2013

eNonprofit Benchmarks Study

An analysis of Online Messaging, Fundraising, Advocacy, Social Media and Mobile Metrics for Nonprofit Organizations

AUTHORED BY

M+R
STRATEGIC SERVICES

NTEN
Nonprofit Technology Network

THANKS!

Here it is again, our favorite time of year: the annual eNonprofit Benchmarks Study has arrived! (If you listen closely you can hear the fanfare and jubilation.) We are proud to share it with you.

The Benchmarks Study is a partnership that relies on contributions, cooperation, and insight from a great many people. This year, 55 nonprofit study partners generously shared their data and their time, our biggest pool of participants ever. Our thanks go out to these organizations; without them, this study would be nothing but empty charts and empty tables. Special thanks also go to NTEN and Salsa Labs, Inc. for their assistance in recruiting participants.

The 2013 eNonprofit Benchmarks Study was written by Will Valverde and Cameron Lefevre of M+R Strategic Services and Annaliese Hoehling of the Nonprofit Technology Network (NTEN).

Madeline Stanionis, Sarah DiJulio, Adam Gerber, Amy Peyrot, Michael Amoruso, Joey Backer, and Theresa Santangelo provided unbelievably awesome assistance with writing, editing, proofreading, data collection and data coding. Theresa Santangelo aggregated and analyzed the 55 nonprofit participants' datasets, with assistance from Joey Backer, Cameron Lefevre, Jonathan Benton, and Mark Fritzel. Charles Yesuwan did the graphic design and printing preparation.

ABOUT M+R STRATEGIC SERVICES
M+R is dedicated to helping our clients change the world through smart strategies and compelling messages that mobilize members, build grassroots support, raise money, and communicate effectively with the media, the public, and decision-makers, both online and off.
www.mrss.com

ABOUT NTEN: THE NONPROFIT TECHNOLOGY NETWORK
NTEN is a community transforming technology into social change. We aspire to a world where all nonprofit organizations skillfully and confidently use technology to meet community needs and fulfill their missions. We connect our members to each other, provide professional development opportunities, educate our constituency on issues of technology use in nonprofits, and spearhead groundbreaking research, advocacy, and education on technology issues affecting our entire community.
www.nten.org

This report is available for free download online at www.e-benchmarksstudy.com

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TABLE OF CONTENTS

READ THIS

The big questions are always: are things getting better? Are nonprofits finding more success online? Are the top-line numbers up? Should your online fundraising director get a raise? And in a lot of ways, the answers are yes. Online and email programs continue to grow in importance for nonprofits of every size and in every issue area. Overall, online revenue has increased, email list sizes keep growing, and organizations are using social media to reach more supporters than ever before.

The good news: Email list sizes are up by 15%. Online revenue grew by 21% over 2011 totals, with only the International sector seeing a decline in online giving. Monthly giving programs in particular have seen explosive growth, with revenue growing by 43%. These top-line numbers show online programs are attracting a larger audience and generating more donations than ever before. There is real reason to celebrate.

And what about social media? If you've been paying attention to trends in the past few years, or really been online at all, the top-line findings for social media probably won't surprise you. Organizations keep attracting more Fans and Followers—Twitter Followers in particular increased at a tremendous rate, with 264% growth over the past year. Despite this growth, email lists continue to dominate in size. For every 1,000 email subscribers, groups in this study have 149 Facebook Fans and 53 Twitter Followers.

BUT READ THIS, TOO

The data this year also tells a second story about email performance, and you should put away your party hats for this one. Email response rates (the percentage of email recipients who took the main action in the email) were down in 2012. Way down, particularly for fundraising messages. Less so for advocacy messages, but still a noticeable decline.

The changes were not consistent across sectors—Rights and International groups suffered the largest drops, and we'll get to the detailed numbers for this (and so much more) later in the study. But the important thing is this: Lower response rates, whether driven by drops in click-through rates (the percentage of message recipients who click on a link in the message) or donation page completion rates (the percentage of people who click on a link who then complete the donation form), have real implications for email program performance.

SO WHAT NOW?

We have some thoughts about what caused the drop in response rates—check them out below in the Speculator's Corner. But none of these factors alone can explain the decline in click-through and response rates in 2012. While the growth of online programs doesn't show signs of stopping, addressing email engagement should be a top priority for anyone involved in raising money and driving advocacy online in 2013.

As you read this study—and as you look at your own program's performance—don't let a change in one metric blind you to the large-scale trend of continued growth in online programs. And just because this big headline is positive doesn't mean we don't have plenty of work to do in engaging people online in our causes.

One last thing before we get down to it: remember that the most important benchmarks are your OWN benchmarks. Establishing benchmarks for your own program will help you see what's working, what's not, and where your biggest missed opportunities lie—and will allow you to make more informed comparisons to the averages and trends in this study.

SPECULATOR'S CORNER

What's behind declining email response rates? It could be real-world events outside the control of any organization's email program. Aggressive electoral campaigns, a relative shortage of major legislative battles compared to 2011, and the lack of a major international humanitarian crisis in the news may have hurt responsiveness for some organizations.

The lower response rates are also part of a long-term trend: in the years we have produced this study, we have never seen fundraising response rates increase from year to year. This long-term trend may be driven in part by a practice common to many email fundraising programs: continuing to send fundraising messages to unresponsive email addresses over long periods of time. As these unresponsive names accumulate, they tend to drag down response rates.

HOW TO USE THIS STUDY

This is the seventh edition of the eNonprofit Benchmarks Study from M+R Strategic Services and NTEN. And as always, we've crammed in as many of the most useful, most relevant, most valuable findings as possible. The data represents information generously provided by 55 nonprofits of various sizes who have partnered with us to create a snapshot of their online performance in 2012. It's a lot to take in, we know. Here's some important background to keep in mind.

- This study contains measures of email messaging, email list size, fundraising, advocacy, social media, and mobile programs.
- Participating organizations are broken down by sector, by email list size, and by Facebook fan page size for the Social Media section. (See Methodology on page 37 for details).
- Pay special attention to the findings for your sector and size: these are your closest peers in the study.

We love numbers, and we have taken tremendous satisfaction in gathering this data and building these charts. But there comes a time when you have to come to terms with the fact that even the things you love have their limitations.

In cases when the data suggests interesting trends or raise important questions that can't be answered directly or definitively by the numbers, we've drawn on our own experience and shared our thoughts in "Speculator's Corner." These represent our best thinking on and interpretation of various findings, but should not be considered proven by the data itself. Maybe you have other ideas—we'd love to hear them; tweet us @MRCampaigns.

This year's study includes nonprofits that may or may not have participated in previous years—which means if you have a copy of a previous eNonprofit Benchmarks Study, you won't be able to make reliable comparisons to this year's dataset. We collected data for 2011 and 2012 from this year's participants where possible, and all comparisons to 2011 in this study are based upon this data, rather than the data collected during past years' studies. It's still fun to hang on to those previous versions for old times' sake, though.
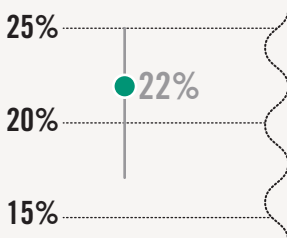
HOW TO READ THE CHARTS

The green circle indicates the median; the number shown is the median value.

The vertical line indicates the range of normal values for the segment; the top of the line is the 75th percentile and the bottom of the line is the 25th percentile.

In this example, the median value is 22% and any value between 17% and 25% would be considered normal.

25%

● 22%

20%

15%

EMAIL MESSAGING

Email list size for study participants grew by 15% in 2012. Small groups grew at the fastest rate, with 35% growth far exceeding increases from 2011.
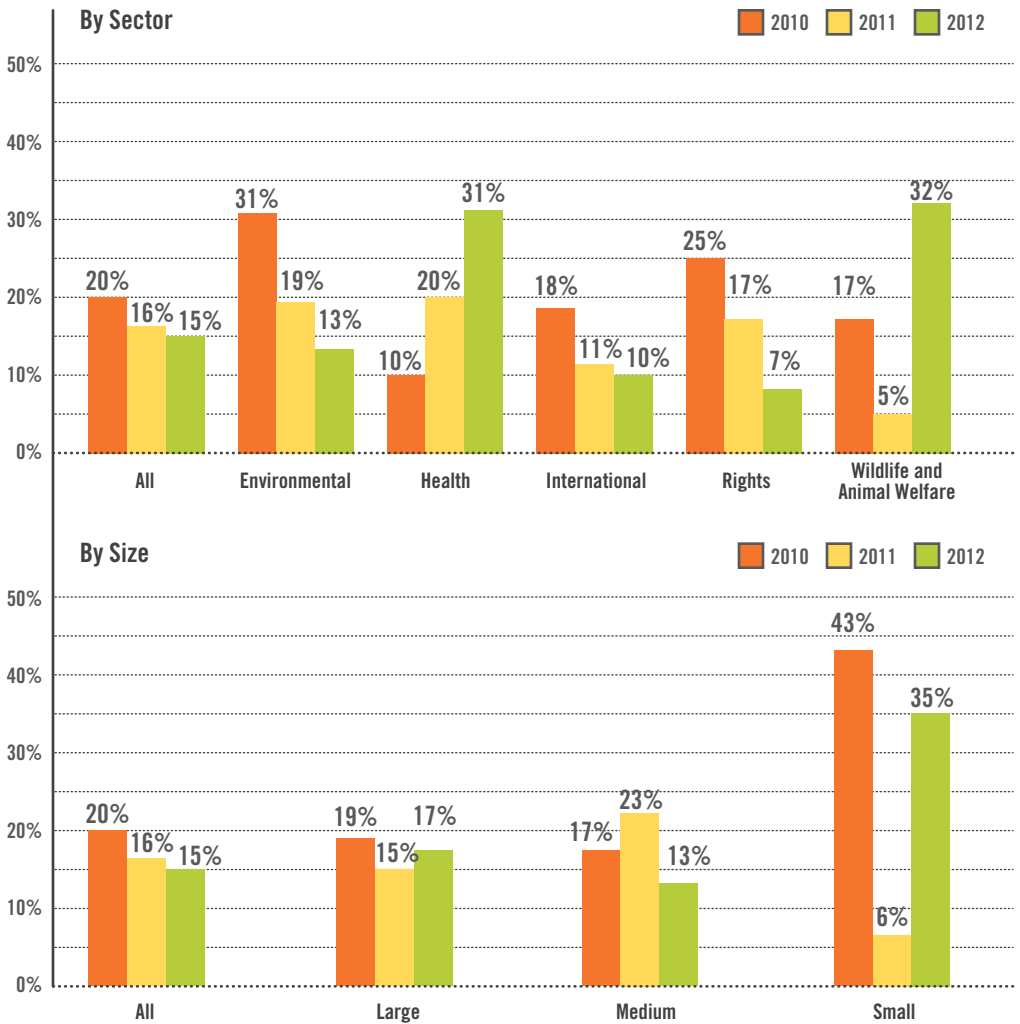
Open rates were at approximately the same levels as in 2011, with a 14% overall open rate. Differences in open rates from the year before, or between different types of messages, are negligible.

Click-through rates are where we see the largest changes in email message performance. Fundraising message click-through rates declined particularly steeply—down by 27% from 2011. These declines are concentrated in the International and Rights sectors.

This drop in click-through rates hurt **response rates**, particularly fundraising response rates, which stood at 0.07% (a 21% drop). Response rates for advocacy messages stand at 3.5% (an 8% drop).
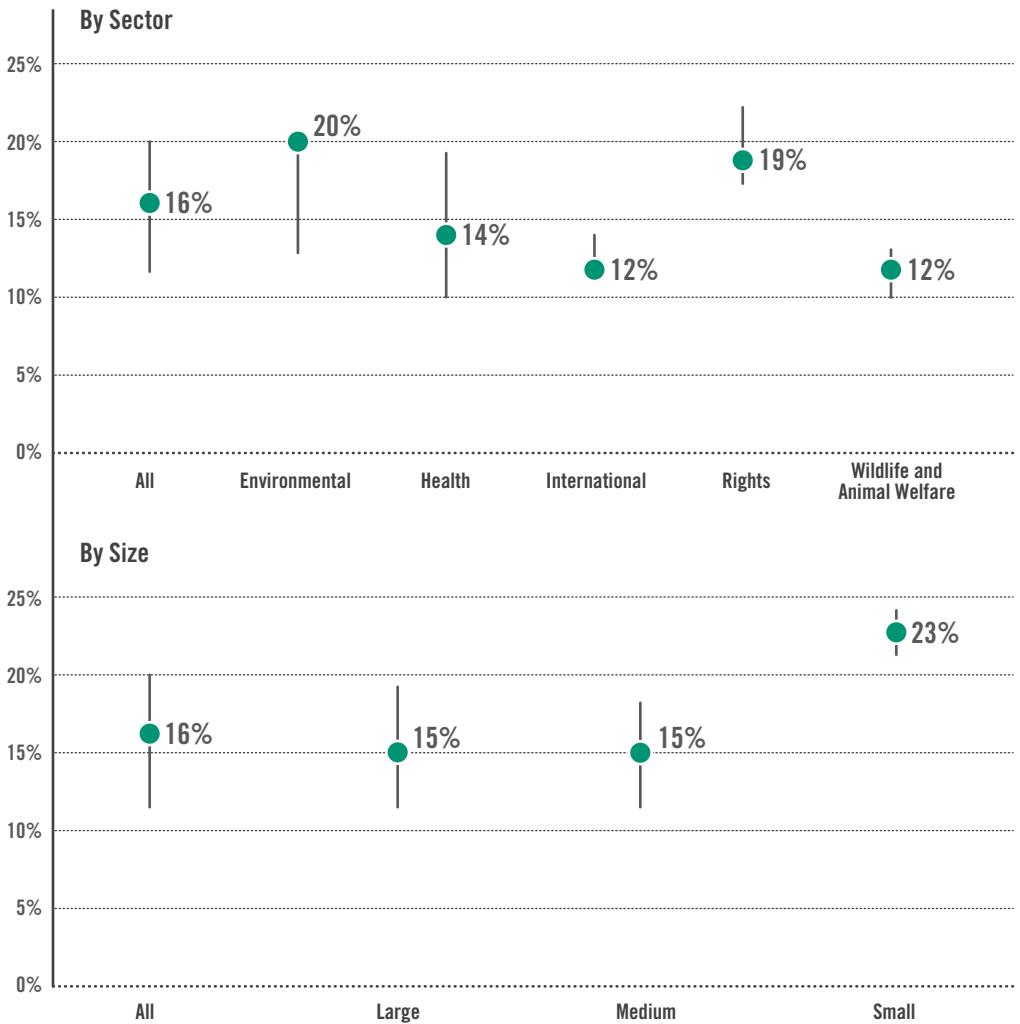
Message volume was unchanged—organizations sent an average of four messages per subscriber per month. Large groups tended to send more messages than small groups, and December was still the busiest month.

