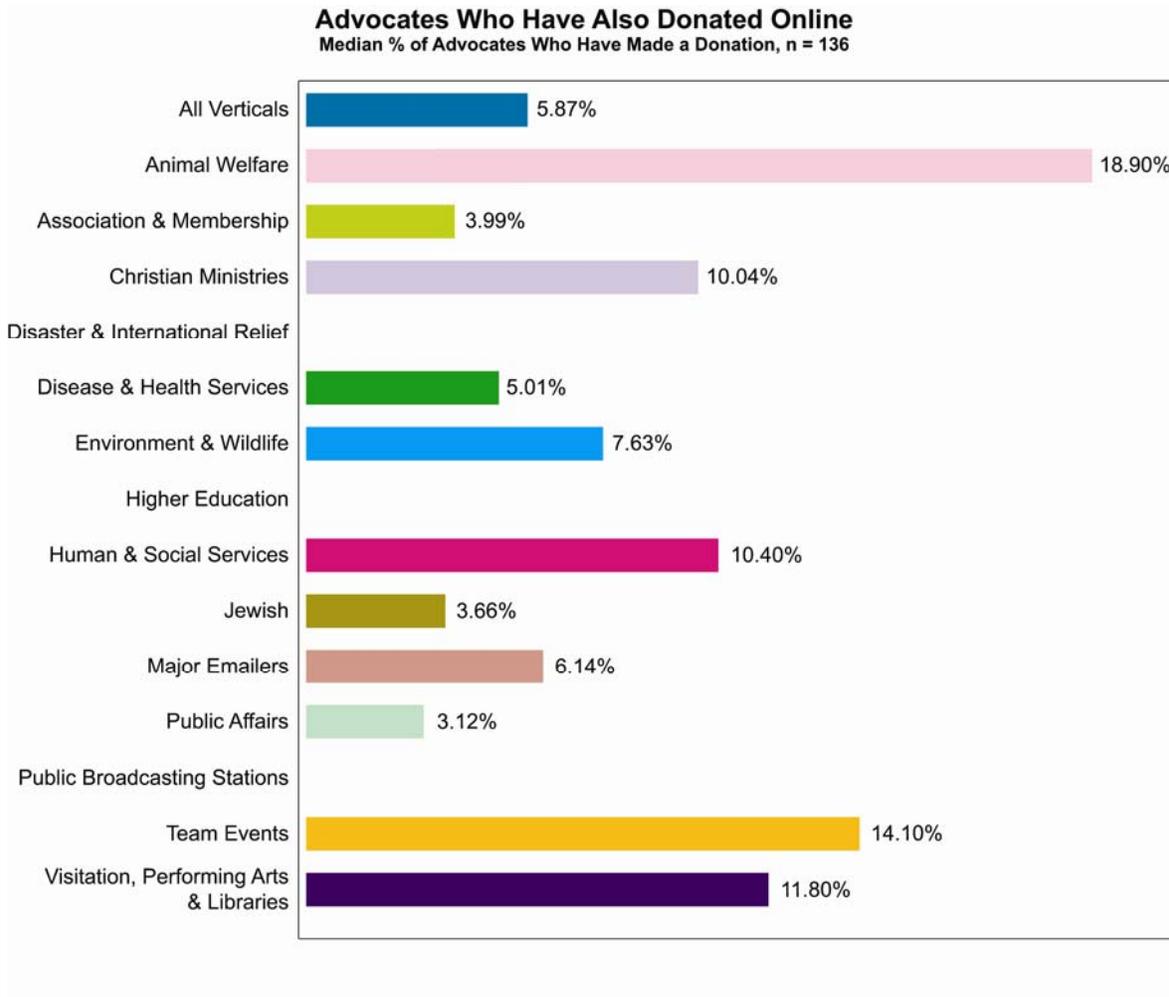


Chart 29: Advocates Who Have Also Donated Online

Conversely, Chart 30 shows that 8.35 percent of all online donors on file have also taken an online advocacy action. For the Environment & Wildlife vertical, nearly 22 percent of online donors are engaged in online advocacy. We believe that engaging donors in online advocacy helps to cement relationships with your cause and organization, thus enhancing donor retention rates and lifetime value.

