

The Donor Mindset Study VII



Op4G

GREY MATTER
RESEARCH & CONSULTING

CUTTING THROUGH THE NOISE:
HOW MUCH MAIL AND E-MAIL DONORS RECEIVE AND READ



KEY NUMBERS TO KNOW



Average number of mailings donors get from non-profits each week: **7.8**



Average number of e-mails donors get from non-profits each week: **9.9**



Proportion that are prospecting messages: **54%** of mail, **58%** of e-mail



How much more communication men report receiving than women: **26%**



How much more wealthier households (\$70k+) receive than others: **30%**



How much more larger donors (\$500+) receive than others: **37%**



How much more liberals receive than conservatives: **38%**



How much more religious people receive than the irreligious: **24%**



How much more donors under age 35 receive than older donors: **77%**



What % of mail donors report reading from organizations they support: **79%**



What % of prospecting mail donors report reading: **59%**



What % of e-mail donors report reading from organizations they support: **78%**



What % of prospecting e-mail donors report reading: **57%**

What type of donors are most likely to read what you send them:



- Men
- Those under age 50
- Non-Caucasians
- Identify with a religious group



A COMMON COMPLAINT

It's something most donor-supported organizations have heard for years: **"Stop sending me so much mail!"** In the last couple of decades, this chorus has picked up a new refrain: **"Stop sending me so much e-mail!"**

In many different qualitative research projects Grey Matter Research has conducted among donors, we've heard this over and over again. So we partnered with Opinions 4 Good (Op4G) to find out just how much mail and e-mail donors believe they receive from charitable organizations. Not only that, but how much do they actually read?

Before going any farther, quickly answer three questions to set your expectations for what our research found:

1. About **how much mail from charities** does the typical donor receive each week?
2. About **how many e-mails from charities** does the typical donor receive?
3. About what proportion of each does the typical donor **actually read** (at least in part)?

Would you estimate donors average one message each week, closer to ten, or more like a hundred? Do they report reading almost nothing, almost everything, or somewhere in between? What's your best guess based on your experience in the industry? Setting your expectations will help you evaluate the information in this report.

Now that you've done that, let's answer those questions.

Grey Matter Research and Op4G are two companies with **extensive experience serving the charitable world**, so we joined forces for ***The Donor Mindset Study***. This is the seventh report in the series.

HOW MUCH DO DONORS RECEIVE?

At first glance, the numbers don't seem very high. The average American donor estimates receiving **3.6 pieces of mail in a typical week** from non-profit organizations they have financially supported.

But then, this figure starts to grow. In addition to 3.6 pieces of mail from organizations they've supported, the average donor also estimates **another 4.2 pieces** of mail from organizations they have not supported. That's **a total of 7.8 pieces of mail each week** – about one or two each day the mail arrives.

In addition to direct mail, the average donor reports receiving another **4.2 e-mail messages** each week from organizations they have supported. Add to that another **5.7 prospecting e-mails** from organizations they have not supported, for **a total of 9.9 e-mails each week**.

That's a total of **17.7 messages from non-profits every week**; 920 per year. It's an average of 2.5 messages every single day. And that doesn't include text messages, outbound telemarketing, advertising, point-of-purchase donation boxes, personal appeals, or other forms of communication donors might receive.

One of the interesting things about this is that donors report **more communication coming from organizations they don't support than from those they do**. On average, 54% of the direct mail they receive, and 58% of the e-mail they receive, comes from organizations they have not financially supported.

Another noteworthy point is that how much communication donors receive from charities varies widely from one person to the next. Just because the average is 7.8 pieces of direct mail doesn't mean that's what everyone is receiving.

Consider how the estimated mail volume breaks out:

Number per Week	From Those They Support	Prospecting	Total Mail
None	14%	16%	7%
1 or 2 pieces	48	36	19
3 or 4 pieces	18	21	23
5 to 9 pieces	11	18	32
10 or more pieces	8	10	19

In short, just 7% of all donors said they do not receive any direct mail from non-profit organizations in a typical week. Most are receiving somewhere between three and nine pieces of direct mail, but **one out of five is getting 10 or more per week.**

Now look at how the e-mail volume breaks out:

Number per Week	From Those They Support	Prospecting	Total E-mail
None	19%	28%	14%
1 or 2 messages	40	25	18
3 or 4 messages	15	15	15
5 to 9 messages	14	17	26
10 or more messages	11	15	27

Fourteen percent generally don't receive e-mails from non-profit organizations, but **27% are typically receiving ten or more messages each week.**

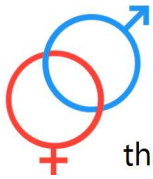
Finally, consider the combined totals:

Number per Week	From Those They Support	Prospecting	Total Combined
None	6%	10%	3%
1 or 2	26	18	8
3 or 4	21	17	9
5 to 9	27	28	26
10 to 19	13	17	32
20 or more	8	10	22

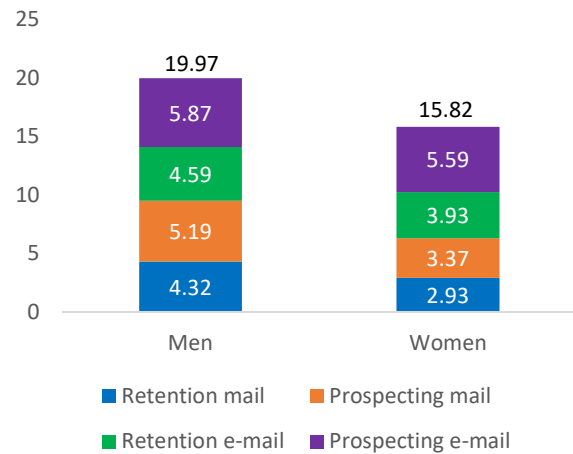
Eight out of ten donors estimate they receive at least five messages per week from non-profit organizations, and over half receive ten or more. Twenty-two percent estimate they get 20 or more mail or e-mail messages from charities in a typical week – about three per day.

