



BENCHMARKS
2014



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(SOME OF THE) BIG QUESTIONS

The purpose of Benchmarks isn't to provide a mountain of charts, averages, and percentages. It's to help nonprofits guide strategy and shape online communications programs that reach and inspire more people to act, give, and do their part to change the world. It's not just about what the numbers *are*, it's about what they *mean*.

The questions this study provokes are just as important as the answers it provides. So before we get to the numbers, let's look at some of the most interesting questions that arose and explore the stories behind them.

WHAT'S THE RIGHT MIX OF ADVOCACY MESSAGING?

HOW DID BIG MOMENTS LIKE TYPHOON HAIYAN AND POLITICAL EVENTS AFFECT NONPROFIT SUPPORT ONLINE?

WHAT'S THE DEAL WITH END-OF-YEAR FUNDRAISING?

WHAT CAN WE LEARN FROM CHURN?

WHAT DID WE LEAVE OUT – AND WHY?



THERE'S NO TIME LIKE THE PRESENT

How did big moments like Typhoon Haiyan and political events affect nonprofit support online?

The moment matters. Real-world events dictate our opportunities and drive attention to – or disinterest in – our causes. The impact of these changes can be subtle or overwhelming, and often appears when we take a look at results by sector.

Typhoon Haiyan created enormous need for humanitarian assistance – and drove incredible generosity for international relief organizations in 2013. Although our study does not isolate emergency giving from other online giving, there's no question that this had a big impact. International groups in our study stood apart from global trends in a few telling ways:

- Unlike every other sector, International groups grew faster in one-time revenue than in monthly giving. An influx of emergency one-time-only donors likely contributed.
- Average gift – which can spike as emergency donors give as generously as they can in the face of dire human need – was also up for International groups.
- Revenue per website visitor and website donation conversion rates were especially high for International groups, as we'd expect if a large amount of traffic came from visitors looking for ways to help during an emergency.
- Many of M+R's international relief clients also saw an especially strong response at end of year, perhaps as an after-effect of the strong Typhoon response.

Of course, international aid and development groups work to make a difference every day and every year – but a natural disaster has the potential to drive exponentially more traffic and attention to this work. **Typhoon Haiyan was the first disaster of this scale since the Horn of Africa famine in 2011, with an impact that can be seen across International groups' online fundraising metrics.**

Conversely, for the Rights groups in our study, it *looks* like fundraising really flattened out, or even went down in some areas. For several of the Rights participants, however, this is actually the result of 2013 being, effectively, a “post-emergency year.”

In 2012, many Rights groups experienced events that combined to give an extraordinary boost to fundraising – current events and an election that cast a spotlight on reproductive health and choice (hi, Todd Akin!); electoral campaigns for same-sex marriage in Maine, Maryland and Washington; and other high-profile fights from coast to coast.

Not all of these fights disappeared on January 1, 2013, but the media attention – and fundraising momentum – faded. Which led to what we see in this study: post-election fundraising results for Rights groups returning to what is more of a normal baseline.

Barring another international humanitarian disaster in 2014, we'd expect to see a similar leveling out or decline for the International sector in next year's Benchmarks Study.

Here's where things take a turn for the surprising: email numbers in December don't look any different than any other month. Yes, overall click-through rates in December were relatively low at 0.65% – but that's to be expected when most email sent in the month is focused on fundraising. Churn also spiked in December, which also makes sense given the high volume overall and heavy mix of fundraising messaging.

But the number we focus on most tells an interesting story: response rate for fundraising messages in December was 0.06% – just a hair below the year-long average of 0.07%.

Overall, supporters did not respond at a higher rate to fundraising messages in December than at any other time of year. However, nonprofits benefited by giving supporters more opportunities to give. That means sending more fundraising messages, and making it easy for email subscribers and other supporters to give via other channels.

This doesn't mean that the annual December email fundraising extravaganza is all hype. We'd be surprised if nonprofits could get away with sending seven fundraising messages in August and see response rates hold up the way they do at the end of the year. And it's important to note that website traffic was also highest in December, which is a good sign for increased revenue.

The key takeaway is that when it comes to email, heavy messaging volume is what makes December stand out from other months, rather than higher response rates. Which means that, even though we didn't see any year-over-year growth in December message volume in 2013, nonprofits may choose to push the envelope even further this coming year.

After all, if seven messages per subscriber is good, could eight be even better? The most wonderful time of the year, indeed.



WHAT'S NOT IN THIS STUDY

What did we leave out – and why?

“As we know, there are known knowns; there are things we know that we know. There are known unknowns; that is to say, there are things that we now know we don’t know. I am a terrible person.” – Secretary of Defense Donald Rumsfeld

We’re paraphrasing slightly, but Secretary Rumsfeld is right. The rest of this study – what we affectionately call the Chart Party – contains all the known knowns. Cold, hard, gorgeous facts. But before we get there, let’s talk a bit about the known unknowns: questions we asked but couldn’t answer, data that was misleading or incomplete, and information we just didn’t quite trust enough to include in the main study.

