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.

Portrait of the Wired Wealthy
(See Appendix A for detailed survey responses)

Demographics:

- These are **generous donors** representing a small group with **enormous financial impact.**

- **High household incomes.** 57% report $100,000 or higher; 27% report $200,000 or higher.

- **Age-wise, younger baby boomers represent the demographic center of gravity.** Mean = 51 years old; Median = 50 years old; 63% under 55 years old.

- **Uber-educated:** 51% have graduate degrees; 87% have 4-year degrees or more.

Internet Habits:

- Average **12 years online.**

- **18** (mean)/**14** (median) **hours a week** online.

Online Activities:

- Wired wealthy are active online:

  - 90% make purchases online (58% regularly)
  - 78% bank and pay bills online
  - 65% read the news online (36% regularly)
  - 51% have taken political action online
  - 43% download or listen to music online (18% regularly)
  - 39% view videos online (11% regularly)
  - 25% read blogs (9% regularly)
  - 20% use SMS (10% regularly)
  - 8% post comments on a blog (2% regularly)

- Social Networks are not just for the young:

  - 52% use YouTube
  - 16% use LinkedIn
  - 14% use MySpace (2% regularly)
  - 12% use Flickr
  - 9% use Facebook (3% regularly)
  - Not on the radar:
    - o Eons (90% never heard of it)
    - o Gather (89% never heard of it)
    - o Care2 (86% never heard of it)
    - o Del.icio.us (83% never heard of it)
    - o Digg (80% never heard of it)

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[1]: $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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[1] 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%
Activities done online regularly:			
% 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)
Relationship Seekers	43%	44%	41%	40%	22%	21%	10%
Casual Connectors	38%	42%	40%	45%	44%	40%	49%
All Business	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.

Usefulness of Charity Web Sites in Deciding to Give
(all respondents by cluster; "Very Useful" shown)

- Relationship Seekers: 46%
- Casual Connectors: 36%
- All Business: 22%
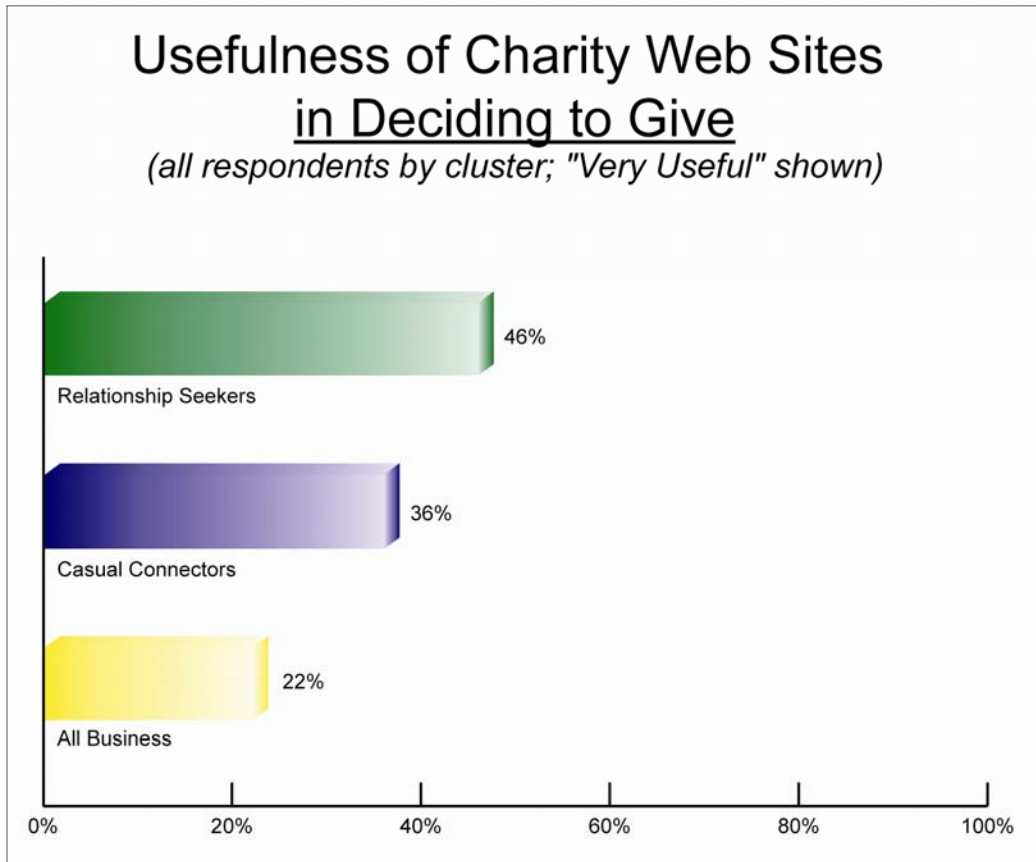
Graph 1: Usefulness of Charity's Web Site in Deciding to Give
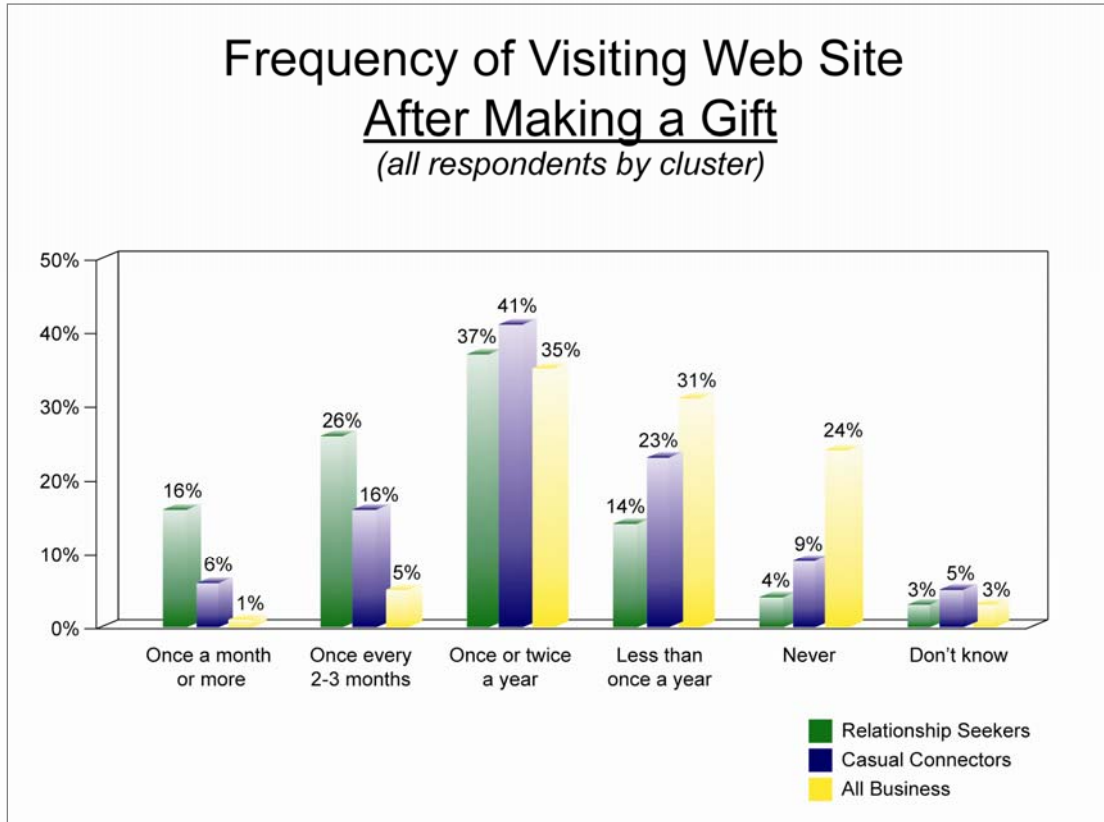
Graph 2: Frequency of Visiting Web Site After Making a Gift

Attitudes Toward Charity Web Sites

(all respondents by cluster; top two "agree strongly/somewhat" shown)

Most charity websites make it **easy to donate**
- Relationship Seekers: 81%
- Casual Connectors: 74%
- All Business: 61%

Most charity websites make it **easy to find contact information** like mailing address and phone number
- Relationship Seekers: 71%
- Casual Connectors: 65%
- All Business: 49%

Most charity websites make it **easy to get the information I need to decide whether to give**
- Relationship Seekers: 67%
- Casual Connectors: 58%
- All Business: 35%

Most charity websites make me **feel personally connected to their cause or mission**
- Relationship Seekers: 61%
- Casual Connectors: 45%
- All Business: 15%

Most charity websites are **well-designed**
- Relationship Seekers: 58%
- Casual Connectors: 52%
- All Business: 33%

Most charity websites are **inspiring**
- Relationship Seekers: 57%
- Casual Connectors: 47%
- All Business: 16%

Legend:
- Relationship Seekers (green)
- Casual Connectors (blue)
- All Business (yellow)

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.

  o 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.

  o 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.

  o 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):

  o *Online giving is more efficient and helps charities reduce their administrative expenses* (72% agree strongly or somewhat)

  o *Online giving lets you make a gift immediately when you are thinking about it, which otherwise you might forget* (70% agree strongly or somewhat)

  o *Online giving lets charities respond more quickly in the event of a crisis or emergency* (68% agree strongly or somewhat)

Factors Supporting Giving Online
(all respondents; top two "agree strongly/somewhat" shown)

More Important

	Agree strongly	Agree somewhat	Total
Online giving is **more efficient** and helps charities reduce their administrative expenses	38%	33%	72%
Online giving lets you **make a gift immediately** when you are thinking about it, which otherwise you might forget	38%	32%	70%
Online giving lets charities **respond more quickly** in the event of a crisis or emergency	35%	33%	68%
Your credit card gives you **frequent flyer miles** or other rewards	27%	25%	53%
Online giving makes it **easier for you to track** your donations over time	25%	23%	48%
There is a **feeling of satisfaction** that you get after donating online	11%	17%	28%

■ Agree strongly
▨ Agree somewhat

0% 20% 40% 60% 80% 100%

Less Important

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)

Factors Detracting From Giving Online
(all respondents; top two "agree strongly/somewhat" shown)