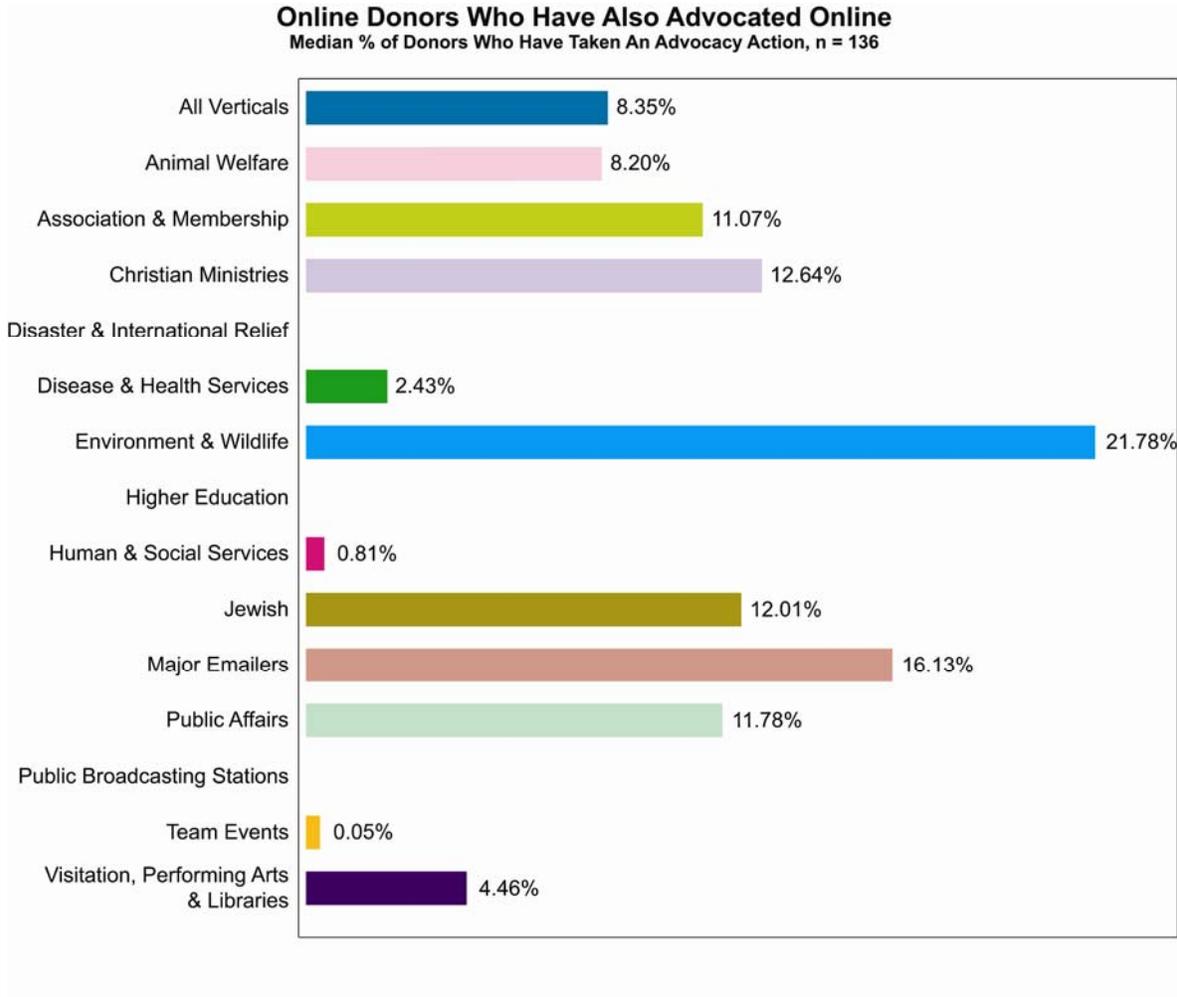


Chart 30: Online Donors Who Have Also Advocated Online

Summary

In just a few years, many nonprofit organizations have begun online marketing programs and seen dramatic increases in their ability to reach their objectives, including to raise more money, communicate more effectively, mobilize advocates, and increase awareness. Online marketers must continually refine their tactics, improve the effectiveness of their fundraising initiatives, and allocate resources more effectively. To do this requires marketers to have a thorough understanding of the key drivers for online success, as well as a way to objectively compare results with those of their peer group.

The common attributes of organizations that have had the most success online include the following:

- Success in driving traffic to their websites by optimizing search engine visibility, offering compelling content, and promoting their site via other media
- Effective content and mechanisms in place to convert website traffic into registered users, who can then be cultivated into donors
- Proven ability to build large email files via online registration programs, list uploads, and viral campaigns
- Effective email communication through compelling content, segmentation, and personalization to sustain interest in their programs
- A high response rate for online appeals, generated by having an effective case for supporting their organization, segmenting and personalizing their appeals, and testing elements of each email, such as the subject line, frequency, and delivery timing

The Convio Online Marketing Nonprofit Benchmark Index Study provides nonprofit organizations insights into how other comparable organizations are performing in metrics relating to key online success drivers. However, every organization is different, each with its own strengths, organizational challenges, and goals. As such, organizations should use this study as a starting point to better understand why metrics are important, which metrics and drivers can have the largest effect on their online marketing programs, and then continue to test what works best for their organization.

Methodology

Study Participants

Convio is the provider of on-demand constituent relationship management software and services for more than 1,200 nonprofit organizations. The Convio online marketing suite includes products for fundraising, advocacy, event fundraising, ecommerce, web content management and email communications. And, these products all share the online marketing database, Constituent360™, giving clients a complete view of constituents' online interactions with their organization in a single database.