WHO GETS THE MOST

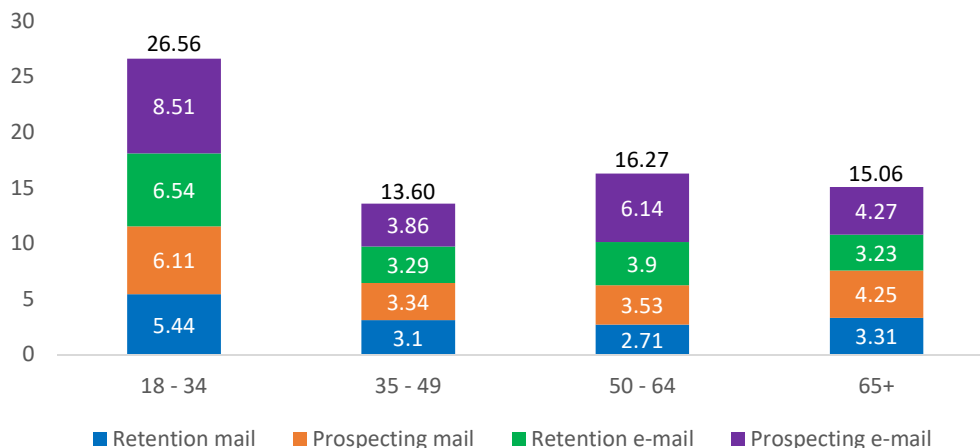
If you are **male, younger, religious (especially Roman Catholic), politically liberal, wealthier, and/or give larger amounts of money to charity**, you probably get more communications from non-profit organizations than other donors do. Interestingly, these population groups tend to get more of all types of communications, including both by mail and e-mail, and both from organizations they have supported and organizations they have not.



Men estimate they receive **26% more communication from non-profits** than women. On average, men tell us they receive 20 messages from charitable organizations each week, while women figure it's a little under 16. Men are particularly likely to see a lot of prospecting pieces delivered to their mailbox (54% more than women).

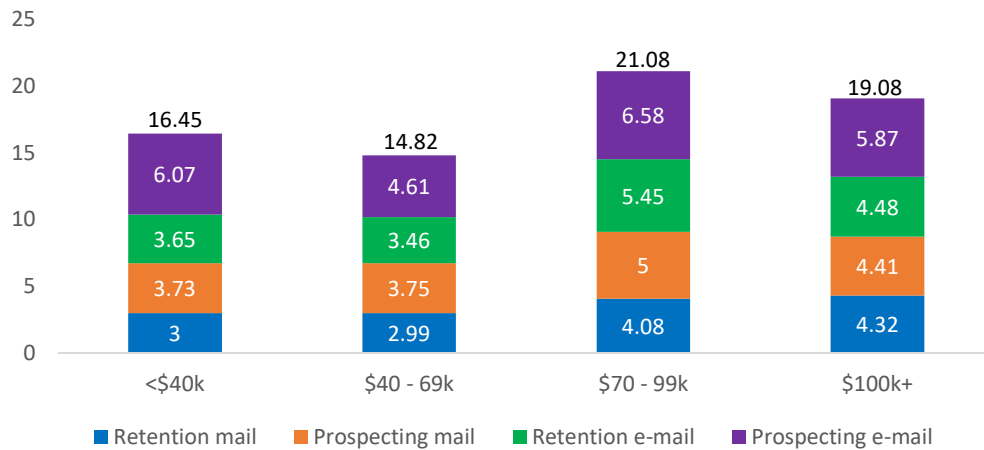


The youngest donors estimate they receive far more communications of all types from charities than do adults over the age of 34. The numbers are higher for mail, but far higher for e-mail. In fact, **the youngest donors estimate they receive 77% more communication** from charitable organizations than do donors 35 and older. Is it realistic that younger donors are actually receiving so much more communication than older ones? The reality of what charities are actually sending is unknown, but given the emphasis many charities, agencies, and consultants put on finding and cultivating the “next generation” of donors, it would not be shocking.

