



The Network for Good Online Giving Index

Update: Q1 & Q2 2011

About this Index

Network for Good, the Internet's leading nonprofit giving platform, has a unique perspective on the experience and behaviors of charitable giving across several distinct channels including: individual charity websites, charity portals and social giving (peer-to-peer) websites. As a platform powering giving opportunities across all three of these channels, Network for Good has created this Online Giving Index with insights and trends to inform charitable engagement for nonprofits seeking to strengthen relationships with donors and corporate partners seeking to integrate giving in online consumer or employee initiatives.

This update to the Network for Good Online Giving Index includes trends and analysis on \$55 million in donations to more than 20,000 charities through the Network for Good platform in Q1 and Q2 2011. This includes donations to Network for Good's nonprofit customers through their own websites and to other nonprofits through 25 corporate partner websites and Network for Good's giving portals at www.NetworkforGood.org and www.SixDegrees.org.

Quarterly updates to this Index are available at www.onlinegivingstudy.org/quarterlyindex.

Note on Data: All channel- specific growth rates and average donation amounts are calculated based on a consistent sample of partners and nonprofit customers year over year. All overall donation growth rates and breakdowns are based on total donation volume.

Definitions

Charity Websites. Many charities use Network for Good as the giving engine behind their websites. There are two types of charity website giving experiences:

- 1) **A charity website with a generic giving page** that does not visually match the charity's website but goes to a Network for Good-branded multi-step checkout process featuring the charity's name and address.
- 2) **A charity website with a branded giving page** that is integrated with the charity's own website. Other than the NetworkforGood.org URL, it is not evident that the donor has left the charity's website to make a gift.



Portal Giving. Network for Good powers giving portals, where donors can search and support any charity registered with the IRS. These include NetworkforGood.org, GuideStar, Charity Navigator and the Capital One No Hassle Giving Site, among others.

Social Giving. Network for Good powers social networks for social good, where donors can give to many charities and, in many cases, fundraise among their friends and family. Such sites include Causes on Facebook, Crowdrise and SixDegrees.org, among others.

Portals and social networks provide compelling platforms for **cause marketing campaigns** that engage consumers or employees to do good, including corporate responses to humanitarian disasters.

Q1 Results Mixed; Social Giving Drives Non-Disaster Donation Growth

Donation Dollar (\$) Index Q1 2011 vs. Q1 2010 EXCLUDES DISASTER RELIEF DONATIONS

Overall Giving		23%
Charity Websites (Generic)		3%
Charity Websites (Branded)		4%
Portal Giving		15%
Social Giving		48%

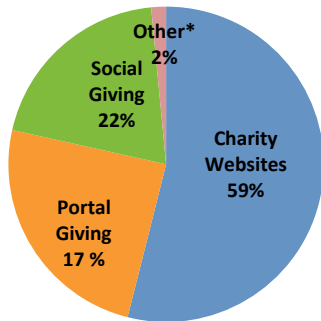
Source: Network for Good

- Charity Websites saw decreased giving levels in Q1 2011 year over year. Donations on nonprofit websites with generic donation pages were down 3% and donations on websites with a branded donation page were down 4%. The average gift size remained consistent year over year at \$80 for nonprofits with a generic donation page and close to \$100 for nonprofits with a branded donation page. Even with the depressed Q1 donation activity, an average nonprofit with a branded donation page raised 5 times more in donations than an average nonprofit with a generic donation page. This trend is consistent for both Q1 2010 and Q1 2011, demonstrating that while donation volume may ebb and flow, the power of a branded donation experience does not.

- Portal Giving in Q1 2010 decreased year over year by 15%, factoring out disaster donations for Haiti relief in 2010 and Japan relief in 2011. The proliferation of places to give online may be diffusing the concentration of donations through portals. Factoring in disaster donations, portal giving grew 19% year-over-year. Giving in the wake of the earthquake in Haiti was more dispersed across giving channels, but confusion over how Japan tsunami relief donations would be handled by the Japanese government and nonprofit sector resulted in a concentration of giving through portal sites including NetworkForGood.org and the Capital One Giving Site.