	Agree strongly	Agree somewhat	Total
I am worried the charity will **send me too much email**	20%	35%	55%
I am concerned that **email solicitations may be fraudulent**	18%	36%	54%
I am worried that the charity will **sell, rent or exchange my email**	18%	33%	51%
I am concerned about **online fraud or identity theft**	17%	33%	50%
I am generally **satisfied with giving by mail or other offline methods**	19%	26%	45%
It's **easier for me to track my giving** if I write checks	19%	19%	38%
The charities I support **do not accept online donations**		14%	17%

Greater Concern ↑ / Lesser Concern

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-generate 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.

    o 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.

    o 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

    o *Most charity web sites are well-designed* (9% agree strongly)

    o *Most charity web sites are inspiring* (8% agree strongly)

    o *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):

    o *Most charity web sites make it easy to donate* (28% agree strongly)

    o *Most charities make it easy to find contact information like mailing address and phone number* (19% agree strongly)

    o *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.

  o 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.

  o Participants who say they visit web sites do so regularly for the following reasons (Figure 4):

    ▪ *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)

"[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

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).

  o 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.

  o 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."
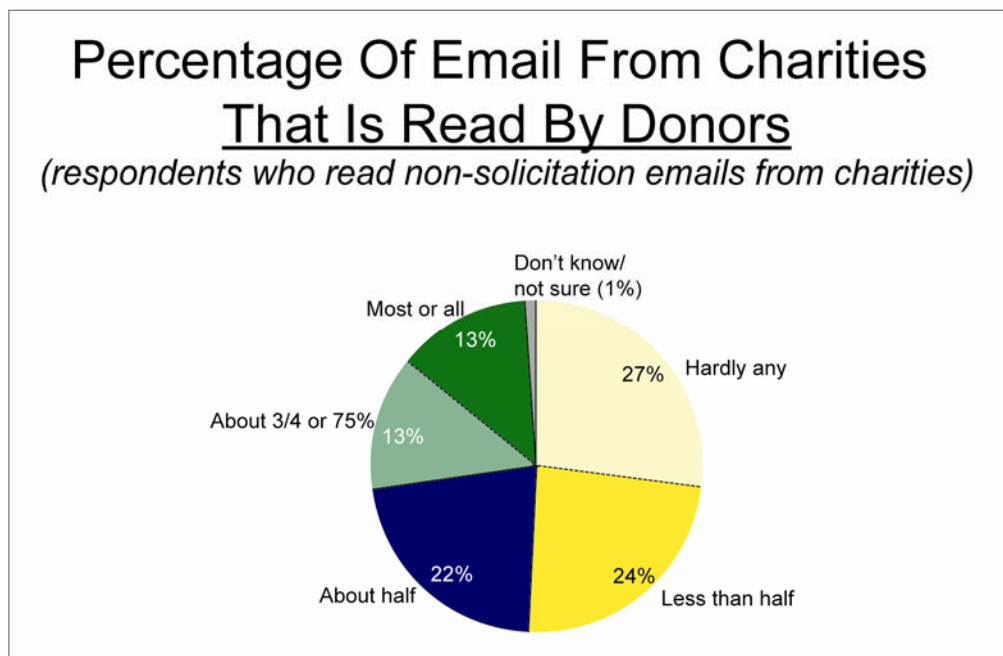
Graph 6: Percentage of Email From Charities That is Read by Donors

  o 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."

  o 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).

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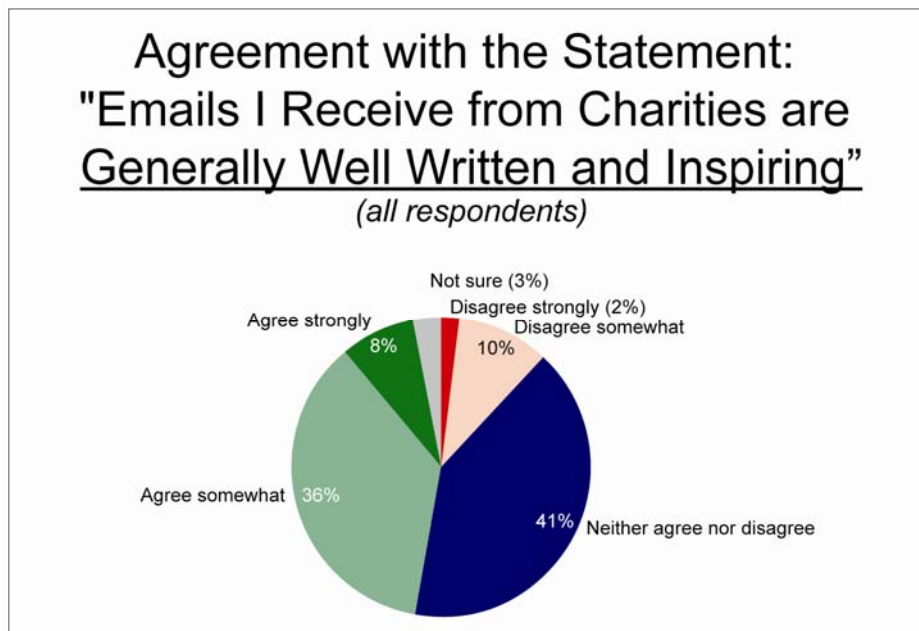
**Graph 7: Agreement with the Statement:
"Emails I Receive from Charities are Generally Well Written and Inspiring"**

- Wired wealthy are receptive to email solicitations, especially renewal notices. Participants rank the following tactics as "very" or "somewhat" appropriate as follows:

    o *The charity sends you an email reminding you to renew your annual gift* (74% very or somewhat appropriate)

    o *The charity sends you an urgent fundraising email asking for donations* (56% very or somewhat appropriate)

- 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):

    o *The charity permits me to tell them how often to email me* (36% a lot more likely)

    o *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)

    o *The charity tells me by email how my donation was spent and what happened as a result* (33% a lot more likely)

"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."

– 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 Likeliness 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):

  o *The charity sends you a message on behalf of another charity or cause that might be of interest to you* (52% very inappropriate)

  o *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).

  o 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.

  o 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.

    o Only 31 percent (31%) say that middle and major donor fundraising staff are "very involved" in their organizations' online strategy.

    o Thirty-three percent (33%) say these staff members are "somewhat involved."

    o 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**.

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.

For more information, please visit **www.seachangestrategies.com.**

Edge Research is a full-service custom research firm that helps corporations and nonprofits meet their strategic objectives. We forge strong partnerships with a select number of clients, learn their business, and continue to provide smart, insightful research and analysis over time.

For more information, please visit **www.edgeresearch.com**.

APPENDIX A (see following pages)

	Total	Relation. Seekers	Casual Connect.	All Business

Q1. What are the 1-3 most important charities OR CAUSES that you donate to regularly? (open ended responses reported out separately)

Q2. Approximately how much do you give in total each year to charitable or cause-oriented organizations, excluding your school and place of worship?

	Total	Relation. Seekers	Casual Connect.	All Business
Less than $1000	4%	5%	4%	4%
$1000 to <$5k	47%	48%	48%	43%
$5k to <$10k	24%	21%	24%	25%
$10k to <$20k	14%	15%	14%	15%
$20k to <$50k	8%	7%	7%	9%
$50k or more	4%	4%	3%	4%
MEAN	$10,896	$11,401	$9,212	$12,698
MEDIAN	$4,500	$4,000	$4,000	$5,000

Q3. Which of the following giving methods have you used in the past two years:

	Total	Relation. Seekers	Casual Connect.	All Business
Made a gift by check and mailed it in	83%	82%	82%	86%
Responded to a phone call from a charity by making a gift or pledge	23%	27%	23%	19%
Made a gift online using a credit card	80%	86%	80%	75%
Wrote a check or made a pledge at a fundraising event	46%	55%	48%	37%
Other, please specify:	23%	26%	22%	20%
Don't know	0%	0%	0%	0%

Q4. Which ONE of the methods would you say is your PREFERRED method for giving? (if gave more than one response in Q3)

	Total	Relation. Seekers	Casual Connect.	All Business
BASE: Used more than one method (Q3)	3002	901	1235	866
Made a gift by check and mailed it in	30%	23%	30%	37%
Responded to a phone call from a charity by making a gift or pledge	0%	0%	0%	0%
Made a gift online using a credit card	51%	56%	50%	47%
Wrote a check or made a pledge at a fundraising event	5%	6%	6%	3%
Other, please specify:	14%	14%	13%	13%
Don't know	0%	0%	0%	0%

Q3/Q4. Preferred method for giving (Q3 single response or Q4 response)

	Total	Relation. Seekers	Casual Connect.	All Business
Made a gift by check and mailed it in	31%	23%	30%	39%
Responded to a phone call from a charity by making a gift or pledge	0%	0%	0%	0%
Made a gift online using a credit card	50%	55%	51%	45%
Wrote a check or made a pledge at a fundraising event	5%	7%	6%	3%
Other, please specify:	13%	14%	13%	12%
Don't know	0%	0%	0%	0%

Q5. Are there particular situations when you specifically choose to give online, as opposed to giving by other methods? Under what circumstances are you most likely to give online? (open ended responses reported out separately)

	Total	Relation. Seekers	Casual Connect.	All Business

Q6_1. Reasons to give online -- Agree/disagree: Online giving is more efficient and helps charities reduce their administrative expenses

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	38%	48%	40%	26%
Agree somewhat	33%	30%	36%	34%
Neither agree nor disagree	18%	15%	15%	24%
Disagree somewhat	2%	2%	2%	4%
Disagree strongly	2%	1%	2%	4%
Not sure	6%	5%	5%	8%
Top 2 box	72%	78%	76%	60%
Bottom 2 box	4%	3%	4%	7%

Q6_2. Reasons to give online -- Agree/disagree: Online giving lets charities respond more quickly in the event of a crisis or emergency

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	35%	44%	37%	21%
Agree somewhat	33%	32%	34%	33%
Neither agree nor disagree	23%	18%	21%	30%
Disagree somewhat	3%	2%	3%	5%
Disagree strongly	2%	1%	1%	5%
Not sure	4%	3%	4%	7%
Top 2 box	68%	77%	71%	54%
Bottom 2 box	6%	3%	4%	10%