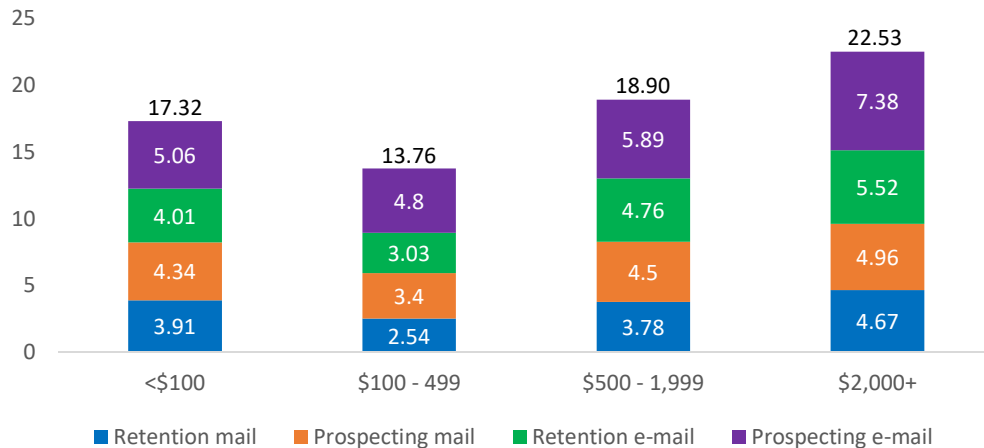




It's probably no surprise that people with greater income – and therefore, at least theoretically, more ability to give – receive more communication from charitable organizations. What may be surprising, however, is that it's not a straight line from lowest to highest income category. There's a **pretty solid dividing line right around \$70,000**, but below that line, there aren't massive differences between donors earning \$40,000 to \$69,999 and those earning under \$40,000. Similarly, above that dividing line, donors in the \$70,000 to \$99,999 category actually gave slightly higher estimates than did the wealthiest respondents.

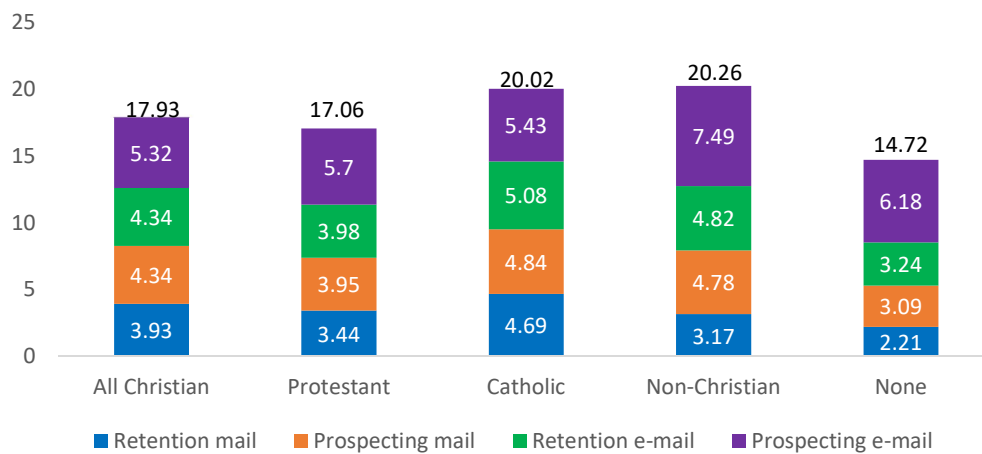


It also is probably no surprise that people who give more to charity also tend to receive more communications from charity. But again, the puzzler is that people giving under \$100 over the last 12 months actually estimate receiving 26% more communications than do donors who gave \$100 to \$499 during that time. The smallest donors estimate higher in every individual category. But who really gets inundated is the donor giving \$2,000 or more in a year (excluding any giving to a local place of worship) – those donors are receiving an average of **nearly 23 communications each week**.

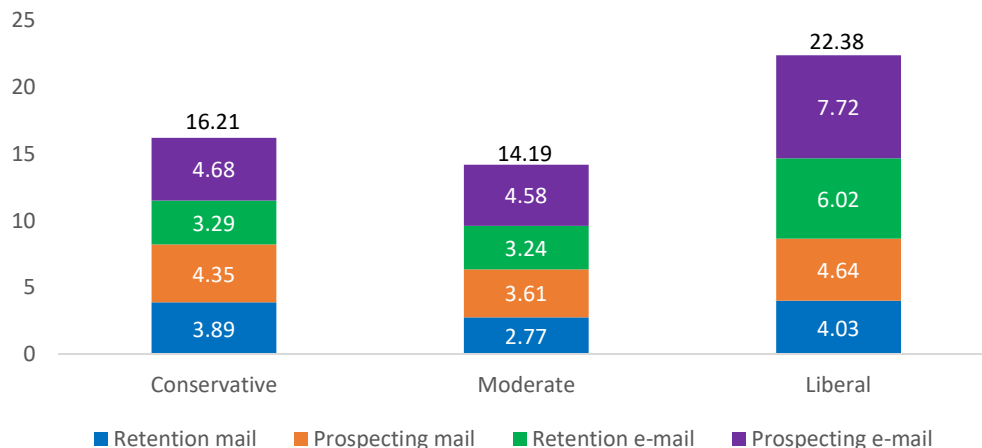




There are two facts that emerge when we look at people with different religious beliefs and practices. One is that, regardless of what faith they identify with, **religious people typically get more communication from non-profits** than do non-religious people. Donors who identify with no particular religious group, or who are atheist or agnostic, receive on average only 14.7 communications from non-profits in a typical week, compared to nearly 18 for Christians and 20 for those from another faith (Judaism, Hinduism, Islam, etc.). Within the Christian world, Roman Catholics estimate a particularly high number of communications from non-profit organizations. Taking this farther, donors who attend worship services estimate getting **57% more direct mail and 15% more e-mail** than do donors who don't regularly attend religious services.



Finally, we can view these numbers by self-identified political orientation. As the graph clearly shows, **liberals self-report a much greater number of communications** from non-profits than do conservatives, with moderates getting the fewest. The biggest difference for liberals is the very high number of e-mails they get.



