

# 2009 eNonprofit Benchmarks Study

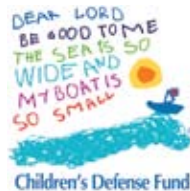
An Analysis of Online Messaging, Fundraising and  
Advocacy Metrics for Nonprofit Organizations



Authored by:



THANK YOU TO OUR NONPROFIT STUDY PARTNERS



# Acknowledgements

This report was written by Karen Matheson and Marc Ruben of M+R Strategic Services (M+R), and Holly Ross of the Nonprofit Technology Network (NTEN).

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## ABOUT M+R STRATEGIC SERVICES

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

## ABOUT NTEN: THE NONPROFIT TECHNOLOGY NETWORK

NTEN aspires to a world where all nonprofit organizations skillfully and confidently use technology to meet community needs and fulfill their missions. We connect our members to each other, provide professional development opportunities, educate our constituency on issues of technology use in nonprofits, and spearhead groundbreaking research, advocacy, and education on technology issues affecting our entire community. [www.nten.org](http://www.nten.org)

The complete report is available free online at: [www.e-benchmarksstudy.com](http://www.e-benchmarksstudy.com).

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# I. Introduction

2008 was quite possibly the most exciting year in the short history of online activism and fundraising. The attention brought to the industry as a result of the 2008 elections motivated millions of online activists and inspired visionary engagement strategies among nonprofit practitioners.

M+R published the first eNonprofit Benchmarks Study in 2006, in partnership with several other organizations, and followed it up with our 2008 study published with the Nonprofit Technology Network (NTEN). During that time, a number of major developments in the online world – from the rise of social media and mobile advocacy to inboxes more crowded than ever – have impacted the effectiveness of email programs. Yet, as the campaign season proved, email is still the primary driver of online advocacy and fundraising.

This new study covers data collected from 32 nonprofit organizations, covering all of calendar years 2007 and 2008. In combination with the previous two studies, it presents a four-year landscape of nonprofit email, fundraising, and advocacy results.

This year's study calculates, for the first time, nonprofit email benchmarks for specific list segments, such as donors vs. non-donors, geographically targeted audiences, and interest-area segments. It also analyzes specific types of advocacy emails like phone call alerts, surveys, and tell-a-friend emails.

## KEY FINDINGS OF THE 2009 BENCHMARKS STUDY

- Email open and click-through rates fell from 2007 to 2008, while response rates remained relatively steady. Open rates declined from 17 to 16 percent, and click-through rates have declined nearly a half of a percent, to 2.4 percent. These declines are less pronounced than the downward trends found in previous studies.
- The average subscriber on each email list received about 3.5 messages per month. This was unchanged from 2007 to 2008.
- In our sample, the number of online gifts increased by 43 percent over 2007, while the total dollars raised online increased by only 26 percent. The response rate for fundraising messages held steady at 0.12 percent across all sectors.
- The increase in the number of gifts helped offset revenue lost from a decline in average gifts. Average gift size across all participating organizations was \$71, down \$15 from the previous year. This decline was most pronounced in the fourth quarter of 2008.
- Fundraising emails sent to previous donors received response rates more than three times as high as those sent to non-donors.
- Email lists continue to grow, though more slowly every year: growth was at 17 percent in 2008, down from 19 percent in 2007 and 21 percent in 2006.
- 19 percent of email addresses “went bad” annually, due to bouncing or unsubscribes – the same as in 2007.
- For most organizations, almost one-third of all online actions are taken by the most active subscribers – just seven percent of the list.
- Alerts sent to previous action-takers on a given issue received response rates three times higher than those sent to the full file.

## II. Email Messaging

Despite the astronomic growth of social media – more than 35 percent of American adults now have a profile on at least one social networking site<sup>1</sup> – the most efficient way to reach supporters is still the same “killer app” nonprofits have relied on for a decade: email.

Whether raising critical funds or rallying support for a cause, email gives your organization a direct line to your supporters. And as online programs have matured, the decline in the performance of email has slowed.

In this chapter, we examine the key metrics of email messaging – open rate, click-through rate, and response rate – to establish updated benchmarks for nonprofit organizations across sectors.

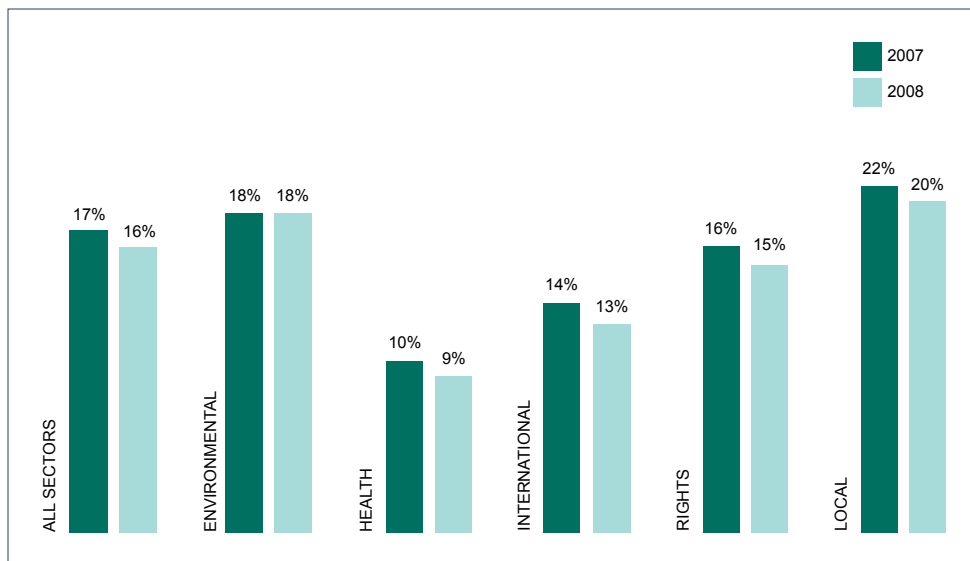
### KEY FINDINGS

- Email open and click-through rates have fallen slightly from 2007 to 2008.
- Both fundraising and advocacy response rates held relatively steady from 2007 to 2008, at 0.12 percent and almost five percent, respectively.
- Message volume remained steady between 2007 and 2008. The average subscriber on a study participant’s list received about 3.5 messages per month in both years, despite marked increases in volume in the fall of 2008, presumably due to the election.
- In the months preceding the election, message volume increased dramatically, but email open rates, click-through rates, and response rates did not suffer as a result.

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<sup>1</sup> Lenhart, Amanda. Adults and Social Network Websites. Pew Internet & American Life Project, January 14, 2009, <http://www.pewinternet.org/Reports/2009/Adults-and-Social-Network-Websites.aspx>, accessed on April 15, 2009.

## EMAIL OPEN RATES

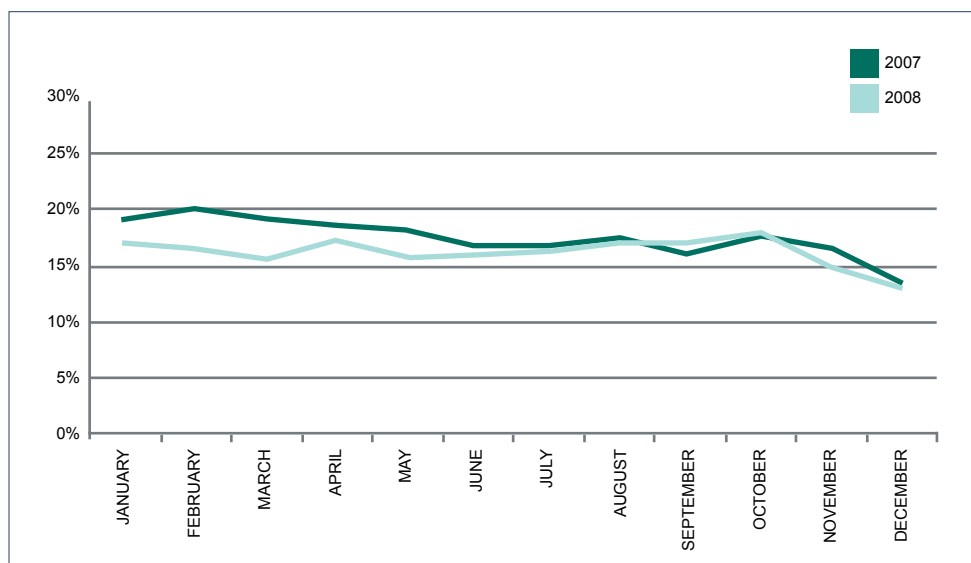


Email open rates had been declining steadily over the past several years, and the change from 2007 to 2008 was no exception. However, the size of the difference in open rates between 2007 and 2008 was only a one percent decrease, while last year's study found a three percent decrease between 2006 and 2007.<sup>2</sup>

Of course, open rates are a notoriously unreliable metric. This is because the technology that allows us to measure an "open" is affected by factors – spam filters, preview panes, image-blocking – that have little to do with whether someone is actually opening (or reading) an email. Many email programs still block images, and we continue to see subscribers click and respond to emails that were not tracked as having been opened.

<sup>2</sup> eNonprofit Benchmarks Study, M+R Strategic Services and Nonprofit Technology Network, 2008.

## EMAIL OPEN RATES BY MONTH



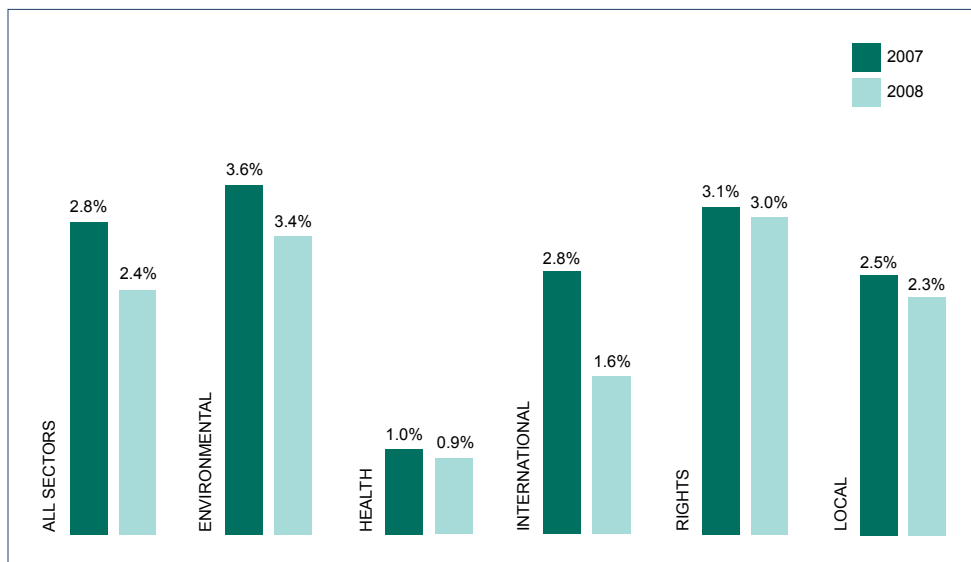
Examining open rates across all study partners by month, we can see a clear and deep decline at the end of both 2007 and 2008, particularly in December. This decline in open rates correlates to an overall increase in message volume during that period.<sup>3</sup>

September was the one month in which open rates were higher in 2008 than 2007, despite the fact that message volume was also up dramatically in that month, as we see later in this chapter. Likely due to excitement around the election, organizations were sending more messages and subscribers were opening more messages.