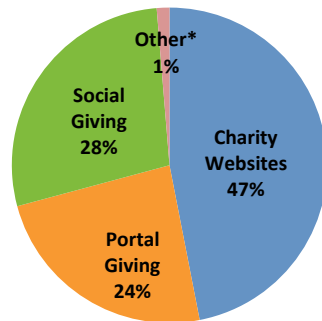
- Social Giving in Q1 2011 increased year over year by 48%, primarily due to non-disaster fundraising campaigns. Social media sites amplify personal appeals from nonprofits to their supporters and individuals to their friends and family. Humanitarian disaster appeals are just one flavor of social networking for social good. Social Giving is driven by giving events (such as giving challenges and cause marketing campaigns) that rally vast networks to drive donations and by personal fundraising campaigns where individuals ask friends and family to support their favorite charity.

Q1 2010 Breakdown



Source: Network for Good

Q1 2011 Breakdown



Source: Network for Good

Note: Growth rates for Charity Websites, Portal Giving and Social Giving channels are based on a consistent sample of partners and nonprofit customers year over year.




Note: Growth rates for all channels exclude humanitarian disaster relief giving: January 2010 Haiti earthquake response and March 2011 Japan tsunami response.

Network for Good processed approximately \$7 million in donations for Haiti in 2010 and another \$7 million for Japan in 2011. Both disaster giving responses occurred in Q1 of their respective years.

* Other includes employee giving and optional contributions to partners.

Q2 Giving Up Across All Channels, Branded Charity Sites See Strong Results

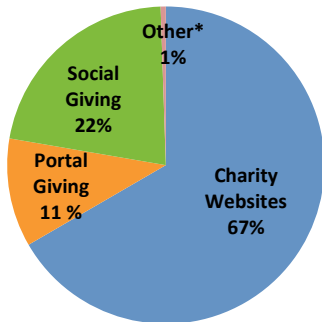
Donation Dollar (\$) Index Q2 2011 vs. Q2 2010

Overall Giving		9%
Charity Websites (Generic)		11%
Charity Websites (Branded)		20%
Portal Giving		6%
Social Giving		25%

Source: Network for Good

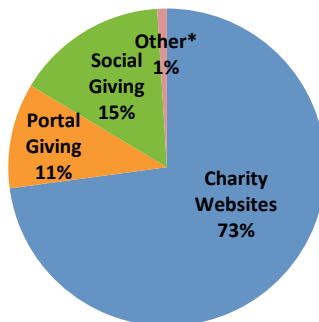
- Charity Websites** with branded or generic donation pages experienced growth in Q2 year over year. Charities with a branded donation experience saw a 20% increase in Q2 2011 versus Q2 2010 and charities with a generic donation page saw 11% donation growth for the same timeframe. The average gift size remained consistent year over year at \$90 for nonprofits with a generic donation page and \$115 for nonprofits with a branded donation page. An average nonprofit with a branded donation page raised 5 times more in donations than an average nonprofit with a generic donation page. This trend is consistent year over year and quarter to quarter, further demonstrating the ROI for a branded donation page.
- Portal Giving** in Q2 2011 increased year over year by 6%. Portals play an important role during times of disaster because they curate a list of nonprofits providing relief and also at the end of the year, because they provide a convenient way for donors to make contributions before the tax year ends. During the rest of the year, unless there is a campaign or urgent call to action, portal giving tends to be a smaller component of overall online giving than other channels.
- Social Giving** in Q2 2011 increased year over year by 25%, consistent with the trend of peer-to-peer giving opportunities becoming more mainstream on social networks. Additionally, many nonprofits, especially smaller organizations, are embracing social media as a way to cultivate supporters. Social Giving is driven by giving events (such as giving challenges and cause marketing campaigns) that rally vast networks to drive donations and by personal fundraising campaigns where individuals ask friends and family to support their favorite charity.

Q2 2010 Breakdown



Source: Network for Good

Q2 2011 Breakdown



Source: Network for Good

Note: Growth rates for Charity Websites, Portal Giving and Social Giving channels are based on a consistent sample of partners and nonprofit customers year over year.

Note: Growth rates for all channels exclude humanitarian disaster relief giving. No large-scale humanitarian disaster responses occurred in Q2 2010 or Q2 2011.

* Other includes employee giving and optional contributions to partners.