HOW MUCH MAIL GETS READ?

Immediately after asking donors how many pieces of mail they receive, we asked them how many pieces they typically read (all or in part). We did the same thing for e-mail. Now, this doesn't mean they're carefully reading every word of a message – they may be skimming it or reading only headlines. But they are at least doing something with it other than sending it to the dreaded “round file” (physically or digitally).



On average, **donors report reading 79% of the mail they receive from organizations they already financially support.** Nearly two-thirds of all donors read or review everything they get in the mail from the organizations they support, while just 7% claim to read nothing – everything goes right to trash or recycle.

One surprise is that readership doesn't vary by...well, by *anything*. Among various subgroups, the proportion of donors claiming to review everything they receive from charities they support ran from a low of 61% among political liberals to a high of 69% in low-income households. The average proportion read was at a low of 74% among donors with no religious affiliation to a high of 82% among parents. There just are no really significant subgroup differences. **This is particularly remarkable** given how often the message in the industry is “Young people don't read direct mail.”

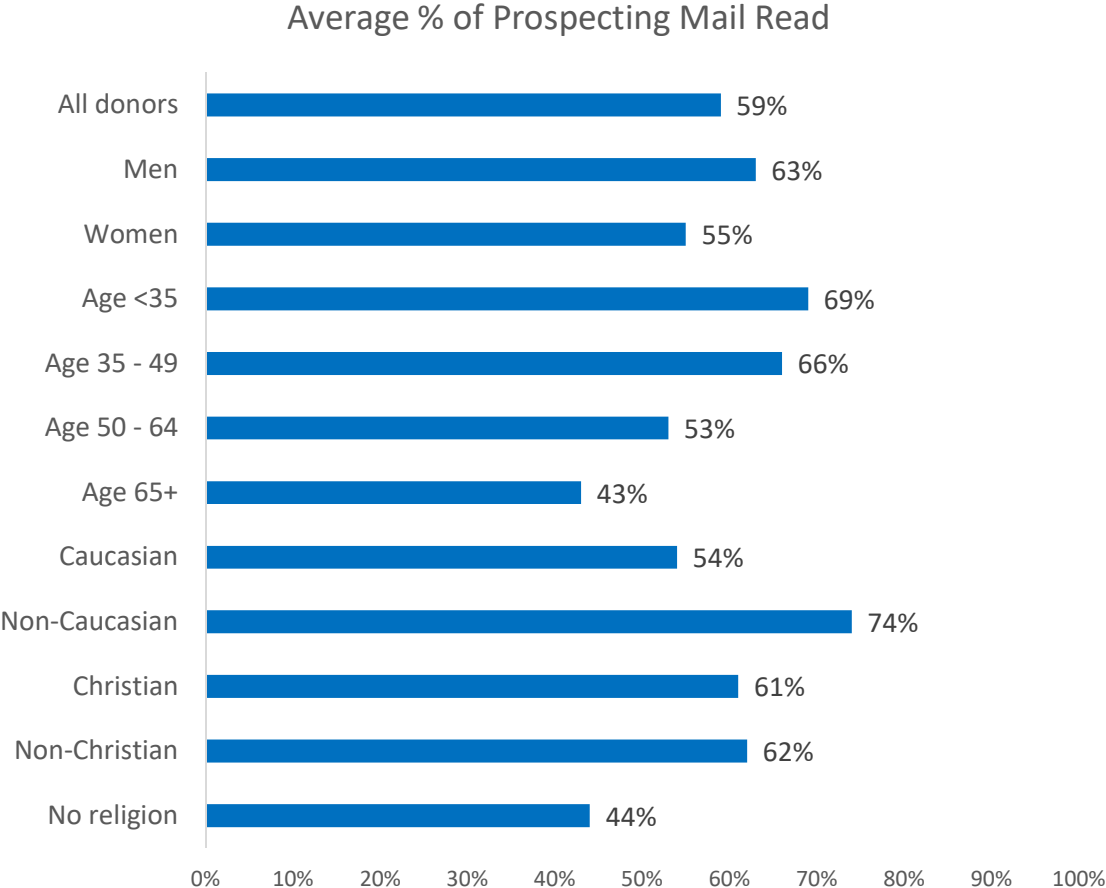
But what about prospecting mailings? The numbers for readership are definitely lower, but still not as low as some might think. One out of four donors say they read nothing that comes from organizations they're not already supporting. But 45% say they at least skim everything that comes in. On average, **donors estimate they read 59% of the prospecting mailings they receive.**

This time, there are a number of subgroup differences to explore. Who is most likely to toss your prospecting mail in the round file without a glance? It's not the younger adult – **it's the older adult.** In fact, only 13% of donors under age 35 discard all of this mail without reviewing it. That number rises as age rises, all the way to 40% of donors age 65 and older. Similarly, while 54% of young donors say they review everything they receive, the same is true for just 32% of seniors.

Race/ethnicity also comes into play. While four out of ten non-Hispanic Caucasians read everything, the same is true for six out of ten non-Caucasians.

Religion is also strongly correlated with greater readership of prospecting mail. Irreligious donors are actually more likely to toss everything unread than they are to read everything

(39% to 33%). Donors who identify with a faith group are more likely than others to read everything they get. Similarly, while 36% of donors who don't attend worship services read no prospecting mail, the same is true for only 19% of worship-goers.