<sup>3</sup> Pearson Correlation  $r = -.495$   $p < .05$



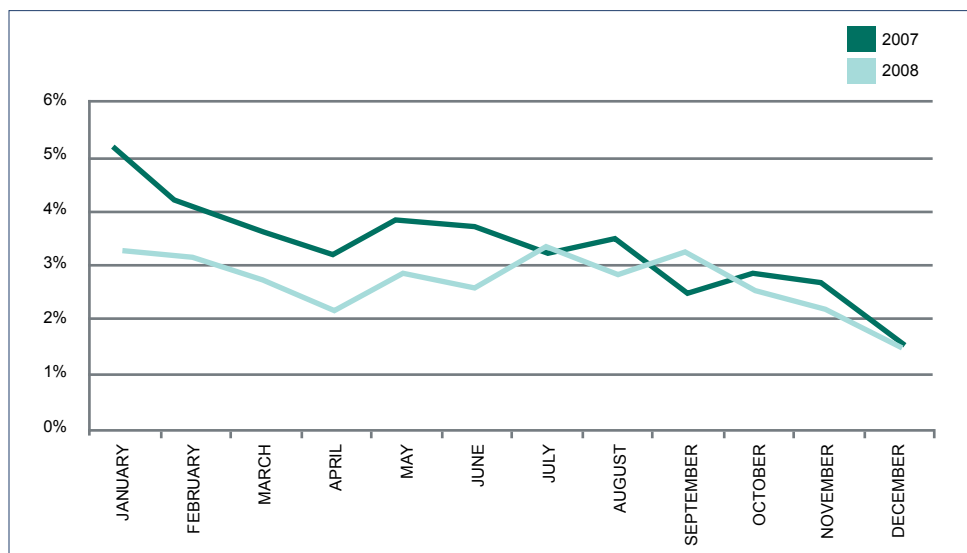
## EMAIL CLICK-THROUGH RATES



Click-through rates fell from 2007 to 2008 across all issue sectors. The international sector faced the most pronounced decline.

Also notable are the dramatically lower click-through rates among health organizations, compared to other sectors. Health groups tend to send fewer emails overall than other types of nonprofits, and often have a higher proportion of fundraising emails – which likely contributes to a lower overall click-through rate.

## EMAIL CLICK-THROUGH RATES BY MONTH



Click-through rates followed a similar trend to email open rates: a steady and deep decline at the end of the year, with the sharpest decline in December. A high proportion of emails going out in December are fundraising appeals, which have much lower click-through rates than other emails.

As with open rates, we see a bump in the September 2008 click-through rates, despite much heavier messaging in that month compared to 2007.

## EMAIL MESSAGING RESULTS BY MESSAGE TYPE

Across all sectors, we evaluated three distinct types of messages – fundraising appeals, email newsletters, and advocacy alerts.

	OPEN RATE	CLICK-THROUGH RATE	PAGE COMPLETION RATE	RESPONSE RATE
2007 FUNDRAISING	16%	0.7%	19%	0.12%
2008 FUNDRAISING	14%	0.6%	19%	0.12%
2007 ADVOCACY	18%	6.3%	83%	4.8%
2008 ADVOCACY	16%	5.5%	88%	4.5%
2007 E-NEWS	16%	3.0%		
2008 E-NEWS	15%	2.1%		

For fundraising messages, open rates were down from 2007 to 2008, but click-through and response rates did not change.<sup>4</sup>

For advocacy messages, open and click-through rates fell slightly, but response rates stayed relatively similar.<sup>5</sup>

For email newsletters, open rates and click-through rates fell slightly in 2008, though the changes were not strictly statistically significant.<sup>6</sup>

It is notable that, despite the slight declines in open and click-through rates, response rates for advocacy and fundraising messages did not drop significantly. It may be that subscribers have a better sense of what awaits them on advocacy and donation landing pages and are less likely to click through simply out of curiosity.

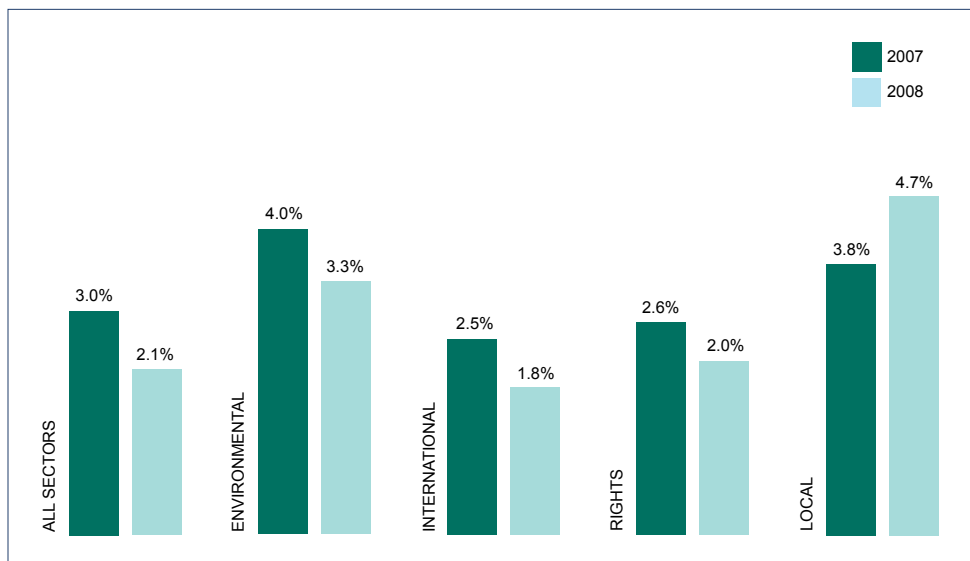
See later chapters for a more detailed analysis of the performance of fundraising and advocacy emails.

<sup>4</sup> The slight change in fundraising click-through rates was not statistically significant.

<sup>5</sup> The declines in advocacy open and click-through rates were statistically significant ( $p < .05$ ), but the decline in advocacy response rates was not.

<sup>6</sup> The change in click-through rates trended towards statistical significance ( $p = 0.10$ ), possibly because of sample size: only 17 organizations had comparative email newsletter data from 2007 and 2008.

## EMAIL NEWSLETTER CLICK-THROUGH RATES

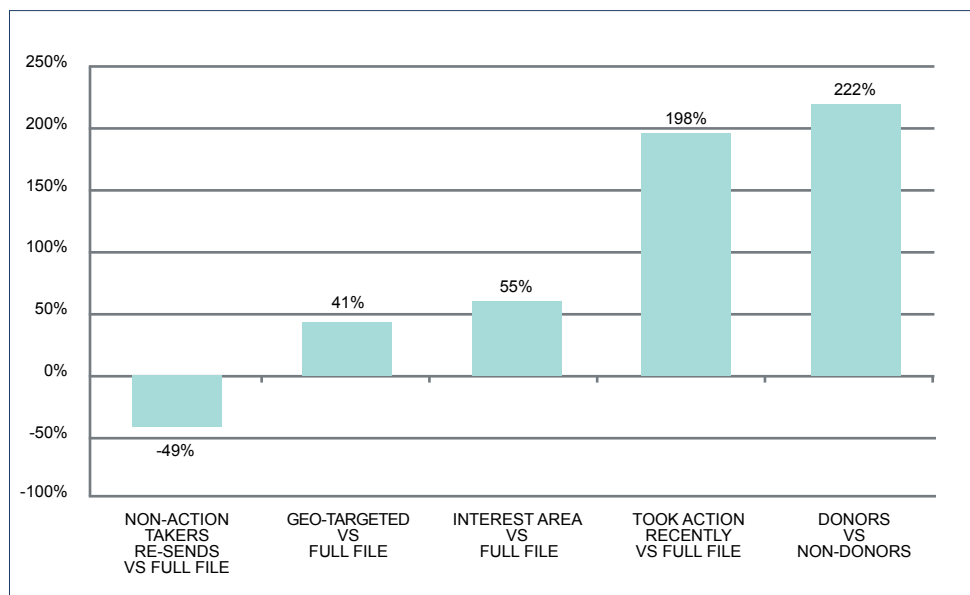


Click-through rates represent the best measure of email newsletters because these messages often don't link to advocacy or donation landing pages. Overall newsletter click-through rates dropped from three percent in 2007 to two percent in 2008.<sup>7</sup>

In our sample, local organizations were the exception to this downward trend. The groups we studied in this sector saw a one percent increase in newsletter click-through rates and secured the strongest click-through rate for email newsletters of any sector.

<sup>7</sup> As mentioned previously, this change trended towards statistical significance ( $p=0.10$ ), possibly because of sample size: only 17 organizations had comparative email newsletter data from 2007 and 2008.

## PERCENT CHANGE IN RESPONSE RATES BY LIST SEGMENT



Many organizations have become more strategic about whom they email and when, segmenting their lists based on prior subscriber behavior and targeting some fundraising appeals and advocacy alerts to those audiences most likely to respond.