Using close to 600 actual nonprofit organizations' actual transaction data from the Convio data warehouse allows us to avoid two major source of research bias common in many recent studies. The first, called Referral Bias, occurs when groups who volunteer to participate in a survey often perform differently than those non-volunteers. The second bias, called Measurement Bias, occurs when trying to compare organizations' results from different sources that aren't apples to apples. This can commonly be seen in how different organizations may include or exclude different sources of online fundraising such as ecommerce, ticket sales, event registration fees, and donation form giving in their definition of online revenue. Making valid comparisons becomes difficult when this data is volunteered or self-reported from sources outside of the researching organization.

As much as we would like to include every Convio client in this year's study, our overarching objective is to provide nonprofits with the best insight into how the industry is actually faring. As a result, we had to exclude organizations that we felt had results which were driven by factors not representative of the overall industry.

One such exclusion was for any organization that did not have at least 12 full months of data on Convio. (Nonprofit organizations that have recently joined or left Convio would be examples of those that would not have a complete year's worth of data.) The most relevant analogy from the for-profit-world would be that of retail same store sales. Comparing only stores that have been open at least a full year avoids skewing the growth numbers upward by including stores that have recently opened in an area and are growing rapidly. The same is true with nonprofits as they deploy their organization onto Convio during the year. As a result, these organizations were excluded from this study.

Other exclusions included organizations that experienced extraordinary growth due to a one-time, unrepeatable event, such as moving a large number of team-based fundraising events from a major competitor to Convio. Once again, this growth is not new growth driven by either the nonprofit performing better, or the industry as a whole, but rather the consolidation of existing events onto one vendor's platform. As a result, these organizations' results were excluded from the study.

What's New This Year?

Last year's study included over 400 nonprofit organization's actual results for the period of July 2006 - June 2007. Given the unprecedented events — both economically and within the nonprofit industry in the fourth quarter of 2008 — we felt that this year we had to arm you with data up through the end of 2008, not just mid-year. As a result, we have changed the timeframe of the study to show the 2008 calendar year, rather than a fiscal year.