EMAIL LIST GROWTH

By Sector

Legend: 2010, 2011, 2012

Sector	2010	2011	2012
All	20%	16%	15%
Environmental	31%	19%	13%
Health	10%	20%	31%
International	18%	11%	10%
Rights	25%	17%	7%
Wildlife and Animal Welfare	17%	5%	32%

By Size

Legend: 2010, 2011, 2012

Size	2010	2011	2012
All	20%	16%	15%
Large	19%	15%	17%
Medium	17%	23%	13%
Small	43%	6%	35%

Email list sizes grew across all sectors and sizes, with 15% overall growth consistent with the overall growth in 2011. While the overall increase was stable, there was a wide range of growth rates among the various sectors. Health and Wildlife and Animal Welfare groups saw a particularly large jump from 2011.

EMAIL LIST CHURN

By Sector

	All	Environmental	Health	International	Rights	Wildlife and Animal Welfare
	16%	20%	14%	12%	19%	12%

By Size

	All	Large	Medium	Small
	16%	15%	15%	23%

Email list churn (the percentage of names on the email list that became unreachable over the course of 2012—see the glossary for a more detailed explanation) was highest for Small groups, and for those in the Environmental and Rights sectors.

We did not find any correlation between list growth and churn—organizations with faster list growth did not appear to encounter higher churn. There was a very weak correlation between email messaging volume and churn: organizations that sent more messages experienced higher churn.

EMAIL RATES BY MESSAGE TYPE

Not all email messages are created equal—and they certainly don't perform equally. In the following table, we've broken out the primary types of email messages in order to see differences in metrics between fundraising, advocacy, and newsletter messages.

The numbers in parentheses represent the change in rate since 2011.
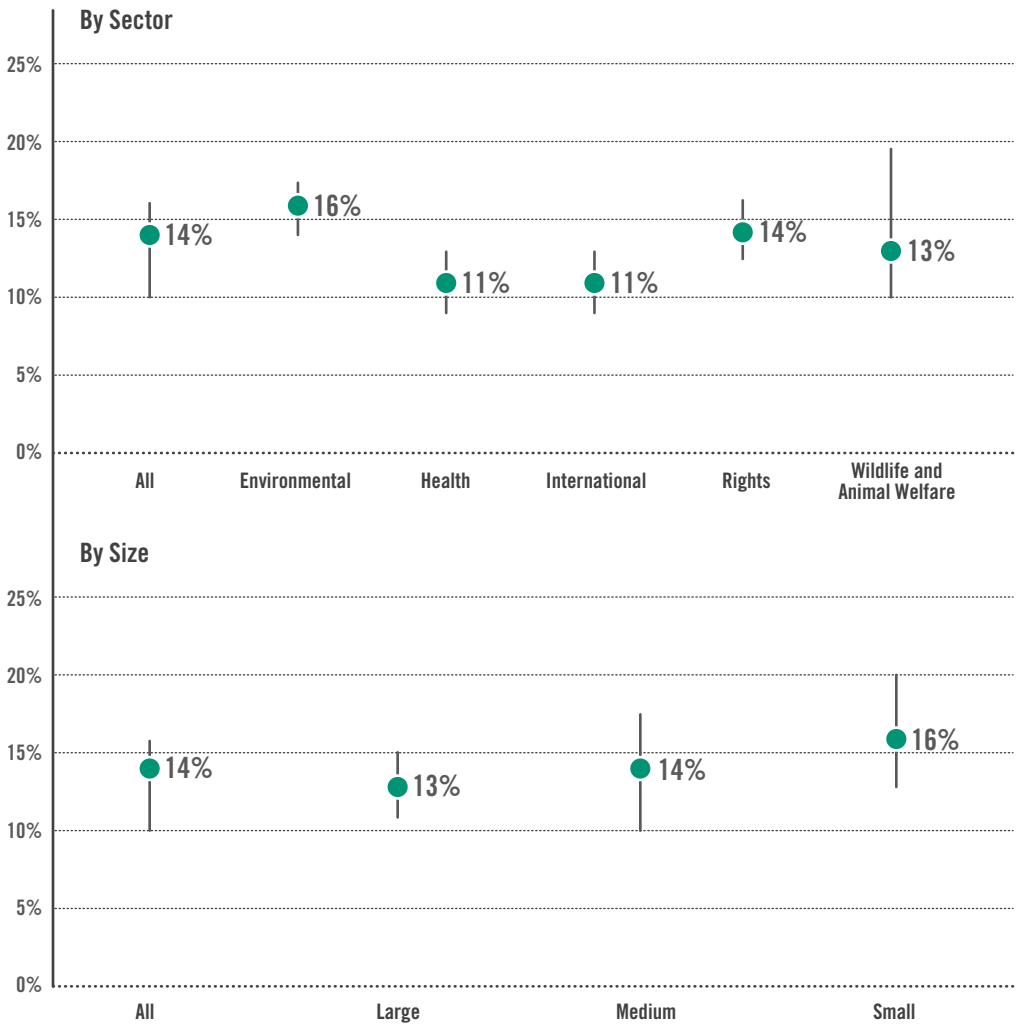
	OPEN RATE	CLICK-THROUGH RATE	RESPONSE RATE	PAGE COMPLETION RATE	UNSUBSCRIBE RATE
All	14% (-1%)	1.7% (-22%)	-	-	0.21% (-14%)
Fundraising	13% (1%)	0.42% (-27%)	0.07% (-21%)	20% (-3%)	0.22% (-6%)
Advocacy	14% (-3%)	3.7% (-14%)	3.5% (-8%)	83% (0%)	0.16% (-9%)
Newsletter	13% (-4%)	1.7% (-14%)	-	-	0.19% (-16%)

Open rates were very similar between different types of messages, and about the same rate as in 2011.
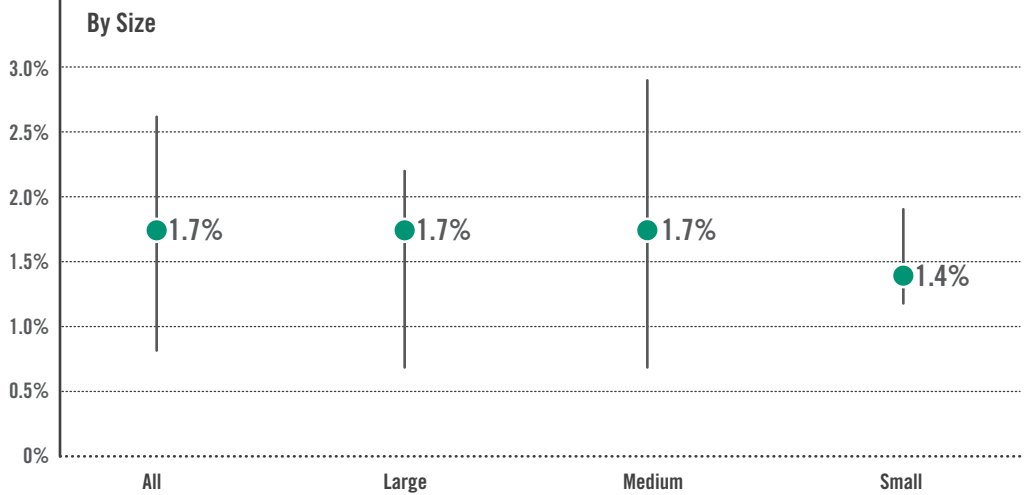
However, while subscribers opened messages at about the same rate as in 2011, they were far less likely to click on a link within those messages. Click-through rates dropped sharply, especially for fundraising messages where they dropped by 27%.

Those supporters who did click through maintained relatively stable levels of page completion overall—though this did not hold true for all sectors. The exceptions were the Environmental and Wildlife and Animal Welfare groups, which saw noticeable declines in their email fundraising page completion rates.

EMAIL OPEN RATES

By Sector

By Size

EMAIL CLICK-THROUGH RATES

By Sector

3.0%	
2.5%	2.6% (Environmental)
2.0%	1.9% (Wildlife and Animal Welfare)
1.5%	1.7% (All) · 1.7% (Rights)
1.0%	1.1% (Health)
0.5%	0.7% (International)
0%	

All · Environmental · Health · International · Rights · Wildlife and Animal Welfare

By Size

3.0%	
2.5%	
2.0%	
1.5%	1.7% (All) · 1.7% (Large) · 1.7% (Medium) · 1.4% (Small)
1.0%	
0.5%	
0%	

All · Large · Medium · Small
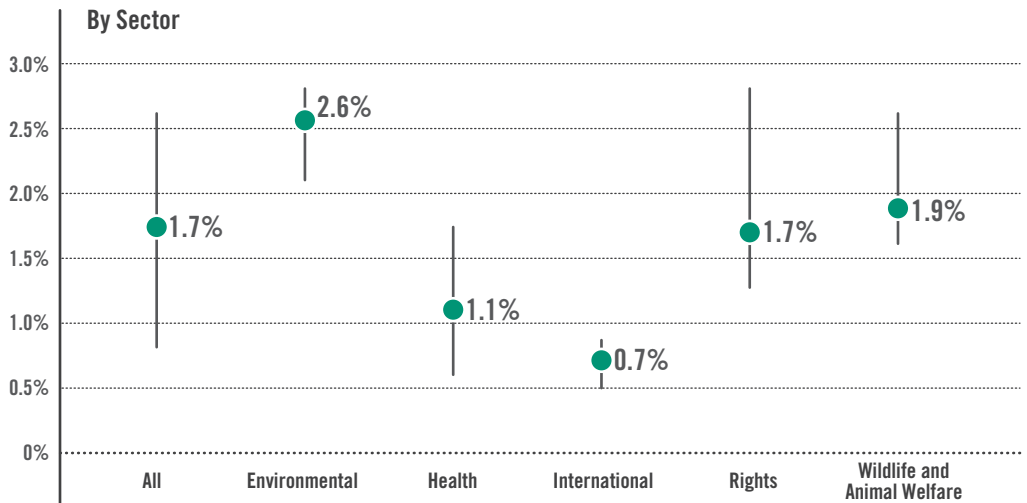
EMAIL ADVOCACY CLICK-THROUGH RATES
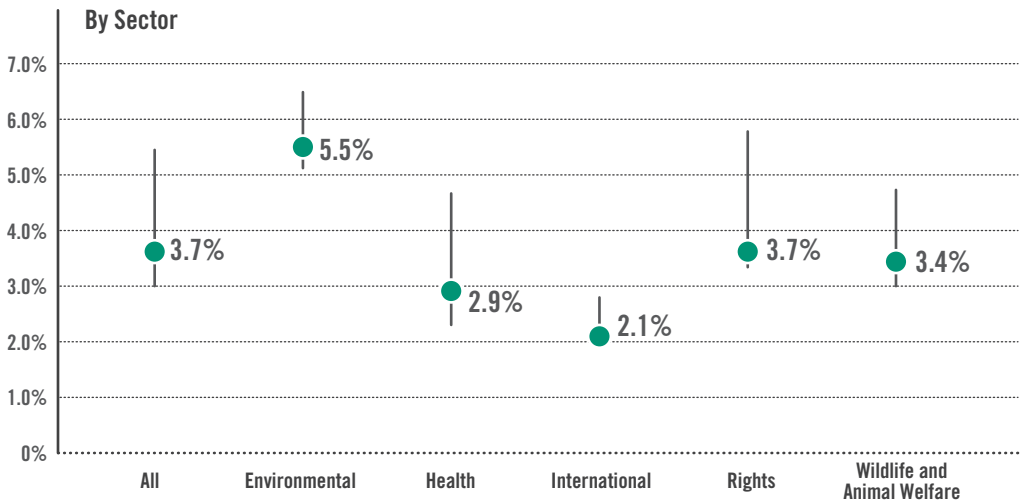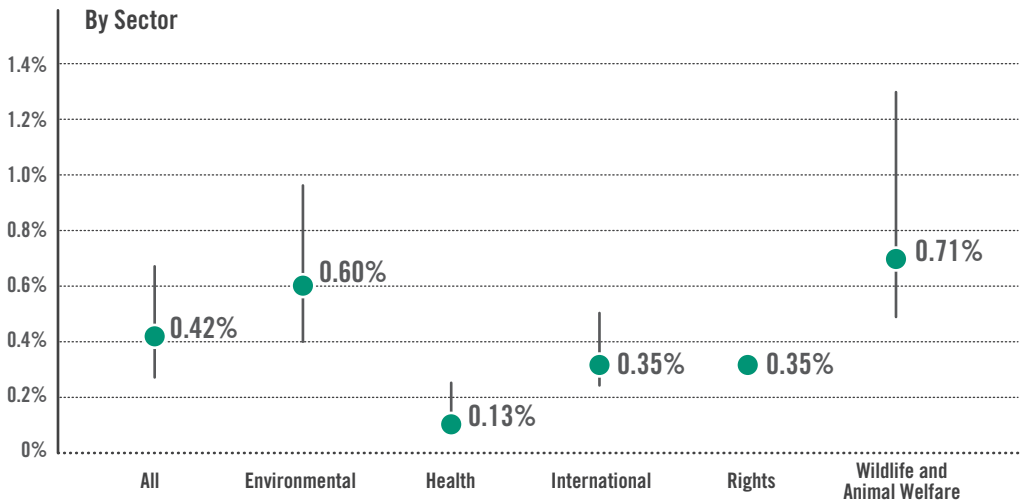

By Sector

Click-through rates for advocacy email messages exhibited a fairly wide spread between sectors. Environmental groups experienced a 5.5% click-through rate for advocacy messages, nearly three times as high as the 2.1% click-through rate for International groups.

SPECULATOR'S CORNER

This is not the first time we have seen Environmental groups score the highest advocacy click-through and response rates in our Benchmarks Study. List composition may play a role: the kind of person who signs up for an Environmental group's email list may simply be more likely to be interested in online activism than an International group supporter.