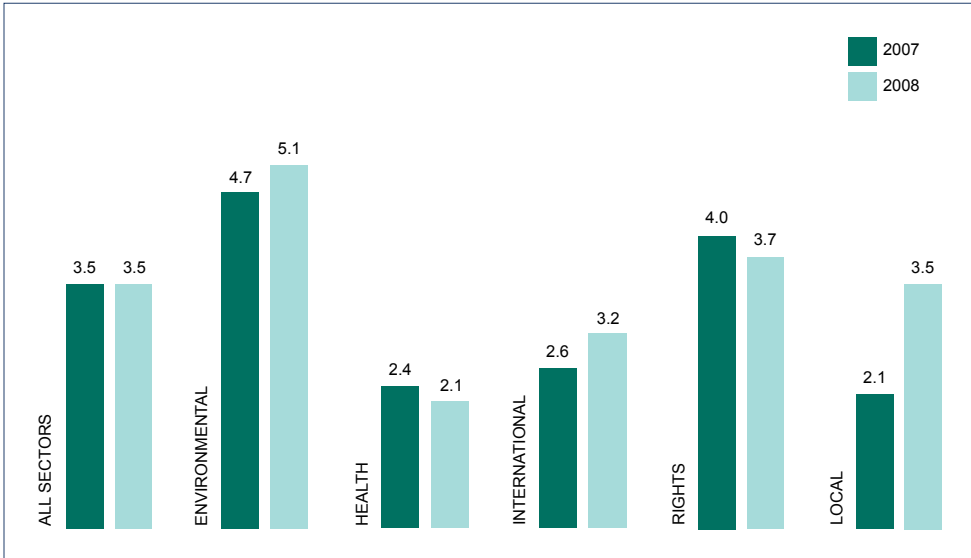
This study's first-of-its-kind segmentation analysis sets industry-wide benchmarks for a number of common list segments. The chart above illustrates the percentage change for a given segment, as compared to a full-list email sent by the same organization.

Fundraising emails sent only to previous donors received response rates more than three times higher than those sent only to prospects on the same list.

Not surprisingly, activists targeted by geographic location or by demonstrated interest in the subject matter had higher advocacy response rates – about one-and-a-half times that of the general population.

Emails sent to activists who had recently taken action on a given issue received triple the response rate of regular full-list actions. Re-sends of advocacy messages to anyone who failed to take action the first time tended to garner little more than half the response rate of a full-file alert. These results demonstrate the value of targeting – and that recent online behavior is one of the most effective predictors of future behavior.

## MESSAGE VOLUME: EMAIL MESSAGES PER MONTH PER SUBSCRIBER

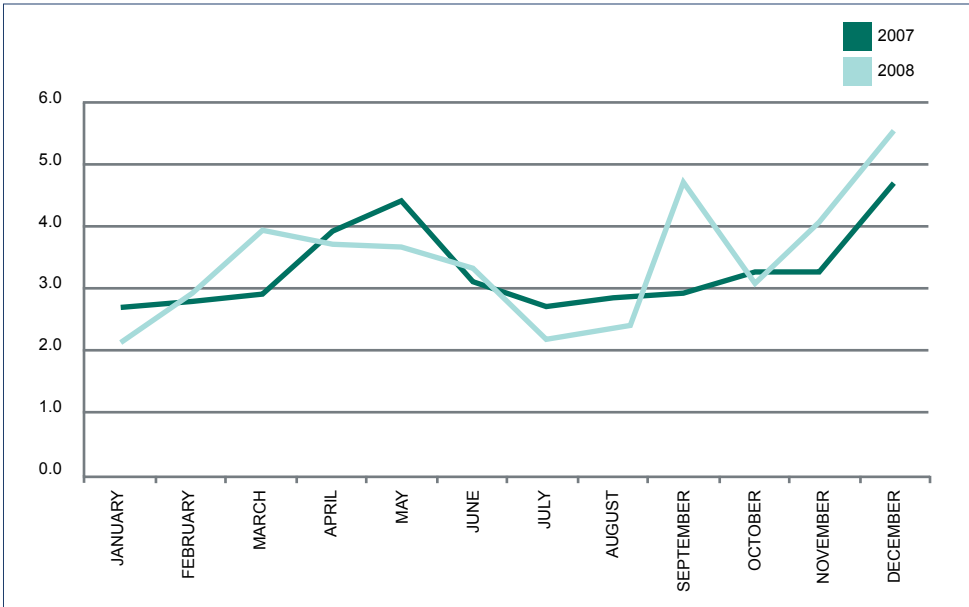


Overall, message volume remained consistent among our nonprofit study partners from 2007 to 2008, at about 3.5 messages per month.

Keep in mind, however, that many organizations segment their lists and target messages based on a variety of criteria. Some individuals may be receiving 10 emails a month from a given organization while others receive only two or three.

Local organizations' messaging volume grew the most of any sector, from below the industry average in 2007 to exactly the same as that average in 2008.

## EMAIL MESSAGE VOLUME BY MONTH

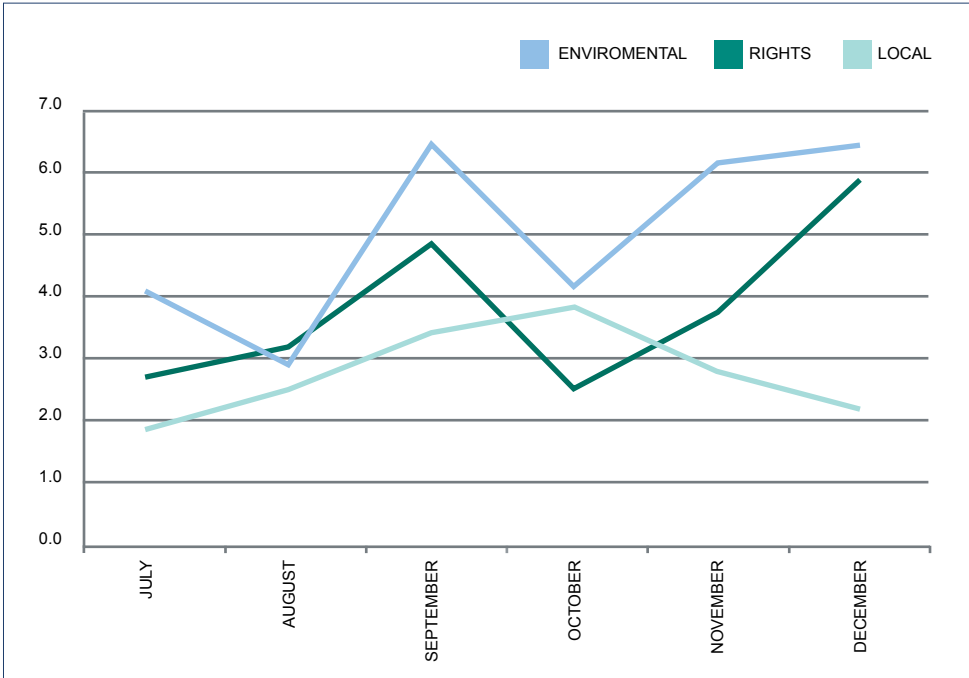


December represents the heaviest messaging month for most organizations. This is a time period in which many nonprofit organizations run end-of-year fundraising drives.

Unlike 2007, the second-busiest month for our study partners in 2008 was September, just before the election. We do not expect to see this trend repeated in 2009.

The other time period in which we typically see increased email activity is the spring – possibly due to a combination of spring fundraising drives and Congress being active – and 2008 was no exception.

## 2008 MESSAGE VOLUME BY MONTH BY SECTOR



Here we explore the impact of the election by looking at three specific sectors' messaging during a notable portion of the year. These three sectors experienced a jump in message volume in September, with environmental groups posting the most dramatic increase, from three messages per subscriber in August to more than six in September.

Rights organizations in our sample followed the same trend as environmental groups in the final months of 2008.

Local organizations' email volume peaked in October, but then dropped off after the election.



## USING TEXT MESSAGING TO BOOST EMAIL ADVOCACY

So you've segmented your list and begun targeting some of your emails...how else can you keep your email response rates high? For NARAL Pro-Choice America, the next frontier was a robust text messaging program that helped strengthen email performance.

NARAL Pro-Choice America spent months building a list of 8,500 supporters who opted in to receive text message alerts as part of its Txt4Choice program. Action alerts hit a peak in the lead up to the election, with mobile-based action alerts, call-in campaigns, and an on-the-fly candidate information service.

In March 2009, when the North Dakota legislature was getting ready to pass a bill that amounted to a statewide abortion ban, NARAL Pro-Choice America and M+R put their multi-channel approach to a scientific test. First, an email action alert went to the full list, asking supporters to send letters to the North Dakota governor about the bill. Then, NARAL Pro-Choice America split the Txt4Choice audience in half, sending one group a text message on the same day as the full-list email, and sending no text message – just the email – to the other group. (The text message asked supporters to reply 'VETO' to sign a petition to the governor, but did not mention the email.)

How did receiving a text message affect email response? The chart below does not include text responses, only the subscribers' response to the email message.

EMAIL ADVOCACY BY SEGMENT	OPEN RATE	CLICK-THROUGH RATE	RESPONSE RATE
FULL FILE	11%	3.7%	3.4%
IN TXT4CHOICE, DID NOT RECEIVE TEXT	24%	7.2%	6.2%
IN TXT4CHOICE, RECEIVED TEXT	35%	19.1%	18.3%

Txt4Choice subscribers – both the test group and the control group – performed much better than the full file in response to the email message. They were more than twice as likely as the full file to open, click, and respond to the email. But Txt4Choice subscribers who received the text message about North Dakota responded at a rate nearly three times greater than those Txt4Choice subscribers who were excluded, and at a rate six times greater than the full email file.

Signing up for text messaging alone correlated with stronger email response rates... but reinforcing an email with another channel of communication boosted response rates even further.

## III. Online Fundraising

As soaring unemployment, vanishing retirement savings, and the plummeting stock market dominate the front pages, no one expected 2008 to be a banner year for online fundraising. Yet even in these tough economic times, most of the groups in our study saw their online fundraising increase from 2007 to 2008.

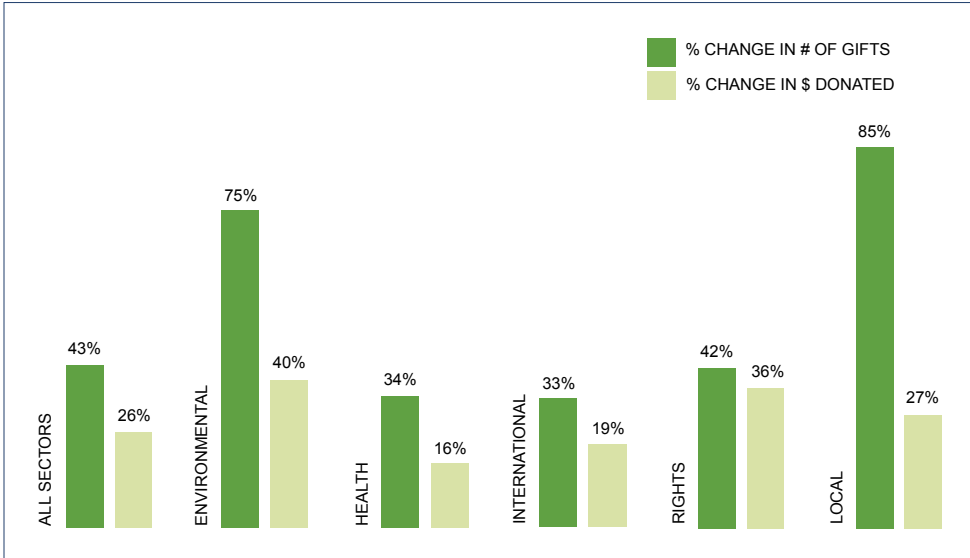
A deeper look, however, reveals that online giving was by no means unaffected by the current downturn. Overall giving was up for the year, but the final quarter of 2008 provides a sobering hint of what may lie ahead. As the economy slumped, year-over-year returns flattened; those who did donate gave less.