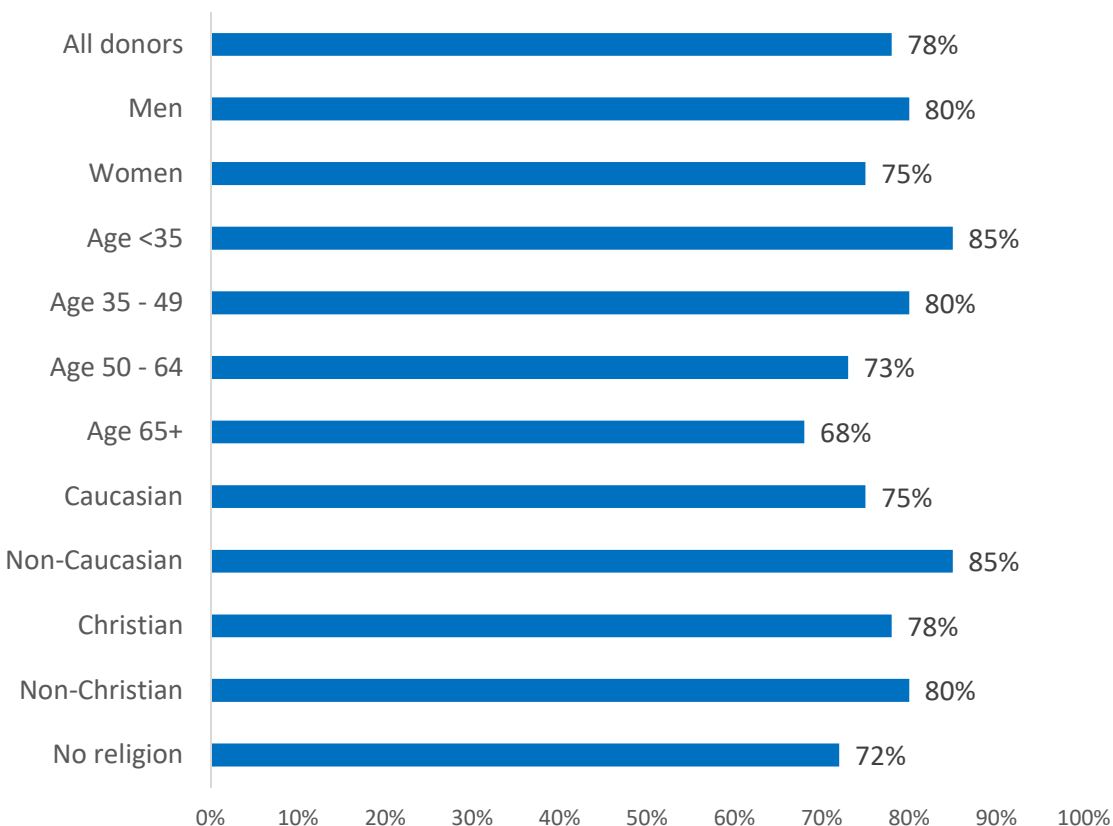
HOW MUCH E-MAIL GETS READ?

Sixty-two percent read at least a portion of all the e-mails they receive, with just 8% hitting the Delete key on everything without reading it. Donors report reading an average proportion of the e-mails they receive from the organizations they support that is nearly identical to the proportion of printed mail they read: **78%**. But with e-mail, there are differences in who's reading.



Donors under the age of 50 report reading a much higher proportion of what they get from the charities they support. Among the youngest donors, the average proportion read is 85%. This falls slowly as age rises, all the way to an average of 68% among the oldest donors. Non-Caucasian donors also read a higher proportion than do Caucasians (85% to 75%). And on average, people who attend religious worship services read more than do others (81% to 72%).

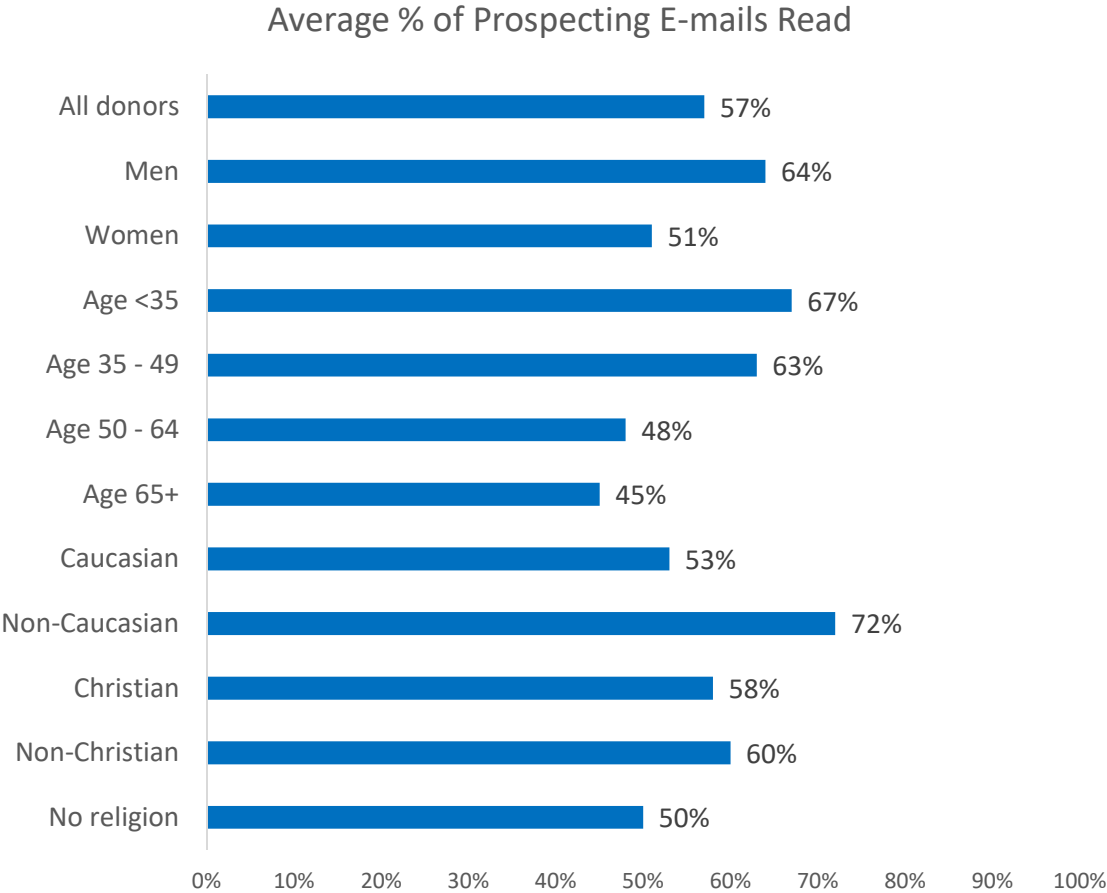
Average % of E-mails Read from Charities They Support