Q6_3. Reasons to give online -- Agree/disagree: There is a feeling of satisfaction that you get after donating online

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	11%	15%	11%	5%
Agree somewhat	17%	23%	18%	12%
Neither agree nor disagree	48%	44%	51%	47%
Disagree somewhat	10%	8%	9%	14%
Disagree strongly	12%	8%	9%	19%
Not sure	2%	1%	2%	3%
Top 2 box	28%	39%	29%	16%
Bottom 2 box	22%	16%	18%	33%

Q6_4. Reasons to give online -- Agree/disagree: Online giving makes it easier for you to track your donations over time

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	25%	30%	26%	18%
Agree somewhat	23%	25%	25%	20%
Neither agree nor disagree	28%	28%	29%	27%
Disagree somewhat	11%	8%	11%	15%
Disagree strongly	11%	8%	8%	18%
Not sure	2%	1%	2%	3%
Top 2 box	48%	55%	51%	38%
Bottom 2 box	22%	16%	19%	33%

	Total	Relation. Seekers	Casual Connect.	All Business

Q6_5. Reasons to give online -- Agree/disagree: Your credit card gives you frequent flyer miles or other rewards

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	27%	31%	30%	21%
Agree somewhat	25%	26%	24%	27%
Neither agree nor disagree	23%	23%	23%	23%
Disagree somewhat	5%	5%	5%	6%
Disagree strongly	16%	13%	16%	20%
Not sure	3%	2%	3%	3%
Top 2 box	53%	57%	54%	47%
Bottom 2 box	22%	18%	20%	27%

Q6_6. Reasons to give online -- Agree/disagree: Online giving lets you make a gift immediately when you are thinking about it, which otherwise you might forget

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	38%	48%	39%	27%
Agree somewhat	32%	31%	33%	31%
Neither agree nor disagree	15%	11%	15%	18%
Disagree somewhat	7%	5%	7%	8%
Disagree strongly	8%	4%	5%	15%
Not sure	1%	1%	1%	2%
Top 2 box	70%	79%	72%	58%
Bottom 2 box	14%	9%	12%	22%

Q6sum1. TOP 1 AGREE. Reasons to give online -- Agree/disagree

	Total	Relation. Seekers	Casual Connect.	All Business
Online giving is more efficient and helps charities reduce their administrative expenses	38%	48%	40%	26%
Online giving lets charities respond more quickly in the event of a crisis or emergency	35%	44%	37%	21%
There is a feeling of satisfaction that you get after donating online	11%	15%	11%	5%
Online giving makes it easier for you to track your donations over time	25%	30%	26%	18%
Your credit card gives you frequent flyer miles or other rewards	27%	31%	30%	21%
Online giving lets you make a gift immediately when you are thinking about it, which otherwise you might forget	38%	48%	39%	27%

Q6sum2. TOP 2 AGREE. Reasons to give online -- Agree/disagree

	Total	Relation. Seekers	Casual Connect.	All Business
Online giving is more efficient and helps charities reduce their administrative expenses	72%	78%	76%	60%
Online giving lets charities respond more quickly in the event of a crisis or emergency	68%	77%	71%	54%
There is a feeling of satisfaction that you get after donating online	28%	39%	29%	16%
Online giving makes it easier for you to track your donations over time	48%	55%	51%	38%
Your credit card gives you frequent flyer miles or other rewards	53%	57%	54%	47%
Online giving lets you make a gift immediately when you are thinking about it, which otherwise you might forget	70%	79%	72%	58%

	Total	Relation. Seekers	Casual Connect.	All Business

Q7_1. Reasons NOT to give online -- Agree/disagree: I am concerned about online fraud or identity theft

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	17%	13%	19%	18%
Agree somewhat	33%	32%	34%	31%
Neither agree nor disagree	17%	16%	16%	18%
Disagree somewhat	19%	22%	17%	19%
Disagree strongly	14%	17%	14%	13%
Not sure	0%	0%	0%	1%
Top 2 box	50%	45%	52%	50%
Bottom 2 box	33%	39%	31%	31%

Q7_2. Reasons NOT to give online -- Agree/disagree: I am generally satisfied with giving by mail or other offline methods

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	19%	14%	18%	27%
Agree somewhat	26%	24%	27%	26%
Neither agree nor disagree	24%	25%	25%	22%
Disagree somewhat	19%	23%	19%	15%
Disagree strongly	12%	15%	12%	11%
Not sure	0%	0%	0%	0%
Top 2 box	45%	37%	44%	52%
Bottom 2 box	31%	38%	30%	26%

Q7_3. Reasons NOT to give online -- Agree/disagree: The charities I support do not accept online donations

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	3%	2%	3%	4%
Agree somewhat	14%	12%	15%	14%
Neither agree nor disagree	26%	24%	26%	28%
Disagree somewhat	20%	22%	21%	19%
Disagree strongly	28%	33%	28%	24%
Not sure	9%	7%	8%	11%
Top 2 box	17%	14%	18%	18%
Bottom 2 box	48%	54%	48%	43%

Q7_4. Reasons NOT to give online -- Agree/disagree: It's easier for me to track my giving if I write checks

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	19%	14%	19%	25%
Agree somewhat	19%	19%	19%	18%
Neither agree nor disagree	21%	20%	22%	22%
Disagree somewhat	20%	22%	20%	18%
Disagree strongly	20%	23%	20%	17%
Not sure	1%	1%	0%	1%
Top 2 box	38%	34%	38%	43%
Bottom 2 box	40%	46%	39%	34%

	Total	Relation. Seekers	Casual Connect.	All Business

Q7_5. Reasons NOT to give online -- Agree/disagree: I am concerned that email solicitations may be fraudulent

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	18%	14%	19%	22%
Agree somewhat	35%	37%	35%	35%
Neither agree nor disagree	17%	17%	18%	17%
Disagree somewhat	17%	19%	18%	14%
Disagree strongly	11%	12%	10%	10%
Not sure	1%	1%	1%	1%
Top 2 box	54%	51%	53%	57%
Bottom 2 box	28%	31%	28%	24%

Q7_6. Reasons NOT to give online -- Agree/disagree: I am worried that the charity will sell, rent or exchange my email

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	18%	14%	18%	23%
Agree somewhat	33%	31%	33%	35%
Neither agree nor disagree	17%	17%	17%	16%
Disagree somewhat	18%	20%	19%	15%
Disagree strongly	13%	16%	12%	11%
Not sure	1%	1%	1%	1%
Top 2 box	51%	46%	51%	57%
Bottom 2 box	31%	36%	31%	26%

Q7_7. Reasons NOT to give online -- Agree/disagree: I am worried the charity will send me too much email

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	20%	13%	17%	30%
Agree somewhat	35%	33%	38%	32%
Neither agree nor disagree	18%	20%	18%	16%
Disagree somewhat	16%	20%	17%	12%
Disagree strongly	11%	14%	9%	9%
Not sure	1%	0%	1%	1%
Top 2 box	55%	45%	55%	63%
Bottom 2 box	27%	34%	26%	21%

Q7sum1. TOP 1 AGREE. Reasons NOT to give online -- Agree/disagree:

	Total	Relation. Seekers	Casual Connect.	All Business
I am concerned about online fraud or identity theft	17%	13%	19%	18%
I am generally satisfied with giving by mail or other offline methods	19%	14%	18%	27%
The charities I support do not accept online donations	3%	2%	3%	4%
It's easier for me to track my giving if I write checks	19%	14%	19%	25%
I am concerned that email solicitations may be fraudulent	18%	14%	19%	22%
I am worried that the charity will sell, rent or exchange my email	18%	14%	18%	23%
I am worried the charity will send me too much email	20%	13%	17%	30%

	Total	Relation. Seekers	Casual Connect.	All Business
Q7sum2. TOP 2 AGREE. Reasons NOT to give online -- Agree/disagree:				
I am concerned about online fraud or identity theft	50%	45%	52%	50%
I am generally satisfied with giving by mail or other offline methods	45%	37%	44%	52%
The charities I support do not accept online donations	17%	14%	18%	18%
It's easier for me to track my giving if I write checks	38%	34%	38%	43%
I am concerned that email solicitations may be fraudulent	54%	51%	53%	57%
I am worried that the charity will sell, rent or exchange my email	51%	46%	51%	57%
I am worried the charity will send me too much email	55%	45%	55%	63%
Q8. Overall, would you say that five years from now:				
You will be making a greater proportion of your charitable gifts online	46%	53%	49%	36%
You will be making a lower proportion of your charitable gifts online	2%	0%	2%	2%
The proportion will stay about the same	37%	33%	34%	44%
Not sure	16%	13%	15%	18%

Q9_R1. Communication with donors: Thinking about your own preferences, how appropriate is each of the following? The charity sends you an urgent fundraising email asking for donations

	Total	Relation. Seekers	Casual Connect.	All Business
Very appropriate	19%	32%	20%	6%
Somewhat appropriate	37%	39%	43%	26%
Neither appropriate nor inappropriate	18%	15%	18%	23%
Somewhat inappropriate	17%	12%	15%	25%
Very inappropriate	7%	2%	4%	17%
Not sure	1%	0%	1%	2%
Top 2 box	56%	71%	63%	33%
Bottom 2 box	24%	14%	19%	42%

Q9_R2. Communication with donors: Thinking about your own preferences, how appropriate is each of the following? The charity sends you an email reminding you to renew your annual gift

	Total	Relation. Seekers	Casual Connect.	All Business
Very appropriate	37%	51%	40%	18%
Somewhat appropriate	37%	35%	40%	35%
Neither appropriate nor inappropriate	12%	8%	11%	17%
Somewhat inappropriate	9%	5%	7%	15%
Very inappropriate	5%	2%	2%	13%
Not sure	0%	0%	0%	1%
Top 2 box	74%	85%	80%	54%
Bottom 2 box	14%	7%	9%	28%

	Total	Relation. Seekers	Casual Connect.	All Business

Q9_R3. Communication with donors: Thinking about your own preferences, how appropriate is each of the following? You have mailed in a donation, and the charity looks up your email using a commercial service in order to communicate with you online

	Total	Relation. Seekers	Casual Connect.	All Business
Very appropriate	3%	4%	3%	1%
Somewhat appropriate	9%	14%	9%	4%
Neither appropriate nor inappropriate	12%	11%	14%	10%
Somewhat inappropriate	29%	33%	32%	22%
Very inappropriate	45%	36%	39%	62%
Not sure	2%	2%	2%	1%
Top 2 box	12%	18%	13%	5%
Bottom 2 box	75%	69%	71%	84%

Q9_R4. Communication with donors: Thinking about your own preferences, how appropriate is each of the following? The charity sends you a message on behalf of another cause or charity that might interest you

	Total	Relation. Seekers	Casual Connect.	All Business
Very appropriate	1%	3%	1%	0%
Somewhat appropriate	6%	10%	6%	2%
Neither appropriate nor inappropriate	10%	12%	11%	6%
Somewhat inappropriate	30%	39%	34%	18%
Very inappropriate	52%	35%	47%	74%
Not sure	1%	1%	1%	1%
Top 2 box	7%	13%	7%	2%
Bottom 2 box	82%	74%	81%	92%

Q9sum1. TOP 1 APPROPRIATE. Communication with donors: Thinking about your own preferences, how appropriate is each of the following?