This chapter examines some factors that may have contributed to the overall resilience of online fundraising. For nonprofits seeking an answer to the question of how their results compare to their peers, we'll provide detailed data by sector. And, for the first time, we will provide benchmarks for fundraising emails sent to targeted audiences based on previous donation history.

### KEY FINDINGS

- The total amount of money raised online increased by 26 percent from 2007 to 2008.
- The primary driver of the growth in the amount raised was the increase in the number of gifts, which went up by an astounding 43 percent! This was offset, however, by a 17 percent decline in average gift size, from \$86 to \$71.
- The response rate for fundraising emails held steady at 0.12 percent – but many organizations sent more messages per recipient in 2008, which, when combined with list growth and increases in unsolicited web giving, contributed to the overall growth in online giving.
- Gifts of under \$250 accounted for 97 percent of all gifts but only 59 percent of total dollars raised by participating organizations in 2008. By contrast, gifts of \$250 and greater made up just three percent of all gifts, but accounted for 41 percent of all revenue!

## CHANGE IN ONLINE GIVING FROM 2007 TO 2008

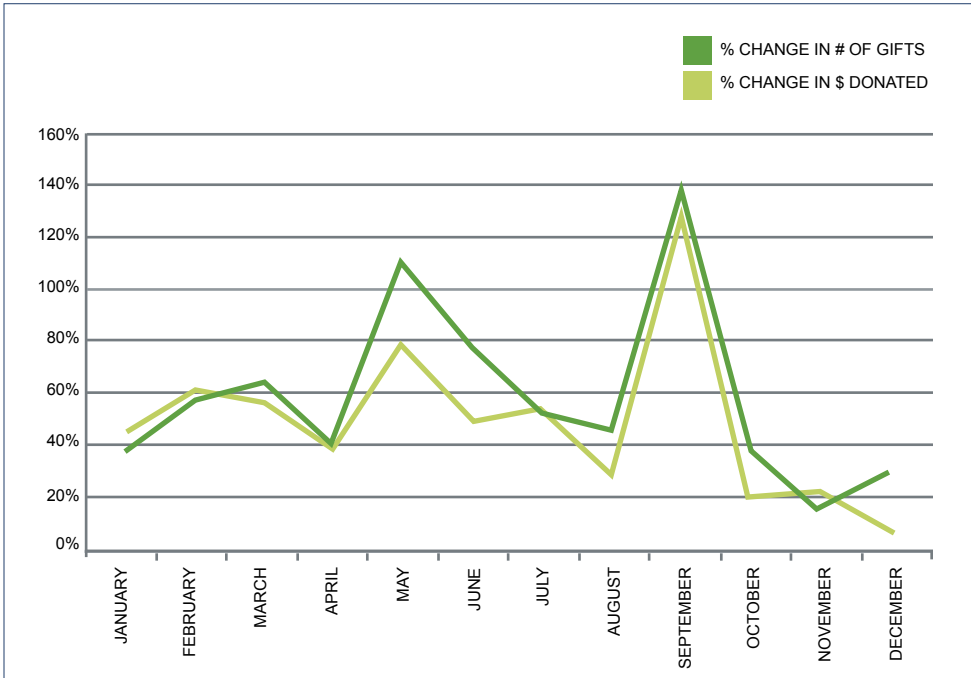


The number of people giving online grew steadily from 2007 to 2008. The number of online gifts went up by 43 percent and the total amount of money raised online increased by 26 percent across our sample.

The health and international sectors in our sample saw the slowest growth, while the environmental sector experienced the most growth in both number of gifts and amount raised.<sup>8</sup>

<sup>8</sup> Only five organizations are included in the dataset for local groups – not enough to draw strong inferences about fundraising performance changes in this particular sector.

## CHANGE IN ONLINE GIVING FROM 2007 TO 2008 BY MONTH

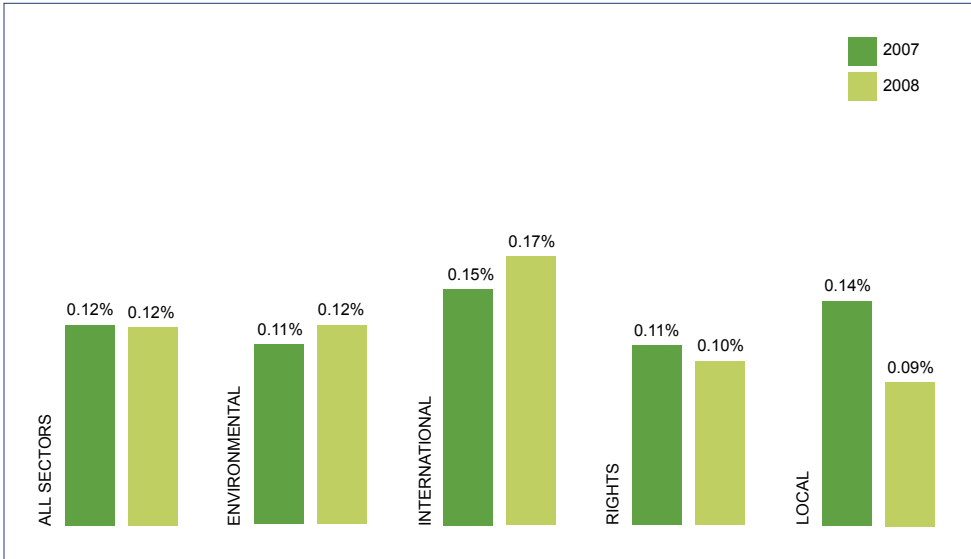


Online fundraising was up overall in 2008, but which months saw the biggest increases?

There were clear spikes in May and September of 2008. The spike in May was likely the result of increased giving to international groups in response to two devastating natural disasters: the earthquake in China and the massive cyclone in Burma. September's spike was the result of a steep increase in giving to environmental groups during that month, which may be attributable to the heated national debate about offshore drilling and the energy crisis during the presidential campaign.

In December 2008, as the economy continued to decline, the number of gifts increased 30 percent over 2007, but the amount given was only up by five percent.

## EMAIL FUNDRAISING RESPONSE RATES



While the overall numbers of gifts and the amount donated both increased in 2008, email response rates held steady.<sup>9</sup>

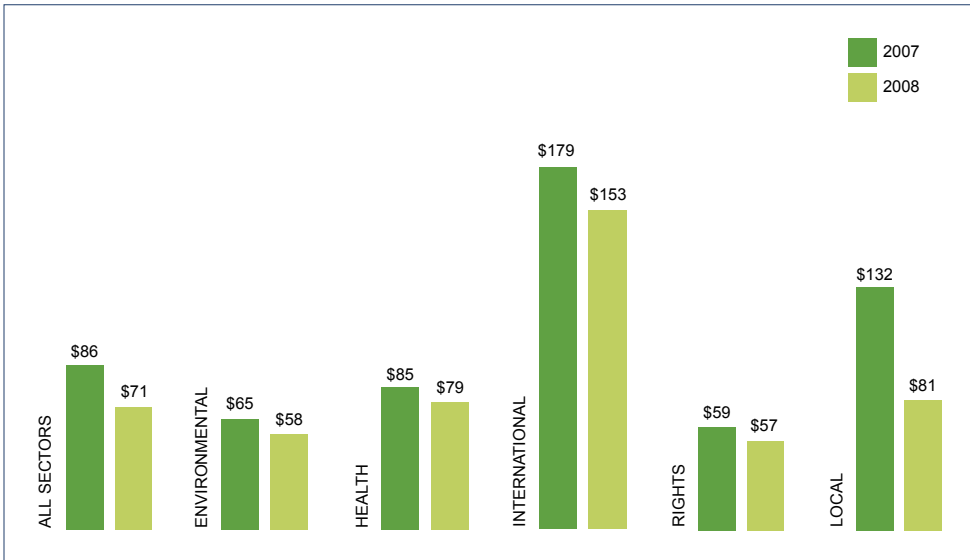
All sectors saw small differences in response rates from 2007 to 2008, but none were statistically significant.

This stands in contrast to three years of steady declines in fundraising email response rates.<sup>10</sup>

<sup>9</sup> Health sector data was not included in this analysis because sufficient data was not provided.

<sup>10</sup> eNonprofit Benchmarks Study, M+R Strategic Services and Nonprofit Technology Network, 2008.

## AVERAGE ONLINE GIFT



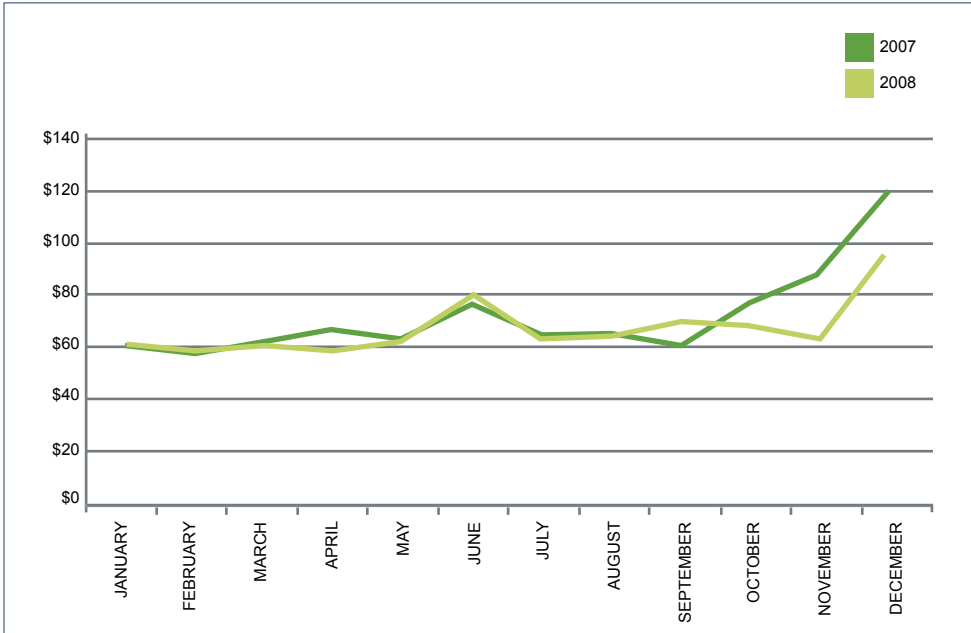
While overall giving increased in 2008, the average gift size decreased. For all participating organizations, average gift size fell from \$86 in 2007 to \$71 in 2008.

