

An in-depth survey  
and study by Convio,  
Sea Change Strategies  
and Edge Research

# The Wired Wealthy

**Using the Internet to Connect  
with Your Middle and Major Donors**

March 24, 2008

## INTRODUCTION

“Let me tell you about the very rich. They are different than you and me.”

“Yes. They have more money.”

That famous literary exchange between F. Scott Fitzgerald and Ernest Hemingway took place more than 70 years ago, and yet the question persists.

In philanthropy, we wonder whether the most generous donors represent a fundamentally different charitable mindset, or whether they simply have more money to give. With the advent of Internet communications, the question takes on new urgency: *What role, if any, can the Internet play in cultivating, securing and stewarding major donors?*

This study aims to make a contribution toward a useful answer.

For the decade or so that charities have been raising money online, the lion’s share of attention has gone to small gift fundraising. Email has emerged as the third leg of a direct response tripod that also includes postal mail and telemarketing. As direct mail becomes more and more expensive, fundraisers have turned to the Internet in hopes of making up the direct mail shortfall.

Amidst all of this hubbub, another Internet story – no less important – has begun quietly to emerge. It is the story of middle and major donors who increasingly use the Internet in their everyday lives, and who are increasingly open to electronic communications as a means for establishing and sustaining giving relationships. There is much anecdotal evidence that in their online habits, these “wired wealthy” donors have gotten ahead of the charities and organizations they support.

This study does indeed suggest that an “Internet Communications Gap” exists between high dollar donors and charities. In short, most causes are not making the best possible use of their Web and email efforts to connect with this critically important audience. It is true that many wired wealthy donors only display finite interest in connecting digitally with the causes they support, which means that *every contact counts*. By and large, this study finds that the opportunity to connect with wired wealthy donors is not used nearly as well as it could.

### The Research Process

In the fall of 2007, Convio, Sea Change Strategies and Edge Research embarked on an in-depth study of wired donors who make four-figure or higher gifts to one or more causes they support. All three companies donated their time to this effort.

Participating as active partners in this research were 23 major nonprofit organizations representing a wide range of missions and strategies. Sectors represented include Advocacy/Public Affairs, Animal Welfare, Christian Ministries, Environment, Health, International Relief and Development, and Public Television.

The heart of the study was an online survey directed at donors who met the following criteria:

- Had given a cumulative total of \$1,000 or more to at least one of the partner organizations in the 18-month period ending in August, 2007 through any channel – online or offline; and
- Had a valid email address on file with that organization.

A total of 3,443 “wired wealthy” donors completed the online survey, representing donors from 23 major nonprofit organizations.

To round out the survey findings, three supporting phases of research were conducted:

- An online survey of nonprofits to gauge their policies and practices with regard to online communications with high dollar donors. Representatives of more than 200 organizations completed that survey;
- In-depth interviews in February and March, 2008 with a handful of donors who had participated in the survey to support key quantitative findings with qualitative information; and
- Additional data was collected from 13 of the 23 partner organizations. The purpose of this data was to put the research into perspective by trying to gauge the relative importance of this donor population as a proportion of the larger giving universe.

Edge Research analysts examined the donor survey data and concluded that it had a margin of error of 1.5 percent points at the 95 percent confidence level. Survey results in this report have been weighted so that the data does not disproportionately reflect one organization.

In addition, Edge analysts performed a cluster or segmentation analysis designed to identify meaningful sub-groups of the wired wealthy donor universe. Results of that analysis are presented in Chapter 2.

Many of the propositions we tested produced passionate responses (e.g., agreeing or disagreeing “strongly”) by only a small minority of respondents. It is important to remember though that *these are all significant donors*. Something that inspires – or annoys – even a small percentage of wired wealthy donors could still be financially important to your organization.

The detailed results from the donor survey are presented in Appendix A.

## ACKNOWLEDGEMENTS

While it took a veritable research village to make this study happen, two team members did far more than their share of the work and were generally indispensable on multiple fronts:

- Sarah Haug of Sea Change Strategies served as project manager, reality checker, herder of cats, and intelligent presence on every aspect of the project; and
- Edge Research’s Colleen McCulloch-Learch exhibited the patience of Job in her handling of what turned out to be a very complicated research effort.

Huge thanks also go to Convio Founder and Chief Strategist Vinay Bhagat, who green-lit the project, helped shape the research strategy, participated in every aspect of its execution, and did more than his share of recruiting nonprofit organizations to participate; to Edge Principal Pam Loeb, who didn’t realize what she was getting into, yet uncomplainingly forged ahead as things got thicker and thicker; and to Mark Rovner of Sea Change Strategies who was the principal architect of the survey, oversaw donor interviews, substantively wrote this white paper, and lent his intellectual brilliance to the project.

Finally, our warmest thanks to the staff members at the 23 participating organizations who volunteered to take part in the study. Anyone who has personally experienced the challenges of database integration will appreciate the patience, focus and hard work that went in to choreographing communications with select individuals from 23 different donor lists.

It is our collective hope that this research contributes to a deeper and more meaningful collaboration between causes that matter and the people who support them. We invite you to read, to criticize, and even more importantly, to build on this research with new efforts to understand this important and evolving relationship.

– *The Wired Wealthy Team*

## CHAPTER ONE: Who Are the Wired Wealthy?

The wired wealthy are by definition engaged online and are generous givers. A closer look at demographics and practices adds some useful details.

First, they are *very* generous givers. Wired wealthy say they give an average of \$10,896 each year to various causes, with a median gift of \$4,500. And they are *notably* wealthy. More than twenty-five percent (25%) have household incomes above \$200,000 per year. More than half have annual household incomes above \$100,000.

Of the 13 participating charities and nonprofits that provided additional data, on average, high dollar donors make up about one percent (1%) of their records (high dollar defined as giving a cumulative total of \$1,000 or more to the partner organization in an 18-month period). While small in numbers of people, that one percent (1%) is responsible for an average of thirty-two percent (32%) of the organization's total dollars raised. Partner organizations reported having, on average, email addresses for twenty-five (25%) of their \$1,000+ donors.

Demographically, wired wealthy are predominantly baby boomers (born between 1946 and 1964), with the center of gravity falling right in the middle of the baby boom cohort. And, they are *extremely* wired. They have been using the Internet for an average of 12 years. They are online an average of 18 hours per week. They know their way around the Web. They do their banking and bill paying online. They read the news online. They make purchases online. And, of course, most make charitable contributions online.

The wired wealthy have dabbled in various social networks and so-called "Web 2.0" venues, but do not appear to be among the heaviest adopters. One exception may be YouTube – more than half of wired wealthy respondents have watched at least one video. A quarter of this group at least occasionally read blogs. Perhaps predictably, Facebook and MySpace do not represent fertile hunting grounds to find or engage the wired wealthy.

<b>Portrait of the Wired Wealthy</b> (See Appendix A for detailed survey responses)		
<p><b>Demographics:</b></p> <ul style="list-style-type: none"> <li>▪ These are <b>generous donors</b> representing a small group with <b>enormous financial impact</b>.</li> <li>▪ <b>High household incomes.</b> 57% report \$100,000 or higher; 27% report \$200,000 or higher.</li> <li>▪ <b>Age-wise, younger baby boomers represent the demographic center of gravity.</b> Mean = 51 years old; Median = 50 years old; 63% under 55 years old.</li> <li>▪ <b>Uber-educated:</b> 51% have graduate degrees; 87% have 4-year degrees or more.</li> </ul>	<p><b>Internet Habits:</b></p> <ul style="list-style-type: none"> <li>▪ Average <b>12 years</b> online.</li> <li>▪ <b>18 (mean)/14 (median) hours</b> a week online.</li> </ul>	<p><b>Online Activities:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Wired wealthy are active online:</b> <ul style="list-style-type: none"> <li>▪ 90% make purchases online (58% regularly)</li> <li>▪ 78% bank and pay bills online</li> <li>▪ 65% read the news online (36% regularly)</li> <li>▪ 51% have taken political action online</li> <li>▪ 43% download or listen to music online (18% regularly)</li> <li>▪ 39% view videos online (11% regularly)</li> <li>▪ 25% read blogs (9% regularly)</li> <li>▪ 20% use SMS (10% regularly)</li> <li>▪ 8% post comments on a blog (2% regularly)</li> </ul> </li> <li>▪ <b>Social Networks are not just for the young:</b> <ul style="list-style-type: none"> <li>▪ 52% use YouTube</li> <li>▪ 16% use LinkedIn</li> <li>▪ 14% use MySpace (2% regularly)</li> <li>▪ 12% use Flickr</li> <li>▪ 9% use Facebook (3% regularly)</li> <li>▪ <b>Not on the radar:</b> <ul style="list-style-type: none"> <li>○ Eons (90% never heard of it)</li> <li>○ Gather (89% never heard of it)</li> <li>○ Care2 (86% never heard of it)</li> <li>○ Del.icio.us (83% never heard of it)</li> <li>○ Digg (80% never heard of it)</li> </ul> </li> </ul> </li> </ul>

## CHAPTER TWO: The Wired Wealthy Clusters

A statistical tool called cluster analysis was used to understand distinct segments or clusters of the wired wealthy. This form of multivariate analysis groups people based on their responses so that organizations can understand important behavioral and attitudinal differences within their donor communities.