	Total	Relation. Seekers	Casual Connect.	All Business
The charity sends you an urgent fundraising email asking for	19%	32%	20%	6%
The charity sends you an email reminding you to renew your annual gift	37%	51%	40%	18%
You have mailed in a donation, and the charity looks up your email using a commercial service in order to communicate with you online	3%	4%	3%	1%
The charity sends you a message on behalf of another cause or charity that might interest you	1%	3%	1%	0%

Q9sum2. TOP 2 APPROPRIATE. Communication with donors: Thinking about your own preferences, how appropriate is each of the following?

	Total	Relation. Seekers	Casual Connect.	All Business
The charity sends you an urgent fundraising email asking for	56%	71%	63%	33%
The charity sends you an email reminding you to renew your annual gift	74%	85%	80%	54%
You have mailed in a donation, and the charity looks up your email using a commercial service in order to communicate with you online	12%	18%	13%	5%
The charity sends you a message on behalf of another cause or charity that might interest you	7%	13%	7%	2%

	Total	Relation. Seekers	Casual Connect.	All Business
Q10. Suppose you received an email solicitation from a charity that you then decided to make a donation to. What would be your likeliest course of action:				
I would most likely click the donate link and make the donation using my credit card	20%	23%	21%	15%
I would most likely navigate on my own to the charity's home page to research the charity before clicking the donation link there	48%	51%	49%	43%
I would most likely mail in a check or call in a pledge by phone	11%	8%	10%	15%
Not sure/depends	22%	18%	21%	28%
Q11_1. What effect, if any, do the following have on your inclination to make an additional donation in the future? The charity sends me email with news of recent victories and accomplishments				
Makes me a lot more likely to give again	18%	35%	19%	1%
Makes me somewhat more likely to give again	42%	49%	54%	20%
No impact on my giving decisions	32%	15%	25%	58%
Makes me somewhat less likely to give again	5%	1%	1%	13%
Makes me a lot less likely to give again	2%	0%	0%	5%
Don't know	1%	0%	1%	2%
Top 2 box	60%	84%	72%	21%
Bottom 2 box	6%	1%	1%	18%
Q11_2. What effect, if any, do the following have on your inclination to make an additional donation in the future? The charity tells me by email how my donation was spent, and what happened as a result				
Makes me a lot more likely to give again	33%	51%	38%	10%
Makes me somewhat more likely to give again	41%	38%	45%	38%
No impact on my giving decisions	22%	10%	15%	44%
Makes me somewhat less likely to give again	1%	0%	0%	3%
Makes me a lot less likely to give again	1%	0%	0%	2%
Don't know	2%	1%	2%	3%
Top 2 box	74%	90%	83%	48%
Bottom 2 box	2%	0%	0%	6%
Q11_3. What effect, if any, do the following have on your inclination to make an additional donation in the future? The charity permits me to tell them how often to email me				
Makes me a lot more likely to give again	36%	41%	38%	29%
Makes me somewhat more likely to give again	37%	37%	37%	36%
No impact on my giving decisions	24%	20%	21%	30%
Makes me somewhat less likely to give again	1%	0%	0%	1%
Makes me a lot less likely to give again	1%	0%	0%	2%
Don't know	2%	1%	3%	3%
Top 2 box	73%	79%	76%	65%
Bottom 2 box	1%	1%	1%	2%

	Total	Relation. Seekers	Casual Connect.	All Business

Q11_4. What effect, if any, do the following have on your inclination to make an additional donation in the future? The charity permits me to control the information I receive, so I only hear about the subjects I care about

	Total	Relation. Seekers	Casual Connect.	All Business
Makes me a lot more likely to give again	34%	41%	35%	25%
Makes me somewhat more likely to give again	37%	36%	38%	37%
No impact on my giving decisions	25%	21%	24%	32%
Makes me somewhat less likely to give again	1%	1%	0%	1%
Makes me a lot less likely to give again	0%	0%	0%	1%
Don't know	3%	2%	3%	3%
Top 2 box	71%	77%	73%	62%
Bottom 2 box	1%	1%	0%	3%

Q11_5. What effect, if any, do the following have on your inclination to make an additional donation in the future? The charity lets me create a customized donor page on their website that lets me see content of special interest to me

	Total	Relation. Seekers	Casual Connect.	All Business
Makes me a lot more likely to give again	8%	14%	9%	3%
Makes me somewhat more likely to give again	18%	24%	20%	8%
No impact on my giving decisions	63%	56%	60%	74%
Makes me somewhat less likely to give again	3%	2%	2%	5%
Makes me a lot less likely to give again	2%	1%	1%	5%
Don't know	6%	4%	7%	6%
Top 2 box	26%	38%	30%	11%
Bottom 2 box	5%	3%	4%	10%

Q11_6. What effect, if any, do the following have on your inclination to make an additional donation in the future? The charity offers me numerous opportunities to tell them what I think and offer feedback online

	Total	Relation. Seekers	Casual Connect.	All Business
Makes me a lot more likely to give again	13%	24%	13%	3%
Makes me somewhat more likely to give again	32%	39%	35%	20%
No impact on my giving decisions	47%	33%	45%	62%
Makes me somewhat less likely to give again	5%	2%	4%	8%
Makes me a lot less likely to give again	2%	1%	1%	5%
Don't know	2%	1%	2%	2%
Top 2 box	45%	63%	48%	22%
Bottom 2 box	7%	3%	5%	13%

	Total	Relation. Seekers	Casual Connect.	All Business
Q11sum1. TOP 1 MORE LIKELY. What effect, if any, do the following have on your inclination to make an additional donation in the future?				
The charity sends me email with news of recent victories and accomplishments	18%	35%	19%	1%
The charity tells me by email how my donation was spent, and what happened as a result	33%	51%	38%	10%
The charity permits me to tell them how often 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 lets me create a customized donor page on their website that lets me see content that is of special interest to me	8%	14%	9%	3%
The charity offers me numerous opportunities to tell them what I think and offer feedback online	13%	24%	13%	3%
Q11sum2. TOP 2 MORE LIKELY. What effect, if any, do the following have on your inclination to make an additional donation in the future?				
The charity sends me email with news of recent victories and accomplishments	60%	84%	72%	21%
The charity tells me by email how my donation was spent, and what happened as a result	74%	90%	83%	48%
The charity permits me to tell them how often to email me	73%	79%	76%	65%
The charity permits me to control the information I receive, so I only hear about the subjects I care about	71%	77%	73%	62%
The charity lets me create a customized donor page on their website that lets me see content that is of special interest to me	26%	38%	30%	11%
The charity offers me numerous opportunities to tell them what I think and offer feedback online	45%	63%	48%	22%
Q12. Have you made a donation to a candidate running for President in 2008? (Check all that apply)				
Yes, and I donated online	13%	20%	11%	9%
Yes, and I donated by mailing in a check	9%	10%	8%	10%
Yes, and I donated through another method (please specify)	3%	4%	3%	2%
No	76%	71%	78%	78%
Don't know	0%	0%	1%	0%
Refused	3%	2%	3%	4%

	Total	Relation. Seekers	Casual Connect.	All Business

Q13. How likely are you to make a donation to a candidate running for President in 2008?

	Total	Relation. Seekers	Casual Connect.	All Business
BASE: Not made a donation to Presidential candidate	2633	713	1123	797
Very likely	15%	19%	14%	13%
Somewhat likely	16%	19%	14%	15%
Neither likely nor unlikely	5%	5%	5%	4%
Somewhat unlikely	9%	8%	9%	9%
Very unlikely	48%	41%	50%	51%
Don't know	5%	5%	5%	6%
Refused	2%	2%	2%	4%
Top 2 box	31%	38%	29%	27%
Bottom 2 box	57%	49%	59%	60%

Q14. Do you think you will make your donation (check all that apply):

	Total	Relation. Seekers	Casual Connect.	All Business
BASE: Likely to make donation	797	270	317	210
Online	57%	65%	55%	49%
By mailing a check	31%	29%	30%	34%
Some other way	5%	5%	6%	4%
Not sure	15%	10%	16%	18%
Refused	0%	0%	0%	1%

Q15. Thinking about the emails you receive from charitable organizations that are NOT soliciting funds, from how many different causes, groups or charities would you say you receive non-solicitation emails:

	Total	Relation. Seekers	Casual Connect.	All Business
None	8%	5%	8%	10%
1 or 2	21%	18%	22%	22%
3 to 5	34%	38%	37%	28%
6 or more	31%	35%	28%	32%
Don't know	6%	4%	6%	8%

Q16. About what percentage of the email you receive from causes and charities do you read?