When it comes to e-mails from organizations they have not financially supported, donors again claim a proportion read that is **very similar to that of direct mail: 57%**. Of course, one thing this figure does not take into account is any e-mails that never reach the donor

because they are are trapped in spam filters or sent to inactive accounts. Still, just 24% say they read nothing they receive from these organizations.

Another element that is similar between e-mail and mail is the types of donors who are more likely to read each one. **People under age 50, men, non-Caucasians, and religious donors are all more likely to read** at least part of each prospecting e-mail they receive than are other types of donors. One additional difference not seen for other forms of communication is that higher-income people also estimate a higher proportion read than do lower-income donors.



IS THIS STUFF REALLY ACCURATE?

Grey Matter Research and Op4G have been working in the research world long enough to know that no research is perfect. But we work hard to make sure the numbers we report are **realistic and reflective of what consumers are actually thinking**.

We took steps to make sure the information would be **as accurate as possible**:

- Asking donors about a limited period of time (one week), which makes estimates easier for them (and therefore more realistic)
- Asking them for the actual number of messages they read, rather than expecting them to calculate a percentage
- Asking them whether they read all or part of the message, rather than trying to narrow it down (e.g. "How many of these did you read all of, some of," etc.)

One thing to note is that, even today, a few Americans do not have Web access. Since this study was conducted online, those people obviously are not reflected in the data.

The numbers in this study are all self-reported estimates from donors themselves. If a donor estimates she receives 12 e-mails a week from non-profits, does that donor actually receive 12 each week? Not necessarily – the volume likely varies, and she may actually receive closer to 10 or to 15 on average. That's why we repeatedly use the word "estimate" throughout this report.

The exactness of the numbers is less important than the **overall story they tell**. While a donor who estimates 12 e-mails per week may not be receiving exactly 12, it is unlikely she's receiving two or 25. It's also highly probable she's receiving significantly more than a donor who tells us he receives three. We were not looking for exact numbers, but for a sense of **how much noise is out there** that your message has to try to penetrate, and how many of these messages are getting at least a little attention from donors.

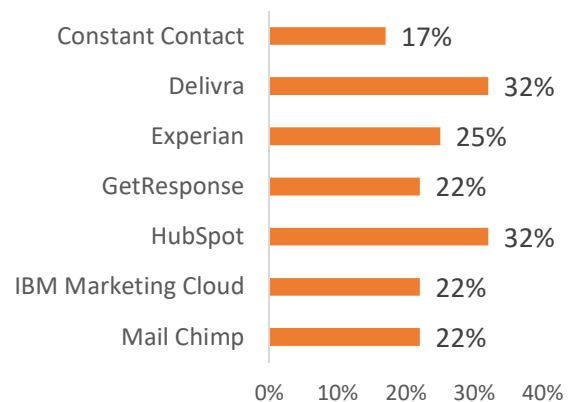
Being able to tap into donors' mailboxes and inboxes every day would provide a more accurate figure of how many messages are received, and following donors around for a week would tell us how many they actually read. Neither is terribly practical (although if you do have the budget to support a study like that, we'd love to hear from you).

So how do these numbers compare to other data? Consider reported open rates for e-mail campaigns. For one thing, it varies from one reporting group to another. Constant Contact tells us the average open rate for an e-mail campaign is 17%. Mail Chimp says it's 22%. Delivra claims it's 32%. That's a pretty wide spread.

Even so, at first glance, the numbers in our study for the proportion donors claim to read may seem quite inflated. But consider some **very important differences** between this study and e-mail industry open rates:

- Open rates are for e-mail *campaigns*; charities also send donors content such as giving receipts and answers to questions by e-mail. Donors undoubtedly see these as “e-mails from charities I support.”
- The open rate is calculated as Unique Opens / (Number of Emails Sent – Bounces), which means e-mails which go to inactive addresses and get **caught in spam filters** (local or ISP level) are counted against the open rate. Since donors never see these, they would not count against the numbers they report.
- Donors can mark certain messages and senders as spam, meaning the only ones that actually get through to them are the ones in which they have **at least some interest**.
- This study only includes **active charitable donors**, while many prospecting e-mails are inevitably sent to Americans who don’t give to charity.
- The quoted open rates are generally for all types of e-mail, whereas our study covered only messages from charities.
- Preview functions on inboxes often allow subject lines, preview text, and other content to be read without opening the e-mail message. So **content may be read, but not recorded as opened**.