Applying cluster analysis to the wired wealthy sample, we found that three distinct groups of donors emerged. The key differentiator dividing these groups is the extent to which donors see the Internet channel as a source of connection between themselves and the causes they support, as opposed to merely a transaction device. At one end of the spectrum are donors looking to make a deeper connection with the charity they support, and are open to online channels as one path to accomplish that. At the other end are donors who see their relationship with charities as far more arms-length, and their receptivity to online communications is highly limited and task-oriented.

Age, education and income differ slightly, but not significantly. Key points of distinction are fundamentally attitudinal – what is it that donors are seeking from the Internet channel, and to what extent are they getting it?

### Relationship Seekers – Twenty-Nine Percent (29%) of all survey respondents

Average annual giving<sup>1</sup>: \$11,401

Relationship Seekers are the group most likely to respond to opportunities to connect emotionally with your organization online. They are slightly younger than the average wired wealthy (42% are between 25 and 44 years old), spend more time online, and are more likely to engage in social networks and other Web 2.0 activities.

Just over sixty percent (60%) say that web sites make them feel personally connected to a cause. This group is most likely to visit your web site after donating, and is most likely to be interested in online political action. This group is notably more likely to view videos online.

Relationship Seekers are multi-channel donors, but more than half say they expect their online giving to grow in the coming years.

#### Relationship Seekers in their own words:

*"It feels like there are so many challenges in the world and sometimes it feels like we are making so little progress on all kinds of fronts...give me a carrot here folks, because otherwise it feels so futile sometimes. And I know we are never going to be done, but just give me something to hang my hat on, something to say, 'yeah, this has made an impact.'"*

*"I do get lots of emails from all these organizations and if it's got interesting content about their work, I'm happy to get them. You pick and choose."*

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<sup>1</sup> Giving figures are based on self-reported giving totals provided by survey participants.

*[When visiting a web site for donor research] "I just want to be convinced that they are really making progress, ...and they have results to show for it. We've contacted this many people...we've put this many ads in a newspaper...we've saved this many wild storks."*

*"We'll send in checks, or do a donation via check card – online or through the mail."*

*"If there was a way for [charities] to say, 'Ok, now we've got this donor. Let's understand their preferences and let's mark it down, let's stick to it.'"*

## **All Business – Thirty Percent (30%) of all survey respondents**

**Average Annual Giving: \$12,698**

These donors predominantly visit charity web sites to donate – period. They do not seem to be looking for a relationship or an emotional connection when visiting your web site. In marked contrast to the other two clusters, only fifteen percent (15%) of the All Business group say that web sites make them feel more personally connected to a cause.

This group is also older (fifty-seven percent (57%) are between 45 and 64 years old), is much less open to receiving email than the other clusters, and, for the most part, is more comfortable with offline giving channels.

The two keys to making the All Business group happy are a smooth and simple donation process, and a tax receipt at the end of the year. After that, they pretty much want to be left alone.

**All Business in their own words:**

*"Sometimes I'll get turned off if the web site is not well enough organized and it's too hard to find whatever I happen to be looking for. Yeah, that matters a lot."*

*"I consider myself a very passive donor...many of the organizations it's simply a monetary donation – don't worry I'll be back next year – and that's really the extent that I want the relationship to be...so what could they send me that would turn my head? I don't know."*

*"I personally want to be left alone. That's my biggest problem with the charities. You send in a check one time and you get inundated with unwanted stuff. Actually, doing online giving seems to help that because you can check all the boxes that you don't want to be contacted."*

*"I pay very much attention to my opt-out options for what types of correspondence I expect to see from these organizations. And assuming that I'm given sufficient choices in that regard, I will certainly provide my email address."*

*"As soon as you find organizations that try to keep individual profiles of their donors and cater to them, send their information to me."*



## Casual Connectors – Forty-One Percent (41%) of all survey respondents

Average annual giving: \$9,212

Casual Connectors, the largest of the three clusters, occupy a middle ground between the All Business and Relationship Seeker groups. They show some interest in sustaining an online connection, though less so than Relationship Seekers. Indeed, in question after question, this group appears to “split the difference” in terms of attitudes and preferences with regard to both Web and email engagement opportunities.

### Casual Connectors in their own words:

*[Once having given my email address] “I expect periodic updates, accountability or an annual report...I expect some acknowledgement along the way in terms of a thank you or you are appreciated as a donor kind of thing.”*

*“As a younger person, I want [charities] to know that I’m different, and they don’t have to resort to the typical styles [of solicitation]. And, to [keep me as] a lifelong donor, I would want them to evolve in their approaches – to show me that they are constantly innovating, constantly thinking creatively about what’s next, and not just dealing with what’s here and now. And that in a way is sort of inspiring in itself.”*

*[When researching a charity] “We’ll usually go to the charity’s web site first and say, ok we’ve heard this little snippet in the news about them – what are they actually doing? ...If the information on the web site is something we are interested in, then I’ll go and I’ll look to see, is their administrative costs appropriate?”*

*[How charities could communicate to keep a lifelong donor] “They would probably send me an email reminder that had some kind of graphic component that was programmatic that explained what I had enabled to happen in the past year.”*

*“I do like learning more about what [the charities] are doing because I feel like that keeps me connected with it and allows me to understand how my dollars are really going to be effective for them.”*

## Implications of Wired Wealthy Clusters

The three clusters offer some important clues about what kinds of communications your wired wealthy constituents might value, and might also help temper organizational expectations. Moreover, as the following sections suggest, most organizations have a long way to go to fully satisfy even the most modest donor demands and expectations. And, it argues strongly for implementing some sort of psychographic segmentation so that you can cultivate relationships with the very different, yet equally valuable, Relationship Seekers, All Business, and Casual Connector clusters.

The one-on-one interviews yielded one more interesting difference, albeit an anecdotal one. All Business donors with whom we spoke describe themselves as disciplined philanthropic planners, who decide their yearly giving in advance and rarely deviate from the plan. Relationship Seekers, on the other hand, present their giving strategy in a much more informal way. Because we only spoke with a total of eight donors, it is easy to make too much of this.

But given what we do seem to know about the behaviors of these clusters, it does make a certain amount of sense.

Below are two tables. The first (Figure 1) profiles key attributes for each of the three clusters. The second (Figure 2) presents cluster breakdowns for each of the major sectors of nonprofits we studied (e.g., Animal Welfare, Health, etc.). Please take the second table with a grain of salt – the proportions are reflective of the groups who chose to participate, and may or may not reflect the cluster divisions of that entire sector. Your mileage, in other words, may vary.