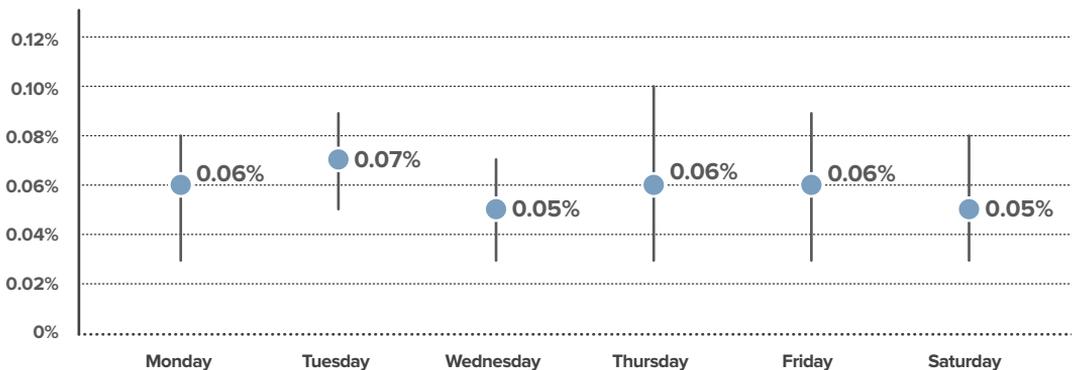
Ooh I Need to Fundraise, 8 Days a Week

We’ve heard it all: “Never send a fundraising appeal on Saturday.” And “Tuesday at 3:52 p.m. EST is the ideal moment to launch an email.” And “In a month with five Wednesdays, the third Wednesday is the second-least effective weekday for open rates.”

So for the first time, this year we decided to take a look at email fundraising response rate by day of week – to see if we could get a firm answer to the age-old question of which days are best and worst for fundraising messages. And what we found was... no firm answer.

Here’s what we can say. We found no correlation between a message’s response rate and the day of week on which it was sent. We even made a nice little chart that showed the response rate between 0.05% and 0.07% for each day of the week. But we looked at the chart, and even though we knew it was accurate, we worried it was going to lie to you. Here it is, the sneaky thing:

DO NOT TRUST THIS CHART: EMAIL FUNDRAISING RESPONSE RATE BY DAY OF WEEK



In cases where we simply didn't have enough data reported to provide a meaningful average, we refrained from reporting results that could be misleading. This comes up most frequently in breakdowns by sector or group size – which is why several charts do not show results for one sector, or for Small groups.

For more details on our study methodology, see page 47 .

Just the facts, ma'am

It's really hard for a bunch of consultants, but we've tried not to interpret and speculate unless we felt the data and our experience allowed it. The rest of this study is less about the why and more about the *what* – what nonprofits did in 2013, what supporters did in response, and what changes occurred in online fundraising and advocacy. We think it's a pretty solid, reliable, and useful snapshot of the state of our industry. Hope you do too.



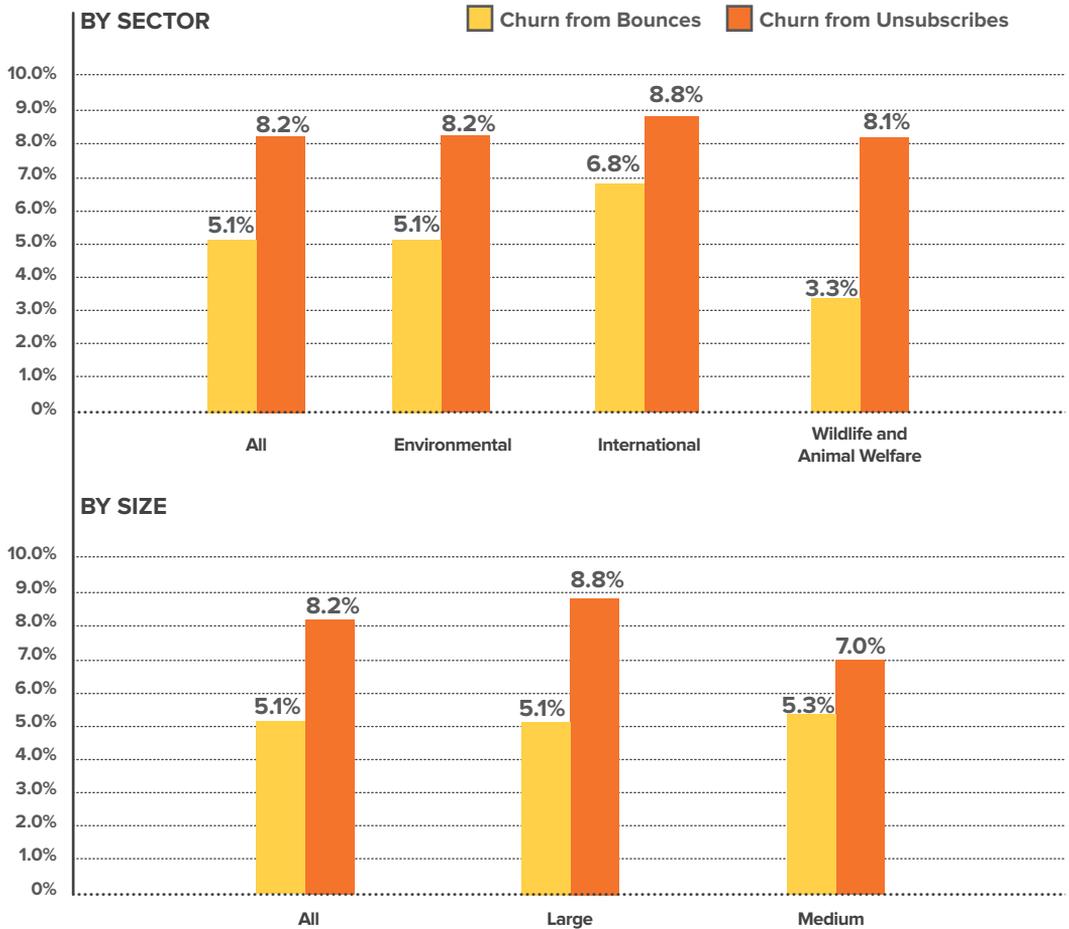


Email Messaging

TL;DR (KEY FINDINGS)