Spotlight: Japan Tsunami Relief 2011 Compared to Haiti Quake Relief 2010

2010 Haiti Earthquake: \$6.7M in donations processed by Network for Good

2011 Japan Tsunami: \$6.9M in donations processed by Network for Good

Portal Giving played a valuable role during both disaster response efforts, but especially in the wake of the Japan tsunami. Because of confusion over whether the Japanese government would accept foreign aid, donors relied on portals to curate lists of trusted nonprofits confirmed to be working on the ground or with partners in Japan. During both the Japan and Haiti disasters, media sites, such as Yahoo! and AOL, also provided ‘how to help’ links to Network for Good to ensure that site users were connected to organizations responding directly. Additionally, companies such as Capital One quickly mobilized cause campaigns to empower customers to respond in a meaningful and convenient way.

Social Giving is becoming an important component of disaster response, as viral calls to action help sustain momentum and recruit a multitude of smaller donations that can add up to significant funding. Two disaster campaigns highlight the power of social giving:

- **OXFAM America** raised 76% of Haiti relief donations processed by Network for Good through Causes on Facebook. Most Causes were set up by fans, showing the power of a network of committed supporters in a crisis.
- Before the tsunami struck Japan, the **Japanese Community & Cultural Center of Northern California** had fewer than 20 members in its Cause on Facebook. To date, the nonprofit has recruited more than 22,500 supporters and raised more than \$400,000 for relief. Their success demonstrates the power of communicating a focused goal – help Japan – across networks to rally support in a time of need and build communities.

Employee Giving drove significant dollars for both the Haiti and Japan responses. Companies such as Capital One, Time Warner, AOL and corporate clients of AngelPoints and YourCause mobilized employees to donate to a handful of trusted charities, often matching donations to amplify the impact. Leadership outreach with a compelling call to action and easy way to give inspired employees to join a collective relief effort. That effort resulted in tangible resources for nonprofits, especially since employee disaster donations have higher average amounts, closer to \$120 per donation, in general.

Top Haiti Relief Charities 2010

1. American Red Cross 27%
2. Doctors Without Borders 16%
3. Beyond Borders 5%
4. OXFAM America 5%
5. U.S. Fund for UNICEF 4%

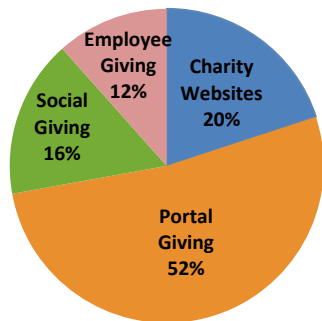
Note: Charities ranked by donation dollars (\$).
Source: Network for Good

Top Japan Relief Charities 2011

1. American Red Cross 57%
2. Salvation Army 9%
3. Save the Children 7%
4. Japanese Cultural & Community Center of Northern CA 4%
5. Americares 3%

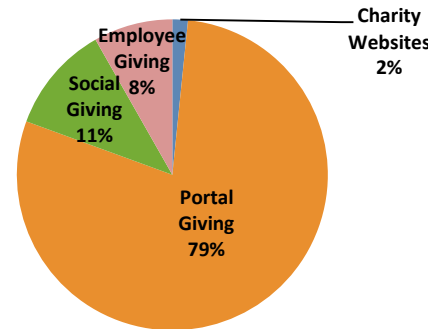
Note: Charities ranked by donation dollars (\$).
Source: Network for Good