In 2012 specifically, part of the advantage may boil down to two words: Keystone XL (or is that one word and two initials?). A high-profile fight drives media coverage and makes it more likely that your supporters are paying attention and ready to take action.

EMAIL FUNDRAISING CLICK-THROUGH RATES

By Sector

The drop in fundraising message click-through rates was not evenly distributed across sectors. What appears at first glance to be an industry-wide drop—fundraising message click-through rates dropped by 27% overall—was instead driven largely by organizations within two sectors which saw major declines. The fundraising message click-through rate for International groups dropped by 40%, and for Rights groups by 38%.

In addition, the fundraising message click-through rate for Health groups declined by 10%, and for Wildlife and Animal Welfare groups by just 3%. Environmental groups saw an increase of 14% from 2011.

EMAIL FUNDRAISING CLICK-THROUGH RATES

By Size

Value	Category
0.42%	All
0.38%	Large
0.42%	Medium
0.96%	Small

y-axis: 0%, 0.3%, 0.6%, 0.9%, 1.2%, 1.5%, 1.8%
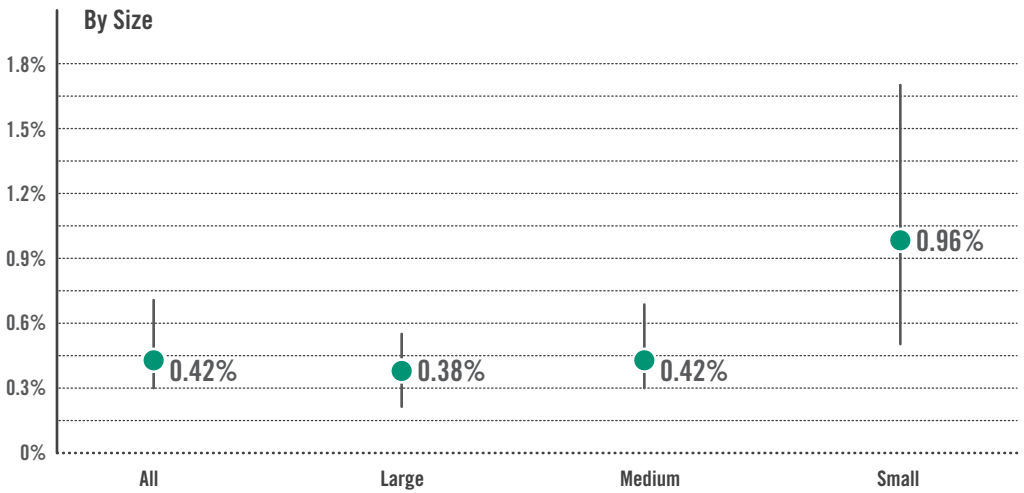
SPECULATOR'S CORNER

We think the divergent trends in click-through rates between sectors suggest that response rate declines may not be due to changes in audience or a sign that email is declining. More likely: declines may be due to real world activities that affected International and Rights organizations more than other sectors.

Without a major humanitarian crisis featuring prominently in the media—other than Hurricane Sandy, which was primarily a domestic disaster—International groups may have encountered greater challenges in motivating donors. Rights groups may have been impacted more than others by the election, and the relative shortage of significant legislative fights in 2012 compared to 2011.

EMAIL NEWSLETTER CLICK-THROUGH RATES
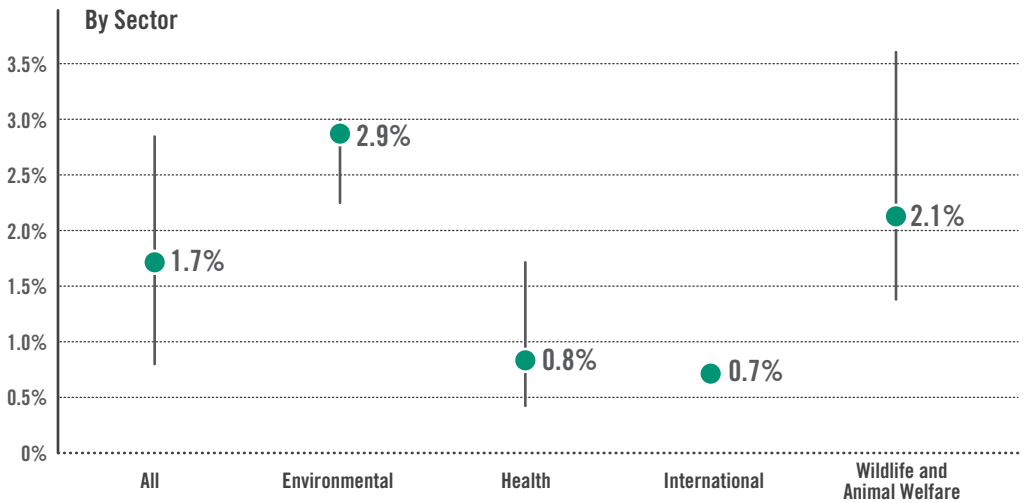
By Sector

The spread in click-through rates between sectors was particularly wide for newsletter messages. Environmental and Wildlife and Animal Welfare groups, at 2.9% and 2.1% respectively, had starkly different click-through rates from Health and International groups (0.8% and 0.7% respectively).

Overall, newsletter click-through rates declined by 14% from the previous year.

Due to a small sample size, we did not calculate the median email newsletter click-through rate for the Rights sector.

SPECULATOR'S CORNER

Environmental and Wildlife and Animal Welfare group newsletters seem to exist in a different—and entirely more favorable—click-through rate universe than Health and International group newsletters.

This may be due to differences in newsletter content, if the highest-performing sectors focus more heavily on driving online actions in their newsletters than the lowest-performing sectors. A straight news update without a strong call to action is likely to drive fewer clicks—even if it meets goals for education and cultivation.

EMAIL UNSUBSCRIBE RATES

By Sector

0.40%
0.35% **0.36%** (Health)
0.30%
0.25% **0.24%** (International)
0.20% **0.21%** (All)
0.15% **0.17%** (Environmental) **0.17%** (Rights) **0.17%** (Wildlife and Animal Welfare)
0.10%
0.05%
0%

All Environmental Health International Rights Wildlife and Animal Welfare

By Size

0.40%
0.35%
0.30%
0.25% **0.26%** (Small)
0.20% **0.21%** (All) **0.19%** (Large) **0.23%** (Medium)
0.15%
0.10%
0.05%
0%

All Large Medium Small
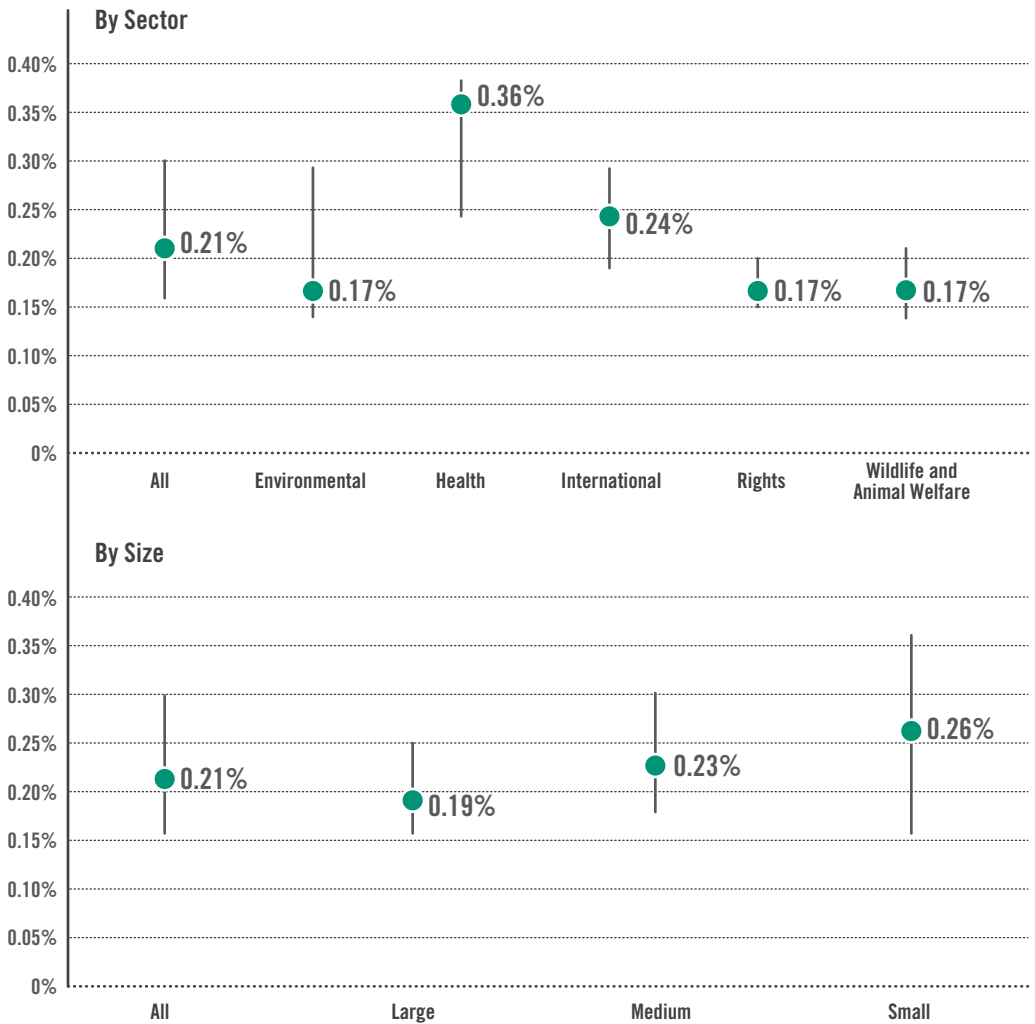
Unsubscribe rates for individual messages were lower than in 2011 overall, and for every sector but Rights, which saw a small increase in unsubscribes per message. Health organizations had by far the highest unsubscribe rates, with all other sectors falling within a fairly narrow range.

SPECULATOR'S CORNER

Why did Health organizations have such high unsubscribe rates? We think these organizations might recruit an unusually high percentage of their subscribers from peer-to-peer fundraising— and peers of peers may be only temporarily engaged and thus more likely to unsubscribe.

2012 MESSAGE VOLUME BY TYPE OF MESSAGE

By Sector

	Fundraising	Advocacy	Newsletter	Other
All	18	13	8	10
Environmental	25	23	7	9
Health	14	7	5	14
International	28	2	9	6
Rights	12	14	14	14
Wildlife and Animal Welfare	21	13	7	4
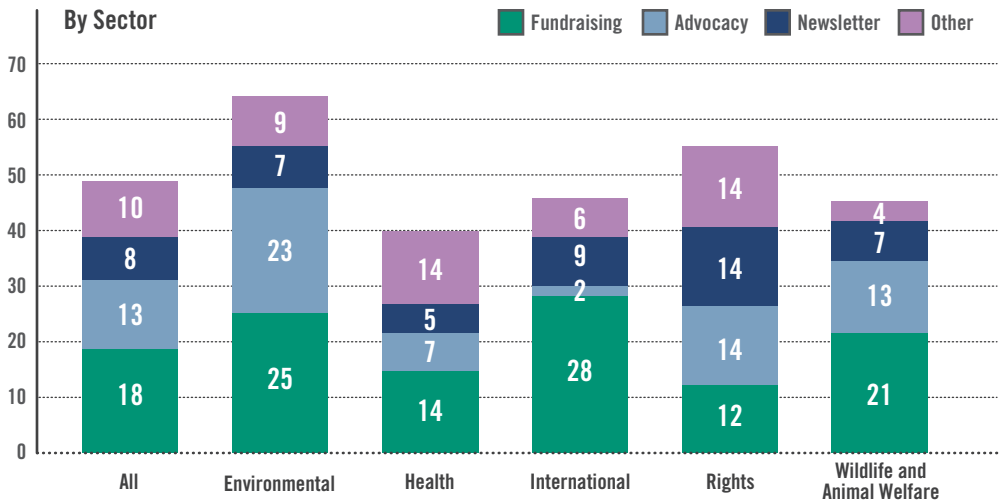
The mix of messages sent by organizations in each sector varied widely—advocacy messages accounted for 36% of all email from Environmental groups, but less than 5% of International messages.

There is a small correlation between advocacy message volume and response rates—groups which send more advocacy messages tend to see higher advocacy response rates.

We did not find a correlation between fundraising message volume and fundraising response rates, either positive or negative.
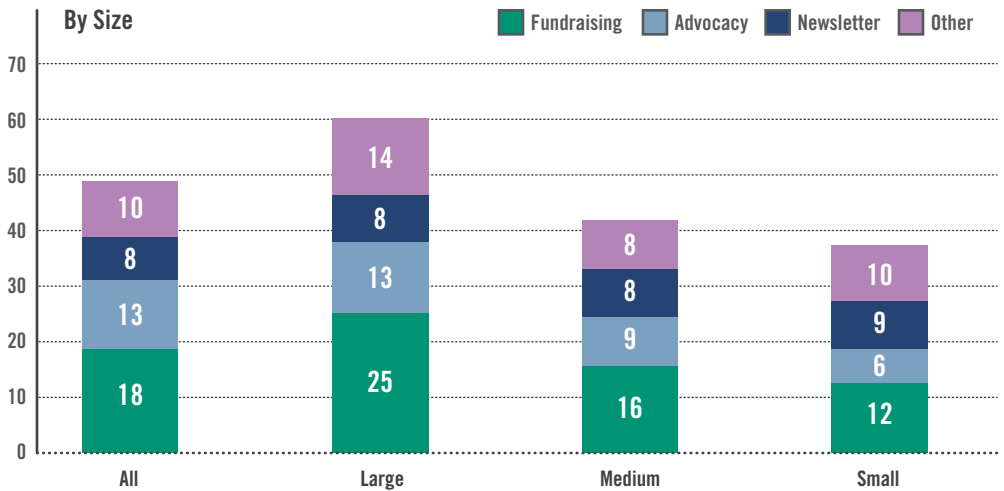
Larger groups tended to send more messages per subscriber. However, the ratio of fundraising emails to overall messages was relatively similar between Medium and Large groups: the former devoted 39% of message to fundraising, the latter 42%. Small groups sent fewer messages overall, and devoted a smaller proportion of messaging volume to fundraising (32% of Small group messages were fundraising).