1. **Email list size** for study participants grew by 14% in 2013. Small groups saw the highest rate of list growth at 26%.
2. **Open rates** were consistent across sectors and types of messaging with a 13% overall open rate. This is a decline of 4% overall from 2012.
3. **Click-through rates** for email fundraising messages were down 13% from 2012, driven by drops in Rights and Environmental sectors. Email advocacy click-through rates were down 17% overall.
4. **Response rates** were driven down by lower open and click-through rates, averaging 0.07% for fundraising messages. Advocacy message response rates averaged 2%, a 25% drop from 2012. Environmental groups stood out with a 4.2% response rate for advocacy messages.

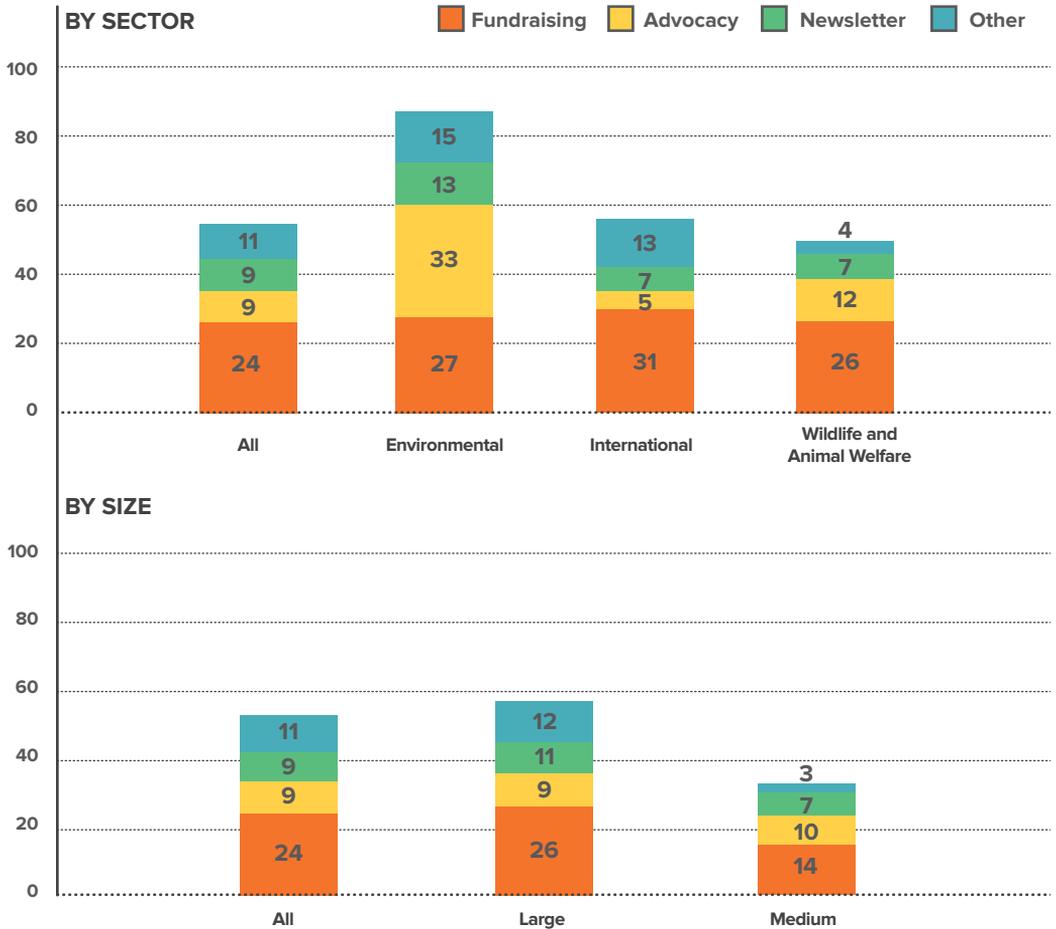
EMAIL LIST CHURN



Due to a small sample size, we did not calculate email list churn for Rights organizations or Small organizations.

For more on churn rates, see page 7.