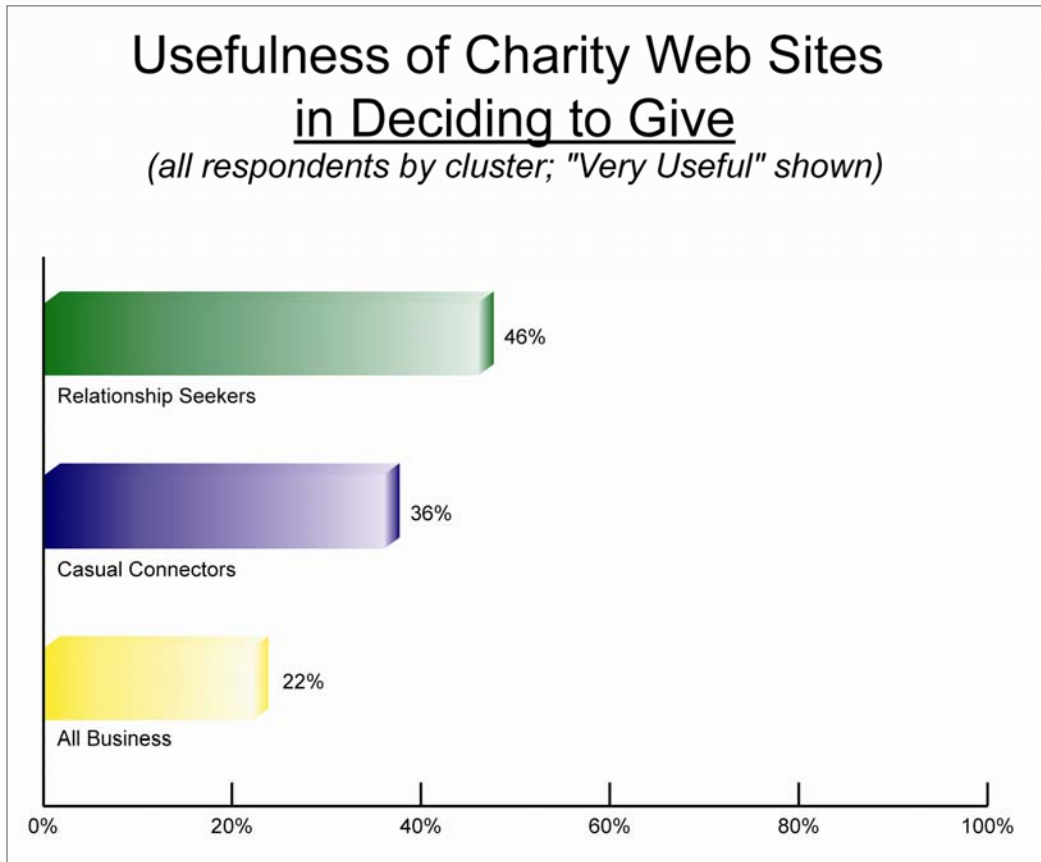
	Relationship Seekers 29% (n. 995)	Casual Connectors 41% (n. 1426)	All Business 30% (n. 1022)
Average age	48 yrs old	50 yrs old	53 yrs old
Average total gift (self-reported)	\$11,401/year	\$9,212/year	\$12,698/year
% Have given online	86%	80%	75%
% Prefer online	56%	50%	46%
% Prefer mail	23%	30%	37%
% Visit charity web site regularly (once per month or more)	16%	6%	1%
% Read most charity emails (75% or more)	42%	27%	9%
<b>Activities done online regularly:</b>			
% Read blogs	13%	8%	6%
% Take political action online	35%	18%	7%
% Engage in social networks online (approx.)	42%	19%	12%

**Figure 1: Key Attribute Comparison Table**

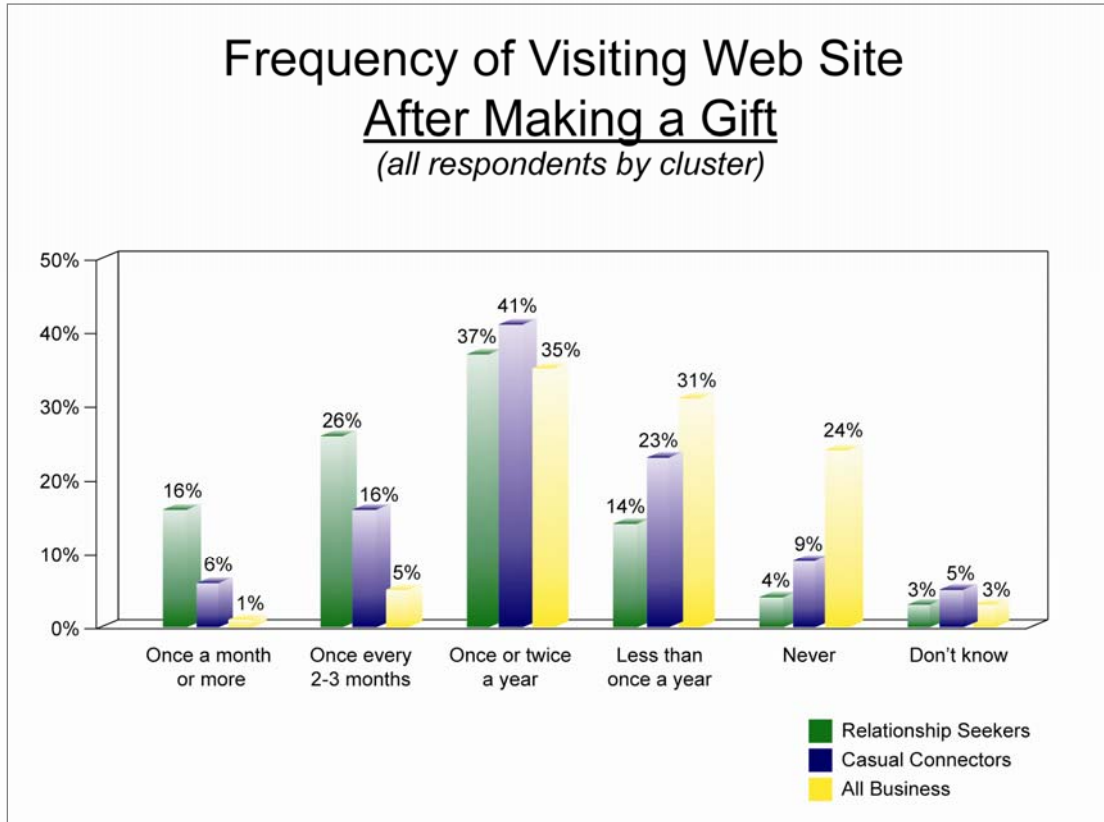
	Advocacy/ Public Affairs (n. 938)	Animal Welfare (n. 122)	Christian Ministries (n. 25)	Enviro (n. 163)	Health (n. 1168)	Internat’l Relief & Dev. (n. 915)	Public Television (n. 112)
<b>Relationship Seekers</b>	43%	44%	41%	40%	22%	21%	10%
<b>Casual Connectors</b>	38%	42%	40%	45%	44%	40%	49%
<b>All Business</b>	20%	15%	20%	16%	34%	40%	41%

**Figure 2: Cluster Representation for Each Sector**

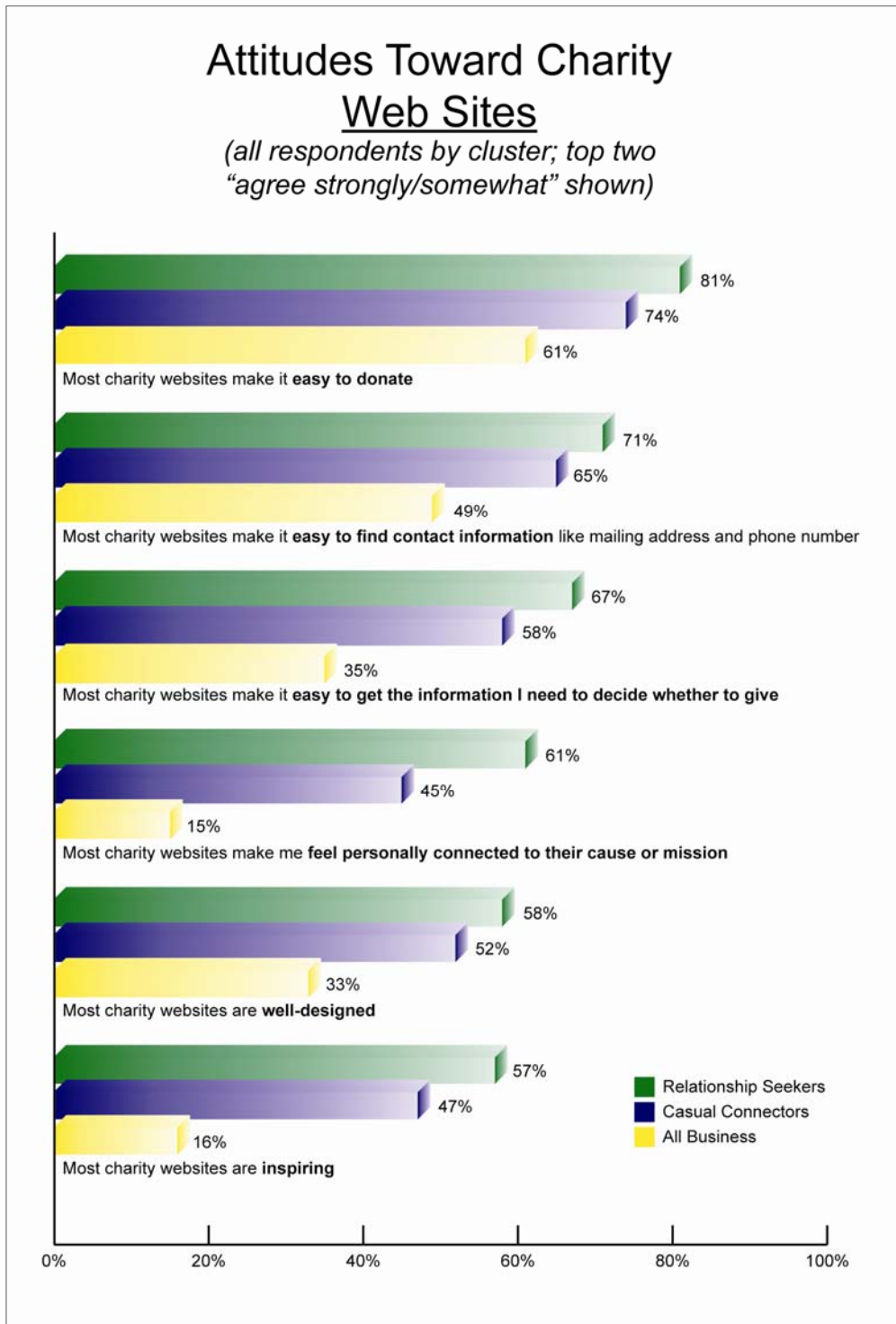
The following three graphs illustrate the distinct differences between cluster attitudes and behaviors in regards to charity web sites.