SPECULATOR'S CORNER

Wait, increased advocacy message volume AND increased average response rate? You read that right! This may be partly due to list source— groups that run lots of advocacy campaigns may find that online actions are a larger source of new names, and names that come in through activism could be more likely to take action again.

We don't see a similar effect for fundraising messages, perhaps because fundraising is a less important source of new names. If there is a relationship between fundraising message volume and supporter response, it is dwarfed by other factors creating differences between sectors.

2012 MESSAGE VOLUME BY TYPE OF MESSAGE

By Size

Legend: Fundraising · Advocacy · Newsletter · Other

	Fundraising	Advocacy	Newsletter	Other
All	18	13	8	10
Large	25	13	8	14
Medium	16	9	8	8
Small	12	6	9	10

MESSAGE VOLUME: MESSAGES PER MONTH PER SUBSCRIBER

By Month

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2.3	2.9	4.1	3.6	3.4	2.9	2.9	3.7	3.4	3.4	4.4	7.4

MESSAGE VOLUME: MESSAGES PER MONTH PER SUBSCRIBER

By Sector

All	4.0
Environmental	4.9
Health	2.7
International	4.0
Rights	3.3
Wildlife and Animal Welfare	4.1

By Size

All	4.0
Large	4.1
Medium	3.8
Small	2.4
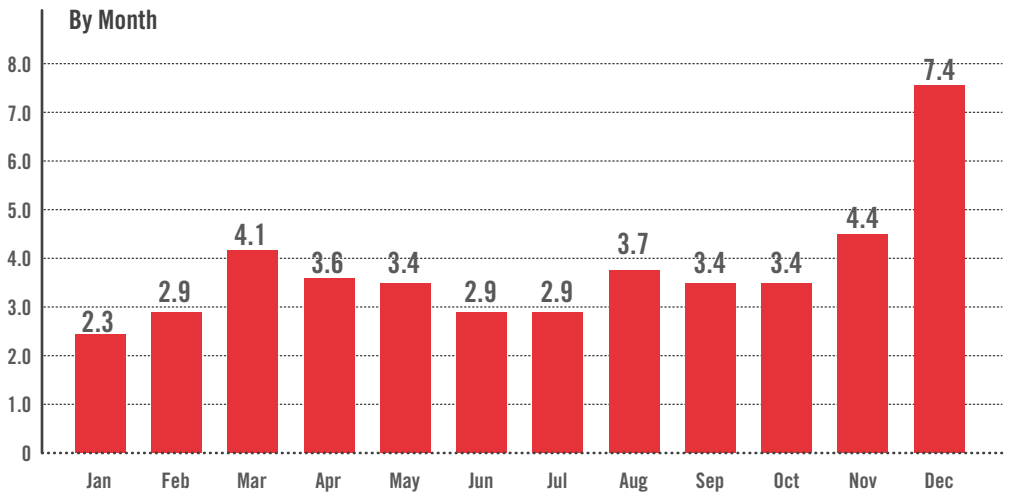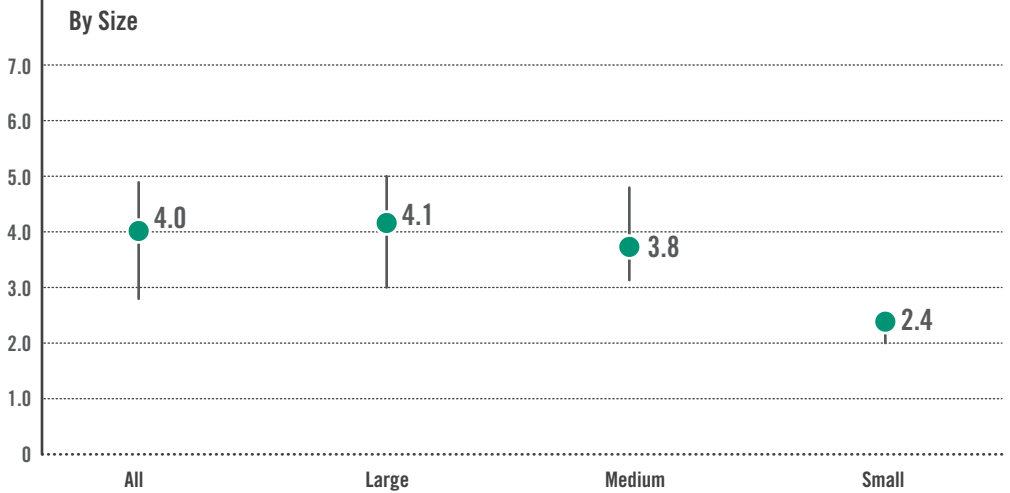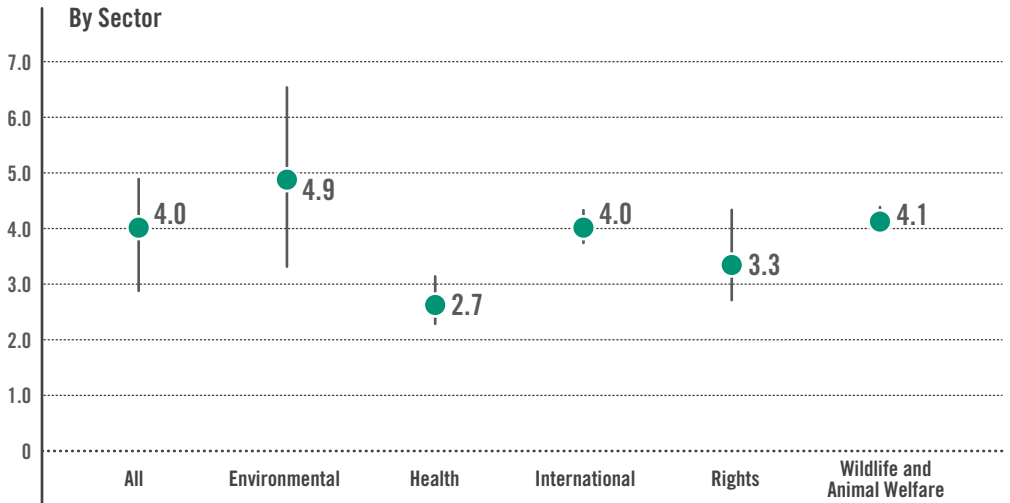
FUNDRAISING

Online revenue increased by 21% in 2012, with every sector except International seeing significant increases from the previous year. Growth in revenue ranged from 11% for Rights groups to 34% for Environmental organizations, while International groups saw revenue decline by 12%.

The **number of online gifts** roughly tracked with revenue overall, while average gift sizes changed by single-digit percentages in all sectors. Email fundraising still accounts for 33% of overall online giving.

Those sectors which saw the biggest decline in click-through rates—International and Rights—also suffered the worst drops in **response rates**. Those sectors for which click-through rates held up relatively well also saw declining response rates, but at a much lower rate.

SPECULATOR'S CORNER

What's the matter with the International sector's fundraising?

The decline for this sector suggests that external events—including the lack of extensive media coverage of large-scale humanitarian crises—affected International groups in particular.

CHANGE IN ONLINE REVENUE FROM 2011 TO 2012

By Sector

	Value
All	21%
Environmental	34%
Health	13%
International	-12%
Rights	11%
Wildlife and Animal Welfare	23%
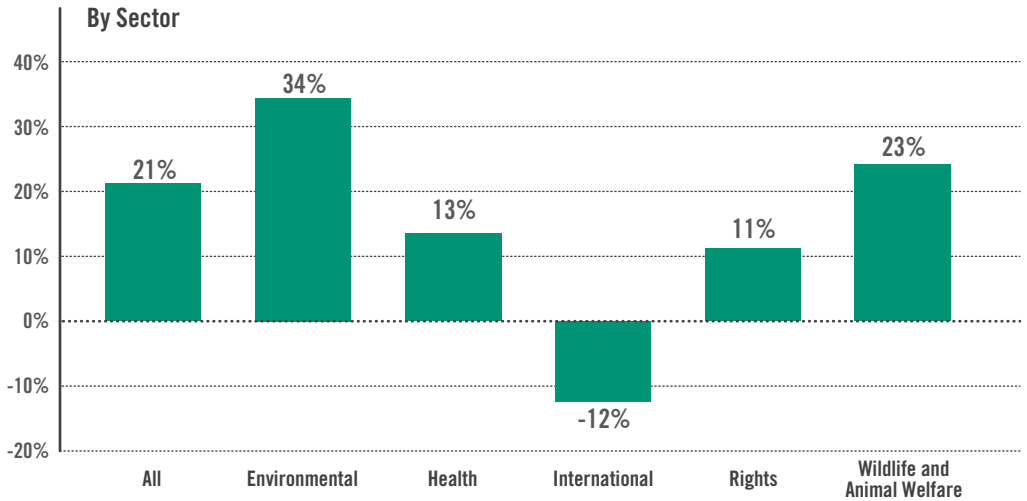
CHANGE IN NUMBER OF ONLINE GIFTS FROM 2011 TO 2012

By Sector

	Value
All	20%
Environmental	28%
Health	22%
International	-14%
Rights	12%
Wildlife and Animal Welfare	19%
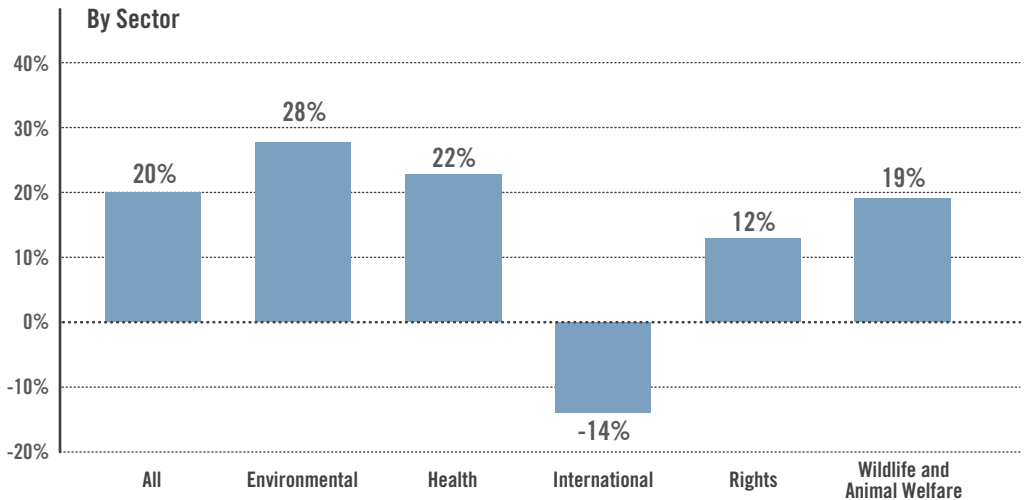
CHANGE IN ONLINE REVENUE FROM 2011 TO 2012: ONE-TIME VS. MONTHLY

By Sector

One-time   Monthly

Sector	One-time	Monthly
All	21%	43%
Environmental	27%	58%
International	-18%	11%
Rights	41%	64%
Wildlife and Animal Welfare	21%	41%
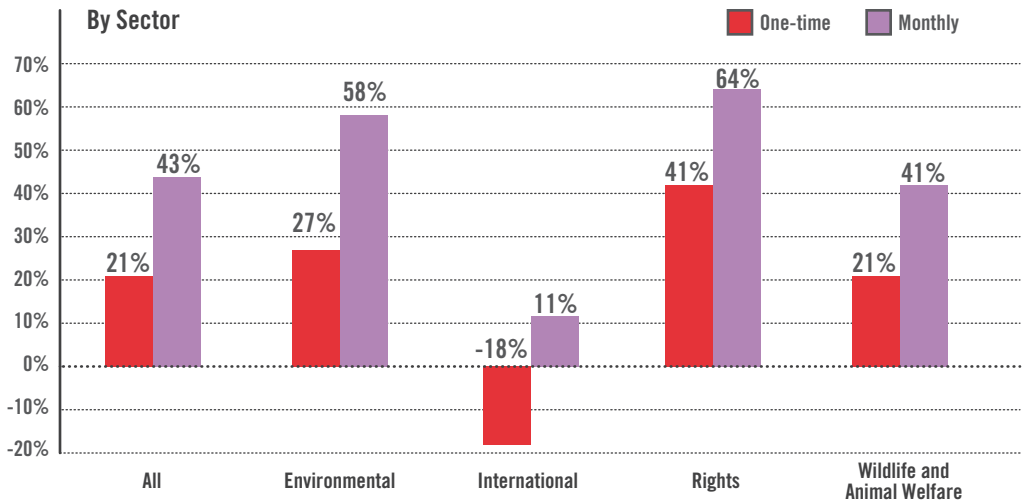
AVERAGE ONLINE GIFT: ONE-TIME VS. MONTHLY

By Sector

One-time   Monthly

Sector	One-time	Monthly
All	$60	$19
Environmental	$59	$17
International	$163	$33
Rights	$89	$20
Wildlife and Animal Welfare	$57	$18
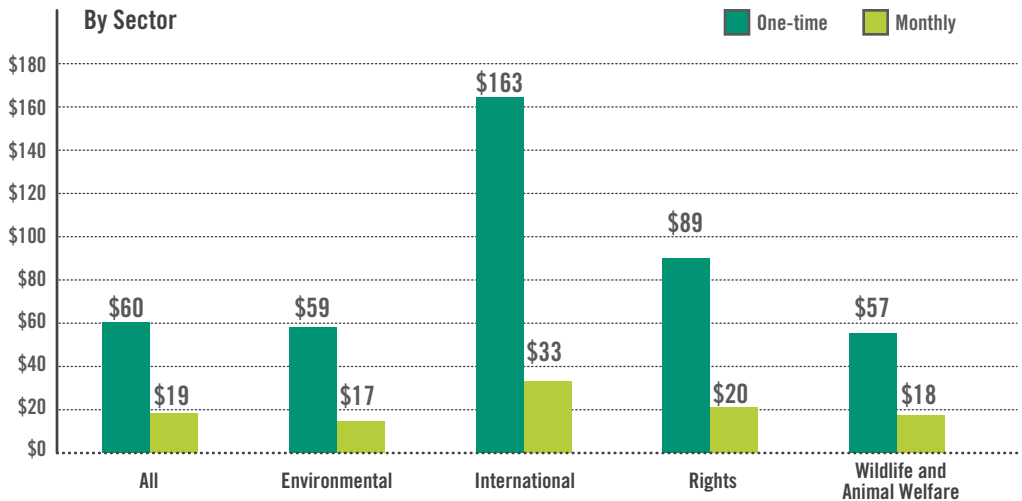
For groups with monthly giving programs, monthly giving revenue grew at a much faster rate than one-time giving revenue. Rights groups saw the largest growth in monthly revenue at 64%, followed closely by Environmental groups with a 58% increase.