	Total	Relation. Seekers	Casual Connect.	All Business
BASE: Q15 all but "None"	3189	947	1318	924
Most or all	13%	19%	14%	5%
About ¾ or 75%	13%	23%	13%	4%
About half	22%	27%	26%	12%
Less than half	24%	21%	26%	24%
Hardly any	27%	10%	20%	53%
Don't know/not sure	1%	1%	1%	1%

	Total	Relation. Seekers	Casual Connect.	All Business
Q17_1. Please indicate if you agree or disagree with each of the statements about emails below: I like email updates that show how my money is being spent				
Agree strongly	22%	39%	23%	3%
Agree somewhat	41%	45%	51%	22%
Neither agree nor disagree	24%	13%	21%	37%
Disagree somewhat	9%	3%	4%	23%
Disagree strongly	4%	0%	0%	13%
Not sure	1%	1%	1%	1%
Top 2 box	62%	84%	74%	25%
Bottom 2 box	14%	3%	4%	36%
Q17_2. Please indicate if you agree or disagree with each of the statements about emails below: I find emails from charities that address me by first name to be too familiar				
Agree strongly	8%	4%	6%	16%
Agree somewhat	17%	12%	17%	21%
Neither agree nor disagree	44%	38%	46%	46%
Disagree somewhat	18%	24%	19%	10%
Disagree strongly	12%	21%	11%	5%
Not sure	1%	0%	1%	2%
Top 2 box	25%	16%	23%	37%
Bottom 2 box	30%	45%	30%	15%
Q17_3. Please indicate if you agree or disagree with each of the statements about emails below: Emails I receive from charities are generally well written and inspiring				
Agree strongly	8%	16%	7%	1%
Agree somewhat	36%	47%	45%	12%
Neither agree nor disagree	41%	30%	38%	54%
Disagree somewhat	10%	6%	7%	18%
Disagree strongly	2%	0%	1%	6%
Not sure	3%	1%	1%	9%
Top 2 box	43%	63%	52%	12%
Bottom 2 box	13%	7%	8%	24%
Q17_4. Please indicate if you agree or disagree with each of the statements about emails below: I used to read more of the emails I get from causes and charities than I do now				
Agree strongly	13%	13%	11%	14%
Agree somewhat	34%	35%	34%	33%
Neither agree nor disagree	33%	27%	37%	32%
Disagree somewhat	14%	19%	13%	11%
Disagree strongly	5%	5%	4%	7%
Not sure	2%	1%	1%	3%
Top 2 box	47%	48%	45%	47%
Bottom 2 box	19%	24%	16%	18%

	Total	Relation. Seekers	Casual Connect.	All Business
Q17_5. Please indicate if you agree or disagree with each of the statements about emails below: I always open and glance at emails from causes I support				
Agree strongly	23%	40%	24%	5%
Agree somewhat	42%	43%	52%	28%
Neither agree nor disagree	10%	6%	9%	16%
Disagree somewhat	16%	9%	12%	29%
Disagree strongly	8%	2%	2%	21%
Not sure	0%	0%	0%	0%
Top 2 box	65%	83%	76%	34%
Bottom 2 box	24%	11%	15%	50%
Q17_6. Please indicate if you agree or disagree with each of the statements about emails below: Charity emails do a good job of making me feel connected to the cause				
Agree strongly	9%	19%	8%	0%
Agree somewhat	37%	53%	46%	10%
Neither agree nor disagree	34%	22%	37%	41%
Disagree somewhat	14%	5%	8%	31%
Disagree strongly	6%	0%	1%	17%
Not sure	1%	0%	1%	1%
Top 2 box	46%	72%	53%	10%
Bottom 2 box	20%	6%	9%	48%
Q17_7. Please indicate if you agree or disagree with each of the statements about emails below: Most charities send me too much email				
Agree strongly	21%	13%	16%	36%
Agree somewhat	35%	33%	37%	33%
Neither agree nor disagree	32%	36%	35%	24%
Disagree somewhat	10%	15%	11%	4%
Disagree strongly	2%	3%	1%	1%
Not sure	1%	1%	1%	2%
Top 2 box	56%	45%	53%	69%
Bottom 2 box	12%	18%	12%	5%
Q17sum1. TOP 1 AGREE. Please indicate if you agree or disagree with each of the statements about emails below:				
I like email updates that show how my money is being spent	22%	39%	23%	3%
I find emails from charities that address me by first name to be too familiar	8%	4%	6%	16%
Emails I receive from charities are generally well written and inspiring	8%	16%	7%	1%
I used to read more of the emails I get from causes and charities than I do now	13%	13%	11%	14%
I always open and glance at emails from causes I support	23%	40%	24%	5%
Charity emails do a good job of making me feel connected to the cause	9%	19%	8%	0%
Most charities send me too much email	21%	13%	16%	36%

	Total	Relation. Seekers	Casual Connect.	All Business
Q17sum2. TOP 2 AGREE. Please indicate if you agree or disagree with each of the statements about emails below:				
I like email updates that show how my money is being spent	62%	84%	74%	25%
I find emails from charities that address me by first name to be too familiar	25%	16%	23%	37%
Emails I receive from charities are generally well written and inspiring	43%	63%	52%	12%
I used to read more of the emails I get from causes and charities than I do now	47%	48%	45%	47%
I always open and glance at emails from causes I support	65%	83%	76%	34%
Charity emails do a good job of making me feel connected to the cause	46%	72%	53%	10%
Most charities send me too much email	56%	45%	53%	69%

Q18_1. How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially? Action alerts that let you send a fax or email to your elected officials

	Total	Relation. Seekers	Casual Connect.	All Business
Very valuable	31%	53%	33%	7%
Somewhat valuable	36%	33%	41%	31%
Not too valuable	20%	10%	18%	31%
Not valuable at all	12%	3%	7%	29%
Don't know	2%	1%	2%	3%
Top 2 box	66%	86%	74%	38%
Bottom 2 box	32%	13%	25%	60%

Q18_2. How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially? Financial updates that show how the charity has been spending donated funds

	Total	Relation. Seekers	Casual Connect.	All Business
Very valuable	35%	49%	41%	12%
Somewhat valuable	49%	44%	51%	49%
Not too valuable	12%	6%	7%	25%
Not valuable at all	4%	1%	0%	12%
Don't know	1%	0%	1%	2%
Top 2 box	83%	94%	92%	61%
Bottom 2 box	16%	6%	7%	37%

Q18_3. How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially? Personal stories by people whose lives have been transformed by the charity

	Total	Relation. Seekers	Casual Connect.	All Business
Very valuable	19%	37%	20%	1%
Somewhat valuable	44%	46%	58%	24%
Not too valuable	24%	13%	19%	43%
Not valuable at all	11%	3%	2%	29%
Don't know	1%	1%	1%	3%
Top 2 box	64%	83%	78%	26%
Bottom 2 box	35%	16%	21%	72%

	Total	Relation. Seekers	Casual Connect.	All Business

Q18_4. How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially? Reviews and summaries of recent news coverage of the cause or charity

	Total	Relation. Seekers	Casual Connect.	All Business
Very valuable	19%	39%	19%	1%
Somewhat valuable	49%	51%	62%	31%
Not too valuable	22%	8%	17%	42%
Not valuable at all	8%	1%	1%	24%
Don't know	1%	0%	1%	2%
Top 2 box	69%	90%	81%	32%
Bottom 2 box	30%	10%	18%	66%

Q18_5. How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially? An email tax receipt at year-end showing how much you gave

	Total	Relation. Seekers	Casual Connect.	All Business
Very valuable	71%	81%	75%	57%
Somewhat valuable	21%	14%	19%	28%
Not too valuable	5%	4%	4%	8%
Not valuable at all	3%	1%	1%	6%
Don't know	1%	0%	1%	2%
Top 2 box	92%	95%	94%	85%
Bottom 2 box	8%	5%	5%	14%

Q18_6. How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially? Personal "news you can use" - consumer and health advice, etc.- related to the charity's issues

	Total	Relation. Seekers	Casual Connect.	All Business
Very valuable	15%	27%	16%	2%
Somewhat valuable	43%	49%	51%	26%
Not too valuable	27%	18%	25%	38%
Not valuable at all	14%	6%	6%	32%
Don't know	2%	0%	2%	2%
Top 2 box	58%	76%	67%	28%
Bottom 2 box	41%	24%	31%	70%

Q18_7. How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially? Success stories

	Total	Relation. Seekers	Casual Connect.	All Business
Very valuable	24%	43%	27%	1%
Somewhat valuable	49%	49%	62%	33%
Not too valuable	19%	7%	10%	43%
Not valuable at all	7%	1%	1%	20%
Don't know	1%	0%	1%	2%
Top 2 box	73%	92%	88%	34%
Bottom 2 box	26%	7%	11%	64%

	Total	Relation. Seekers	Casual Connect.	All Business
Q18_8. How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially? Volunteer opportunities				
Very valuable	15%	27%	15%	4%
Somewhat valuable	47%	51%	54%	34%
Not too valuable	26%	18%	25%	35%
Not valuable at all	9%	3%	3%	24%
Don't know	2%	1%	2%	3%
Top 2 box	62%	78%	70%	38%
Bottom 2 box	36%	21%	29%	58%

	Total	Relation. Seekers	Casual Connect.	All Business
Q18_9. How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially? Contests				
Very valuable	2%	4%	2%	0%
Somewhat valuable	9%	13%	12%	2%
Not too valuable	33%	38%	37%	22%
Not valuable at all	53%	42%	46%	72%
Don't know	3%	2%	3%	3%
Top 2 box	11%	17%	14%	2%
Bottom 2 box	86%	81%	83%	95%

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

	Total	Relation. Seekers	Casual Connect.	All Business
Q18sum2. TOP 2 VALUABLE. How valuable would you personally find the following kinds of information sent to you in an email from a charity you support financially?				
Action alerts that let you send a fax or email to YOUR elected officials	66%	86%	74%	38%
Financial updates that show how the charity has been spending donated funds	83%	94%	92%	61%
Personal stories by people whose lives have been transformed by the charity	64%	83%	78%	26%
Reviews and summaries of recent news coverage of the cause or charity	69%	90%	81%	32%
An email tax receipt at year-end showing how much you gave	92%	95%	94%	85%
Personal "news you can use" - consumer and health advice, etc. - related to the charity's issues	58%	76%	67%	28%
Success stories	73%	92%	88%	34%
Volunteer opportunities	62%	78%	70%	38%
Contests	11%	17%	14%	2%