**Graph 1: Usefulness of Charity's Web Site in Deciding to Give**



**Graph 2: Frequency of Visiting Web Site After Making a Gift**



**Graph 3: Attitudes Toward Charity Web Sites**

## CHAPTER THREE: Giving Channel Behaviors

Wired wealthy are multi-channel donors. Eight in ten have made donations online, and an equal number have written a check, presumably in response to direct mail, and sent it via postal mail.

By definition, wired wealthy are *not only* online donors; the existence of an email address on file qualifies them for this study irrespective of whether they made a donation online. Many have, however, embraced the Web for online giving, with half saying that online giving is their *preferred* giving method. This preference holds true for all three clusters.

According to the wired wealthy, the most compelling arguments for online giving are its efficiency, the speed with which the money can be put to use, and the ability for donors to make their gift while the idea is fresh in their mind. A majority of wired wealthy also cite the airline miles they accrue and the ability to track donations more easily as reasons to give on the Web.

**“For me, donating online is super easy. It can take like two seconds because I have Google toolbar that has autofill.”**

*– Relationship Seeker*

This group has for the most part made their peace with the risks of online commerce. While wired wealthy donors to some extent share the concerns others raise about donating online, these issues do not appear to be limiting their online engagement. Anxieties about identity theft, fraud and misuse of email addresses take a back seat to the perceived upside of electronic giving.

Looking ahead, fewer than half – forty-six percent (46%) – say that in five years they will be making a higher proportion of their gifts online. Though we expected that number to be higher, it may be that the wired wealthy has already embraced online giving to a significant degree (thirty-seven percent (37%) say the proportion will remain the same). Only two percent (2%) say they expect their overall online giving to decline as a proportion of all giving.

**[When researching a charity] “...then the next thing probably is to go back to the web site and say, is it easy to give online? Because that’s really important to us. We do everything we can online.”**

*– Casual Connector*

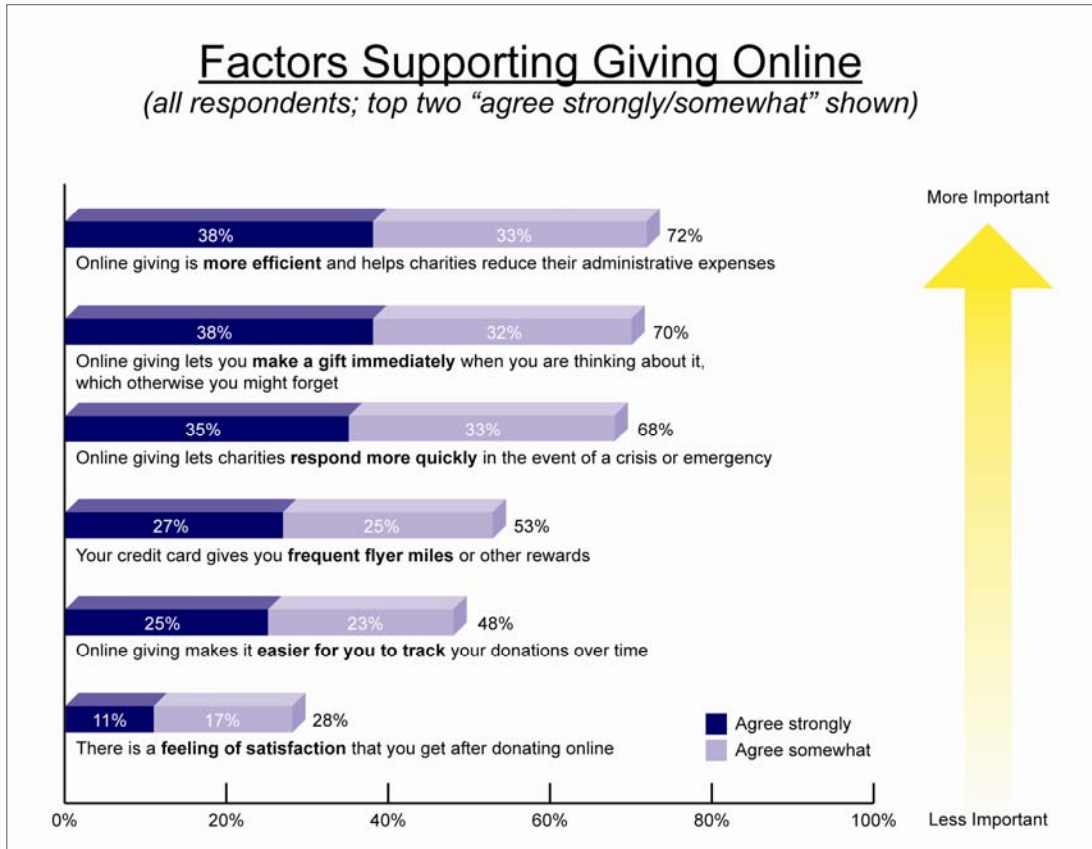
In sum, the wired wealthy represent the future of middle and major donor giving. These donors, most of whom are in their early 50s, are comfortable online. They are just now entering their prime giving years. And they are a gigantic demographic cohort. Those fearing that direct mail is dead will find some solace in the continued willingness of this group to give via the mail; for about a third of the wired wealthy that remains their preferred channel. But clearly there is a major shift from the mail to the Web, and any major gifts program that fails to account for this transition has quite a bit of catching up to do.

**“If I have the opportunity to donate online instead of sending in [a check], then I prefer to do that.”**

*– All Business*

**Summary of Key Findings** (see Appendix A for detailed survey responses):

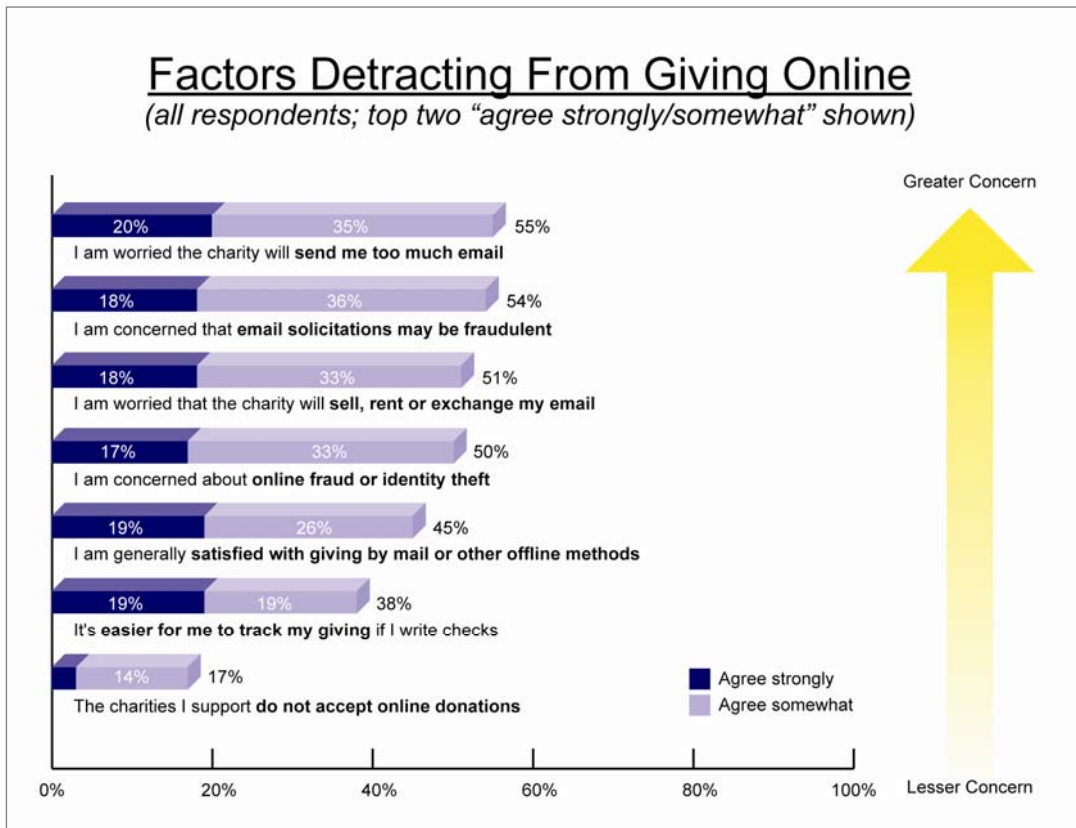
- Wired wealthy use multiple giving channels for donating.
  - Eighty-three percent (83%) of participants say they have donated via postal mail, and eighty percent (80%) say they have donated online.
- The Web is the preferred giving channel of a slight majority of respondents.
  - Fifty-one percent (51%) say online giving is their preferred channel, compared with thirty percent (30%) who say they prefer giving by postal mail.
- Wired wealthy say they will be shifting more – but not all – of their giving to the Web in coming years.
  - Forty-six percent (46%) say they are likely to be making more of their donations online using the Internet in five years; thirty-seven percent (37%) say the proportion of online vs. offline giving will stay the same.
- Among reasons to give online, wired wealthy are most likely to cite speed, efficiency and instant gratification. The following “agree-disagree” statements about the benefits of online giving gained the greatest support among survey participants (Graph 4):
  - *Online giving is more efficient and helps charities reduce their administrative expenses* (72% agree strongly or somewhat)
  - *Online giving lets you make a gift immediately when you are thinking about it, which otherwise you might forget* (70% agree strongly or somewhat)
  - *Online giving lets charities respond more quickly in the event of a crisis or emergency* (68% agree strongly or somewhat)