Monthly giving was also a bright spot for International groups in 2012: revenue from monthly donors increased by 11%, compared to an 18% drop in this sector for one-time giving.

Due to a small sample size, we did not calculate the median average gifts or change in one-time and monthly revenue for the Health sector.

ONLINE REVENUE SHARE BY TYPE: ONE-TIME VS. MONTHLY

By Sector

One-time ■ Monthly ■

Category	One-time	Monthly
All	89%	11%
Environmental	91%	9%
International	82%	18%
Rights	88%	12%
Wildlife and Animal Welfare	91%	9%

By Size

One-time ■ Monthly ■

Category	One-time	Monthly
All	89%	11%
Large	91%	9%
Medium	86%	14%
Small	94%	6%
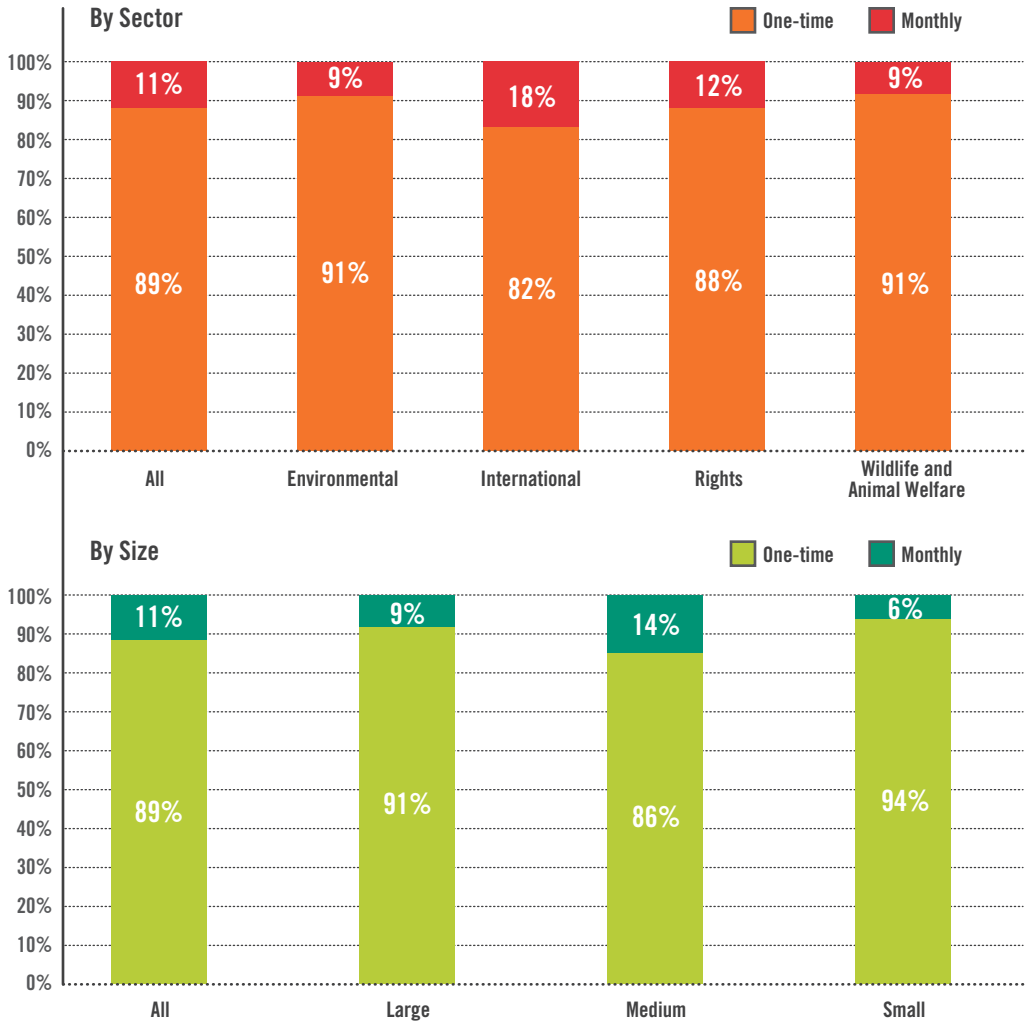
Due to a small sample size, we did not calculate the median online revenue share by type for the Health sector.

# ONLINE FUNDRAISING SHARE BY SOURCE: EMAIL VS. OTHER ONLINE SOURCES

By Sector

Email ▪ Other Online Sources ▪

	All	Environmental	Health	International	Rights	Wildlife and Animal Welfare
Other Online Sources	67%	57%	99%	83%	60%	55%
Email	33%	43%	1%	17%	40%	45%
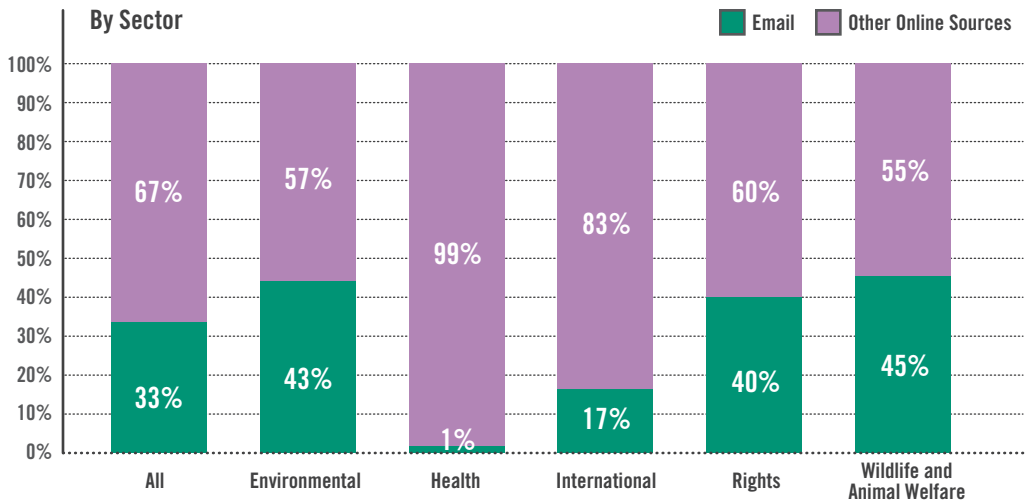
One-third of online revenue in 2012 was sourced to email, with Environmental and Wildlife and Animal Welfare groups leading the way at 43% and 45% from email respectively. The remaining two-thirds of revenue came from other sources, such as unsolicited web giving, peer referrals, and social media.

Health organizations were unique in raising 99% of their online revenue from sources other than email, which may be due to a larger share of online revenue coming from peer-to-peer and event fundraising.

EMAIL FUNDRAISING RESPONSE RATES

By Sector

By Size
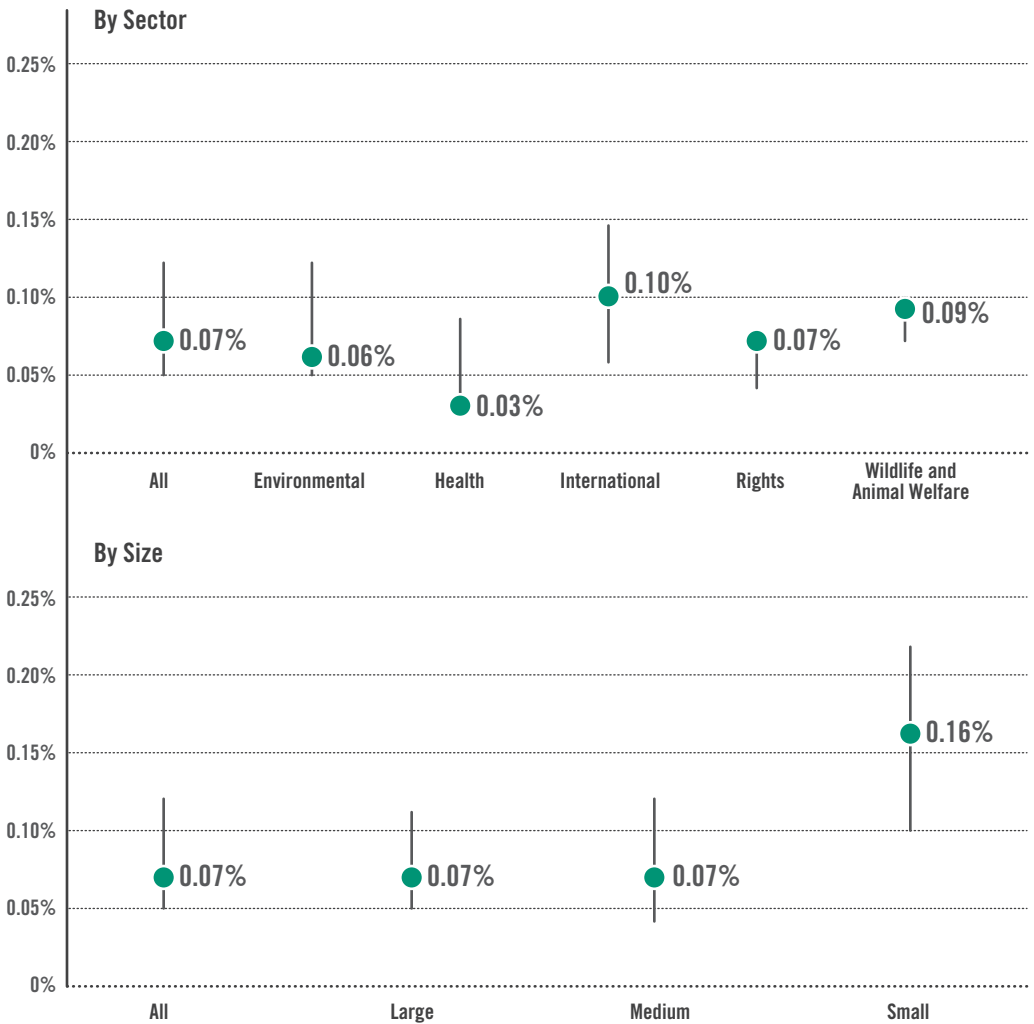
Most sectors fell within a fairly narrow range for email fundraising response rates, with a 0.06% rate for Environmental groups, 0.07% for Rights groups, 0.09% for Wildlife and Animal Welfare groups, and 0.10% for International groups. Health groups fell far behind other sectors, garnering a 0.03% response rate for fundraising messages.

All sectors saw decreases in fundraising message response rates, but these decreases are not identical. For Environmental and Wildlife and Animal Welfare groups, the decline is due to reduced donation page completion rates—down 18% and 21% respectively. Fundraising message response rates for International and Rights groups, on the other hand, fell in concert with a severe drop in click-through rates. For more on the decline in response rates, see the Speculator's Corner on page 2.

Small groups experienced a fundraising message response rate of 0.16%, far higher than the 0.07% response rate for Medium and Large groups.

ADVOCACY

Organizations experienced much more stable results year over year for advocacy messages than for fundraising messages. While **click-through rates** declined by 14%, page completion rates held steady across all sectors. This led to a relatively modest decline in **response rates**.

EMAIL ADVOCACY RESPONSE RATES

By Sector
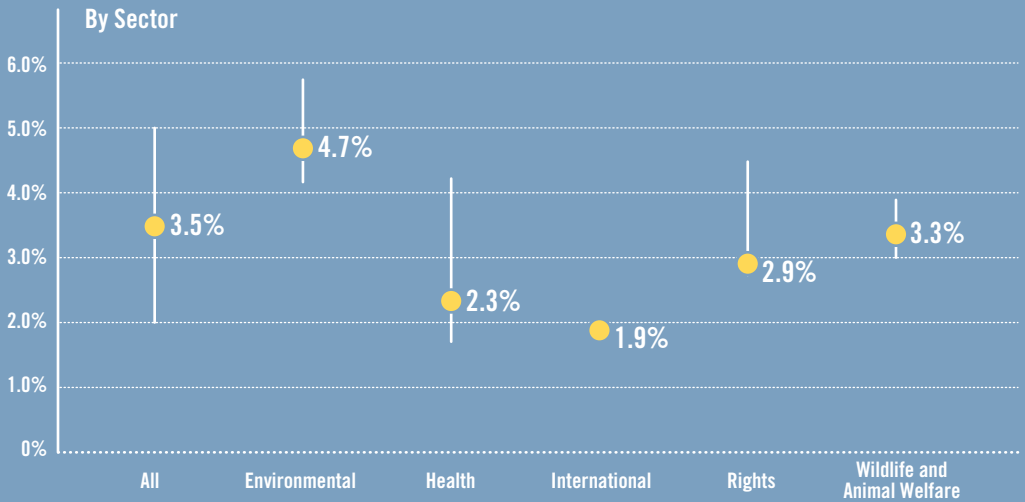
Environmental groups had the highest advocacy message response rate at 4.7%, followed by Wildlife and Animal Welfare groups at 3.3%. While International groups enjoyed the highest response rate for fundraising messages, they had the lowest response rate for advocacy messages.

There is a modest correlation between advocacy messaging volume and response rate—organizations which send more advocacy messages tend to see higher response rates for those messages (see the Speculator's Corner on page 15 for our thoughts on this trend).