EMAIL VOLUME: MESSAGES PER YEAR PER SUBSCRIBER

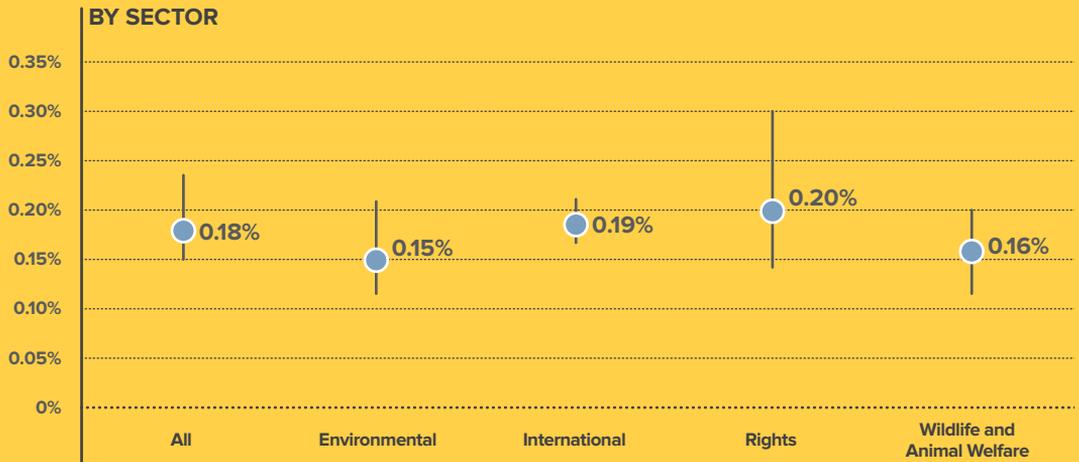


Due to a small sample size, we did not calculate messages per subscriber for Rights organizations or Small organizations.

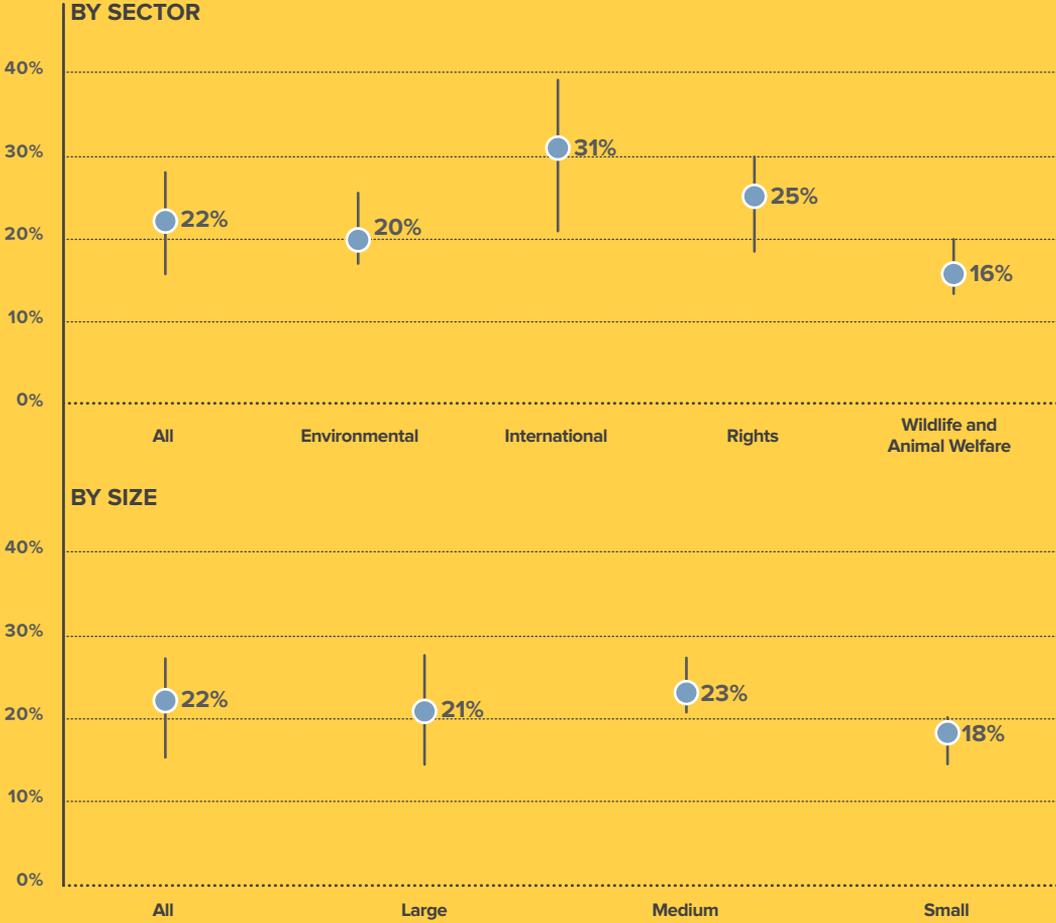
Environmental groups sent more advocacy messages than fundraising messages. That's in contrast to International and Wildlife and Animal Welfare groups, which featured a much higher proportion of fundraising messaging. See page 3 for more on this trend.

Most of the difference in overall volume between Large and Medium groups comes from additional fundraising messages.