	Total	Relation. Seekers	Casual Connect.	All Business
Q19A. SPLIT A: Following are some other ways that charities and causes have used to connect online with their supporters. In which, if any, of the following have you personally taken part?				
BASE: Split sample A	1766	448	776	542
Read a blog hosted by a charity or cause group	14%	36%	8%	4%
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 or cause	3%	8%	2%	1%
Viewed a video online posted or sent by a charity or its supporters	29%	93%	6%	8%
Contributed a video to a Youtube group or directly to a charity	0%	1%	0%	0%
Listened to an audio or podcast offered by a charity	13%	44%	3%	3%
Downloaded wallpaper or a screensaver offered by a charity	3%	8%	2%	1%
Forwarded a message from a cause or charity to a friend or colleague	42%	85%	38%	12%
Joined a group on MySpace, Facebook, Friendster or another social network dedicated to a particular cause or charity	3%	8%	2%	1%
None of the above	46%	0%	49%	78%

	Total	Relation. Seekers	Casual Connect.	All Business
Q19B_1. SPLIT B: In which, if any, of the following would you personally be interested in taking part?				
Read a blog hosted by a charity or cause group				
BASE: Split sample B	1677	547	650	480
Very interested	2%	4%	1%	0%
Somewhat interested	18%	44%	8%	3%
Neither interested nor uninterested	21%	23%	25%	14%
Somewhat uninterested	19%	16%	26%	15%
Very uninterested	39%	12%	40%	67%
Don't know	1%	1%	1%	2%
Top 2 box	20%	48%	8%	3%
Bottom 2 box	58%	28%	66%	82%

	Total	Relation. Seekers	Casual Connect.	All Business

Q19B_2. SPLIT B: In which, if any, of the following would you personally be interested in taking part?
Post a message to a blog hosted by a charity or cause group

	Total	Relation. Seekers	Casual Connect.	All Business
BASE: Split sample B	1677	547	650	480
Very interested	1%	3%	0%	0%
Somewhat interested	10%	25%	4%	1%
Neither interested nor uninterested	20%	27%	22%	11%
Somewhat uninterested	20%	23%	23%	14%
Very uninterested	47%	22%	49%	73%
Don't know	1%	1%	1%	1%
Top 2 box	11%	28%	4%	1%
Bottom 2 box	68%	45%	73%	86%

Q19B_3. SPLIT B: In which, if any, of the following would you personally be interested in taking part?
Participate in a live chat with an expert or representative of the charity

	Total	Relation. Seekers	Casual Connect.	All Business
BASE: Split sample B	1677	547	650	480
Very interested	3%	8%	1%	0%
Somewhat interested	16%	32%	10%	4%
Neither interested nor uninterested	22%	26%	24%	15%
Somewhat uninterested	18%	20%	23%	11%
Very uninterested	40%	14%	41%	68%
Don't know	1%	0%	1%	2%
Top 2 box	19%	40%	11%	5%
Bottom 2 box	58%	34%	63%	79%

Q19B_4. SPLIT B: In which, if any, of the following would you personally be interested in taking part?
View a video online posted or sent by a charity or cause or its supporters

	Total	Relation. Seekers	Casual Connect.	All Business
BASE: Split sample B	1677	547	650	480
Very interested	5%	15%	0%	0%
Somewhat interested	29%	76%	9%	5%
Neither interested nor uninterested	21%	5%	36%	18%
Somewhat uninterested	16%	3%	26%	17%
Very uninterested	28%	2%	28%	59%
Don't know	1%	0%	1%	1%
Top 2 box	34%	91%	9%	5%
Bottom 2 box	44%	5%	54%	76%

	Total	Relation. Seekers	Casual Connect.	All Business
Q19B_5. SPLIT B: In which, if any, of the following would you personally be interested in taking part?				
Contribute a video to a Youtube group or directly to a charity				
BASE: Split sample B	1677	547	650	480
Very interested	1%	2%	0%	0%
Somewhat interested	3%	9%	1%	0%
Neither interested nor uninterested	19%	26%	19%	11%
Somewhat uninterested	17%	21%	20%	8%
Very uninterested	58%	39%	59%	80%
Don't know	2%	3%	1%	2%
Top 2 box	4%	12%	1%	0%
Bottom 2 box	75%	59%	79%	87%
Q19B_6. SPLIT B: In which, if any, of the following would you personally be interested in taking part?				
Listen to an audio or podcast offered by a charity				
BASE: Split sample B	1677	547	650	480
Very interested	3%	9%	0%	0%
Somewhat interested	21%	53%	6%	4%
Neither interested nor uninterested	21%	19%	29%	14%
Somewhat uninterested	20%	12%	28%	18%
Very uninterested	34%	6%	35%	62%
Don't know	1%	0%	2%	1%
Top 2 box	24%	63%	7%	5%
Bottom 2 box	53%	19%	63%	80%
Q19B_7. SPLIT B: In which, if any, of the following would you personally be interested in taking part?				
Download wallpaper or a screensaver offered by a charity				
BASE: Split sample B	1677	547	650	480
Very interested	2%	4%	1%	0%
Somewhat interested	10%	22%	6%	2%
Neither interested nor uninterested	20%	25%	21%	13%
Somewhat uninterested	16%	18%	19%	11%
Very uninterested	50%	30%	51%	72%
Don't know	2%	1%	2%	2%
Top 2 box	12%	26%	7%	2%
Bottom 2 box	67%	48%	70%	83%

Q19B_8. SPLIT B: In which, if any, of the following would you personally be interested in taking part?
Forward a message from a charity to a friend or colleague

	Total	Relation. Seekers	Casual Connect.	All Business
BASE: Split sample B	1677	547	650	480
Very interested	5%	12%	1%	0%
Somewhat interested	27%	51%	23%	4%
Neither interested nor uninterested	21%	15%	28%	20%
Somewhat uninterested	16%	13%	19%	16%
Very uninterested	30%	9%	27%	58%
Don't know	1%	0%	1%	2%
Top 2 box	31%	63%	25%	4%
Bottom 2 box	46%	22%	46%	74%

Q19B_9. SPLIT B: In which, if any, of the following would you personally be interested in taking part?
Join a group on MySpace, Facebook or another social network that is dedicated to a particular cause or charity

	Total	Relation. Seekers	Casual Connect.	All Business
BASE: Split sample B	1677	547	650	480
Very interested	1%	3%	0%	0%
Somewhat interested	8%	18%	4%	1%
Neither interested nor uninterested	16%	20%	17%	9%
Somewhat uninterested	16%	20%	17%	10%
Very uninterested	58%	37%	60%	78%
Don't know	2%	1%	2%	2%
Top 2 box	9%	21%	4%	1%
Bottom 2 box	74%	57%	77%	88%

Q19Bsum1. TOP 1 INTERESTED. In which, if any, of the following would you personally be interested in taking part?

	Total	Relation. Seekers	Casual Connect.	All Business
BASE: Split sample B	1677	547	650	480
Read a blog hosted by a charity or cause group	2%	4%	1%	0%
Post a message to a blog hosted by a charity or cause group	1%	3%	0%	0%
Participate in a live chat with an expert or representative of the charity	3%	8%	1%	0%
View a video online posted or sent by a charity or cause or its supporters	5%	15%	0%	0%
Contribute a video to a Youtube group or directly to a charity	1%	2%	0%	0%
Listen to an audio or podcast offered by a charity	3%	9%	0%	0%
Download wallpaper or a screensaver offered by a charity	2%	4%	1%	0%
Forward a message from a charity to a friend or colleague	5%	12%	1%	0%
Join a group on MySpace, Facebook or another social network that is dedicated to a particular cause or charity	1%	3%	0%	0%

	Total	Relation. Seekers	Casual Connect.	All Business
Q19Bsum2. TOP 2 INTERESTED. In which, if any, of the following would you personally be interested in taking part?				
BASE: Split sample B	1677	547	650	480
Read a blog hosted by a charity or cause group	20%	48%	8%	3%
Post a message to a blog hosted by a charity or cause group	11%	28%	4%	1%
Participate in a live chat with an expert or representative of the charity	19%	40%	11%	5%
View a video online posted or sent by a charity or cause or its supporters	34%	91%	9%	5%
Contribute a video to a Youtube group or directly to a charity	4%	12%	1%	0%
Listen to an audio or podcast offered by a charity	24%	63%	7%	5%
Download wallpaper or a screensaver offered by a charity	12%	26%	7%	2%
Forward a message from a charity to a friend or colleague	31%	63%	25%	4%
Join a group on MySpace, Facebook or another social network that is dedicated to a particular cause or charity	9%	21%	4%	1%
Q20. Before thinking about donating to a charity for the first time, do you ever visit their website?				
Yes, nearly every time	49%	61%	48%	40%
Yes, often	17%	16%	18%	16%
Yes, sometimes	19%	17%	20%	21%
No, rarely or never	13%	6%	12%	21%
Not sure	1%	1%	2%	2%
Q21. In general, how useful is a charity's website in helping you make your decision whether to give?				
Very useful	34%	46%	36%	22%
Somewhat useful	46%	45%	46%	48%
Not too useful	11%	6%	11%	15%
Not useful at all	5%	2%	3%	11%
Don't know	3%	1%	4%	5%
Q22. Which if any of the following online resources have you consulted when deciding whether to make a donation? (Select all that apply)				
CharityNavigator	20%	23%	20%	18%
Guidestar	10%	11%	10%	11%
The Better Business Bureau Wise Giving Alliance	14%	16%	13%	13%
Network for Good	5%	7%	5%	4%
Other [please specify]	6%	6%	6%	5%
None of the above	57%	55%	57%	60%
Don't know	6%	5%	7%	6%
Q23. Once you have made a donation to a charity, how often would you say you visit that organization's website?				
Once a month or more	7%	16%	6%	1%
Once every 2-3 months	16%	26%	16%	5%
Once or twice a year	38%	37%	41%	35%
Less than once a year	23%	14%	23%	31%
Never	12%	4%	9%	24%
Don't know	4%	3%	5%	3%

	Total	Relation. Seekers	Casual Connect.	All Business

Q24_1. Reasons for visiting websites -- do you: Visit to check the progress of an issue or read about recent accomplishments

	Total	Relation. Seekers	Casual Connect.	All Business
Regularly done	10%	21%	7%	2%
Occasionally done	43%	55%	47%	25%
Rarely/ Never	47%	24%	45%	72%
Not sure	1%	0%	1%	1%

