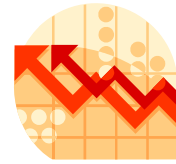




Industry Pulse



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With their mailstream competitors continuing to struggle, fundraisers have moved from a major player to a dominant one in the past year. Analyzing the 10,000 or so pieces of direct mail pieces we get in our Who's Mailing What! Archive each year reveals some clear trends, in particular comparing the calendar year of 2009 to previous years.

While financial, publishing and catalog mail have dramatically shrunk their volume in the mailstream since the economy started tanking nearly two years ago, fundraisers have kept up their mailing frequency. In fact, fundraising mail actually rose in 2008 and 2009 as compared to 2007. And since 2007, fundraisers grew from a respectable 13 percent of the mailstream to 20 percent in 2009. That means a full one-fifth of the mailstream is fundraising mail. Wow. It's reflected in my mailbox. Yours?

So while the oversize fundraising mailings — with calendars and other freemiums stuck inside — aren't as prevalent as in years past, clearly direct mail remains fundraisers' primary source of revenue. While email solicitations and member communications have grown exponentially, most dollars are still coming through direct mail, as well as many of the other key communications.

Two other trends of note are the declining control mailings and self-mailer format mailings. Back in 2006, nearly 50 percent of fundraising mail were controls. In 2009? It's all the way down to 37 percent, having dropped by 13 percent in the last year alone. With more multichannel efforts, downsized mailers, and a general re-engineering of the marketing done by many nonprofits in order to deal with a changing donor base, it makes sense that fundraisers aren't sending out the same efforts every year.

Also, the flirtation with the self-mailer format appears to be going cold. While some nonprofits appear to have had success with self-mailers, such as CARE, overall its usage is down. Hovering between 4 and 5 percent from 2006 to 2008, the use of the self-mailer format dropped by a whole percentage point to 3 percent last year.

In 2009, the usage of personalization slightly declined by around 4 percent. Premiums also slipped by about 1 percent from 2008 to 2009, when 16 percent of all fundraising efforts used them. Nonetheless, that still represents an 18 percent increase compared to 2007.