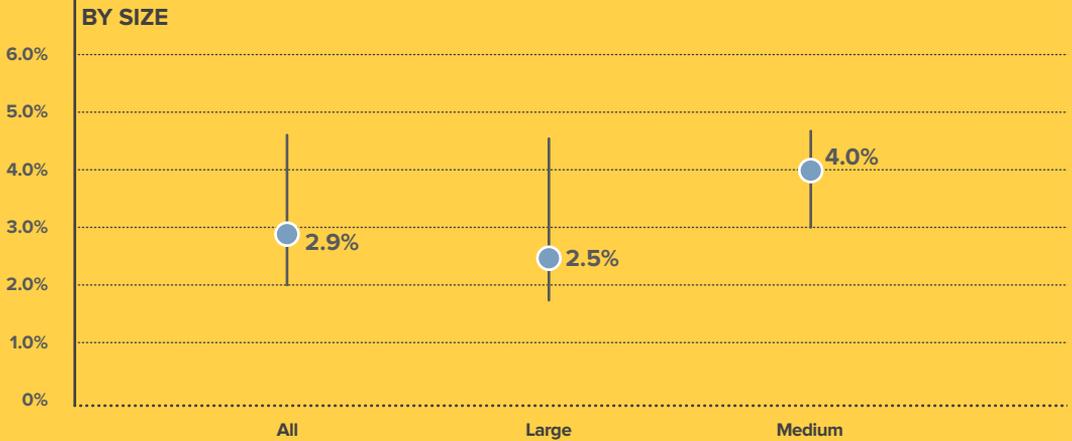
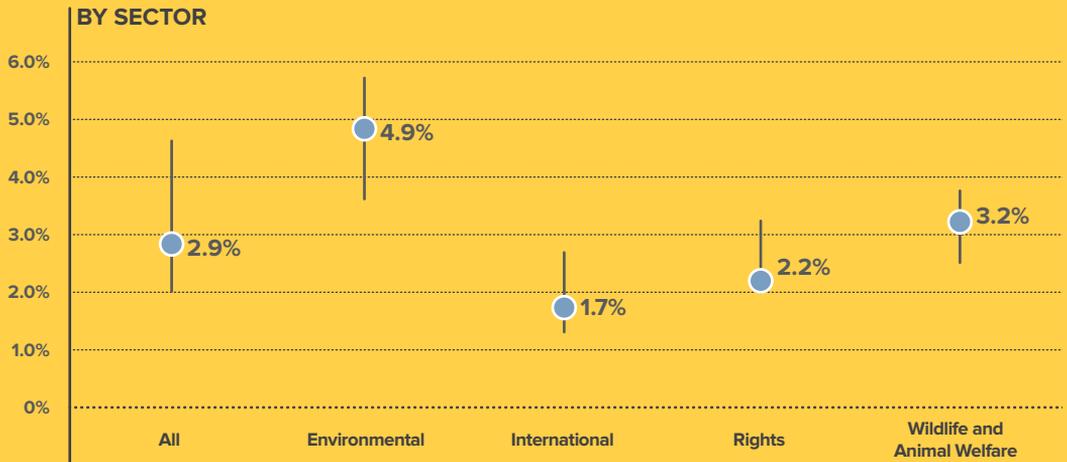
EMAIL UNSUBSCRIBE RATES



EMAIL FUNDRAISING PAGE COMPLETION RATES

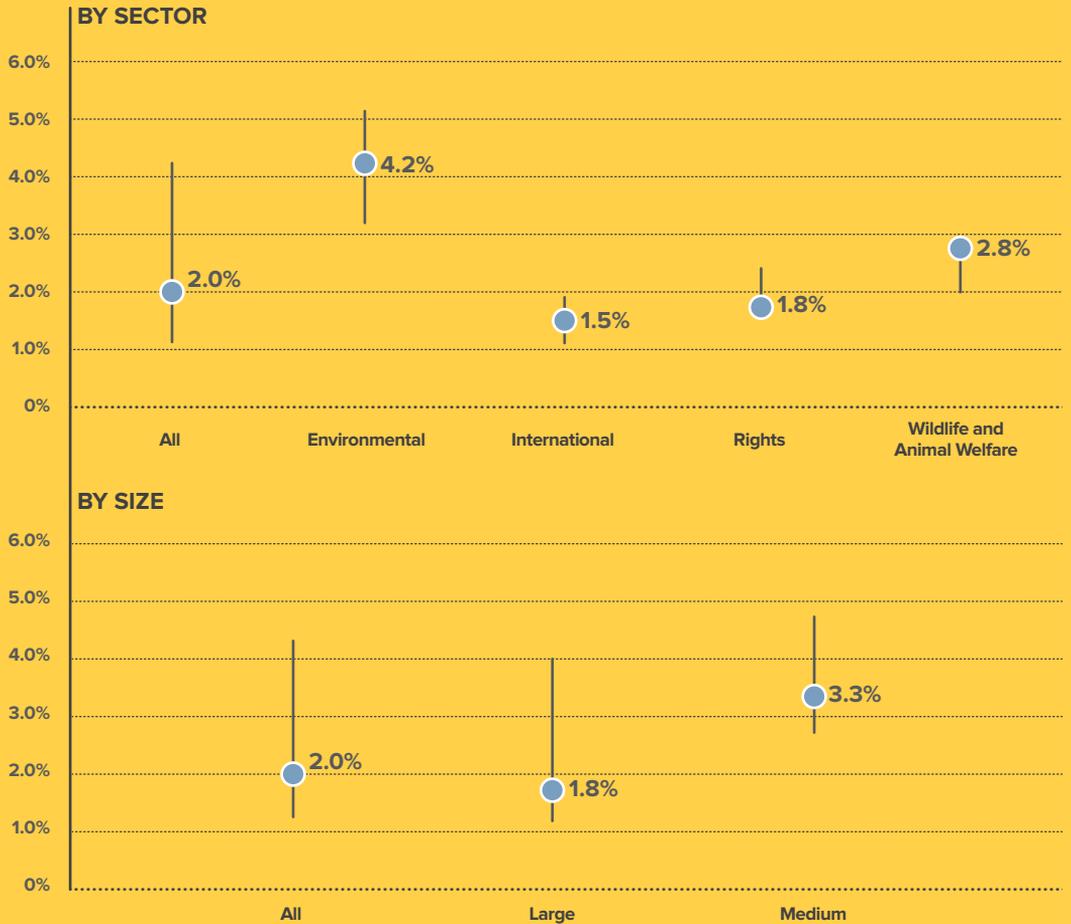


EMAIL ADVOCACY CLICK-THROUGH RATES



Due to a small sample size, we did not calculate email advocacy click-through rates for Small organizations.