Q24_2. Reasons for visiting websites -- do you: Visit to renew my gift or make an additional donation

	Total	Relation. Seekers	Casual Connect.	All Business
Regularly done	18%	22%	18%	15%
Occasionally done	46%	51%	48%	38%
Rarely/ Never	35%	26%	34%	46%
Not sure	1%	1%	1%	0%

Q24_3. Reasons for visiting websites -- do you: Visit to take action on a political or advocacy issue

	Total	Relation. Seekers	Casual Connect.	All Business
Regularly done	14%	29%	11%	3%
Occasionally done	34%	38%	38%	24%
Rarely/ Never	51%	32%	50%	72%
Not sure	1%	1%	1%	1%

Q24_4. Reasons for visiting websites -- do you: Visit to get information I can use in my everyday life, such as health, lifestyle or consumer tips

	Total	Relation. Seekers	Casual Connect.	All Business
Regularly done	5%	10%	4%	1%
Occasionally done	26%	36%	27%	14%
Rarely/ Never	68%	53%	67%	83%
Not sure	1%	1%	2%	1%

Q24_5. Reasons for visiting websites -- do you: Some other reason [please specify]

	Total	Relation. Seekers	Casual Connect.	All Business
Regularly done	2%	4%	1%	1%
Occasionally done	3%	4%	3%	3%
Rarely/ Never	11%	6%	11%	17%
Not sure	13%	11%	13%	13%

Q24sum1. DO REGULARLY. Reasons for visiting websites -- do you:

	Total	Relation. Seekers	Casual Connect.	All Business
Visit to check the progress of an issue or read about recent accomplishments	10%	21%	7%	2%
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 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%

	Total	Relation. Seekers	Casual Connect.	All Business

Q25_1. Please indicate if you agree or disagree with each of the following statements about the websites of charities to which you donate. Most charity websites make it easy to get the information I need to decide whether to give.

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	11%	18%	11%	4%
Agree somewhat	43%	49%	47%	31%
Neither agree nor disagree	27%	19%	26%	37%
Disagree somewhat	10%	10%	8%	13%
Disagree strongly	1%	0%	1%	3%
Not sure	7%	3%	7%	12%
Top 2 box	53%	67%	58%	35%
Bottom 2 box	12%	10%	9%	16%

Q25_2. Please indicate if you agree or disagree with each of the following statements about the websites of charities to which you donate. Most charity websites make it easy to find contact information like mailing address and phone number.

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	19%	24%	19%	12%
Agree somewhat	43%	47%	46%	37%
Neither agree nor disagree	17%	13%	16%	23%
Disagree somewhat	11%	11%	9%	13%
Disagree strongly	2%	2%	2%	4%
Not sure	8%	4%	7%	11%
Top 2 box	62%	71%	65%	49%
Bottom 2 box	13%	12%	11%	16%

Q25_3. Please indicate if you agree or disagree with each of the following statements about the websites of charities to which you donate. Most charity websites make it easy to donate.

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	28%	35%	30%	18%
Agree somewhat	44%	46%	45%	43%
Neither agree nor disagree	14%	9%	14%	20%
Disagree somewhat	6%	6%	5%	7%
Disagree strongly	1%	0%	1%	2%
Not sure	7%	4%	6%	11%
Top 2 box	72%	81%	74%	61%
Bottom 2 box	6%	6%	5%	8%

Q25_4. Please indicate if you agree or disagree with each of the following statements about the websites of charities to which you donate. Most charity websites are inspiring.

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	8%	14%	8%	2%
Agree somewhat	32%	43%	38%	14%
Neither agree nor disagree	41%	32%	39%	53%
Disagree somewhat	9%	7%	7%	15%
Disagree strongly	2%	0%	1%	6%
Not sure	7%	3%	6%	11%
Top 2 box	40%	57%	47%	16%
Bottom 2 box	12%	8%	8%	20%

	Total	Relation. Seekers	Casual Connect.	All Business

Q25_5. Please indicate if you agree or disagree with each of the following statements about the websites of charities to which you donate. Most charity websites make me feel personally connected to their cause or mission.

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	7%	13%	6%	1%
Agree somewhat	33%	47%	38%	13%
Neither agree nor disagree	40%	29%	40%	53%
Disagree somewhat	11%	7%	8%	17%
Disagree strongly	3%	0%	2%	6%
Not sure	6%	3%	6%	10%
Top 2 box	40%	61%	45%	15%
Bottom 2 box	13%	8%	10%	23%

Q25_6. Please indicate if you agree or disagree with each of the following statements about the websites of charities to which you donate. Most charity websites are well-designed.

	Total	Relation. Seekers	Casual Connect.	All Business
Agree strongly	9%	13%	11%	3%
Agree somewhat	39%	45%	41%	29%
Neither agree nor disagree	33%	27%	30%	43%
Disagree somewhat	9%	10%	9%	9%
Disagree strongly	2%	1%	1%	3%
Not sure	8%	4%	7%	12%
Top 2 box	48%	58%	52%	33%
Bottom 2 box	11%	11%	10%	12%

Q25sum1. TOP 1 AGREE. Please indicate if you agree or disagree with each of the following statements about the websites of charities to which you donate.

	Total	Relation. Seekers	Casual Connect.	All Business
Most charity websites make it easy to get the information I need to decide whether to give.	11%	18%	11%	4%
Most charity websites make it easy to find contact information like mailing address and phone number.	19%	24%	19%	12%
Most charity websites make it easy to donate.	28%	35%	30%	18%
Most charity websites are inspiring.	8%	14%	8%	2%
Most charity websites make me feel personally connected to their cause or mission.	7%	13%	6%	1%
Most charity websites are well-designed.	9%	13%	11%	3%

	Total	Relation. Seekers	Casual Connect.	All Business

Q25sum2. TOP 2 AGREE. Please indicate if you agree or disagree with each of the following statements about the websites of charities to which you donate.

	Total	Relation. Seekers	Casual Connect.	All Business
Most charity websites make it easy to get the information I need to decide whether to give.	53%	67%	58%	35%
Most charity websites make it easy to find contact information like mailing address and phone number.	62%	71%	65%	49%
Most charity websites make it easy to donate.	72%	81%	74%	61%
Most charity websites are inspiring.	40%	57%	47%	16%
Most charity websites make me feel personally connected to their cause or mission.	40%	61%	45%	15%
Most charity websites are well-designed.	48%	58%	52%	33%

Q26. If you had to give the charitable community one piece of advice about how to improve their websites, what would it be? (open ended responses reported out separately)

Q27. How many years have you been using the Internet?

	Total	Relation. Seekers	Casual Connect.	All Business
5 or fewer	5%	4%	6%	5%
6-10	41%	37%	44%	41%
11-15	42%	47%	39%	41%
More than 15	12%	12%	11%	14%
MEAN	11.975	12.17125	11.67468	12.19503
MEDIAN	12	12	10	12

Q28. Approximately how many hours a week on average do you spend accessing the Internet or other online services?

	Total	Relation. Seekers	Casual Connect.	All Business
Fewer than 5	12%	8%	13%	14%
5-9	18%	17%	18%	18%
10-14	21%	18%	21%	23%
15-19	11%	12%	11%	11%
20-24	15%	16%	15%	14%
25-39	12%	16%	11%	10%
40 or more	11%	14%	11%	10%
MEAN	17.69	20.15192	16.8707	16.44546
MEDIAN	14	15	14	12

Q29_1. Which of the following activities do you engage in online? Emailing

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	96%	98%	96%	94%
Yes, but infrequently	3%	2%	3%	4%
Rarely	0%	0%	1%	0%
Never	0%	0%	0%	0%
Not sure	0%	0%	0%	0%

	Total	Relation. Seekers	Casual Connect.	All Business

Q29_2. Which of the following activities do you engage in online? Taking political action

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	20%	35%	18%	7%
Yes, but infrequently	31%	35%	32%	27%
Rarely	23%	17%	25%	26%
Never	25%	12%	24%	39%
Not sure	0%	0%	0%	0%

Q29_3. Which of the following activities do you engage in online? Surfing the web to research an issue

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	76%	83%	74%	71%
Yes, but infrequently	20%	15%	21%	22%
Rarely	3%	2%	3%	5%
Never	1%	0%	1%	2%
Not sure	0%	0%	0%	0%

Q29_4. Which of the following activities do you engage in online? Reading magazines and newspapers online

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	36%	45%	32%	33%
Yes, but infrequently	29%	29%	29%	28%
Rarely	21%	18%	23%	20%
Never	14%	8%	15%	19%
Not sure	0%	0%	0%	0%

Q29_5. Which of the following activities do you engage in online? Banking/bill paying online

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	66%	72%	66%	61%
Yes, but infrequently	12%	11%	12%	14%
Rarely	6%	5%	8%	6%
Never	15%	13%	14%	19%
Not sure	0%	0%	0%	0%

Q29_6. Which of the following activities do you engage in online? Buying products or services online

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	58%	64%	56%	53%
Yes, but infrequently	32%	28%	35%	33%
Rarely	8%	6%	7%	11%
Never	2%	1%	2%	3%
Not sure	0%	0%	0%	0%

Q29_7. Which of the following activities do you engage in online? Reading blogs

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	9%	13%	8%	6%
Yes, but infrequently	16%	23%	14%	12%
Rarely	32%	36%	31%	28%
Never	43%	28%	47%	54%
Not sure	0%	0%	0%	0%

	Total	Relation. Seekers	Casual Connect.	All Business

Q29_8. Which of the following activities do you engage in online? Sending or receiving mobile phone text messages

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	10%	16%	10%	5%
Yes, but infrequently	10%	11%	10%	7%
Rarely	18%	23%	18%	16%
Never	61%	50%	61%	72%
Not sure	1%	0%	1%	0%

Q29_9. Which of the following activities do you engage in online? Listening to or downloading music

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	18%	26%	17%	14%
Yes, but infrequently	25%	28%	26%	21%
Rarely	24%	26%	23%	24%
Never	32%	21%	34%	41%
Not sure	0%	0%	0%	0%

Q29_10. Which of the following activities do you engage in online? Watching or downloading videos

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	11%	18%	8%	7%
Yes, but infrequently	28%	38%	26%	21%
Rarely	33%	31%	34%	32%
Never	28%	13%	31%	40%
Not sure	0%	0%	0%	0%

Q29_11. Which of the following activities do you engage in online? Writing a blog or commenting on a blog

	Total	Relation. Seekers	Casual Connect.	All Business
Yes, regularly	2%	4%	2%	2%
Yes, but infrequently	6%	11%	4%	5%
Rarely	20%	27%	19%	13%
Never	71%	58%	74%	80%
Not sure	0%	0%	0%	0%

Q29sum1. DO REGULARLY. Which of the following activities do you engage in online?