SOCIAL MEDIA

Social media audience sizes continued to grow significantly faster than email lists, with a 46% median increase of Facebook Fans in 2012. Twitter audience sizes have grown dramatically over the past year—organizations experienced a 264% increase in Followers. Despite this rapid growth, Facebook continues to be the larger social media presence for most groups: for every 1,000 email subscribers, groups in this study have 149 Facebook Fans and 53 Twitter Followers.
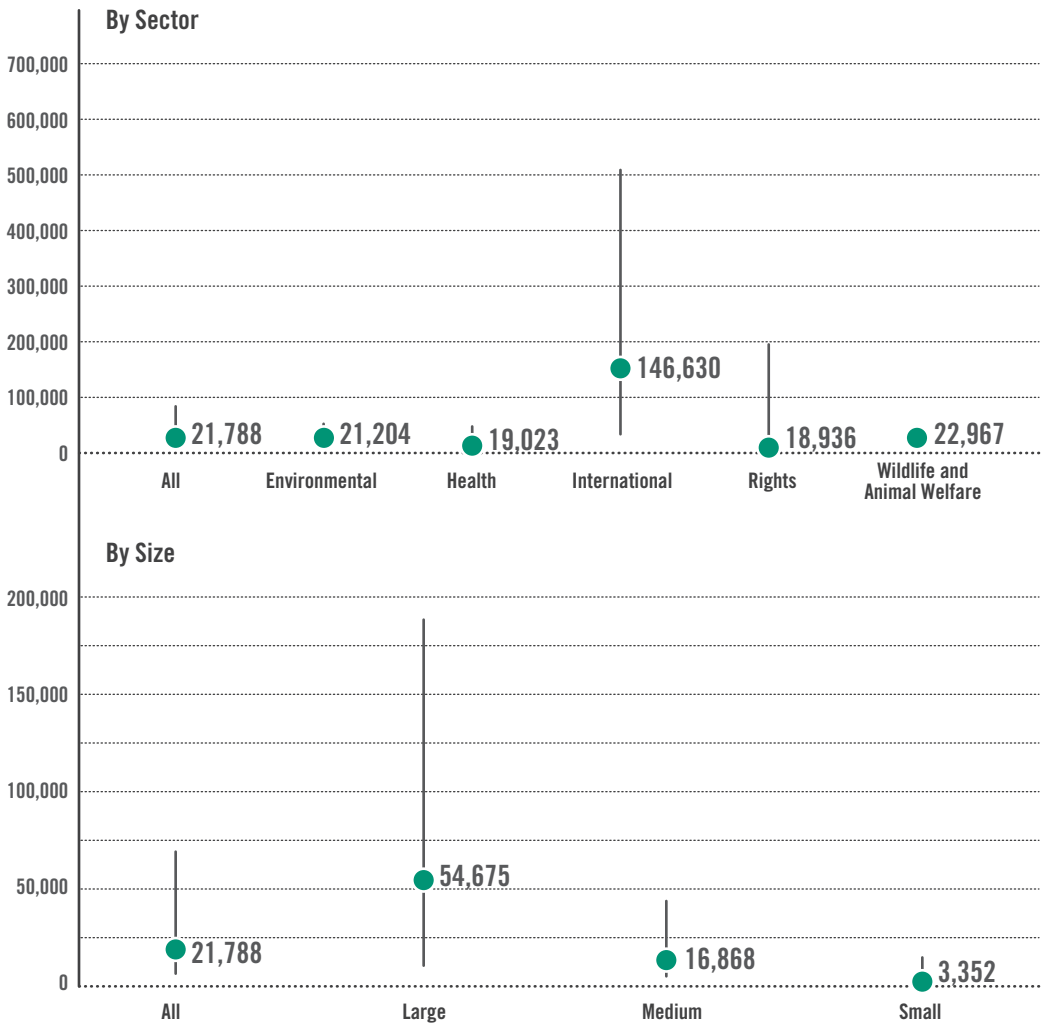
Post frequency: groups posted about once per day on Facebook—though Large groups posted twice as frequently. Type of post had a dramatic effect on the way that users engage: Photo posts were far and away the most popular content for users to like, share, or comment on.

However, Photos are largely ineffective at generating clicks to webpages beyond the confines of Facebook. **Driving traffic** is most effective with Link and Share posts. This raises an interesting question for organizations deciding what kinds of content to feature on Facebook—what works best for engaging users won't necessarily be the most effective way to drive traffic to an advocacy page, for instance.

FOR EVERY 1,000 EMAIL SUBSCRIBERS, NONPROFITS HAVE...

	FACEBOOK FANS	TWITTER FOLLOWERS
All	149	53
Environmental	136	28
Health	57	34
International	283	231
Rights	257	126
Wildlife	158	40
Large	135	44
Medium	126	49
Small	273	175

TWITTER FOLLOWERS

By Sector

700,000			
600,000			
500,000			
400,000			
300,000			
200,000			
100,000			
0			

21,788 — All
21,204 — Environmental
19,023 — Health
146,630 — International
18,936 — Rights
22,967 — Wildlife and Animal Welfare

By Size

200,000			
150,000			
100,000			
50,000			
0			

21,788 — All
54,675 — Large
16,868 — Medium
3,352 — Small

There is an extremely wide range in the number of Followers organizations have on Twitter, both between sectors and within the International, Rights, and Large segments. Overall, groups saw a 264% increase in Twitter Followers from 2011 to 2012.

FACEBOOK PAGE: TOTAL FANS

By Sector

400,000		
350,000		
300,000		
250,000		
200,000		
150,000	**173,580**	
100,000	**94,543**	
50,000	**70,430**	**35,538**
0	**20,569** **18,145**	

All   Environmental   Health   International   Rights   Wildlife and Animal Welfare

By Size

400,000	
350,000	
300,000	
250,000	
200,000	
150,000	
100,000	**117,424**
50,000	**35,538**
0	**27,978** **8,332**

All   Large   Medium   Small
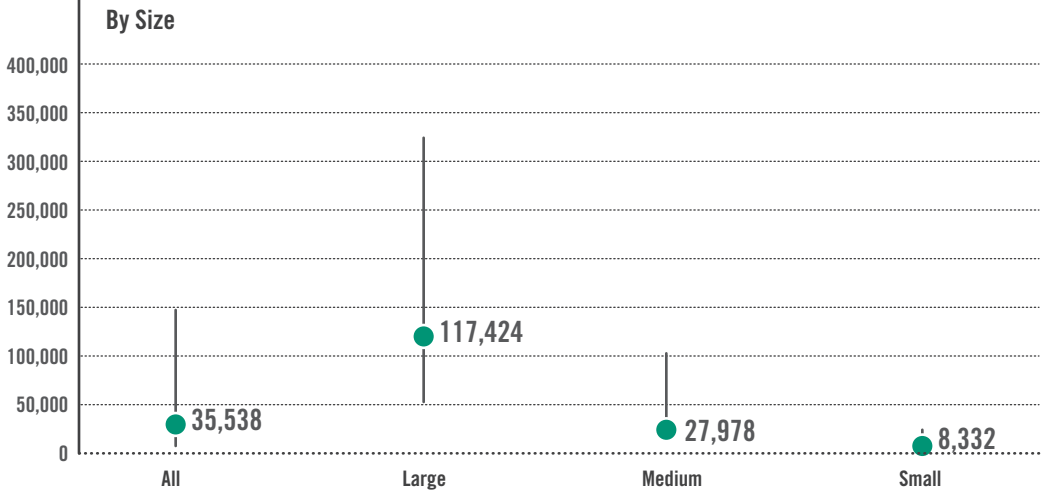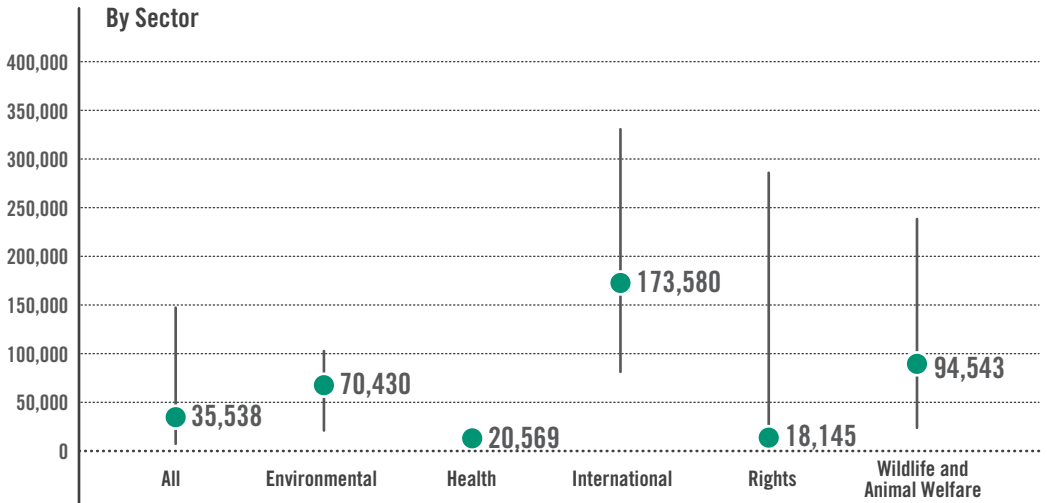
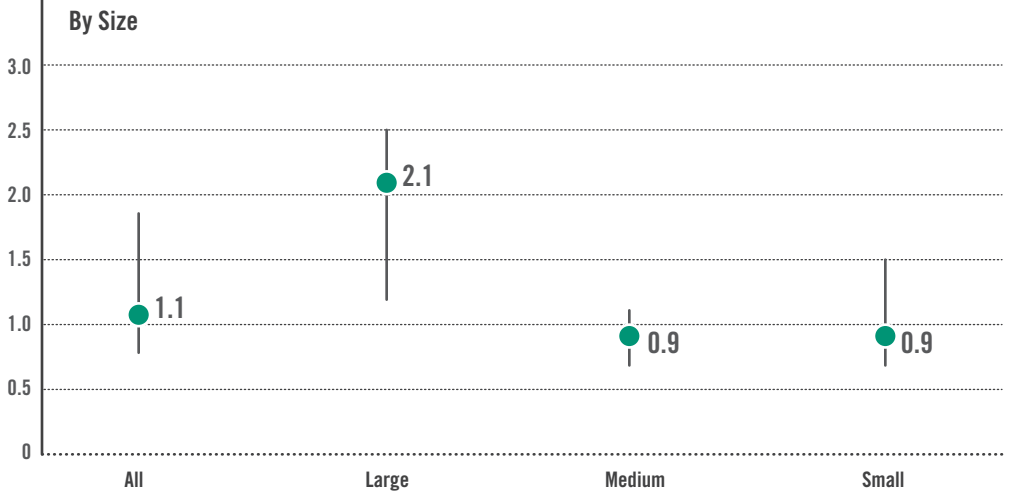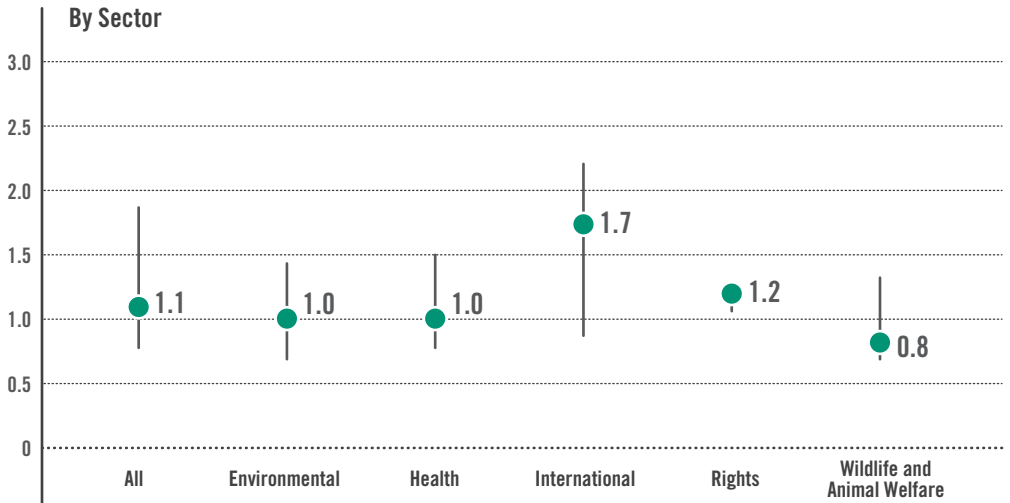A Note on Facebook Data: Charts on pages 28 through 32 divide organizations by their number of Facebook Fans, not by email list size. An organization listed as Large earlier in the report may not fall in the same category in this section of the study.

FACEBOOK PAGE: MONTHLY GROWTH RATE

By Sector

	All	Environmental	Health	International	Rights	Wildlife and Animal Welfare
	2.6%	2.7%	3.0%	2.7%	1.5%	3.2%

By Size

	All	Large	Medium	Small
	2.6%	1.8%	2.7%	3.1%
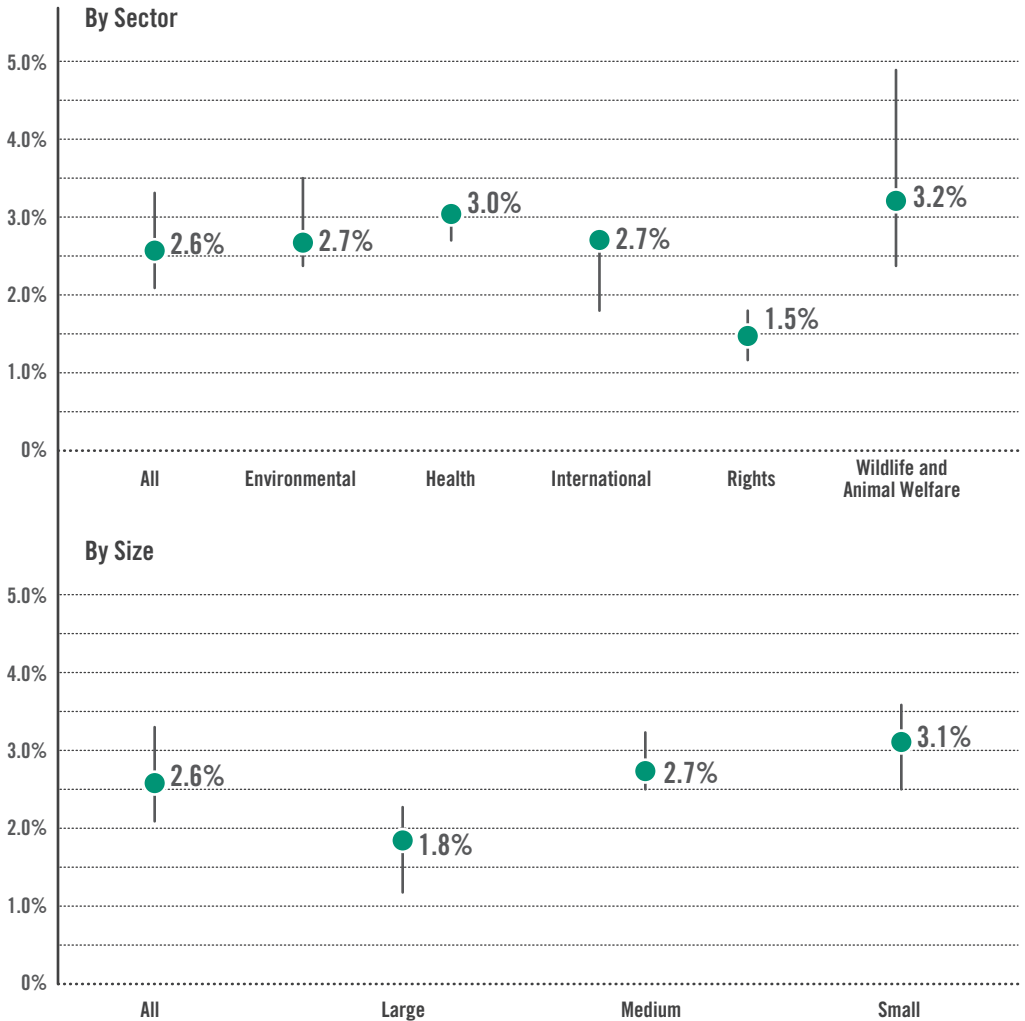
We saw a broad range in number of Facebook Fans similar to the range for Twitter Followers, with some organizations attracting much larger audiences than peer organizations within their sector. As a more mature medium, Facebook pages did not see the same dramatic explosion in followership, with monthly growth rates of 2.6% overall. Rights groups trailed behind other sectors in expanding their Facebook audiences (as Rights groups also trailed in email growth), with just 1.5% monthly growth.