Rather than try to draw comparisons to last year's study — which had a different time period, and a different set of nonprofits — we included several multi-year comparisons in this study to allow you to see how organizations' results this year compare to years past.

This year's study includes results from almost 600 nonprofit organizations grouped by commonality of their missions. This commonality, we call “verticals”, is the most effective way for organizations to find comparable organizations to which they can benchmark their results.

We added two new verticals to this year's study. The first we call “Jewish”; this vertical includes organizations whose mission focuses on providing social services to Jewish constituents or promoting issues relating to Israel. We have found in other analysis that while many of these nonprofit organizations have a strong religious affiliation, their performance is dramatically different than those of Christian Ministries, and therefore warrant their own comparable group. The second new vertical included this year we call “Team Events”. Nonprofit organizations that derive more than 80 percent of their fundraising revenue from constituents' participation in a walk, run, bike, or other peer-based fundraising event are included in this vertical. Their tactics and strategies for online fundraising are different enough from other groups that their results warranted more in-depth study. Removing these groups from their traditional mission-based vertical did have some impact on each of the verticals, but we feel that this approach gives a better view of what a typical nonprofit in that vertical should have realistically achieved online during the year.

In order to understand the story about what happened to the nonprofit industry in 2008, several new metrics were added to this year's study. This included a breakout of how fundraising performed during the fourth quarter of 2008, as well more insight into the percentage of the email file that is actually “usable” and available for your organization to communicate with throughout the year. Additional metrics within fundraising, as well as multi-year trending, were also added to other key online metrics this year.

A change was made in how the email appeal and newsletter metrics were calculated this year. In last year's study we took the median of all email messages to determine the open rate, click-through rate, and response rate. Giving each email equal weight caused the All Verticals benchmark to be heavily influenced by the disproportionately large number of emails sent by organizations in the Major Emailers vertical. To remedy this, we used the average results by organization, which gives each organization an equal weight regardless of how many emails they sent this year. We feel this is more representative of results that the average nonprofit should experience.

Industry Verticals

Organizations meeting the parameters of the study 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 15 benchmarks, including an “All Verticals” benchmark for each of the metrics in this paper. 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 instance, 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 year's study had any results for any of the advocacy related metrics.

Note, in some cases, we were able to combine similar verticals with other organizations that we believe 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. Vertical groups that did not have at least ten similar organizations based on their common mission were excluded.

Vertical	Description	Study Participants
Animal Welfare	Regional humane societies and national organizations devoted to animal welfare issues	32
Association & Membership	Organizations whose members have a common professional affiliation	18
Christian Ministries	Churches, ministries, and other organizations of various religious affiliations	37
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	32
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	64
Environment & Wildlife	Regional and national environmental and conservation organizations	26
Higher Education	Colleges, universities, and their alumni associations	16
Human & Social Services	Local, regional, and national organizations that deliver human and social services to people in need	65
Jewish	Organizations that provide human services, aid to Israel, and support for issues of importance to Jewish constituents	12
Major Emailers	Organizations from various verticals with more than 250,000 constituent email addresses in their email file	52
Public Affairs	Organizations involved in shaping public policy and legislative advocacy at a state or federal level	80
Public Broadcasting Stations	Public radio and public television stations	21
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	113
Visitation, Performing Arts & Libraries	Organizations such as zoos, museums and aquariums that rely on members and guests visiting their facilities	29
Total 2009 Study		597

Figure 1: Vertical Segment Descriptions

Previous Convio studies have shown that organizations with email files of more than 250,000 addresses perform dramatically different 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. As such, the performance of any benchmark can be significantly skewed by organizations of this magnitude; therefore, they have been broken out into a separate category we call “Major Emailers”. The number of organizations from each vertical that compose this vertical are shown in Figure 2.