Claimed Average Open Rates



Considering all of these differences, the figures in this study start to look far more realistic.

The numbers do give us a very important item: **insight into the perceptions of donors**. Regardless of whether they actually read exactly 79% of their charitable mail, the fact that younger people tell us they read a higher proportion of messages indicates greater openness to reading what charitable organizations send them. In the end, those perceptions may be the most important finding of all.

SO WHAT DOES IT ALL MEAN?

Over the years, we've heard a lot of off-the-cuff comments from donors, along the lines of:



- "I just round-file all the fundraising mail."
- "I'm absolutely inundated with mail/e-mail from charities."
- "I just hit delete, delete, delete with all these e-mails."
- "They're wasting their time sending me this – it's just junk mail."

It's almost a badge of honor to complain about how much charities "waste" with their fundraising efforts, and how the poor donor has to wade through mountains of printed and electronic communication from non-profits.

Yet when donors are asked to give thoughtful, numeric estimates without an agenda behind them, a very different story emerges: **they're actually reading much of what you send them.** Not all of it, of course, but quite a high proportion.

We've also heard bromides such as the following from various non-profit and agency executives:

- "Donors don't read anything we send them."
- "E-mail is too easy to delete, so we don't send anything important that way."
- "Young people don't like direct mail and they don't read it."
- "Our older donors love us and read everything."

It's very easy to follow clichés, with the idea that since so many people accept them, they must contain some truth. But **there's an awful lot of conventional wisdom in this world that isn't very wise.**

Consider some of the major points to emerge from this research:

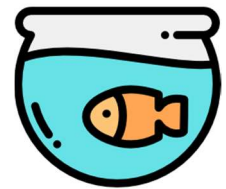
Donors are reading a majority of what they receive

We didn't attempt to measure how much of each communication donors read, but they're giving most things at least a quick skim. And at a minimum that's an opportunity for you to **capture their attention for a more complete read.** Despite consumer comments such as, "I just toss it all," they actually don't.



Are you taking advantage of the attention you're getting?

We did not attempt to differentiate between a message that is thoroughly read and one which gets a quick glance, but logic dictates there are plenty of the latter. The chances are that your messages are getting seen – are you doing enough to make sure they get *read*?



A Microsoft study estimated the average attention span of humans as eight seconds. Goldfish are at nine seconds. If people are looking at your stuff, **you have to do something to engage them...and quickly.**

There really is a lot of noise for you to cut through

The average donor estimates receiving 2.5 non-profit messages in the mailbox or inbox every day. And since that's based on a weekly average, it's likely that on certain days and times of the year it's even higher. Plus, this doesn't take into consideration the credit card offers, hotel rewards programs, gym specials, catalogs, messages from Nigerian bankers, and everything else they get. You do have a lot of noise to try to cut through for your message to be heard.



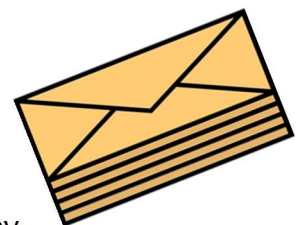
A 2010 Grey Matter Research study showed the average donor financially supported five different organizations in the last year. If that figure continues to be true in 2018, it would mean **the typical charity is sending 37 pieces of mail to each donor per year, along with 44 e-mails.** That's about one piece of mail every ten days, along with one e-mail every eight days.

One of the most common mistakes we have seen non-profit organizations make is failing to grasp the **importance of message frequency** in communications. An organization has something important to tell donors, communicates it very clearly a couple of times (maybe three, just to be really sure), and then figures donors got the message. Often, when we talk to them, we learn they really haven't.

Yes, they're reading your stuff, but they're reading everyone else's, too. You have to keep hammering home the message and the brand for what you're saying to cut through the clutter.

Certain groups have particularly cluttered inboxes

Men, younger donors, and political liberals all tend to tell us they get a particularly high volume of non-profit communications. So do people with higher incomes, religious individuals, and those who give more money to charity.

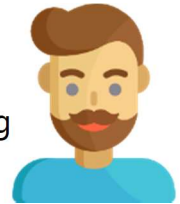


Some of these are quite understandable. People who give more are not only more attractive targets, but they tend to support more organizations. Hence, they hear from more organizations. We also know from previous studies that religious people tend to give more than do the irreligious, and religious people obviously hold much more potential for supporting religious organizations.

But think about both your donor communications and your prospecting efforts. Are you knowingly or unknowingly **fishing in the same pond as everyone else**? For instance, are your efforts to develop the “next generation” of donors contributing to the heavy saturation of charitable communications young donors report? Are your efforts unintentionally targeting religious people and/or political liberals, who get a lot more non-profit messaging? Are there ways your prospecting can target groups that are still good prospects but which don’t tend to have quite as much incoming noise?

Young donors are actually reading more than older donors

This is true regardless of where the message is coming from or how it’s being delivered. Why is this? We didn’t explore any “why’s” in this study, but there may be a variety of contributing factors.