FACEBOOK PAGE: NUMBER OF POSTS PER DAY

By Sector

Value	Category
1.1	All
1.0	Environmental
1.0	Health
1.7	International
1.2	Rights
0.8	Wildlife and Animal Welfare

By Size

| Value	Category
1.1	All
2.1	Large
0.9	Medium
0.9	Small

Another Note on Facebook Data: In February 2013, Facebook announced a bug in their reporting for Reach which affected the 2012 data collected for pages 30 to 32. While the reporting issue was fixed, Facebook was unable to correct data for 2012. As a result, the data below should be used only in comparison with your 2012 data, which is reported under the previous system. We recommend against comparing this to your 2013 data, as Reach is now calculated and reported differently by Facebook.

FACEBOOK PAGE: AVERAGE 28-DAY REACH AS PERCENTAGE OF FANS

By Sector

	All	Environmental	Health	International	Rights	Wildlife and Animal Welfare
	327%	277%	216%	301%	431%	414%

By Size

	All	Large	Medium	Small
	327%	230%	301%	380%
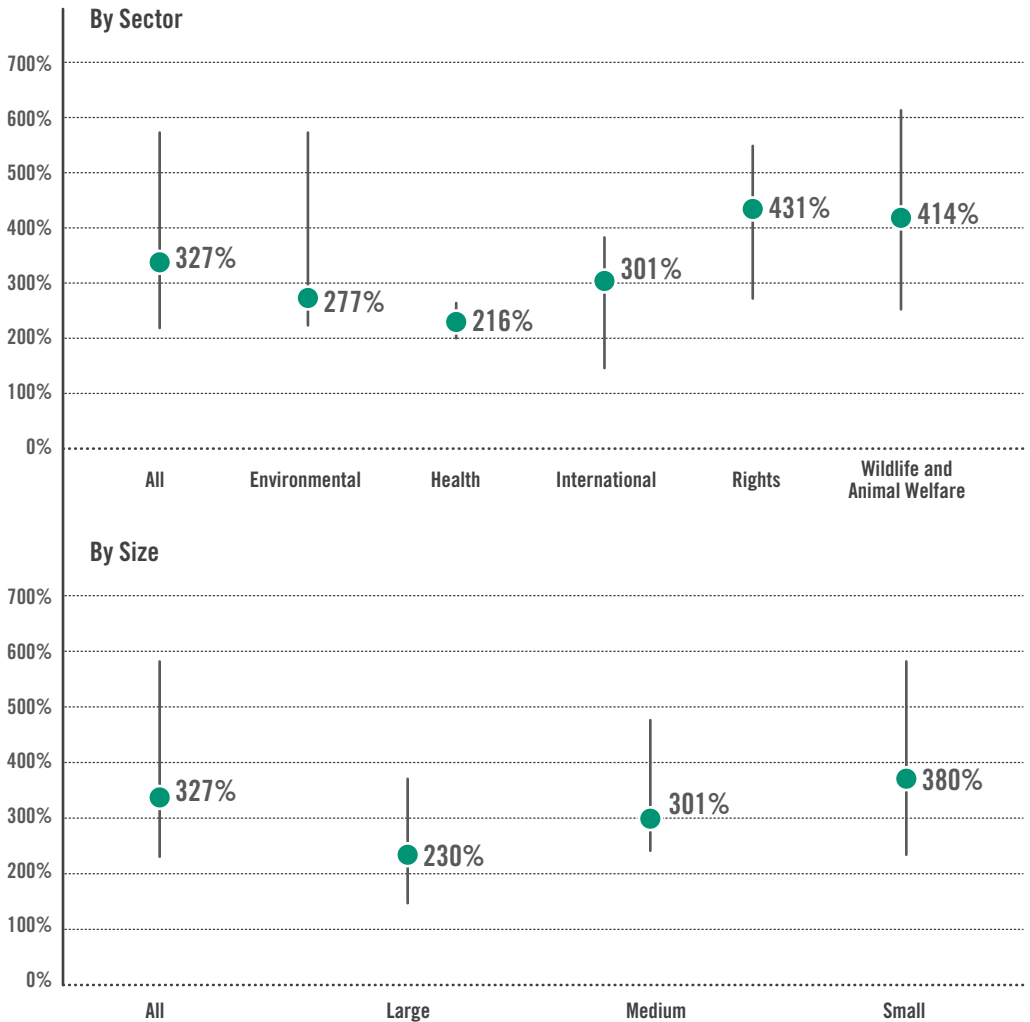
Reach is the number of people who are shown an organization's Facebook Page posts anywhere on Facebook. As with ads and other content, these users may not notice the content; Reach tells us only that the content is displayed for them.

FACEBOOK POST: AVERAGE LIFETIME VIRALITY

By Sector

By Size
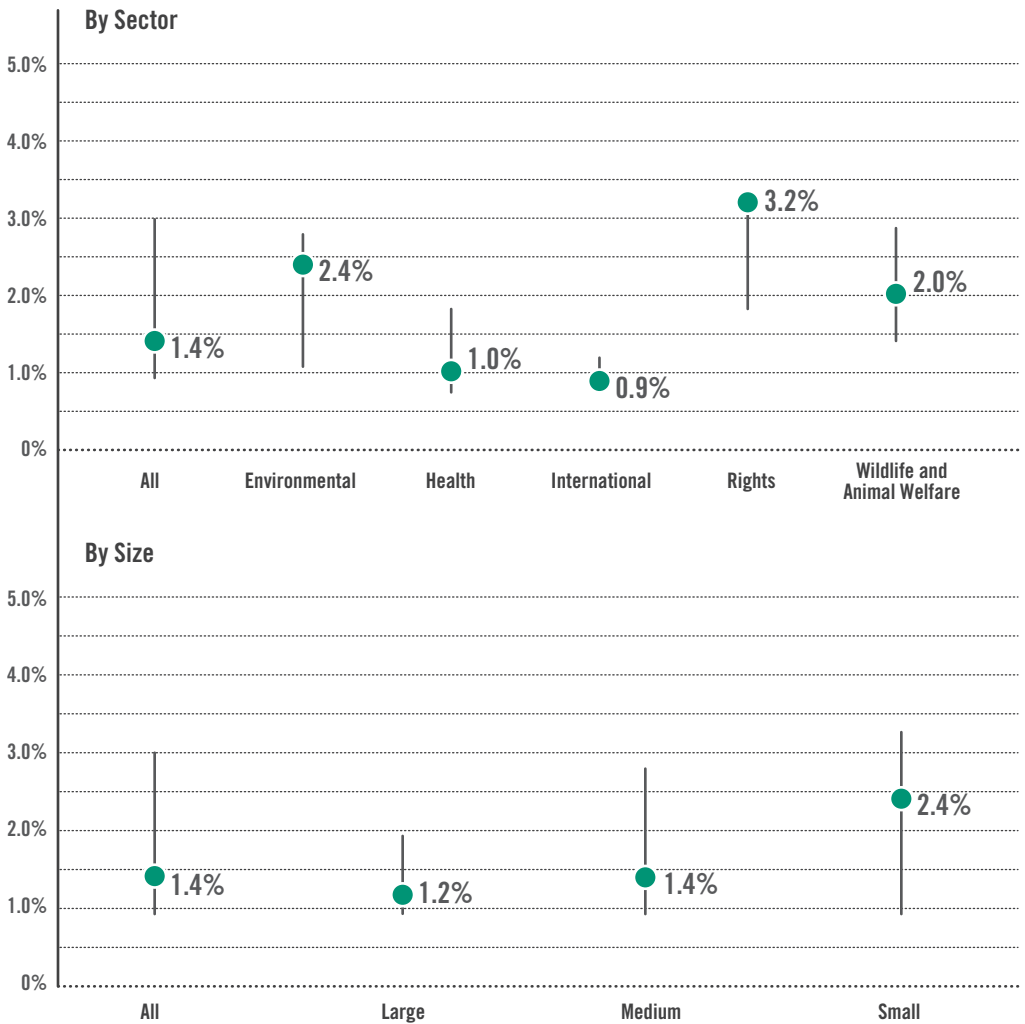
Virality is the percentage of users who see an organization's post on Facebook and then create a "story" on Facebook by liking, sharing, or commenting on that post, answering a question, responding to an event, or claiming an offer.

Overall, 1.4% of users who were shown a post created a story. Small groups had significantly higher median Virality than Large and Medium groups.

FACEBOOK POST: AVERAGE LIFETIME VIRALITY

By Post Type
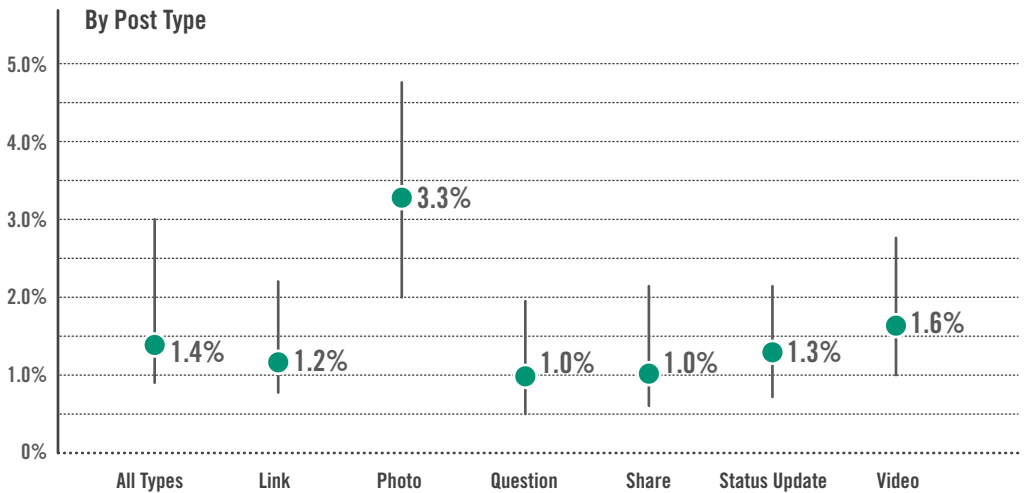
Photos are by far the content with the highest Virality—users were more than twice as likely to like, share, or comment on a Photo post than any other content. Organizations seeking to generate the most viral activity may have more success with Photo posts than other types of posts.

FACEBOOK POST: AVERAGE LIFETIME LINK CLICKS AS PERCENTAGE OF POST REACH

By Post Type
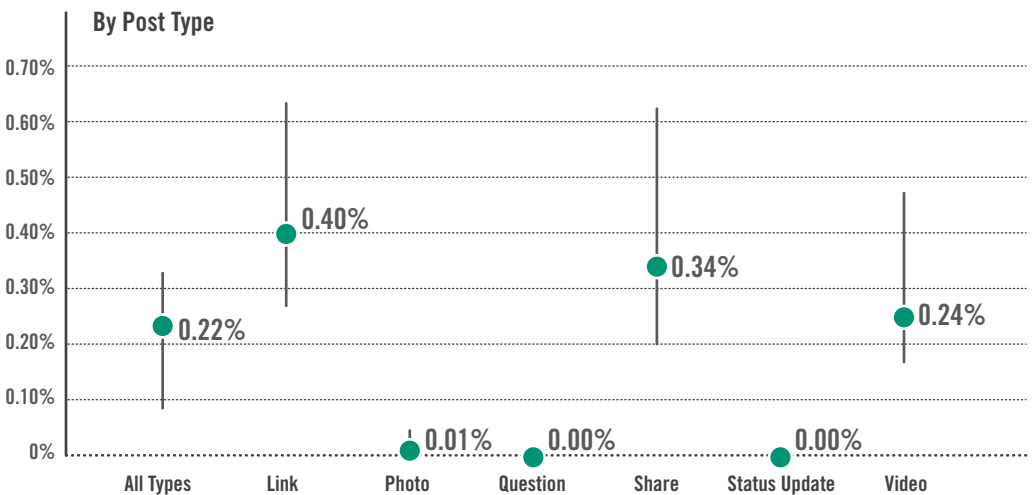

While Facebook users were much more likely to like or share a Photo post, when it comes to getting users to click on a link to a website, Link and Share posts were much more likely to result in clicks. Link, Share, and even Video posts were far more successful in encouraging users to visit a webpage even as they were less effective at generating comments, likes, and shares of their own.