	Total	Relation. Seekers	Casual Connect.	All Business
Emailing	96%	98%	96%	94%
Taking political action	20%	35%	18%	7%
Surfing the web to research an issue	76%	83%	74%	71%
Reading magazines and newspapers online	36%	45%	32%	33%
Banking/bill paying online	66%	72%	66%	61%
Buying products or services online	58%	64%	56%	53%
Reading blogs	9%	13%	8%	6%
Sending or receiving mobile phone text messages	10%	16%	10%	5%
Listening to or downloading music	18%	26%	17%	14%
Watching or downloading videos	11%	18%	8%	7%
Writing a blog or commenting on a blog	2%	4%	2%	2%

	Total	Relation. Seekers	Casual Connect.	All Business

Q30_1. Following are some online publications, social networks and other online services. Do you use:
Facebook

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	3%	6%	2%	1%
Use it, but not regularly	6%	7%	5%	5%
Heard of it, but never use it	71%	72%	69%	74%
Never heard of it	20%	15%	23%	19%
Not sure	0%	0%	0%	0%

Q30_2. Following are some online publications, social networks and other online services. Do you use:
Friendster

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	0%	1%	0%	0%
Use it, but not regularly	3%	4%	3%	2%
Heard of it, but never use it	31%	37%	30%	27%
Never heard of it	66%	58%	67%	70%
Not sure	0%	0%	0%	1%

Q30_3. Following are some online publications, social networks and other online services. Do you use:
Eons

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	0%	0%	0%	0%
Use it, but not regularly	0%	0%	0%	0%
Heard of it, but never use it	10%	11%	10%	9%
Never heard of it	90%	89%	90%	90%
Not sure	0%	0%	0%	1%

Q30_4. Following are some online publications, social networks and other online services. Do you use:
MySpace

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	2%	5%	2%	1%
Use it, but not regularly	12%	17%	12%	7%
Heard of it, but never use it	83%	76%	84%	87%
Never heard of it	3%	2%	3%	4%
Not sure	0%	0%	0%	0%

Q30_5. Following are some online publications, social networks and other online services. Do you use:
Digg

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	1%	1%	0%	1%
Use it, but not regularly	2%	3%	2%	2%
Heard of it, but never use it	17%	20%	15%	15%
Never heard of it	80%	76%	82%	81%
Not sure	1%	0%	0%	1%

Q30_6. Following are some online publications, social networks and other online services. Do you use:
YouTube

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	8%	15%	7%	4%
Use it, but not regularly	44%	53%	42%	39%
Heard of it, but never use it	44%	30%	47%	53%
Never heard of it	3%	2%	4%	4%
Not sure	0%	0%	0%	0%

	Total	Relation. Seekers	Casual Connect.	All Business

Q30_7. Following are some online publications, social networks and other online services. Do you use: Flickr

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	2%	2%	2%	1%
Use it, but not regularly	10%	12%	8%	9%
Heard of it, but never use it	30%	34%	30%	27%
Never heard of it	58%	52%	60%	62%
Not sure	0%	0%	0%	1%

Q30_8. Following are some online publications, social networks and other online services. Do you use: Gather

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	0%	0%	0%	0%
Use it, but not regularly	0%	0%	0%	0%
Heard of it, but never use it	10%	13%	9%	9%
Never heard of it	89%	87%	90%	90%
Not sure	0%	0%	0%	1%

Q30_9. Following are some online publications, social networks and other online services. Do you use: Care2

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	1%	2%	0%	1%
Use it, but not regularly	2%	4%	2%	1%
Heard of it, but never use it	11%	13%	10%	9%
Never heard of it	86%	80%	87%	88%
Not sure	1%	0%	0%	1%

Q30_10. Following are some online publications, social networks and other online services. Do you use: Delicious

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	1%	1%	0%	0%
Use it, but not regularly	1%	2%	1%	1%
Heard of it, but never use it	15%	19%	12%	14%
Never heard of it	83%	78%	86%	83%
Not sure	0%	0%	0%	1%

Q30_11. Following are some online publications, social networks and other online services. Do you use: LinkedIn

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	4%	7%	4%	2%
Use it, but not regularly	12%	15%	12%	11%
Heard of it, but never use it	15%	17%	15%	14%
Never heard of it	68%	61%	70%	72%
Not sure	0%	0%	0%	1%

Q30_12. Following are some online publications, social networks and other online services. Do you use: Match.com

	Total	Relation. Seekers	Casual Connect.	All Business
Use it regularly	1%	2%	1%	1%
Use it, but not regularly	5%	7%	5%	3%
Heard of it, but never use it	73%	75%	75%	69%
Never heard of it	21%	16%	19%	27%
Not sure	0%	0%	0%	1%

	Total	Relation. Seekers	Casual Connect.	All Business
Q30_13. Following are some online publications, social networks and other online services. Do you use: iVillage				
Use it regularly	0%	0%	1%	0%
Use it, but not regularly	5%	6%	6%	3%
Heard of it, but never use it	42%	47%	41%	39%
Never heard of it	52%	46%	52%	58%
Not sure	0%	0%	0%	1%
Q30sum1. USE REGULARLY. Following are some online publications, social networks and other online services. Do you use:				
Facebook	3%	6%	2%	1%
Friendster	0%	1%	0%	0%
Eons	0%	0%	0%	0%
MySpace	2%	5%	2%	1%
Digg	1%	1%	0%	1%
Youtube	8%	15%	7%	4%
Flickr	2%	2%	2%	1%
Gather	0%	0%	0%	0%
Care2	1%	2%	0%	1%
Delicious	1%	1%	0%	0%
LinkedIn	4%	7%	4%	2%
Match.com	1%	2%	1%	1%
iVillage	0%	0%	1%	0%
Q31. Are there any other online publications or social networks that you visit regularly? (open ended responses reported out separately)				
Q32. What is your gender?				
Male	50%	49%	49%	51%
Female	50%	51%	51%	49%
Q33. What is your age?				
18-24	1%	1%	1%	1%
25-44	32%	42%	32%	24%
45-54	30%	29%	32%	30%
55-64	24%	21%	24%	27%
65+	13%	8%	12%	19%
MEAN	50.5	47.71935	50.3901	53.26553
MEDIAN	50	47	50	53

	Total	Relation. Seekers	Casual Connect.	All Business
Q34. What is the last grade that you completed in school?				
Grade school	0%	0%	0%	0%
Some high school	0%	0%	0%	0%
High school graduate	2%	1%	2%	2%
Some college, no degree	8%	9%	8%	6%
Vocational training/2-year college	3%	3%	4%	2%
4-year college/bachelor's degree	26%	29%	25%	24%
Some postgraduate work, no degree	10%	10%	11%	8%
2 or 3 years' postgraduate work/master's degree	29%	28%	30%	28%
Doctoral/law degree	22%	19%	20%	29%
Not sure/refused	0%	0%	0%	1%
Q35. Which of the following categories best describes your occupation, or what you do for a living?				
Professional/Technical	38%	39%	38%	39%
Administrative/Managerial	16%	17%	17%	13%
Legal/lawyer	5%	5%	4%	5%
Sales/Service	5%	6%	6%	3%
Teacher/Educator	7%	6%	6%	9%
Law Enforcement	0%	0%	0%	0%
Clerical/White Collar	2%	2%	2%	1%
Craftsman/Blue Collar	0%	0%	1%	0%
Student	1%	1%	1%	1%
Homemaker	5%	4%	6%	6%
Retired	15%	12%	14%	19%
Unemployed, looking for work	0%	0%	1%	0%
Other	5%	7%	5%	4%
Q36. Generally speaking, do you think of yourself as a Democrat, a Republican, an independent, or something else?				
Strong Democrat	33%	41%	31%	29%
Not very strong Democrat	6%	7%	6%	5%
Independent/lean Democrat	19%	20%	19%	18%
Strictly independent	5%	5%	4%	6%
Independent/lean Republican	10%	7%	13%	10%
Not very strong Republican	6%	4%	7%	7%
Strong Republican	10%	7%	11%	11%
Other	3%	3%	2%	3%
Not sure/nothing	1%	1%	1%	2%
Prefer not to answer	6%	4%	6%	8%
Q37. What is your religion?				
Protestant (includes Baptist, Lutheran, Methodist, Episcopal, etc.)	30%	29%	31%	28%
Catholic	25%	23%	27%	25%
Jewish	6%	7%	6%	6%
Other	8%	8%	8%	8%
None	21%	24%	19%	22%
Not sure	1%	2%	2%	1%
Prefer not to answer	8%	6%	7%	10%

	Total	Relation. Seekers	Casual Connect.	All Business
Q38. What is your race?				
White	90%	92%	91%	88%
Black	1%	1%	1%	1%
Asian	2%	1%	2%	2%
Other	2%	2%	2%	1%
Not sure	0%	0%	0%	0%
Prefer not to answer	5%	3%	4%	8%
Q38B. Are you Hispanic or of Spanish descent?				
Yes	3%	3%	3%	2%
No	93%	94%	93%	91%
Prefer not to answer	5%	3%	4%	7%

Q39. For statistical purposes only, would you please indicate which of the following categories best represents your total household income?

	Total	Relation. Seekers	Casual Connect.	All Business
Less than $50,000	4%	5%	5%	4%
$50,000-$99,999	17%	18%	18%	15%
$100,000-$199,999	30%	33%	29%	27%
$200,000-$299,999	13%	14%	14%	13%
$300,000-$499,999	8%	7%	8%	8%
$500,000 or more	6%	6%	6%	7%
Not sure	0%	0%	0%	0%
Prefer not to answer	21%	16%	20%	26%