EMAIL ADVOCACY RESPONSE RATES



Due to a small sample size, we did not calculate email advocacy response rates for Small organizations.

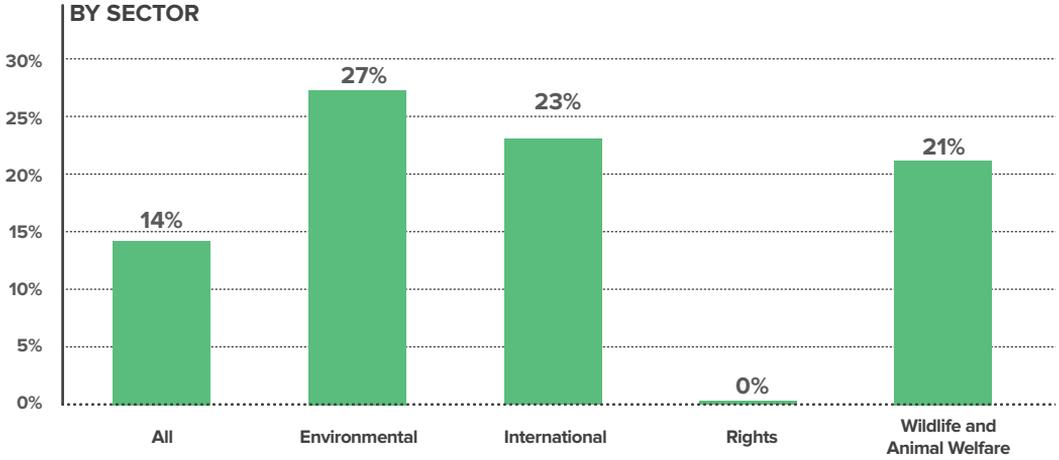


Fundraising

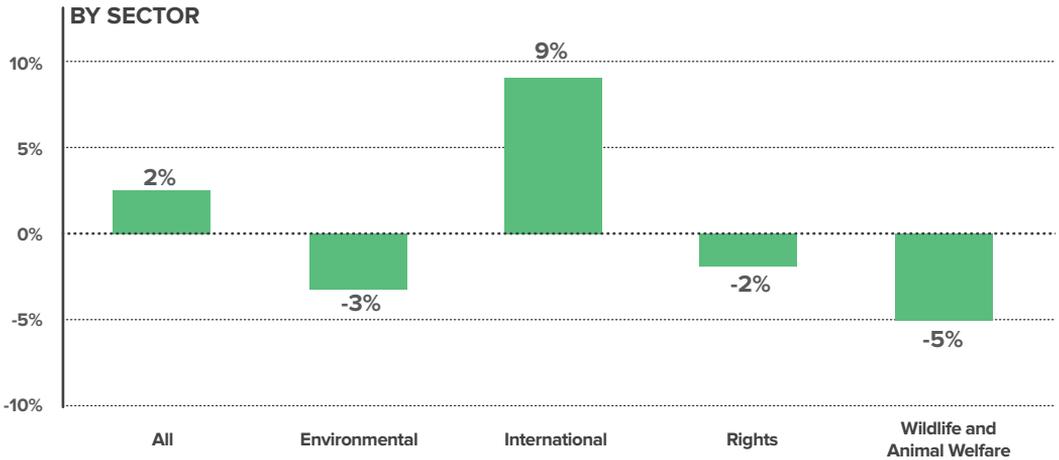
TL;DR (KEY FINDINGS)

1. **Online revenue** increased by 14% in 2013, with the largest gains in the International and Wildlife and Animal Welfare sectors. Rights groups saw little change from 2012.
2. The **number of online gifts** was also up 14% from last year, with large increases in every sector except for Rights.
3. **Average revenue per 1,000 fundraising messages** delivered was \$17. To put it another way, nonprofits received 1.7 cents for every fundraising message delivered. International groups were an outlier on this metric, raising \$59 per 1,000 fundraising messages.
4. **Monthly giving** accounted for 16% of all online revenue in 2013. Monthly revenue grew much faster than one-time giving in 2013, with an overall growth rate of 25%. Only International groups bucked this trend, with one-time gift growth outpacing monthly.
5. **Average gift** grew by 2% overall, but fluctuated significantly by sector. Only International groups saw any increase in average gifts – at 9% – while all other sectors saw modest declines.