**Graph 4: Factors Supporting Giving Online**



- They do not have security concerns about online giving. The following “agree-disagree” statements about the risks and dangers of online giving gained the greatest support among survey participants (Graph 5):
  - *I am worried the charity will send me too much email* (55% agree strongly or somewhat)
  - *I am concerned that email solicitations may be fraudulent* (54% agree strongly or somewhat)
  - *I am worried that the charity will sell, rent, or exchange my email* (51% agree strongly or somewhat)



**Graph 5: Factors Detracting From Giving Online**

## CHAPTER FOUR: General Attitudes and Preferences – Web Sites

Most wired wealthy donors have only modest demands and expectations regarding nonprofit web sites. Those modest expectations are often met *but rarely exceeded*.

Based on considerable past research we have conducted, we know that all online donors want a simple and secure giving process. Most wired wealthy also want easy access to organizations' financials and other data in support of donors' giving decisions. *Those looking for more – for inspiration, for connection, or for deeper engagement opportunities – are more apt to be underwhelmed by nonprofit web sites.*

A notable minority of wired wealthy also report visiting third party evaluators – particularly CharityNavigator – as part of their personal philanthropic due diligence. CharityNavigator has just added an option for donors to add their own personal views of various charities and causes. This reflects a broader trend online affecting all areas of commerce, with user-generated content (e.g., TripAdvisor) supplanting “professional” evaluations (e.g., Frommers). There is every reason to expect that this trend will continue to grow within the philanthropy world.

On the Web 2.0 front, wired wealthy are not among the early adopters, nor do they express any appreciable interest in potential charity offerings. None of the options tested garnered significant enthusiasm. A few did receive double-digit expressions of interest: viewing videos, reading blogs, downloading podcasts, and passing along content that might be of interest to friends and colleagues. Note that these are *passive* options. *Active* options such as posting to a blog or uploading one's own videos or photos are far less interesting to this group.

The average percentages do mask some dramatic differences among the clusters in this arena. For instance, more than ninety percent (90%) of Relationship Seekers express some interest in video, compared with thirty-four percent (34%) overall. By contrast, only five percent (5%) of the All Business cluster say they are interested in video.

**When deciding to make a gift, one Casual Connector interviewed for this study weighted the following factors as important considerations:**

- 10% – The web site
- 40% – Your connection to a cause, emotion behind it
- 20% – The people that you are working with [from the charity]
- 30% – Are they good stewards of money? Do they have a high ranking? Are they under investigation from the BBB? Is it a real charity?

**“...how an organization spends its money on its mission may weigh more heavily to me than nice stories about their mission. So, some of that information I'm not getting from the organization's web site; I'm getting from third parties [like Charity Navigator].**

**So in a lot of ways, maybe a lot of my decision is already made even before I hit the organization's web site and yeah, there can be a make or break decision based on what I see [at the organization's web site] but that doesn't happen all the time.”**

**– All Business**

## Summary of Key Findings (see Appendix A for detailed survey responses):

- Nonprofit web sites are an important decision-making resource for the wired wealthy yet only receive fair grades from these donors.
  - Sixty-six percent (66%) of participants say they visit the web site of a cause or charity before donating for the first time; of those, forty-nine percent (49%) say they visit in nearly every instance when they are considering a donation to a new cause.
  - Thirty-four percent (34%) of participants rate organizations' web sites "very useful" in helping them make a giving decision; another forty-six percent (46%) rate them "somewhat useful."
- Most nonprofit web sites do not ignite donors' passions. The following "agree-disagree" statements about organizations' web sites gained the *least* support among survey participants (Figure 3):
 

**"The web site has the ability to miss the opportunity to capture [what makes an organization inspiring], and often does."**

**– All Business**

  - *Most charity web sites are well-designed* (9% agree strongly)
  - *Most charity web sites are inspiring* (8% agree strongly)
  - *Most charity web sites make me feel personally connected to their cause or mission* (7% agree strongly)
- An easy and secure donation process is a "must have" for all online donors, and wired wealthy are moderately satisfied on this score. The following "agree-disagree" statements about organizations' web sites gained the greatest support among survey participants (Figure 3):
  - *Most charity web sites make it easy to donate* (28% agree strongly)
  - *Most charities make it easy to find contact information like mailing address and phone number* (19% agree strongly)
  - *Most charity web sites make it easy to get the information I need to decide whether to give* (11% agree strongly)

Please indicate if you agree or disagree with each of the following statements about the web sites of charities to which you donate. (Q25)				
Agree strongly:	Total	Relationship Seekers	Casual Connectors	All Business
Most charity web sites make it easy to donate.	28%	35%	30%	18%
Most charity web sites make it easy to find contact information like mailing address and phone number.	19%	24%	19%	12%
Most charity web sites make it easy to get the information I need to decide whether to give.	11%	18%	11%	4%
Most charity web sites are well-designed.	9%	13%	11%	3%
Most charity web sites are inspiring.	8%	14%	8%	2%
Most charity web sites make me feel personally connected to their cause or mission.	7%	14%	6%	1%

**Figure 3: Attitudes Toward Charity Web Sites**

- Most wired wealthy donors are *not* frequent web site visitors.
  - Sixty-one percent (61%) of participants say that once they have donated, they return to an organization’s web site once or twice a year or less; seven (7%) say they visit as often as once a month.
  - Participants who say they visit web sites do so regularly for the following reasons (Figure 4):

**“[The charity has] a counter [on their web site] that says how many houses they’ve raised enough money to rebuild. So I go back about once a month to see how many houses they have money to rebuild.”**

**– Casual Connector**

- *To renew membership or make an additional gift* (18% say they do this regularly)
- *To take action on a political or advocacy issue* (14% say they do this regularly; 29% of Relationship Seekers)
- *To check progress on an issue or read about recent accomplishments* (10% say they do this regularly)

Following are some reasons people have given for visiting the web sites of a charity or organization to which they have given. For each of these, please say whether that is something you have done regularly, something you have done occasionally, or something you have done only rarely if ever. (Q24)				
Do this regularly:	Total	Relationship Seekers	Casual Connectors	All Business
Visit to renew my gift or make an additional donation	18%	22%	18%	15%
Visit to take action on a political or advocacy issue	14%	29%	11%	3%
Visit to check the progress of an issue or read about recent accomplishments	10%	21%	7%	2%
Visit to get information I can use in my everyday life, such as health, lifestyle, or consumer tips	5%	10%	4%	1%
Some other reason (please specify)	2%	4%	1%	1%

**Figure 4: Reasons to Visit Charity Web Sites Regularly**

- With one or two exceptions, the wired wealthy display limited interest in Web 2.0 opportunities. The minority who are interested in these opportunities, however, may still warrant attention. Video, blogs, podcasting and pass-along opportunities are of some interest. Given a variety of Web 2.0 engagement opportunities, survey participants expressed the most interest in the following (Figure 5):

**“Yes [I find videos pretty compelling]. It makes it real, you know.”**

*– Casual Connector*

- Viewing a video (34% very or somewhat interested; 91% of Relationship Seekers)
- Forwarding a message (31% very or somewhat interested; 63% of Relationship Seekers)
- Listening to an audio or podcast (24% very or somewhat interested; 63% of Relationship Seekers)