No sector saw an increase in average gift. This is in marked contrast to the previous eNonprofit Benchmarks Study, when all sectors other than the international sector saw a modest increase in the average gift size.<sup>11</sup> This year's decline in average gift was relatively small for rights organizations and highly pronounced for internationally focused groups and local groups.

This dataset does not include monthly sustaining gifts, which tend to be much lower than one-time gifts.

<sup>11</sup> eNonprofit Benchmarks Study, M+R Strategic Services and Nonprofit Technology Network, 2008.

## AVERAGE ONLINE GIFT BY MONTH



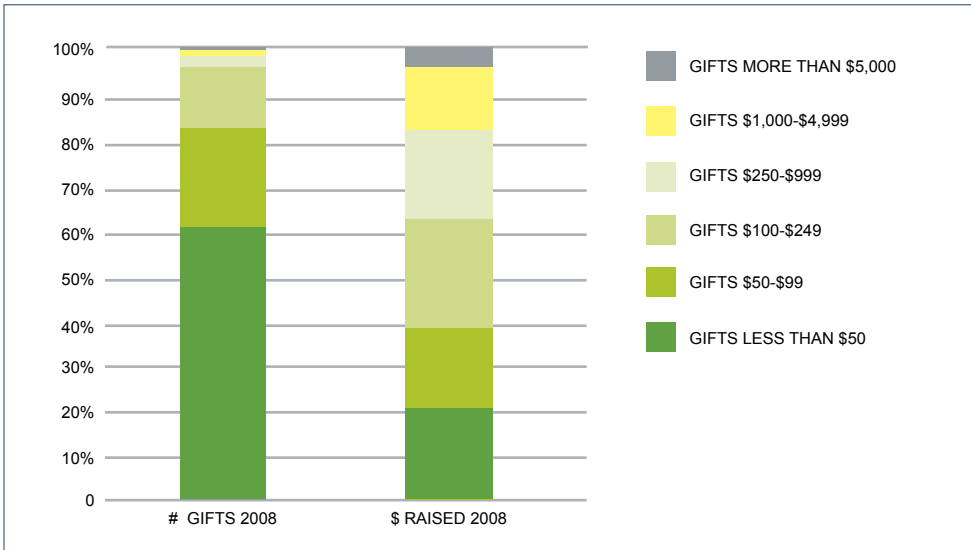
Average gifts held relatively steady until the final quarter of the year.

The annual boost from end-of-year online fundraising was considerably lower this year, however – and the drop at the end of the year was the primary reason for the overall decrease in average gifts in 2008.

2007 saw gift size increase steadily from September all the way through December. But in 2008, after an increase in September, gift size actually decreased from October to November as news of the U.S. economic crisis hit a fever pitch.

Again, this data does not include monthly sustaining gifts.

## 2008 GIVING BY GIFT SIZE



Lower-dollar donations are a growing slice of the online pie for our study partners.

As average gifts dropped, donations under \$50 grew from 51 percent of all gifts to 61 percent in 2008. In fact, only three percent were above \$250 (down from seven percent the year before).

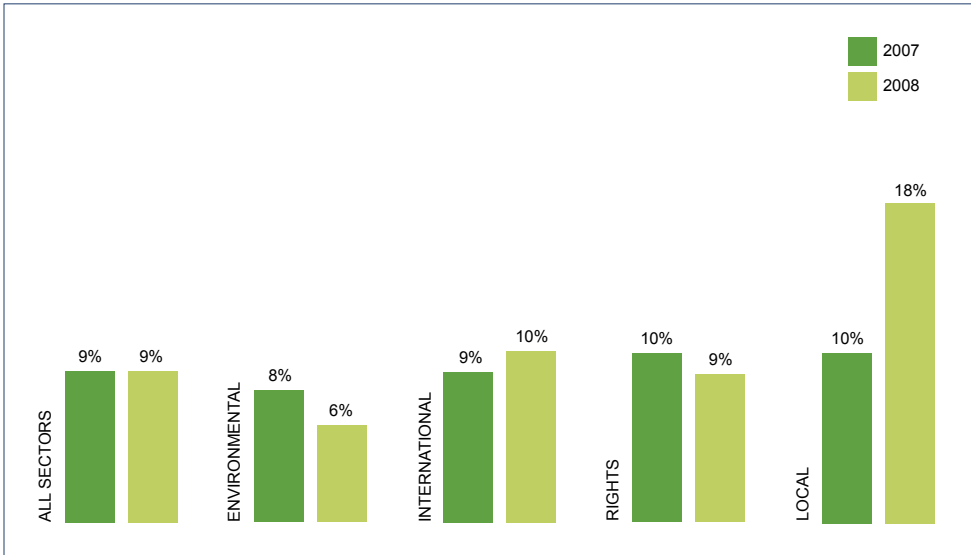
The percentage of gifts over \$1,000 was down by half in 2008.

Overall, it is clear that the growth in online fundraising in 2008 was driven by low-dollar gifts.

This data stresses the need for organizations to concentrate on maximizing average gifts from low-dollar donors, as well as improving targeted strategies to maintain higher-dollar donors' support at the same level.



## MONTHLY GIVING AS A PERCENTAGE OF ALL ONLINE GIVING



Overall, monthly gifts accounted for nine percent of online gifts in both 2007 and 2008.<sup>12</sup> While monthly giving as a percentage of total amount raised did not change from 2007, keep in mind that 2008 overall giving was up by 26 percent from 2007, so monthly giving kept an even pace with that growth.

In our sample, local organizations relied on monthly gifts more than any other sector. The proportion of income from monthly gifts increased from 10 percent in 2007 to 18 percent in 2008 for the local organizations included in the dataset.

The average monthly gift size in 2008 stayed fairly consistent with 2007 at \$21.

<sup>12</sup> Health sector data was not included in this analysis because sufficient data was not provided.

## WEAK ECONOMY, STRONG CAMPAIGN

Even as the recession put a damper on end-of-year giving, some organizations used ingenuity and agility to increase online donations.

Staffers at Oxfam America, an international aid group, were deeply concerned after their first end-of-year fundraising appeal of 2008 generated only 50 percent of the previous year's revenue. They circled the wagons, brainstormed new approaches that could be implemented over the remaining 45 days of the year, and increased end-of-year giving by almost \$200,000 over 2007, bringing in over 3,500 more donations and beating their goals.

### Here's how they did it:

- **Utilized focused messaging.** Instead of relying on traditional end-of-year language focusing on a broad overview of organizational successes and upcoming initiatives, Oxfam highlighted one specific, urgent issue – the global hunger epidemic – helping make the case for why it was important to give *right this minute*.
- **Made the most of their email schedule.** Oxfam set a public goal and deadline which were promoted in all email and web copy; a thermometer graphic drove the point home. In addition, by replacing an email newsletter and an appeal from another Oxfam program, the web team was able to add two fundraising appeals to the campaign without increasing the overall volume of messages over the previous year.
- **Optimized landing pages.** Based on test results from previous campaigns, Oxfam made two critical changes to their donation pages. First, M+R helped Oxfam conceive and script a short, powerful online video, which was included in every appeal and on every donation page. Produced in-house, it used moving text, simple animation, and compelling music to make the case for giving. Oxfam also worked with Convio to produce an API-based donation form, which transformed default Convio donation forms into cleaner, simpler forms.
- **Maximized homepage real estate.** Oxfam made the most of every visit to their homepage with dynamic promotions, including the organization's first ever "lightbox," which compelled visitors to give before visiting the rest of the site. Four different homepage promotions were strategically rotated to keep content fresh, and copy was updated as the deadline approached. As a result, passive giving to the end-of-year campaign topped \$450,000, and Oxfam raised an additional \$1.4 million in passive giving through the main donate page during this period.

Because of the organization's willingness to make changes mid-campaign, Oxfam America was able to beat the previous year's goals and engage more donors than ever before. Even during a recession.

## IV. Online Advocacy

For the last decade, the internet has been a powerful vehicle for millions of activists to communicate with lawmakers, corporations, government agencies, and other decision-makers. Online activism reached new heights in 2008, as the election engaged online constituents across the nation.

In this chapter, we'll look at key online advocacy metrics including open, click-through, page completion, and response rates. We'll provide some historical context by examining how those rates have changed over time. In addition, we'll review the impact that super-activists have had on various organizations' online work.

Lastly, this study is the first to break down industry-wide email metrics for different types of actions, from standard online petitions to phone call alerts, tell-a-friend emails, surveys, and more.

### KEY FINDINGS

- Advocacy response rates remained fairly steady between 2007 and 2008, averaging 4.5 percent in 2008.
- Standard advocacy actions – such as completing a one-step action form – have much higher click-through and response rates than high-threshold actions like phone calls.
- Of the high-threshold engagement opportunities tracked, online surveys and recruit-a-friend actions received the highest response rates.
- For most organizations, the top seven percent of active subscribers account for almost one-third of all advocacy activity.

## EMAIL ADVOCACY RESPONSE RATES

ALL ORGANIZATIONS	AVERAGE RESPONSE RATE
2007	4.8%
2008	4.5%
<b>CHANGE FROM 07</b>	<b>-0.4%</b>
<b>% CHANGE FROM 07</b>	<b>-8%</b>

In this study, we define advocacy messages as any email to an online subscriber that provides a link to an online petition, survey, or form that generates a message to a target.

Between 2007 and 2008, advocacy response rates held steady, with only a negligible decline of 0.4 percent (which was not statistically significant).<sup>13</sup>

### **Why didn't advocacy response rates decline significantly, as they have in past years?<sup>14</sup> A number of factors could be in play:**

- Increased segmentation of organizational email lists to engage the most dedicated subscribers more often;
- Improved layout and design of advocacy pages;
- Subscribers' increased familiarity with online advocacy forms; and
- Probably to a lesser extent, the momentum generated by political campaigns and news organizations in the 2008 election.

<sup>13</sup> The 2008 eNonprofit Benchmarks Study presented advocacy response rate data from 10 organizations (all clients of M+R Strategic Services) out of the total 21 participating nonprofits. This year's study uses advocacy data from all 32 participating organizations, resulting in a sample more representative of the industry.

<sup>14</sup> eNonprofit Benchmarks Study, M+R Strategic Services and Nonprofit Technology Network, 2008.