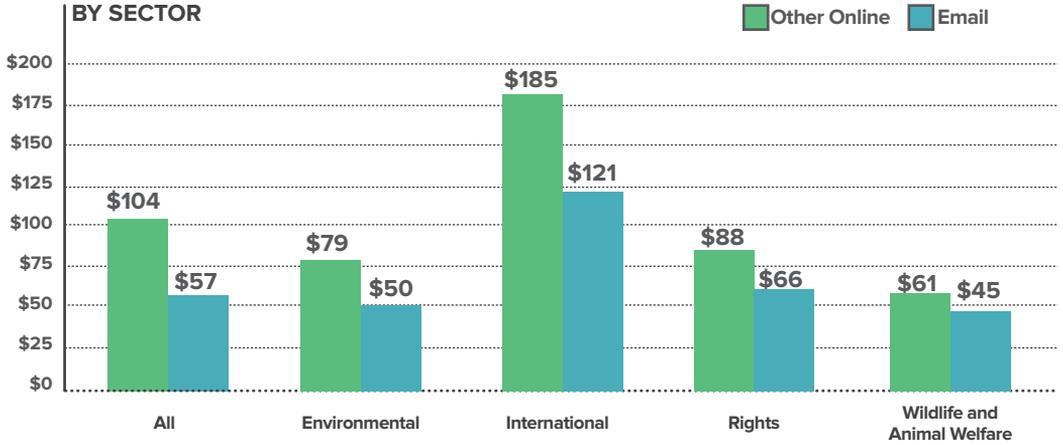
CHANGE IN NUMBER OF ONLINE GIFTS FROM 2012 TO 2013



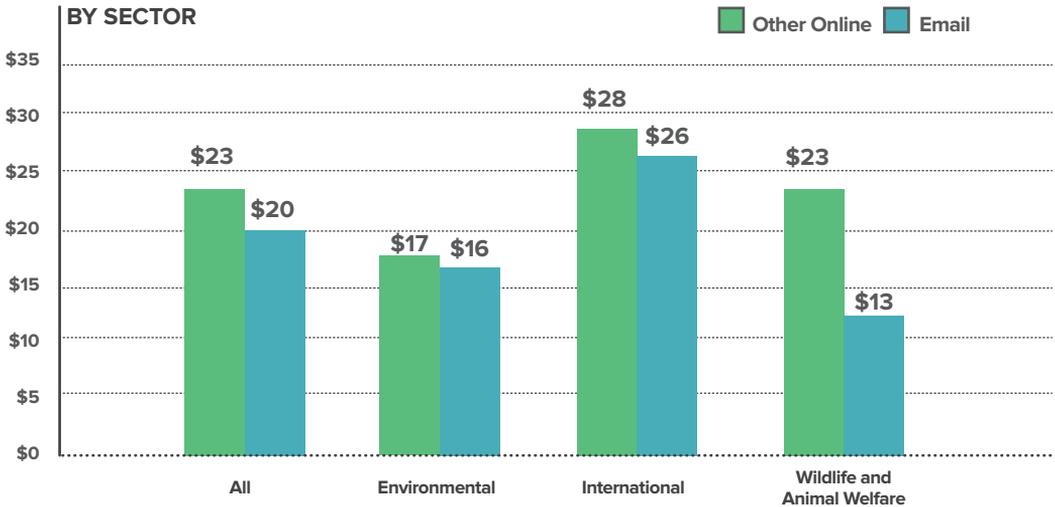
CHANGE IN AVERAGE ONLINE GIFT SIZE FROM 2012 TO 2013



AVERAGE ONE-TIME GIFT SIZE: EMAIL VS. OTHER ONLINE



AVERAGE MONTHLY GIFT SIZE: EMAIL VS. OTHER ONLINE



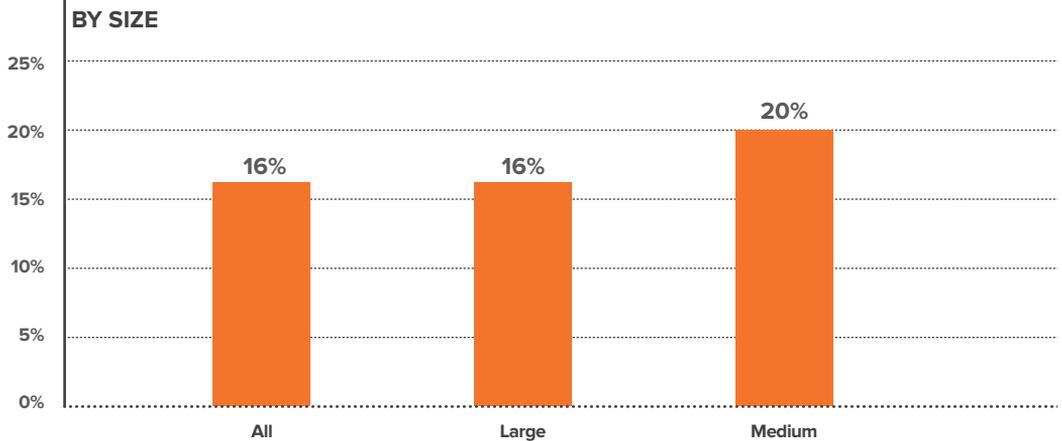
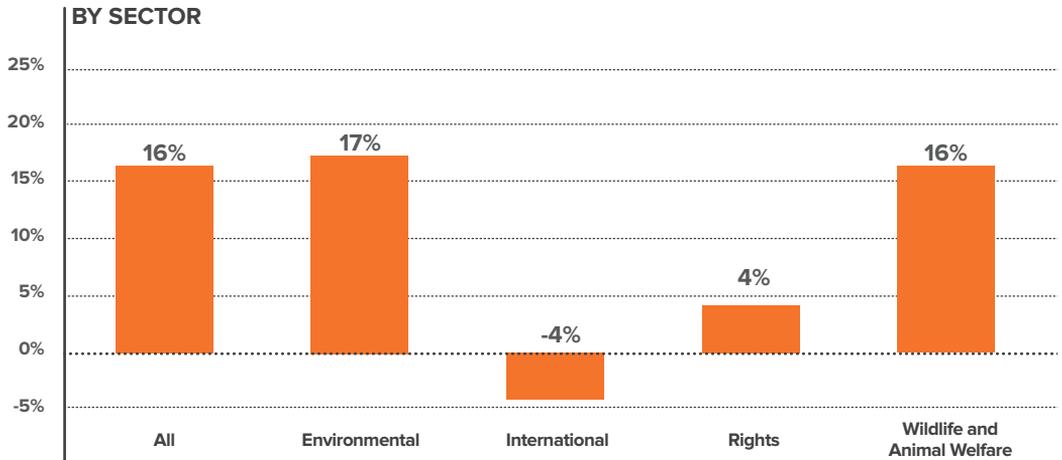
Due to a small sample size, we did not calculate average monthly gift size for Rights organizations.