Following are some other ways that charities and causes are using to connect online with their supporters. In which, if any, of the following things would you personally be interested in taking part? (Q19Bsum2)				
Very interested and somewhat interested (combined):	Total	Relationship Seekers	Casual Connectors	All Business
View a video online posted or sent by a charity or cause or its supporters	34%	91%	9%	5%
Forward a message from a charity to a friend or colleague	31%	63%	25%	4%
Listen to an audio or podcast offered by a charity	24%	63%	7%	5%
Read a blog hosted by a charity or cause group	20%	50%	8%	3%
Participate in a live chat with an expert or representative of the charity	19%	40%	11%	5%
Download wallpaper or a screensaver offered by a charity	12%	26%	7%	2%
Post a message to a blog hosted by a charity or cause group	11%	28%	4%	1%
Join MySpace, Facebook or another social network that is dedicated to a particular cause or charity	9%	21%	4%	1%
Post a message to a blog hosted by a charity or cause group	11%	28%	4%	1%

**Figure 5: Methods Charities Use to Connect with Wired Wealthy Online; Percent Who Are Very or Somewhat Interested**

Following are some other ways that charities and causes are using to connect online with their supporters. In which, if any, have you personally taken part? (Q19A)				
Have personally taken part:	Total	Relationship Seekers	Casual Connectors	All Business
Forwarded a message from a charity to a friend or colleague	42%	85%	38%	12%
Viewed a video online posted or sent by a charity or cause or its supporters	29%	93%	6%	8%
Read a blog hosted by a charity or cause group	14%	36%	8%	4%
Listened to an audio or podcast offered by a charity	13%	44%	3%	3%
Posted a message to a blog hosted by a charity or cause group	4%	12%	1%	1%
Participated in a live chat with an expert or representative of the charity	3%	8%	2%	1%
Downloaded wallpaper or a screensaver offered by a charity	3%	8%	2%	1%
Joined MySpace, Facebook or another social network that is dedicated to a particular cause or charity	3%	8%	2%	1%
None of the above	46%	0%	49%	78%

**Figure 6: Methods Charities Use to Connect with Wired Wealthy Online; Percent Who Have Personally Taken Part**

- Quite a few participants say they have consulted the following sources in making their giving decisions: CharityNavigator (20%); the BBB Wise Giving Alliance (14%); and Guidestar (10%).

**“I’ll look at Charity Navigator ratings. I’ll look at what the money is being used for – how much of it is administrative, how much of it is actually benefiting the cause. That’s important to me.”**

**– Casual Connector**

## CHAPTER FIVE: General Attitudes and Preferences – Email

*Here is what the wired wealthy are telling you about email: You only have a few bites at the apple. Make them count.*

In his path-breaking work *Permission Marketing*, author and marketing guru Seth Godin argues that all email from an organization should be “anticipated, personal, and relevant.” By this standard, nonprofit email receives, at best, mediocre marks from the wired wealthy.

Wired wealthy get a lot of email, including a lot of email from the charities they support. Many say they get *too much* email from the groups they support. And the emails they do receive only get so-so marks.

**“I’ve actually had one charity say, ‘How do you want us to communicate with you?’ which I really appreciated.”**

– *Casual Connector*

This is a group who want to hear from you, but not all the time. And when you are communicating with them, they expect you to meet some version of the Godin standard.

As with web sites, an “inspiration gap” appears to be present. Only a minority of respondents find emails from causes they support to be inspiring or report that these emails make them feel more connected to the cause. For the All Business cluster that may not matter, but to the seventy percent (70%) of wired wealthy who are looking for more of a connection, this is a sign of a lost opportunity.

**“Instead of just checking a box that says ‘Never [referring to email opt-out box], they could actually grade it and say ‘only contact me once or twice a year, [or during] exceptional events [i.e. crisis or disaster].’ At the moment it’s either email me or don’t email me.”**

– *All Business*

The wired wealthy offer some clues about what kinds of communication would be most welcome. All clusters would greatly appreciate a tax summary at the end of each year and they all want to know whether that donation they sent you went to good use. They all would appreciate a renewal notice. And, they want to be able to tell you how often to communicate with them.

In addition, Relationship Seekers and Casual Connectors like action alerts and find success stories very valuable.

Two words of caution: first, about email appends. A strong majority of wired wealthy respondents say that looking up their email address using commercial databases is very

inappropriate. Alienating even a handful of these donors could cost your organization many thousands of dollars in gifts. Given the mixed track record of appends in practice, this should be cause for hesitation in applying this tactic.

Wired wealthy respondents also say it would be highly inappropriate for one organization to send an email on behalf of another like-minded cause. This is an interesting finding in light of some anecdotal evidence suggesting that such cross-promotions have been quite successful in the past. It is possible that the reality of the practice is less disturbing than the idea of it. It is equally possible that cross-promotions annoy people, but you never hear about it. In either case, care and caution are warranted.

**When asked what she expects a charity to do with her email address, the Casual Connector responded: “It’s certainly not that they share it with everybody under the sun.”**

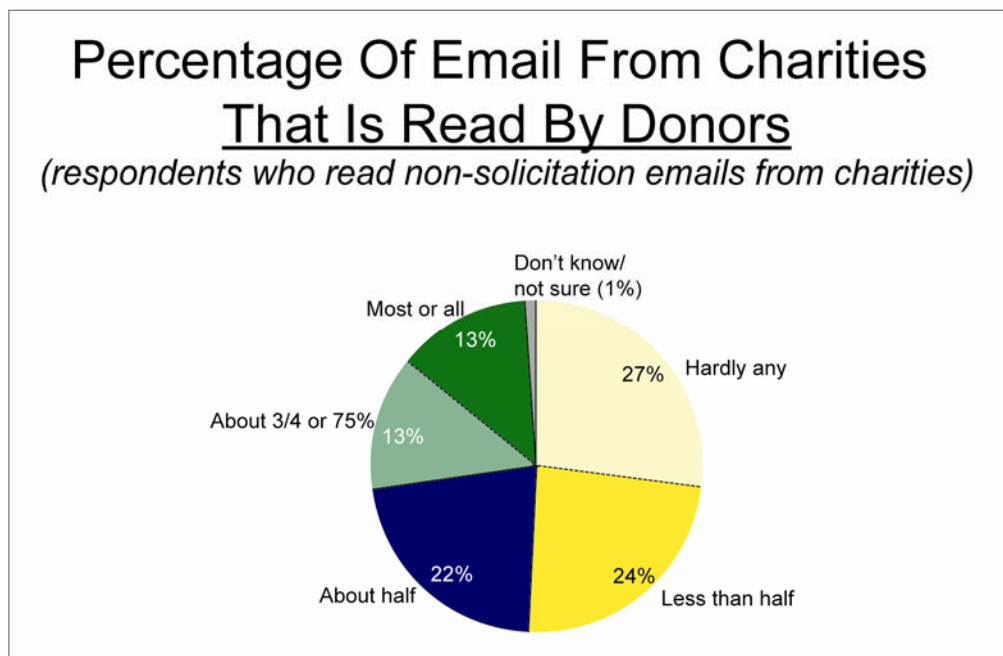


**Summary of Key Findings** (see Appendix A for detailed survey responses):

- Wired wealthy believe they get too much email from nonprofits. Not all of it gets read (Graph 6).
  - Sixty-five percent (65%) of participants say they receive email from three or more causes; thirty-one percent (31%) receive emails from six or more.
  - Seventy-three percent (73%) of participants say they read “about half” or less of each charity email they receive; twenty-seven (27%) say they read “hardly any.”