Major Emailers by Vertical	Study Participants
Animal Welfare	1
Association & Membership	2
Christian Ministries	7
Disaster & International Relief	6
Disease & Health Services	7
Environment & Wildlife	6
Higher Education	5
Human & Social Services	0
Jewish	2
Public Affairs	12
Public Broadcasting Stations	4
Team Events	0
Visitation, Performing Arts & Libraries	0
Total Major Emailers	52

Figure 2: Major Emailers by Vertical

The other exception to when comparing nonprofit organization’s results is the Team Events vertical, which was added this year. As mentioned above, if an organization derives the majority of their fundraising revenue from constituents’ participation in a walk, run, bike, or other team-based fundraising events, we believe their performance is driven more by their type of fundraising than by their vertical. Because of this, any organization that qualifies for inclusion in this study as either a “Team Event” or a “Major Emailer”, or any other vertical, the Team Event vertical trumps inclusion in the other verticals.

Other Considerations

Each metric studied includes a breakdown of how each of the 14 verticals performed compared to an All Verticals benchmark composed of all the organizations that were relevant for that particular metric, as noted by the “n” value in the chart title. Some metrics in this study may include an “n” value of fewer than 597 participants based on the time period the metric covers, or the study participants who employ that tactic online. For instance, not all study participants use Convio for their online fundraising; as a result, the Online Fundraising (Revenue) by Vertical metric contains fewer than 597 participants.

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. Your results may, of course, be higher or lower than the benchmark.

When calculating growth rates from one year to the next, we wanted to make sure that the growth was being driven by the organizations themselves, not by a change in the mix of study participants from period to period. In order to calculate this, all growth metrics used organizations that had data for three full years (2006-2008). As a result, the sample size for many of the growth metrics may be considerably smaller than the total number of organizations with data on Convio for 2008.

Metrics Summary Tables by Vertical

Website and Email File Metrics

	Website			Email File			
	Monthly Unique Website Visitors (Median)	Website Traffic Growth (Median Growth Rate of Individual Orgs.)	Website Registration Conversion Rate (Median)	Total Email File Size (Median)	Usable Email File Size (Median)	Total Email File Growth (Median Growth Rate of Individual Orgs.)	Usable Email File Growth (Median Growth Rate of Individual Orgs.)
All Verticals	9,830	20%	3.22%	34,736	18,951	28%	18%
Animal Welfare	18,690	24%	3.17%	34,180	17,200	34%	27%
Association & Membership	13,633	36%	3.05%	16,357	9,906	25%	17%
Christian Ministries	14,668	19%	3.54%	41,463	26,168	29%	19%
Disaster & International Relief	7,053	17%	2.44%	15,698	9,803	29%	18%
Disease & Health Services	16,246	17%	2.29%	26,471	15,199	15%	9%
Environment & Wildlife	5,633	23%	1.18%	36,204	30,729	34%	21%
Higher Education	4,144	21%	1.32%	46,284	27,873	19%	14%
Human & Social Services	5,253	23%	3.00%	13,513	8,377	39%	31%
Jewish	5,465	28%	2.30%	14,844	9,288	24%	12%
Major Emailers	43,629	18%	5.47%	460,826	252,641	23%	15%
Public Affairs	8,032	19%	2.24%	28,817	15,242	17%	12%
Public Broadcasting Stations	19,273	24%	3.10%	43,410	26,568	21%	17%
Team Events	3,672	22%	19.05%	35,398	15,898	33%	28%
Visitation, Performing Arts & Libraries	18,045	16%	1.27%	48,150	38,919	24%	15%