TEXT MESSAGING

	25TH PERCENTILE	MEDIAN	75TH PERCENTILE
List Size	8,774	31,538	47,016
Annual List Growth	20%	32%	90%
Annual Churn	3%	8%	20%
Texts Sent per Subscriber in 2012	5	9	13

SOURCE OF NEW MOBILE SUBSCRIBERS

Other - 9%

Upload - 6%

Keyword Opt-in - 9%

Integration with CRM - 76%
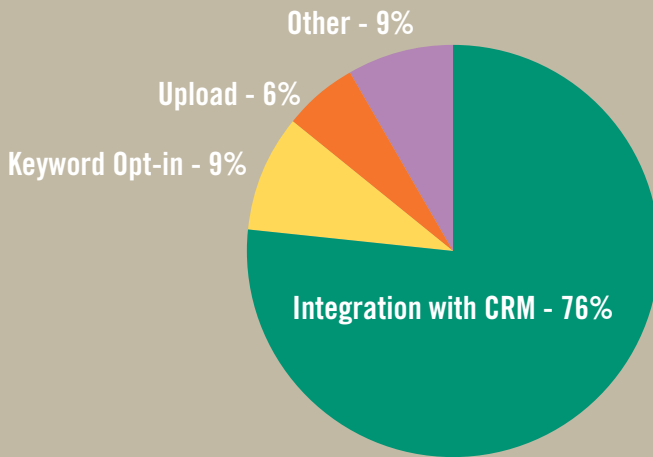
Mobile programs still account for a relatively small portion of overall supporter engagement—mobile lists are a fraction of the size of email, and text messages were sent much less frequently than email messages or social media posts. However, mobile lists are growing at about double the rate of email lists, with a median increase of 32% in 2012.

The vast majority of these new sign-ups were from web forms—users opting in as they complete a sign-up, advocacy, or donation form. This suggests that there is extensive overlap between mobile and email lists.

GLOSSARY OF TERMS

ADVOCACY EMAIL
An email that asks recipients to sign an online petition, send an email to a decision-maker, or take a similar easy-to-perform action. For the purposes of this study, advocacy email does not include higher bar actions like making a phone call or attending an event. Advocacy email rates were calculated from advocacy emails with a simple action sent to either the full file or a random sample of the full file.

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

DELIVERABLE EMAILS
Only the emails that were delivered, not including the emails that were sent and bounced.

FANS, FACEBOOK
People who "like" a Facebook Fan page.

FOLLOWERS, TWITTER
People who subscribe to receive the tweets of another Twitter user.

FULL FILE
All of an organization's deliverable email addresses, not including unsubscribed email addresses or email addresses to which an organization no longer sends email messages.

FUNDRAISING EMAIL
An email that only asks for a donation, as opposed to an email newsletter, which might ask for a donation and include other links. For the purposes of this study, fundraising email only includes one-time donation asks; it does not include monthly gift asks. Fundraising email rates were calculated from all fundraising emails, regardless of whether the email went to the full file, a random sample of the file, or a targeted portion of the file.

LINK CLICK, FACEBOOK
A click on a link included in a Facebook post. For the purposes of this study, we only analyzed Posts which included a clickable link.

LIST CHURN
Calculated as the number of subscribers who became unreachable in a 12-month period divided by the sum of the number of deliverable email addresses (or phone numbers, in the case of text messaging list churn) at the end of that period plus the number of subscribers who became unreachable during that period. Study participants were required to track the number of subscribers who became unreachable each month to account for subscribers both joining and leaving an email list during the 12-month period who would otherwise go uncounted.

MONTHLY GIFT
A donation where the donor signs up once to donate on a regular schedule, typically by pledging a regular gift amount on a credit card each month. Also known as a sustaining gift.

NEWSLETTERS, EMAIL
An email with multiple links or asks, which can include fundraising or advocacy asks. Email newsletter rates were calculated from all email newsletters, regardless of whether the newsletter went to the full file, a random sample of the file, or a targeted portion of the file.

OPEN RATE
Calculated as the number of HTML email messages opened divided by the number of delivered emails. Email messages that bounced are not included.

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

PAGE REACH, FACEBOOK
An organization's Facebook Page Reach is the number of people who have seen any content associated with the organization's Facebook Fan page. According to Facebook, data from before July 2, 2012 only includes users viewing a post on a desktop computer; data after July 2 includes desktop and mobile devices.

POST REACH, FACEBOOK
Post Reach is the number of Facebook users who have seen an organization's post on Facebook. According to Facebook, data from before July 2, 2012 only includes users viewing a post on a desktop computer; data after July 2 includes desktop and mobile devices.

PERCENTILE
The percentile of observed values below the named data point. 25% of the observations are below the 25th percentile; 75% of the observations are below the 75th percentile. The values between the 25th percentile and the 75th percentile are the middle 50% of the observed values and represent the normal range of values.

RANDOM SAMPLE
A segment of the full email file selected at random, such that there would be no reason to expect a different rate than an email sent to the full file.

RESPONSE RATE
Calculated as the number of people who took the main action requested by an email message divided by the number of delivered emails. We only calculated response rates in this study for fundraising emails and for advocacy emails with simple asks, such as signing a petition or sending an email to a decision maker.

SPECULATOR
Someone who pores over the charts and tables in this report and simply can't resist making some sense of it all. All of us at M+R speculate. Constantly. If you do too, join the conversation—tweet us @MRCampaigns.

TARGETED EMAIL
A segment of the full email file selected purposefully, such as by geography or past action. Emailing people in a city, emailing past donors, emailing past action takers, emailing people who have not taken an action, or emailing people who have not made a donation would all be examples of targeted email.

TIMELINE, FACEBOOK
A user's collection of posts, photos, and other stories created on Facebook.

UNIQUE CLICKS
The number of people who clicked on any trackable link in an email message, as opposed to the number of times the links in an email were clicked. If a subscriber clicked on every link in a message 10 times, this is counted as 1 unique click.

UNSOLICITED WEB GIVING
An online gift from a casual visitor to the website, as distinguished from a gift that is a response to an email message.

UNSUBSCRIBE RATE
Calculated as the number of individuals who unsubscribed in response to an email message divided by the number of delivered emails.

VIRALITY, FACEBOOK
Virality is the percentage of Facebook users who see a post on Facebook and then create a story on Facebook from that post. A story can be created by sharing, liking, or commenting on the post; answering a question; responding to an event; or claiming an offer. The number of people who have created a story from a Page post is referred to by Facebook as "People Talking About This (PTAT)."

STUDY METHODOLOGY

The 2013 eNonprofit Benchmarks Study collected data about email messaging, email list size, fundraising, online advocacy, Facebook, Twitter, and mobile programs from 55 U.S.-based national nonprofits for the calendar year of 2012. We analyzed the results of 1.6 billion email messages sent to over 45 million list subscribers; more than $438 million of online donations from over 6.5 million online gifts; and 7.3 million advocacy actions.

The average given for a metric is the median. To calculate the benchmarks metrics reported in this study, we first calculated a metric for each group and then calculated the median across groups, so that no single group had more weight than any other. Each benchmark aggregates data from at least 3 study participants. Not all study participants reported data for every metric.

Study participants provided data about individual email messages sent in 2011 and 2012. They coded their individual email messages by type (advocacy, fundraising, newsletter, or other). Advocacy rates were calculated from email with a simple online advocacy action sent to the full file or a random sample of the full file. Fundraising rates were calculated from one-time giving messages. Newsletter rates were calculated from all newsletter emails.

Calculating list churn for a year requires data snapshots at regular intervals over the course of the year. Looking at list size and new or lost email addresses only at the beginning and end of the year may not account for subscribers who join during the year and then unsubscribe or become undeliverable before the year ends. Study participants were required to track the number of subscribers who became undeliverable each month to contribute to the list churn metric; 24 study participants met this standard.

We want to emphasize that the 2013 study represents just a single snapshot in time, and the make-up of the participating nonprofits varies from year to year. Therefore, we cannot confidently extrapolate year-over-year studies by placing the two studies side-by-side. At any point in this study where we refer to results from past years, we are using historical data provided by this year's participants to make the comparison.

Email list size groups were determined by looking at the deliverable email list size over the course of 2012 and grouping nonprofit participants into three categories, as follows:

Small - Under 100,000; Medium - 100,000-500,000; and Large - Over 500,000.

Facebook Fan page size groups were determined by looking at the Facebook Fan page size over the course of 2012 and grouping nonprofit participants into three categories, as follows:

Small - Under 25,000; Medium - 25,000-100,000; and Large - Over 100,000.

This year's study participants were grouped by sector as follows:

ENVIRONMENTAL
- Appalachian Mountain Club
  www.outdoors.org
- Environmental Defense Fund
  www.edf.org
- Environmental Working Group
  www.ewg.org
- Food & Water Watch
  www.foodandwaterwatch.org
- Golden Gate National Parks
  Conservancy
  www.parksconservancy.org
- Greenpeace USA
  www.greenpeace.org/usa/en
- League of Conservation Voters
  www.lcv.org
- National Parks Conservation
  Association
  www.npca.org
- Oceana
  www.oceana.org
- Rails-to-Trails Conservancy
  www.railstotrails.org
- Save Our Environment
  www.saveourenvironment.org
- Sierra Club
  www.sierraclub.org
- Union of Concerned Scientists
  www.ucsusa.org

HEALTH
- American Cancer Society, Inc.
  www.cancer.org
- American Heart Association
  www.heart.org
- American Lung Association
  www.lung.org
- Children's National Medical Center
  www.childrensnational.org
- Easter Seals
  www.easterseals.com
- Families USA
  www.familiesusa.org

INTERNATIONAL
- American Red Cross
  www.redcross.org
- CARE
  www.care.org
- Doctors Without Borders/Médecins
  Sans Frontières (MSF)
  www.doctorswithoutborders.org
- International Rescue Committee
  www.rescue.org
- ONE
  www.one.org
- Operation Smile
  www.operationsmile.org
- Oxfam America
  www.oxfamamerica.org
- U.S. Fund for UNICEF
  www.unicefusa.org
- Women for Women International
  www.womenforwomen.org

RIGHTS
- American Rights at Work
  www.americanrightsatwork.org
- Communications Workers of
  America
  www.cwa-union.org
- Human Rights Campaign
  www.hrc.org
- Human Rights Watch
  www.HRW.org
- National Council of La Raza
  www.nclr.org
- Pathfinder International
  www.pathfinder.org
- Planned Parenthood Action Fund,
  Inc.
  www.plannedparenthoodaction.org
- Planned Parenthood Federation of
  America, Inc.
  www.plannedparenthood.org
- United Farm Workers
  www.ufw.org

WILDLIFE AND ANIMAL WELFARE
- Audubon
  www.audubon.org
- Defenders of Wildlife
  www.defenders.org
- Humane Society of the United
  States
  www.humanesociety.org
- IFAW (International Fund for
  Animal Welfare)
  www.ifaw.org
- National Wildlife Federation
  www.nwf.org
- RedRover
  www.redrover.org
- San Diego Zoo Global
  www.sandiegozooglobal.org
- Trout Unlimited
  www.tu.org
- Wildlife Conservation Society
  www.wcs.org

OTHER
- AARP
  www.aarp.org
- AARP Foundation
  www.aarpfoundation.org
- Drug Policy Alliance
  www.drugpolicy.org
- Friends of the Smithsonian
  www.si.edu
- Mass Mentoring Partnership
  www.massmentors.org
- National Trust for Historic
  Preservation
  www.preservationnation.org
- PeopleForBikes.org
  www.peopleforbikes.org
- Share Our Strength
  www.nokidhungry.org
- St Joseph's Indian School
  www.stjo.org

THANK YOU TO OUR NONPROFIT STUDY PARTNERS

American Red Cross

EDF
ENVIRONMENTAL
DEFENSE FUND
Finding the ways that work

DEFENDERS OF WILDLIFE

GOLDEN GATE
NATIONAL
PARKS
CONSERVANCY

Operation Smile | 30 YEARS

SaveOurEnvironment.org
A National Coalition for the Environment

Union of Concerned Scientists
Citizens and Scientists for Environmental Solutions

American Heart Association
Learn and Live

LEAGUE OF CONSERVATION VOTERS
www.lcv.org

AMERICAN LUNG ASSOCIATION

A M C
APPALACHIAN MOUNTAIN CLUB

AARP
Real Possibilities

CWA

Easter Seals
DISABILITY SERVICES

St. Joseph's Indian School
We serve and teach, we receive and learn.

ENVIRONMENTAL WORKING GROUP
THE POWER OF INFORMATION.

NATIONAL PARKS CONSERVATION ASSOCIATION

FamiliesUSA
The Voice for Health Care Consumers

mass mentoring

HUMAN RIGHTS WATCH

INTERNATIONAL RESCUE COMMITTEE

OCEANA | Protecting the World's Oceans

UNITED FARM WORKERS
¡ SI SE PUEDE !

IFAW.org
INTERNATIONAL FUND FOR ANIMAL WELFARE

food&waterwatch

GREENPEACE

Planned Parenthood
Care. No matter what.

AARP
FOUNDATION

American Cancer Society

THE OFFICIAL SPONSOR OF BIRTHDAYS.

METRICS FOR ONLINE ADVOCACY, FUNDRAISING, AND NEWSLETTER EMAILS

Metric	ALL SECTORS	ENVIRONMENTAL	HEALTH	INTERNATIONAL	RIGHTS	WILDLIFE AND ANIMAL WELFARE	LARGE	MEDIUM	SMALL
Open Rate	14%	16%	11%	10%	14%	14%	14%	14%	-
	13%	14%	9%	11%	13%	13%	13%	12%	16%
	13%	14%	10%	10%	13%	14%	12%	14%	20%
Click-Through Rate	3.7%	5.5%	2.9%	2.1%	3.7%	3.4%	4.2%	3.7%	-
	0.42%	0.60%	0.13%	0.35%	0.35%	0.71%	0.38%	0.42%	0.96%
	1.7%	2.9%	0.8%	0.7%	-	2.1%	1.9%	1.4%	1.7%
Page Completion Rate	83%	88%	82%	84%	76%	89%	86%	80%	-
	20%	17%	22%	27%	20%	12%	23%	19%	13%
Response Rate	3.5%	4.7%	2.3%	1.9%	2.9%	3.3%	3.9%	2.7%	-
	0.07%	0.06%	0.03%	0.10%	0.07%	0.09%	0.07%	0.07%	0.16%
Unsubscribe Rate	0.16%	0.12%	-	0.22%	0.16%	0.16%	0.16%	0.16%	-
	0.22%	0.18%	0.30%	0.23%	0.20%	0.20%	0.20%	0.25%	0.24%
	0.19%	0.12%	0.28%	0.22%	0.14%	0.15%	0.16%	0.22%	0.31%
Average Gift - One Time	$60	$59	-	$163	$89	$57	$60	$57	$89
Average Gift - Monthly	$19	$17	-	$33	$20	$18	$17	$22	$18

For every 1,000 Email subscribers, nonprofits have…

149 Facebook Fans   53 Twitter Followers   29 Mobile subscribers

2013 eNonprofit Benchmarks Study