**“There’s gotta be a way for [charities] to get a little bit more sophisticated about some of these preferences.”**

*– Relationship Seeker*



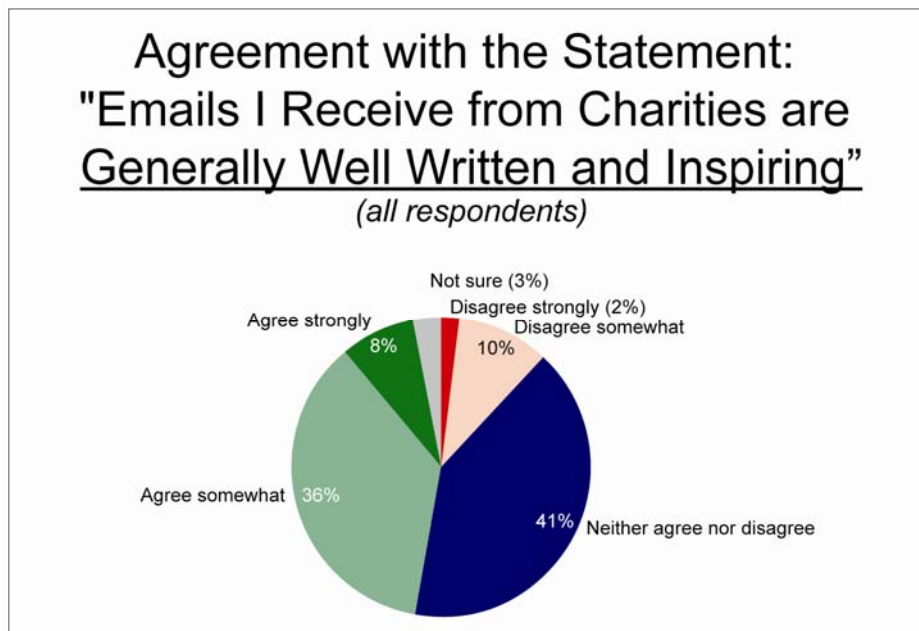
**Graph 6: Percentage of Email From Charities That is Read by Donors**

- Forty-seven percent (47%) of participants agree strongly or somewhat with the statement “I used to read more of the emails I get from causes and charities than I do now.”
- The following “agree-disagree” statements about organizations’ emails gained the greatest support among survey participants (Figure 7).
  - *I always open and glance at emails from causes I support* (23% agree strongly)
  - *I like emails that show how my money is being spent* (22% agree strongly)
  - *Most charities send me too much email* (21% agree strongly)

- Wired wealthy do not find nonprofit emails particularly inspiring (Graph 7).
  - Eight percent (8%) of participants agree strongly with the statement “emails I receive from charities are generally well-written and inspiring;” thirty-six percent (36%) agree somewhat.

Please indicate if you agree or disagree with the following statements about emails. (Q17sum1)				
Agree strongly	Total	Relationship Seekers	Casual Connectors	All Business
I always open and glance at emails from causes I support	23%	40%	24%	5%
I like email updates that show how my money is being spent	22%	39%	23%	3%
Most charities send me too much email	21%	13%	16%	36%
I used to read more of the emails I get from causes and charities than I do now	13%	13%	11%	14%
Charity emails do a good job of making me feel connected to the cause	9%	19%	8%	0%
Emails I receive from charities are generally well written and inspiring	8%	16%	7%	1%
I find emails from charities that address me by my first name to be too familiar	8%	4%	6%	16%

**Figure 7: Attitudes Toward Aspects of Email Communications; Agree Strongly Responses**



**Graph 7: Agreement with the Statement: "Emails I Receive from Charities are Generally Well Written and Inspiring"**

- Wired wealthy are receptive to email solicitations, especially renewal notices. Participants rank the following tactics as “very” or “somewhat” appropriate as follows:
    - *The charity sends you an email reminding you to renew your annual gift* (74% very or somewhat appropriate)
    - *The charity sends you an urgent fundraising email asking for donations* (56% very or somewhat appropriate)
- “What I would like which they don’t all do and I find it very irritating – they don’t send an end of year statement for tax purposes...I just have to keep all these bits of paper. It would just be so much better if at the end of the year...they would send me one receipt, which they don’t do.”**
- Tactics most likely to please wired wealthy donors are action alerts, success stories, tax receipt at year-end, and reports back on how money was spent. Donors across all three clusters would like more control over the frequency and content of email communications. One-third or more of participants say the following would make them “a lot” more likely to give again in the future (Figure 8):
    - *The charity permits me to tell them how often to email me* (36% a lot more likely)
    - *The charity permits me to control the information I receive, so I only hear about the subject I care about* (34% a lot more likely)
    - *The charity tells me by email how my donation was spent and what happened as a result* (33% a lot more likely)
- All Business**

**“Upon becoming a new donor, I wouldn’t mind filling out a brief survey that sort of assesses my interest in the organization, like why I’m interested in them. So that they can do targeted emails, and so they know more about who their donor base is so they can create web information that addresses those interests.”**

**– Casual Connector**

What effect, if any do the following have on your inclination to make an additional donation in the future? (Q11)				
Makes me a lot more likely to give again:	Total	Relationship Seekers	Casual Connectors	All Business
The charity permits me to tell them how to email me	36%	41%	38%	29%
The charity permits me to control the information I receive, so I only hear about the subjects I care about	34%	41%	35%	25%
The charity tells me by email how my donation was spent, and what happened as a result	33%	51%	38%	10%
The charity sends me email with news of recent victories and accomplishments	18%	35%	19%	1%
The charity offers me numerous opportunities to tell them what I think and offer feedback online	13%	24%	13%	3%
The charity lets me create a customized donor page on their web site that lets me see content that is of special interest to me	8%	14%	9%	3%

**Figure 8: Factors that Impact the Likelihood to Give Again;  
A Lot More Likely Responses**

- Wired wealthy strongly *disapprove* of the practices of email appends and cross-promotions between groups. Participants rank the following tactics as “very inappropriate” as follows (Figure 9):
  - *The charity sends you a message on behalf of another charity or cause that might be of interest to you* (52% very inappropriate)
  - *You have mailed in a donation, and the charity looks up your email using a commercial service in order to communicate with you online* (45% very inappropriate)

**“I worry about when people give me money to sponsor me [for an event]; I worry about how frequently they get communicated to after their name gets in the system. I feel like they may be either inundated or overly pressured...”**

**– Relationship Seeker**

Communication with donors: Thinking about your own preferences, how appropriate is each of the following? (Q9)				
Percent responding “Very inappropriate”	Total	Relationship Seekers	Casual Connectors	All Business
The charity sends you a message on behalf of another cause or charity that might interest you	52%	35%	47%	74%
You have mailed in a donation, and the charity looks up your email using a commercial service in order to communicate with you online	45%	36%	39%	62%
The charity sends you an urgent fundraising email asking for donations	7%	2%	4%	17%
The charity sends you an email reminding you to renew your gift	5%	2%	2%	13%

**Figure 9: Appropriate Uses of Email Address; Very Inappropriate Responses**

- Wired wealthy differ markedly among clusters about the extent to which they value certain kinds of email content (Figure 10).
  - For instance, fifty-three percent (53%) of Relationship Seekers consider action alerts “very valuable,” while only seven percent (7%) of All Business donors say the same thing.
  - Forty-three percent (43%) of Relationship Seekers rate success stories as “very valuable.” Only one percent (1%) of All Business donors agree.

**“Anybody who is emailing me more than once a week is going to drive me crazy eventually and I’ll look at it less...If there is nothing going on, I don’t need to hear the same material over and over again.”**

**– Relationship Seeker**

**When describing a pet peeve, a Casual Connector responded: “It’s not thinking through what your target audience wants to hear. It’s sending out things that may not be relevant, sending out things that may not be well written, look boring, not following through with a donor.”**

How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially? (Q18sum1)				
Very valuable	Total	Relationship Seekers	Casual Connectors	All Business
An email tax receipt at year-end showing how much you gave	71%	81%	75%	57%
Financial updates that show how the charity has been spending donated funds	35%	49%	41%	12%
Action alerts that let you send a fax or email to your elected officials	31%	53%	33%	7%
Success stories	24%	43%	27%	1%
Reviews and summaries of recent news coverage of the cause or charity	19%	39%	19%	1%
Personal stories by people whose lives have been transformed by the charity	19%	37%	20%	1%
Personal ‘news you can use’ – consumer and health advice, etc. – related to the charity’s issues	15%	27%	16%	2%
Volunteer opportunities	15%	27%	15%	4%
Contests	2%	4%	2%	0%

**Figure 10: Types of Information Sent by Email Deemed Very Valuable**

## CHAPTER SIX: What Organizations Are Doing to Connect with the Wired Wealthy

The main focus of this study was the online survey with wired wealthy donors, but we also wanted to gain a sense of what steps charities and nonprofits were taking to speak to their best donors using email and the Web. In November 2007, we launched a companion online survey of fundraisers, communicators and other nonprofit staff to get some insights. We promoted the survey via a number of public fora, and staff members from more than 200 different organizations took part.

Our hypothesis was that most organizations have not invested in the Internet as a key channel for engaging with high dollar donors. While this is true of many organizations, the survey suggests that organizations appear to be in a state of flux, with no clear pattern among responding groups.

The good news is that there seems to be widespread recognition that high dollar donors are online. More than half say they have received online gifts of \$1,000 or more. On the other hand, major donor fundraisers appear only marginally involved in most organizations' online strategy, and organizations are pursuing a disjointed array of strategies for addressing the needs of some of their most important donors.

Notably, only a third of responding organizations say they create special versions of their email newsletters and other recurring communications for high dollar donors. That would be the first thing the wired wealthy would want.