Figure 3: Website and Email File Metrics by Vertical

Online Revenue Metrics

	Online Revenue							
	Total Annual Online Revenue (Median)	Online Number of Gifts (Median)	Average Online Gift (Median)	Online Revenue Growth (Median Growth Rate of Individual Orgs.)	Q4 Online Revenue (Median)	Q4 Online Revenue Growth (Median Growth Rate of Individual Orgs.)	Online Revenue per Email Address (% of Total File) (Median)	Ecommerce Revenue (Median)
All Verticals	\$235,334	3,313	\$67.47	14%	\$62,348	3%	\$6.79	\$6,655
Animal Welfare	\$170,115	3,302	\$49.14	28%	\$49,993	24%	\$5.78	\$5,594
Association & Membership	\$72,938	339	\$70.08	1%	\$17,815	-7%	\$0.85	\$2,249
Christian Ministries	\$327,270	4,047	\$103.24	22%	\$117,548	-2%	\$6.97	\$37,557
Disaster & International Relief	\$243,816	2,344	\$105.14	8%	\$108,085	-2.5%	\$19.67	\$13,929
Disease & Health Services	\$117,747	1,121	\$73.73	5%	\$29,399	-4%	\$5.60	\$11,091
Environment & Wildlife	\$64,034	958	\$63.14	-8%	\$32,478	-8%	\$1.10	\$1,308
Higher Education	\$59,976	942	\$143.17	17%	\$24,301	26%	\$1.32	\$4,922
Human & Social Services	\$126,524	1,190	\$128.90	26%	\$55,738	15%	\$10.32	\$4,787
Jewish	\$264,180	487	\$405.54	32%	\$106,221	19%	\$12.30	\$1,673
Major Emailers	\$1,539,792	20,476	\$59.91	18%	\$670,002	0%	\$3.23	\$260,168
Public Affairs	\$28,904	297	\$109.76	-5%	\$14,101	-14%	\$1.20	\$2,601
Public Broadcasting Stations	\$547,260	4,959	\$106.89	4%	\$295,073	11%	\$10.58	\$181,104
Team Events	\$613,140	10,409	\$50.56	16%	\$76,052	4%	\$11.62	\$1,115
Visitation, Performing Arts & Libraries	\$96,862	948	\$121.13	1%	\$48,635	-6%	\$3.69	\$2,835

Figure 4: Online Revenue Metrics by Vertical

Email Appeal and Email Newsletter Metrics

	Email Appeals			Email Newsletters	
	Email Appeal Open Rate (Median)	Email Appeal Click-Through Rate (Median)	Email Appeal Response Rate (Median)	Email Newsletter Open Rate (Median)	Email Newsletter Click-Through Rate (Median)
All Verticals	20%	2.07%	0.13%	23%	3.96%
Animal Welfare	20%	2.22%	0.32%	25%	5.74%
Association & Membership	15%	2.38%	0.22%	22%	3.96%
Christian Ministries	20%	2.40%	0.17%	25%	5.10%
Disaster & International Relief	19%	2.05%	0.15%	21%	3.48%
Disease & Health Services	19%	1.18%	0.06%	21%	4.73%
Environment & Wildlife	20%	2.12%	0.18%	26%	6.36%
Higher Education	22%	1.81%	0.07%	28%	3.44%
Human & Social Services	21%	2.04%	0.13%	23%	3.37%
Jewish	16%	1.73%	0.18%	24%	4.83%
Major Mailer	15%	1.56%	0.17%	22%	4.58%
Public Affairs	18%	1.27%	0.10%	20%	3.61%
Public Broadcasting Stations	22%	2.06%	0.45%	21%	1.84%
Team Events	24%	2.87%	0.09%	23%	3.34%
Visitation, Performing Arts & Libraries	24%	4.03%	0.08%	28%	4.05%

Figure 5: Email Appeal and Email Newsletter Metrics by Vertical

Discussion of Metrics

Organizations should use this study to understand why metrics are important and which metrics and drivers can have the biggest effect on their online marketing programs. With this understanding as a foundation, organizations can do their 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 organizations have had using Convio online marketing, 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 <http://www.convio.com/clients/case-studies>

Join the Discussion on Connection Café Blog and in the Online Convio Client Community

On Convio's blog, Connection Café, and in the Online Convio Client Community, you will find on-going 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 the client community is accessible only to clients and partners. Please visit www.connectioncafe.com and <http://community.customer.convio.com> to join the discussion.

About Convio

Convio is a leading provider of on-demand constituent relationship management software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Common Ground™ CRM system helps organizations effectively track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and applications focused on the unique needs of nonprofit organizations. For more information, please visit www.convio.com



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