Haiti Relief \$ Breakdown 2010



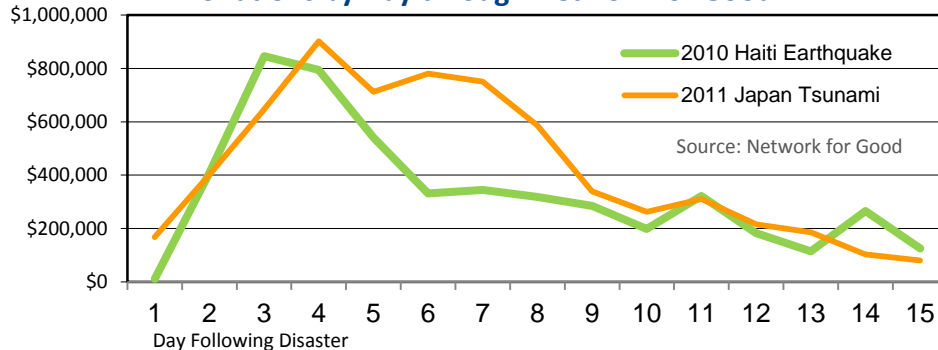
Source: Network for Good

Japan Relief \$ Breakdown 2011



Source: Network for Good

Donations by Day through Network for Good



Source: Network for Good

Sample of Network for Good Partner Japan Disaster Campaigns 2011

YAHOO! Japan Relief

Web Images Video Finance Movies More

My Yahoo! Make Y! your homepage

YAHOO! SITES

- Mail
- Shine
- Autos
- Finance (Dow Jones)
- Maps
- Messenger
- Movies
- Sports

Update: Quake damage brings Tokyo to standstill

TODAY - March 11, 2011

Footage gives startling views of tsunami

Welcome to AOL.com! Follow us. New

Web Images Video Ma

Search the Web

Tsunami Relief: How You Can Help

Defense Ministry / AP

Capital One what's in your wallet?

Giving Site Home For Nonprofits Spread The Word FAQ Contact Us My Profile

Japanese Quake & Tsunami Relief

Donate your No Hassle Rewards® or cash using your Capital One® card

Capital One covers all transaction fees so 100% of your donation reaches your charity of choice

- American Red Cross
- Save the Children
- GlobalGiving
- Oxfam America

THE NO HASSLE CAMPAIGN POWERED BY GivingSite Network for Good

AFP/Stringer/Getty Images

URGENT NEWS 8.9 magnitude earthquake devastates Japan · Give now

causes Home Profile Causes Wishes Donate

8.9 MAGNITUDE EARTHQUAKE HITS JAPAN

Give now

FUNDRAISING PROJECT

Northern Japan Earthquake Relief Fund

CREATED BY JAPANESE CULTURAL & COMMUNITY CENTER OF NORTHERN CALIFORNIA

THE RELIEF FUND

The Northern Japan Earthquake Relief Fund was established by the Japanese Cultural and Community Center of Northern California (JCCCNC) to help the victims of the Great Tohoku Earthquake and Tsunami which took place on... [Learn more about this non-profit](#)

PROJECT GOAL \$1000000

\$400716 raised

JAPAN EARTHQUAKE AND TSUNAMI RELIEF

SUPPORT RELIEF EFFORTS IN JAPAN

JAPAN EARTHQUAKE AND TSUNAMI RELIEF SAYS... Now is the time to Crowdfunder. The Japanese are in the middle of a major disaster. Donate to the projects below or start your own fundraiser.

via Crowdfunder 20 hours ago

EVENT: Japan Earthquake and Tsunami Relief

SHARE THIS EVENT

Like 57

HERE'S THE STORY:

Now is the time to Crowdfunder. The Japanese are in the middle of a major disaster. Please

DONATE

FUNDRAISE FOR THIS EVENT

\$2,205 RAISED OF \$10,000 GOAL

DONATIONS

Katherine Schmerzler \$25

YourCause.com

ReliefRequest.com

Easy, fast, and effective disaster response

powered by YourCause

AngelPoints Disaster Response Solution

Join the movement of companies already using our solution

American Red Cross

Emergency Operation Centers are opened in areas affected by the recent earthquake and related tsunami, and are staffed by the chapters.

Since its founding in 1881, the American Red Cross has been the nation's premier

Read more...

Donate Now more info >

We need your help to raise \$50,000!

Goal: \$50,000

Raised: \$10,094

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About Network for Good

Network for Good is a nonprofit social enterprise that empowers nonprofits and corporate partners to unleash generosity with scalable ways to advance good causes. We also help nonprofits raise funds for their missions through simple, affordable and effective online fundraising services and offer free training through our online learning center (www.Fundraising123.org), interactive online community (www.TheNetworkforGood.org) and webinar series (www.Nonprofit911.org). Network for Good has processed approximately \$525 million in donations for more than 60,000 nonprofits since its 2001 founding by AOL, Cisco and Yahoo!. www.networkforgood.org

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