### Summary of Key Findings:

- There is widespread recognition that high value donors are engaging – and giving – online.
  - Eighty-three percent (83%) of participating staff members agree that \$1,000 donors are generally active Internet users.
  - Sixty-four percent (64%) say they believe that high dollar donors are visiting their web site and subscribing to their emails.
  - Fifty-seven percent (57%) say their organization has received online donations of \$1,000 or more.
- Organizations have not adopted a clear path or approach for engaging with the wired wealthy. Provided with a variety of potential strategies and tactics:
  - Thirty-five percent (35%) say they have devised special online communications for high dollar donors only.
  - Twenty-four percent (24%) say they adapt email solicitations for high dollar donors.
  - Sixteen percent (16%) say they send email updates to high dollar donors, but not email solicitations.
  - Nine percent (9%) say they suppress high dollar donors from all emails.

- Major donor fundraisers are not centrally involved in online communications planning at most organizations.
  - Only 31 percent (31%) say that middle and major donor fundraising staff are “very involved” in their organizations’ online strategy.
  - Thirty-three percent (33%) say these staff members are “somewhat involved.”
  - Thirty-three percent (33%) say middle and major donor fundraising staff are either “not too involved” or “not involved at all.”



## RECOMMENDATIONS FOR CHARITIES AND CAUSES

Following are our recommended strategies and tactics for organizations committed to building stronger relationships with their wired wealthy donors. Some of these recommendations are equally applicable to *all* online donors, and indeed to all online constituents. And while it certainly makes sense to adopt most of these recommendations universally, from a financial point of view, it is the wired wealthy whose happiness will contribute most to your bottom line.

Unfortunately, there is no obvious shortcut for separating the reclusive All Business donors from the eager Relationship Seekers and so forth. *What you can do, what we urge you to do, is create and provide options that lets the wired wealthy customize their online relationship with you.* As one donor we interviewed asked, “Why are my only choices either email me or don’t email me?” If we offer one overarching recommendation, it is to find a way to get beyond this all or nothing choice.

1. **Don’t panic ... but don’t assume doing nothing is an option.** Most wired wealthy donors are not fundamentally unhappy with online communications. But they aren’t delighted either. Using the online channel better should be a development priority. And, recognize that your middle and major donors are coming to your web site, and what they see may influence their giving decisions. Ask yourself: Is our web site up to the task? Are our emails inspiring?
2. **Segment your list.** Your best donors want different things from you.

Your All Business group – and probably the others – want the smoothest possible online donation process, and the best possible case for giving on your site. Emails for All Business should be scarce, but should include an annual tax summary and periodic donor reports on where the money is going and what you have accomplished

Your Casual Connectors and Relationship Seekers are open to **cultivation**. Look at your emails and your home page as opportunities to inspire.

- a. Tell great stories, both on your web site and in your emails. Use powerful, evocative images.
- b. Report back to donors via email at least once per quarter detailing some of the ways you have used their donations.
- c. Provide and promote some engagement options, including video, podcasts, your blog, and action opportunities. Permit donors to opt out of communications promoting these special engagement options if they are not interested.

Finally, that all-important group of Relationship Seekers is looking for **engagement**. In addition to the engagement options above:

- d. Invite highly motivated donors to blog about you, join your LinkedIn group, or review you favorably on CharityNavigator’s new donor comment area.
- e. Recognize donors who have been giving for some time, or who have helped to recruit others.
- f. Solicit ideas and suggestions from donors on a regular basis.

3. **Power to the people – make donor control your new mantra.** If at all possible, provide donors with some control over the content and frequency of emails.

Create email options for your wired wealthy donors. Let them choose between a minimal package of emails that includes an annual renewal reminder, a tax summary and more comprehensive email options. Ask donors for their information and frequency preferences and create customized emails that reflect content interests.

4. **Let the message drive the technology and not the reverse.** For this group of donors in particular, don't get stampeded into whatever the latest thing is online. Don't replace quality with quantity. Don't communicate when you have nothing to say, just because there is a scheduled email. Try to segment emails by interests, but don't assume you know what those segments are; ask your donors. Make inspiration a metric that guides much of what you communicate.
5. **Pay special attention to video.** Maybe this is the single exception to recommendation four. Relationship Seekers are heavy users of online video and express significant interest in seeing more. Hire a professional producer, and ask a test group of donors what they think before launching to a wider audience. No single video is going to change everything; a series of modestly produced short videos will get more mileage than one blockbuster. Most "viral videos" never go "viral." Don't measure success merely by looking at how many times a video has been viewed. The real measure is whether the right people – your wired wealthy Relationship Seekers – have seen it, and whether it has inspired them.
6. **Make listening an every day tactic.** We found the participants in this study to be not at all shy about expressing their likes and dislikes. With online communications and philanthropy in general in a state of flux, keeping close tabs on the evolving preferences of your constituency will be critically important. Even the act of asking has cultivation value; donors will be pleased you are listening.

Here are three ways to make listening a key element of your communications plan:

- a. Track "over the transom" comments. Chances are your organization already gets a fair amount of unsolicited email from list members and donors. Are you seeing it? Is someone at least distributing summaries of the issues that are coming up repeatedly? A handful of emails may represent a much larger group of folks with similar concerns.
- b. Establish a donor advisory panel. This is rapidly becoming a fixture in the commercial sector. Recruit a few hundred donors (and possibly list members) to serve as a sounding board for future issues, tactics and campaign ideas. Survey them at least once a month so they feel like they are being utilized.
- c. Ask for feedback in your newsletter. Ask readers to rate each issue, and then ask for additional open-ended feedback.

## CONCLUSION

So we end this white paper with the question with which we began: are the attitudes and preferences of the wired wealthy different in some material way from other online donors and engagers, or are they just more important because they give substantially more money? Based on other research, we are inclined to agree with Hemingway – the main difference is one of quantity and not quality. Moreover, what the wired wealthy are asking for – notably more control over their relationship with the charities to which they give – should be equally valuable with givers large and small.

We sincerely hope this study will inspire your organization to develop a creative, strategic and responsive online communications strategy for your middle and major donors. They have been waiting for you.

And while we have repeatedly emphasized the fact that each one of these donors is important and merits special handling, it is equally important to recognize that online communications are still fundamentally experimental. Don't forget to take some risks along the way.

Finally, we offer this study as the opening of a conversation with, and among, the philanthropy community on how best to employ these new channels of communication to foster a richer and more satisfying giving relationship between organizations and their supporters – even if the goal in some cases is to give donors their space! Please share with us your own experiences, and don't be shy in offering your critique, concerns and suggestions for the next round of research.

## METHODOLOGY

The Wired Wealthy study of high dollar donors was conducted by Edge Research as part of a joint research effort with Convio and Sea Change Strategies. A total of 23 nonprofit organizations participated in the study, spanning seven vertical sectors; Advocacy/Public Affairs, Animal Welfare, Christian Ministries, Environment, Health, International Relief and Development, and Public Television.

Participating organizations were asked to provide a list of all those who had donated \$1,000 or more in the past 18 months to their organization, for whom they had email addresses. All combined, the participating organizations contributed a total of 39,381 names from which the survey sample frame was constructed.

The survey instrument was designed by the research team, and participating organizations reviewed the contents prior to the study launch. The main objectives adhered to during the instrument design were uncovering best practices for communicating with an organization's best donors, and how to more strategically incorporate Internet communications into major donor fundraising plans.

Data collection began October 12, 2007 and finished November 25, 2007. In total, 3,443 individuals completed a survey. The margin of error for the sample as a whole is  $\pm 1.5\%$  in either direction at the 95% confidence interval, meaning that the results will not vary by any more than 1.5% in 95 out of 100 cases. The margins of error for vertical sectors and organizational data sets vary. Final response rates for each organization varied, but on average were 10%.

The total data are weighted (weighted n size=2759) so that the results are not disproportionately skewed toward any one organization. The data are also weighted by gender (50% each). Vertical sector data are also weighted in this manner; data for individual organizations are not weighted.

## ABOUT THE SPONSORS OF THIS STUDY



Convio is a leading provider of on-demand constituent relationship management software and services to nonprofit organizations to enable nonprofit organizations to more effectively raise funds, influence public policy and support their missions by leveraging the Internet to build strong relationships with constituents. The company's online constituent relationship management, or eCRM, solution includes a suite of on-demand software modules for fundraising, advocacy, email marketing and Web content management complemented by a portfolio of best-in-class consulting services.

For more information, please visit  
**[www.convio.com](http://www.convio.com)**.



Sea Change Strategies works with nonprofits to help them achieve remarkable results in marketing, fundraising and communications. We focus on sound strategy, new ideas and disciplined execution as building blocks to help our clients thrive in the new world of integrated marketing.

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**APPENDIX A** (see following pages)