## CLICK-THROUGH RATES FOR DIFFERENT TYPES OF ADVOCACY AND ENGAGEMENT ACTIONS

High-threshold actions like letters to the editor, phone calls, or volunteer requests yield considerably lower response rates than standard advocacy messages. Yet these actions are critical to deepening relationships with committed supporters and generating higher-impact communications to decision-makers.

For this study, we analyzed the most common types of high-threshold emails, looking at click-through rates and, where enough data was available, response rates.

TYPE OF ADVOCACY OR OTHER ENGAGEMENT	NUMBER OF GROUPS IN SAMPLE	CLICK-THROUGH RATE	% CHANGE FROM REGULAR EMAIL ADVOCACY <sup>15</sup>
Regular Email Advocacy	28	5.5%	
Tell a Friend	22	4.8%	-10%
Survey	16	4.0%	-4%
Cross Promotion	10	2.8%	-54%
Letter to the Editor	6	1.8%	-51%
Volunteer	12	1.7%	-71%
Submit Story	8	1.6%	-75%
Event Invitation	24	1.4%	-80%
Phone Call Alert	20	0.8%	-95%

Online surveys and emails asking recipients to send a message to their friends yielded click-through rates relatively close to those of regular advocacy emails.

Letter-to-the-editor alerts and cross promotions (a recruitment strategy where two organizations agree to send each other's action alert to their own lists) produced click-through rates about half those of regular action alerts.

The click-through rates of emails requesting time-consuming activities like volunteering (which includes hosting an event), submitting a personal story, or attending an event were considerably lower than other types of actions.

Phone call alerts received the lowest click-through rates of all, since most organizations only ask people to click to report calls they've already made.

<sup>15</sup> This metric calculates the click-through rate of each email type as a percentage of regular advocacy alerts for a given organization, making it a more reliable statistic than the raw click-through rate. Also note that some of these emails may have been sent to targeted segments of the list.

## PAGE CONVERSION AND RESPONSE RATES FOR DIFFERENT TYPES OF ADVOCACY AND ENGAGEMENT ACTIONS

TYPE OF ADVOCACY OR OTHER ENGAGEMENT	NUMBER OF GROUPS IN SAMPLE	PAGE COMPLETION RATE	RESPONSE RATE
Survey	8	77%	3.92%
Event	7	19%	0.37%
Phone <sup>16</sup>	10	63%	0.82%

When it comes to high-threshold actions, response rate data is far more variable than click-through data, since there are significant inconsistencies across the industry in tracking these types of actions.

Online survey emails generated nearly the same response rate as regular emails, even though surveys almost always take longer to complete than a simple advocacy action.

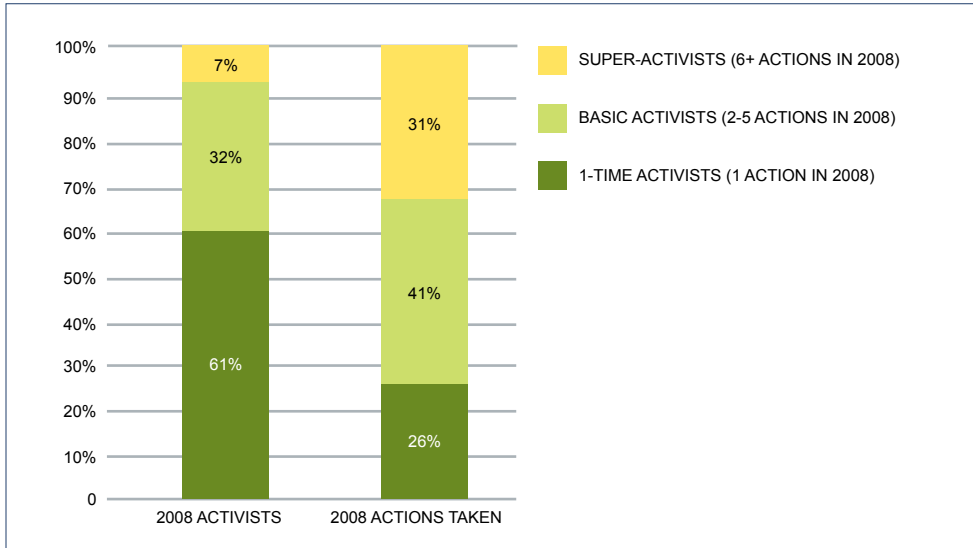
Phone call alerts tended to receive about half the response rate of a full-list advocacy alert – though keep in mind that some organizations sent their phone call alerts to targeted segments of the list, which drives up the response rate, and we only calculated phone call response rates for organizations that had forms for tracking calls. We combined data from 2007 and 2008 to calculate these metrics.

Event invitation emails garnered the lowest response rates of all.

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<sup>16</sup> This metric measures the total number of subscribers who report back to an organization that they made a call, since phone calls themselves are generally not trackable. We only calculated response rates for phone alerts that had “report your call” landing pages.

## 2008 ACTION TAKERS VS. ACTIONS TAKEN



A closer look at 2008 online activists (defined as subscribers who took at least one action during the year) reveals that while only seven percent of subscribers were categorized as super-activists, that segment accounted for almost one-third of actions taken in 2008.

Successful programs work to ensure that super-activists continue to be satisfied, while simultaneously cultivating less active subscribers to increase their activism.

## USING ONLINE VIDEO TO DRIVE ADVOCACY

In 2008, nonprofits used online videos more than ever before – not just as viral recruitment vehicles but also to advance issue-based advocacy campaigns and deepen relationships with subscribers. Advocacy videos were a mainstay of the Obama campaign, from chief strategist David Plouffe’s wonky pep talks at his desk, to the pop heights of will.i.am’s “Yes We Can” video.

Unvarnished or slick, video can be a catalyst for action. The Human Rights Campaign (HRC) has taken both tacks with success.

In 2007, a legislative battle was brewing over a federal hate crimes law that would cover sexual orientation and gender identity. HRC produced a polished video combining victims’ stories, engaging text animation, a soundtrack by Cyndi Lauper, and compelling scenes of grassroots action. It accumulated more than 360,000 views and recruited over 60,000 new online activists.

But low-budget videos can work wonders in different situations. In 2008, HRC needed to respond quickly to a hateful statement by a Utah state senator. They whipped up a quick online video that used audio of the statement and text on a black background. What HRC’s in-house team created in an afternoon helped generate 44,000 responses and recruited nearly 3,000 new activists.

Yet incorporating video can go beyond embedded YouTube clips on advocacy pages. To mobilize activists around lesbian, gay, bisexual and transgender equality in 2009, HRC launched EndtheLies.org, a campaign website where visitors can navigate through an interactive wall of embedded videos featuring outrageous statements by opponents of equality. Clicking on any video brings up comment pages and links to advocacy campaigns on each topic.

EndtheLies.org has recruited 13,000 new activists for HRC. When the National Organization for Marriage launched an ad campaign against same-sex marriage, EndtheLies.org provided the perfect platform for HRC’s response. Perhaps more importantly, the site has become a rallying point for the organization, promoted everywhere from direct mail and the organization’s magazine to media appearances on MSNBC – all because of the power of online video.



# V. Email List Size

## INTRODUCTION

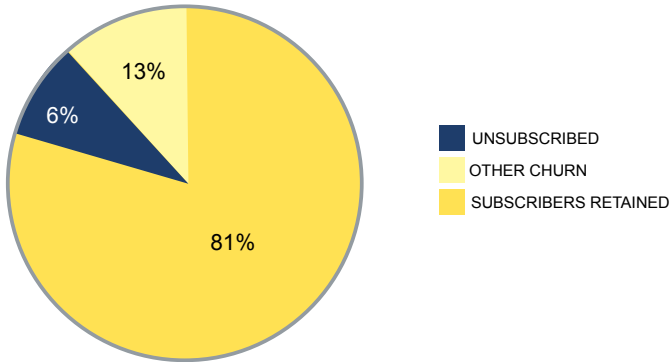
One of the key determinants of grassroots strength is the size of an organization's deliverable email list. A larger list allows for greater success in just about every sphere of online engagement, from fundraising to advocacy to viral recruitment. And, since managing a 100,000-person list takes nearly as much effort as managing a 1 million-person list, economies of scale make larger lists even more valuable.

But growing an email list requires constant effort. Every day, your list will lose members to unsubscribes, email addresses going bad, and messages being marked as spam. What's more, list growth becomes increasingly difficult (and more costly) as the best sources of new recruits are tapped out.

## KEY FINDINGS

- The annual churn rate, or the rate at which an email list "goes bad" in a year, held steady at 19 percent between 2007 and 2008.
- Fundraising messages saw a 0.15 percent unsubscribe rate in 2008, and other emails weren't far behind: informational messaging, advocacy alerts and newsletters all had unsubscribe rates of 0.12 percent.
- Email lists are continuing to grow, though the rate of growth was 17 percent in 2008, down two points from 2007.

## 2008 EMAIL LIST CHURN



Annual list churn – the rate at which email addresses “go bad” in a given year – was calculated by dividing the number of subscribers who became unreachable in a 12-month period by the total number of subscribers in the system during that same period. Only 10 of our nonprofit study partners tracked churn on their lists. For that subset, we split churn into two groups: unsubscribes, and email addresses lost to other churn (spam complaints, addresses bouncing, discontinued email addresses, etc.).

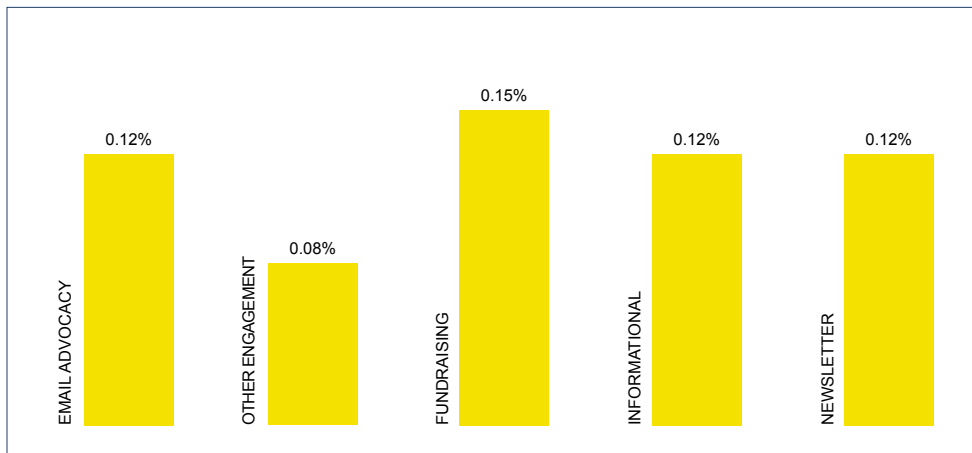
Annual churn stayed constant at 19 percent over the past two years. By comparison, 2006 saw 21 percent churn rates,<sup>17</sup> with an even higher churn rate of 28 percent in 2005.<sup>18</sup>

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<sup>17</sup> eNonprofit Benchmarks Study, M+R Strategic Services and Nonprofit Technology Network, 2008.