There is some evidence that younger people tend to have **a greater level of passion** for the causes they support; maybe this spills over to how much they immerse themselves in each one.

Younger people are also in the earlier stages of building relationships with brands and organizations, whereas seniors have been doing this for a long time. It’s possible **older donors already feel they’ve heard what organizations have to say** and don’t feel the need to read as much.

Some marketers have moved away from trying to reach younger adults through traditional channels; possibly non-profit messages to younger donors face somewhat less mailbox clutter through which they have to navigate.

One thing we do know is that younger American adults as a group have more diversity than older adults. When we combine age and ethnicity, we find that the group reading the **highest proportion of its mail from non-profit organizations is young non-Caucasians, and the group reading the lowest proportion is Caucasians 50 and older**. Older Caucasians are also the group reading the lowest proportion of their e-mails from charities. So the racial/ethnic diversity of younger donors correlates with a greater proportion of messages being read.

Stop limiting yourself in what you can do

The conventional wisdom often is that you reach older people through mail and younger people through e-mail. *The Donor Mindset Study III* showed that donors see advantages to both methods of communication, and that nearly two-thirds have no consistent bias toward or against either form of communication. This study is further evidence that the conventional wisdom may not be so wise. E-mail is certainly an effective form of communication for older donors, and direct mail is getting read by younger donors. Consider how to use each one most effectively, rather than assuming that one form best reaches one type of person.



WHO IS GREY MATTER RESEARCH?

Grey Matter Research has an intensive focus on serving the non-profit community with **valuable, relevant consumer insights**. Knowledge is power; we help bring knowledge to our clients which allows them to make more informed, wiser decisions.

Our motivation truly is to **partner with our clients**, which is why we've been working with some of the same organizations **for over two decades**. Whether we're helping a client discover how consumers perceive their brand, why lapsed donors left, what major donors expect, or any other topic, we have **A Passion for Research That Makes a Difference**.

We work directly with donor-supported organizations and in partnership with the fundraising, branding, and marketing services agencies that support them.

Our work has been **covered by the international media**, such as *Fast Company*, NPR, *USA Today*, *Wall Street Journal*, MSNBC, *Christianity Today*, Associated Press, *Harvard Business Review*, *Chronicle of Philanthropy*, and many other outlets all over the world.

You can learn more about our qualitative and quantitative research on our website: www.greymatterresearch.com.

Company president Ron Sellers would be delighted to chat with you – call him at **602-684-6294**, or go the digital route at ron@greymatterresearch.com.

A Few Clients We've Served

- Duke University
- Compassion International
- Catholic Relief Services
- BMW
- Alzheimer's Association
- TrueSense Marketing
- One & All (formerly Russ Reid)
- ALSAC/St. Jude
- World Vision
- Operation Smile
- National Christian Foundation
- Cancer Treatment Centers of America
- Goodwill Industries
- Southern Baptist Convention
- University of Nevada Las Vegas
- Women for Women International
- Coca-Cola
- Elizabeth Glaser Pediatric AIDS Foundation
- Moody Global Ministries
- American Red Cross



WHO IS OP4G?

Founded in 2010, philanthropic online market research panel Op4G invites its panel members to participate in paid online research surveys, and then requires they donate a portion of their incentives – at least 25% and up to 100% – back to one of its 400-plus participating non-profit organizations.

Op4G's unique approach to recruiting yields **a highly engaged group of quality people** who, as respondents, are dedicated to helping market research clients fulfill information needs.

Panel member trust is key to **quality data**. Each element of Op4G is designed to fiercely protect members' privacy. Every activity is opt-in, every survey participant is anonymous, and every member is in full control of their secure information. Op4G is headquartered in Portsmouth, NH and operates globally.

Since beginning client delivery in June 2011, clients' incentive funds have allowed panel members to **donate over \$400,000** to Op4G's growing number of non profit partners.

To learn more about Op4G's client services or how to begin a partnership that benefits your charity, please visit www.opinions4good.com or contact support@Op4G.com.



THE DONOR MINDSET STUDY

Op4G and Grey Matter Research offer five other *Donor Mindset Study* reports:

- I. [The Charitable Deduction – Not All Donors Think We Should Keep It Around](#). Six out of ten donors believe donations in the US will drop if the deduction is eliminated, but only half of all donors believe deductions should be fully deductible for those who itemize.
- II. [American Donors Are Far Less Generous Than They Think They Are](#). Nearly nine out of ten donors believe they give away a higher proportion of their income than they actually do, which may suppress additional giving.
- III. [Direct Mail vs. E-mail: Charitable Donors Compare](#). Very few donors see one of these means of communication by charities as consistently better than the other; most see advantages to (and are open to) both methods.
- IV. [Donor Perceptions of the Child Sponsorship Model](#). There are plenty of misperceptions about this model, such as the fact that three out of four donors wrongly believe sponsored children have more than one sponsor.
- V. [Size Does Matter – How Donors See Large vs. Small Organizations](#). Donors tend to see large organizations as more effective in their work and having greater dollar-for-dollar impact, while smaller organizations are more financially efficient.
- VI. [The Elephant in the Room – Charitable Overhead Ratios and Donor Decisions](#). How much do donors know or care about what charities spend on overhead, fundraising, and administration? Not as much as you might think.

Click on any link above for more information, or e-mail ron@greymatterresearch.com to request any of these resources.