<sup>18</sup> eNonprofit Benchmarks Study, M+R Strategic Services and The Advocacy Institute, 2006.

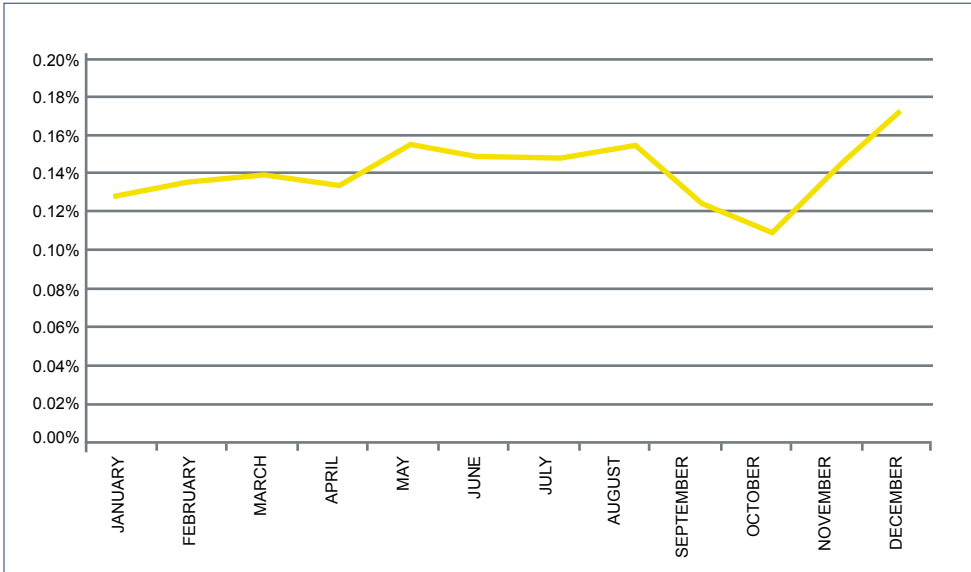
## 2008 UNSUBSCRIBE RATES BY MESSAGE TYPE



As one might expect, different types of messaging have different unsubscribe rates. Fundraising emails draw the highest unsubscribe rates, but not considerably higher than other types of messaging.

In 2008, the unsubscribe rate for informational emails was just as high as the rates for advocacy messages and newsletters. Considering that informational messaging does not ask anything of subscribers, that might seem counterintuitive – but while fundraising appeals, advocacy messages, and newsletters are a central part of many organizations' online communications programs, informational messages tend to be less mission-critical. Cutting back on extraneous informational messaging may give subscribers fewer chances to leave your list.

## 2008 AVERAGE UNSUBSCRIBE RATE PER EMAIL MESSAGE BY MONTH

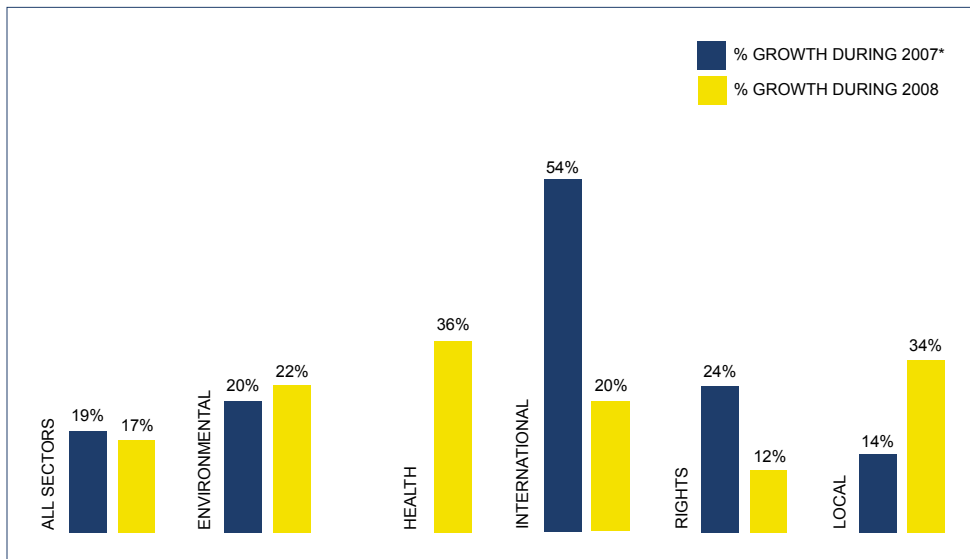


In 2008, average monthly unsubscribe rates for messaging stayed relatively stable except for a noticeable drop in the fall and a peak in December.

Subscribers seem to have given frequently-messaging organizations a free pass prior to the election, as their interest level in political advocacy remained high.

But the party was over in December, when a jump in unsubscribe rates is an annual occurrence. Message volume tends to increase in December (see Email Messaging chapter) when a greater percentage of the emails are fundraising appeals, which tend to have higher unsubscribe rates.

## ANNUAL LIST GROWTH



Factoring in list churn, the annual net growth rate of our nonprofit study partners' deliverable email lists decreased from 19 percent growth in 2007 to 17 percent growth in 2008. Monthly net growth in 2008 averaged just over one percent.

Growth rates in 2008 were particularly variable when broken down by sector, with international groups' growth slowing the most, followed by rights groups, whose slowdown was more pronounced this year than in the previous year. The local groups in our study saw robust growth in 2008, as did health organizations.

The decrease in overall growth rate between 2007 and 2008 is most likely due to a natural stabilization of the larger lists in our sample, whose size had grown quickly in previous years but tapered off after exhausting low-cost or low-effort recruitment sources. In addition, among international groups, a number of major humanitarian emergencies in previous years drew in new subscribers and caused growth that – thankfully – did not continue this year.

\* We have not listed the 2007 health sector data in the graph because we did not have enough 2007 list size data from participating health organizations.

## SOCIAL MEDIA AS A RECRUITMENT ENGINE

As social media sites have exploded, many have loudly wondered if the death of email can be far behind.

If email is dying, it's not going quietly. Email still rules the online marketing roost. And email and social networking aren't at odds – some organizations are having success using social media to build their email lists.

Green Hour is a program of the National Wildlife Federation (NWF) that connects kids to nature by giving parents ideas for taking kids outside – and by connecting them to a community of other parents. It's a small program in the NWF family, with no budget for list building, but by using a mix of social media strategies NWF more than doubled the size of their Green Hour email list – from 2,605 to 5,540 – over the course of a year.

One of the great things about social media is the sheer number of sites and networks devoted to all kinds of very specific communities. NWF staffers focused on sites and networks for women and parents, joining these networks, sharing tips and advice based on Green Hour's content and, occasionally, posting direct appeals to sign up for the Green Hour newsletter or download content from the site.

The NWF team also used StumbleUpon, a social news recommending site, to promote Green Hour content, and to get over 100 mommy bloggers to display Green Hour badges on their sites. All told, social media sites now account for over 70 percent of the traffic to the Green Hour site.

But it's not just quantity that these sites are delivering. The email addresses NWF gained from social networking campaigns are high-quality, because they are true opt-ins from highly qualified sources. They have maintained a 35 percent open rate on the weekly e-newsletter.

### **Here are some recommendations for building your own lists via social media:**

- Authentic content sells itself. In social media, you have to give as good as you get. So provide value first, ask for sign-ups second.
- Have a clear call to action on every page/site to which you drive traffic. Capitalize on that traffic by giving them something to do!
- Source-code your newsletter additions. Make sure you know which networks and which conversations are driving the most traffic and recruits.
- Be patient. Social media is about having conversations. It will take you a while to build the connections that will help you drive the traffic you need to really amplify your list building.

# VI. GLOSSARY OF TERMS

## EMAIL MESSAGING RATES

The following messaging rates are commonly used among the study participants and the nonprofit community at large:

### OPEN RATE

Calculated as the number of HTML email messages opened, divided by the number of people who received the email. See the Email Messaging chapter for more on open rates.

### CLICK-THROUGH RATE

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

### PAGE COMPLETION RATE

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

### RESPONSE RATE

Calculated as the number of people who took the main action requested by an email message, divided by the number of people who received the email message. We only included response rates in this study where the corresponding action was the completion of an online form (such as advocacy action or donation).

## EMAIL MESSAGING SEGMENTS

An email messaging segment refers to the group of people or audience to which a particular email message was sent. Organizations target all different types of audience segments, and they often define those segments in unique ways:

### FULL FILE

Message audience was the full deliverable file of an organization's subscribers. For the purpose of this study, "full file" could also refer to a random sample that represented an organization's broader list. Most organizations have small groups of subscribers – major donors, board members, etc. – who are suppressed from many messages, but we counted messages with negligible suppressions as "full file."

### DONORS ONLY

Message audience only included current or past donors to the organization. This mostly included online donors, but there were a few organizations in the sample that were able to include offline donation history in their selection of the donor audience.

### GEO-TARGETED

Message audience was a specific geographic region that included but was not limited to a specific state, city, county, legislative district, or voting precinct.

### INTEREST AREA

Message audience was defined by past demonstrated interest in a specific issue area within an organization's broader mission, either by having previously taken an action on or donated to the issue, or by having signed up for an issue-specific newsletter or messaging stream. There was no limit to the recency of these past actions, donations, or signups.

### RECENT ACTION TAKERS

Message audience was composed of subscribers who had taken action in approximately the previous month, on a message with the same action or campaign as the message for which the audience was calculated. For example, an organization may have sent a message to their full list asking subscribers to sign a petition and then sent a second message asking the people who signed the petition to tell their friends to sign.

### NON-ACTION TAKER RE-SENDS

Message audience was composed of subscribers who had not taken action on a recent message. For example, an organization may have sent a message to their full list asking subscribers to take action and then sent a second message asking the people who had not taken action yet to do so now.



## ADVOCACY MESSAGING TERMS

The following definitions explain how the study refers to different types of online advocacy:

### REGULAR EMAIL ADVOCACY

In the Advocacy chapter, regular email advocacy refers to online actions that can be taken by filling out a form and pressing a submit button. These online forms can be petitions or email/fax campaigns that generate letters to a decision-maker or other target.

### OTHER ENGAGEMENT EMAILS

Other engagement represents a set of higher-threshold asks. For example, an organization may ask their subscribers to call a public official rather than simply submitting a form letter, to attend an event or a hearing, to fill out a survey, or to sign up as a volunteer. This type of messaging is usually advocacy-related, but we separate this from strict email advocacy because the metrics are so different between the two, in part because other engagement emails can often be difficult to track.

## CATEGORIES OF OTHER ENGAGEMENT MESSAGING

### CROSS PROMOTION

An email message promoting another organization's cause, petition, or action. A number of organizations in the study partnered with other organizations to recruit new subscribers from each other's email lists. Each organization sends a message from the partner organization to its email list; subscribers land on a sign-up page of the partner organization.

### EVENT INVITATION

An invitation to an offline gathering or event that may include a rally or march, a house party, a movie screening or happy hour, or a fundraising event.

### LETTER TO THE EDITOR

A letter-to-the-editor (LTE) message asks subscribers to write a letter to the editor of their local or national newspapers on a specific topic, usually in their own words, but with suggested ideas for content provided by the organization.

### PHONE CALL ALERT

A message with a request to call an elected official or other target in support of or opposition to a given issue.

### SUBMIT STORY

A message asking subscribers to write and send a personal story of how they were or would be affected by a specific policy or event.

### SURVEY

A message asking subscribers to fill out a multiple-question survey.

### TELL-A-FRIEND

A message asking subscribers to send a message from the organization to their friends. This message might include links to a tell-a-friend form hosted on the organization's website, or it might be a standard action alert or other email with instructions to forward the email.

### VOLUNTEER

A message with details about an opportunity for subscribers to volunteer offline in some way for an organization, including hosting a house party or other small event.

# VII. Study Methodology

The 2009 eNonprofit Benchmarks Study collected email messaging, list subscriber, and online fundraising and advocacy transactional data from 32 U.S.-based national nonprofit organizations for the calendar years of 2007 and 2008. We analyzed almost 10,000 email messages sent to over 10 million list subscribers; more than 100 million dollars of online donations from over 100 million online gifts; and 3.6 million advocacy actions.

This year's sample includes a new sector of local organizations including state-based children's rights, environmental, and reproductive rights organizations. Additionally, since the 2009 sample is much larger than the 2008 sample, the 2007 numbers and metrics calculated in this study may vary from the 2007 numbers and metrics in the previous study.

The following organizations participated in the 2009 study:

## CIVIL/LEGAL RIGHTS

- American Rights at Work ([www.americanrightsatwork.org](http://www.americanrightsatwork.org))
- Children's Defense Fund ([www.childrensdefense.org](http://www.childrensdefense.org))
- Common Cause ([www.commoncause.org](http://www.commoncause.org))
- Human Rights Campaign ([www.hrc.org](http://www.hrc.org))
- Human Rights First ([www.humanrightsfirst.org](http://www.humanrightsfirst.org))
- Humane Society of the United States ([www.humanesociety.org](http://www.humanesociety.org))
- International Fund for Animal Welfare ([www.ifaw.org](http://www.ifaw.org))
- NARAL Pro-Choice America ([www.prochoiceamerica.org](http://www.prochoiceamerica.org))
- Planned Parenthood Federation of America ([www.plannedparenthood.org](http://www.plannedparenthood.org))
- Planned Parenthood Action Fund ([www.plannedparenthoodaction.org](http://www.plannedparenthoodaction.org))
- United Animal Nations ([www.uan.org](http://www.uan.org))

## ENVIRONMENTAL

- Earthjustice ([www.earthjustice.org](http://www.earthjustice.org))
- Environmental Defense ([www.edf.org](http://www.edf.org))
- League of Conservation Voters ([www.lcv.org](http://www.lcv.org))
- National Parks Conservation Association ([www.npca.org](http://www.npca.org))
- Save Our Environment ([www.saveourenvironment.org](http://www.saveourenvironment.org))
- The Wilderness Society ([www.wilderness.org](http://www.wilderness.org))

## INTERNATIONAL

- CARE USA ([www.careusa.org](http://www.careusa.org))
- Habitat for Humanity ([www.habitat.org](http://www.habitat.org))
- International Rescue Committee ([www.theirc.org](http://www.theirc.org))
- Oxfam America ([www.oxfamamerica.org](http://www.oxfamamerica.org))
- United Nations Foundation ([www.unfoundation.org](http://www.unfoundation.org))

## HEALTH

- American Lung Association ([www.lungusa.org](http://www.lungusa.org))
- Easter Seals ([www.easterseals.com](http://www.easterseals.com))
- National MS Society ([www.nationalmssociety.org](http://www.nationalmssociety.org))
- Susan G. Komen for the Cure<sup>19</sup> ([www.komen.org](http://www.komen.org))

## LOCAL

- Children's Alliance ([www.childrensalliance.org](http://www.childrensalliance.org))
- Children First for Oregon ([www.cffo.org](http://www.cffo.org))
- Colorado Environmental Coalition ([www.ourcolorado.org](http://www.ourcolorado.org))
- Florida Association of Planned Parenthood Affiliates ([www.floridaplannedparenthood.org](http://www.floridaplannedparenthood.org))
- Mass Audubon ([www.massaudubon.org](http://www.massaudubon.org))
- Washington Environmental Council<sup>20</sup> ([www.wecprotects.org](http://www.wecprotects.org))

## OTHER

- Smithsonian Institution ([www.si.edu](http://www.si.edu))

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<sup>19</sup> Susan G. Komen for the Cure fundraising data was not included in this study.

<sup>20</sup> Washington Environmental Council messaging data was not included in this study.

## EMAIL MESSAGING METRICS

Yearly email open, click-through, page completion, and response rates found in the Messaging chapter and Appendix were calculated by year for each organization and averaged by organization so that no single organization had more weight than any other in our sample. See the glossary for specifics on how open, click-through, page completion, and response rates were calculated.

Each organization provided M+R Strategic Services (M+R) with data on every email message delivered by their organization during the years 2007 and 2008: the date the message was launched, number of subscribers that received the message, number of unique subscribers who clicked on any message links, number of donations made or actions taken, and number of unsubscribes. In addition, each message was coded to indicate whether it was a fundraising, advocacy, newsletter or other communication, and what type of audience it was sent to (see the glossary for audience definitions).

The time-intensive message coding done by all organizations made it possible to calculate metrics for advocacy messages sent out by all organizations with an advocacy program. As a result, all advocacy messages sent by participating organizations were used to calculate advocacy messaging rates. This stands in contrast to last year's study, where data from only ten organizations were used to calculate advocacy messaging rates.

Tests for statistical significance between 2007 and 2008 differences were done using a dependent samples t-test, which looks at year-over-year changes within organizations across the dataset.

## FUNDRAISING AND ADVOCACY DATA

With an exception of two of the organizations, each organization provided M+R with every online donation in 2007 and 2008, along with a unique identifier, transaction date and transaction amount. Similarly, nearly all of the organizations also provided M+R with every 2008 online email advocacy transaction date and unique identifier.

## CHURN RATE DATA

Obtaining an accurate picture of list churn requires data snapshots of an organization's database at equal intervals of time, such as every month or every quarter. Because subscribers are continually unsubscribing and becoming undeliverable, their data are often left behind when they leave a database. Recreating accurate data snapshots for a given time period in the past is difficult and sometimes impossible; for this reason, M+R decided to use only data from its current clients in the study. Of the 10 organizations used for calculation of this metric, all had database snapshots taken on the first of every month. This should be taken into account when reviewing churn data.

## APPENDIX: BENCHMARKS REFERENCE SHEET

Feel free to copy or tear out this handy list of benchmarks for your reference. Put them on your bulletin board, and you'll always be able to answer the question, "How did that email do compared to benchmarks?"

### METRICS FOR ALL MESSAGES

ORGANIZATION TYPE	2008	
	AVERAGE OPEN RATE	AVERAGE CLICK-THROUGH RATE
ALL SECTORS	16%	2.4%
ENVIRONMENTAL	18%	3.4%
HEALTH	9%	0.9%
INTERNATIONAL	13%	1.6%
RIGHTS	15%	3.0%
LOCAL	20%	2.3%

### METRICS FOR EMAIL NEWSLETTER MESSAGES

ORGANIZATION TYPE*	2008	
	AVERAGE OPEN RATE	AVERAGE CLICK-THROUGH RATE
ALL SECTORS	15%	2.1%
ENVIRONMENTAL	20%	3.3%
INTERNATIONAL	12%	1.8%
RIGHTS	13%	2.0%
LOCAL	21%	4.6%

### METRICS FOR ONLINE ADVOCACY MESSAGES

ORGANIZATION TYPE	2008			
	AVERAGE OPEN RATE	AVERAGE CLICK-THROUGH RATE	AVERAGE PAGE COMPLETION RATE	AVERAGE RESPONSE RATE
ALL SECTORS	16%	5.5%	88%	4.5%
ENVIRONMENTAL	18%	8.7%	93%	7.7%
HEALTH	16%	3.9%	89%	3.8%
INTERNATIONAL	16%	5.3%	83%	4.5%
RIGHTS	14%	6.0%	86%	5.0%
LOCAL	20%	4.7%	55%	2.6%

\* We have not listed the health sector in the breakout by sector because only two health organizations provided email newsletter data.

## METRICS FOR FUNDRAISING MESSAGES

ORGANIZATION TYPE	2008			
	AVERAGE OPEN RATE	AVERAGE CLICK-THROUGH RATE	AVERAGE PAGE COMPLETION RATE	AVERAGE RESPONSE RATE
ALL SECTORS	14%	0.6%	19%	0.12%
ENVIRONMENTAL	17%	0.5%	22%	0.12%
HEALTH	6%	0.3%	9%	0.02%
INTERNATIONAL	11%	0.6%	29%	0.17%
RIGHTS	13%	0.8%	13%	0.10%
LOCAL	18%	0.4%	20%	0.08%

## 2008 AVERAGE GIFT SIZE

ORGANIZATION TYPE	NON-MONTHLY GIFT	MONTHLY GIFTS
ALL SECTORS	\$71	\$21
ENVIRONMENTAL	\$58	\$16
HEALTH	\$79	\$31
INTERNATIONAL	\$153	\$33
RIGHTS	\$57	\$17
LOCAL	\$81	\$30

## 2008 CHURN DATA

	% OF TOTAL SUBSCRIBERS
TOTAL CHURN	19%
UNSUBSCRIBE CHURN	6%
SUBSCRIBERS RETAINED	81%

## PERCENT CHANGE IN RESPONSE RATES BY LIST SEGMENT

	% DIFFERENCE IN RESPONSE RATE
NON-ACTION TAKER RE-SENDS VS FULL FILE	-44%
GEO-TARGETED VS FULL FILE	41%
INTEREST AREA VS FULL FILE	55%
TOOK ACTION RECENTLY VS FULL FILE	198%
DONORS VS NON-DONORS	222%