EMAIL REVENUE PER 1,000 FUNDRAISING EMAILS DELIVERED



Due to a small sample size, we did not calculate email revenue for Small organizations.

CHANGE IN NUMBER OF WEBSITE VISITORS PER MONTH FROM 2012 TO 2013



Due to a small sample size, we did not calculate change in website visitors for Small organizations.

WEBSITE DONATION CONVERSION RATE



Due to a small sample size, we did not calculate website donation conversion rate for Small organizations.

Website donation conversion rate is the percentage of visitors to an organization's website who make a donation. This includes donations to any form made by visitors from any traffic source (email, paid ads, organic search, etc.).



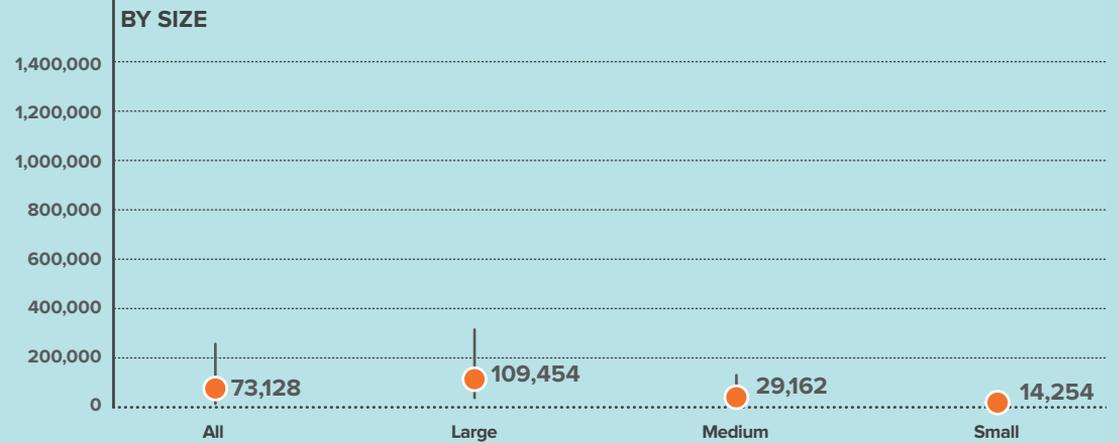
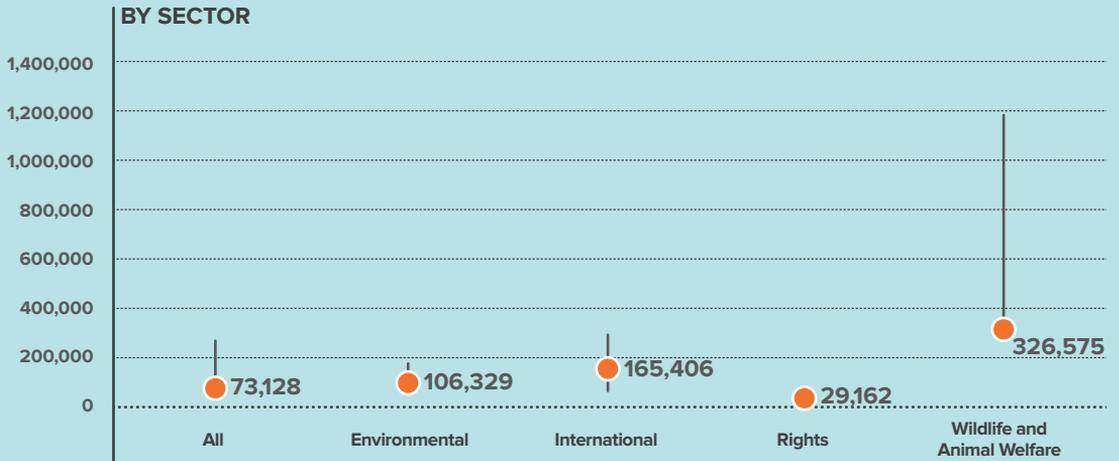
Social Media

TL;DR (KEY FINDINGS)

1. **Social media audience sizes** remain significantly smaller than email list sizes. For every 1,000 email subscribers, study participants had an average of 199 Facebook fans and 110 Twitter followers.
2. **Growth in social media audiences** far outpaces that of email. Where email list sizes grew by 14% in 2013, Facebook and Twitter audiences grew by 37% and 46% respectively.
3. **Post frequency** is relatively consistent among groups of every size and sector on Facebook, though there is more variance on Twitter. Nonprofits post on Facebook an average of 1.2 times per day, and tweet 5.3 times per day.

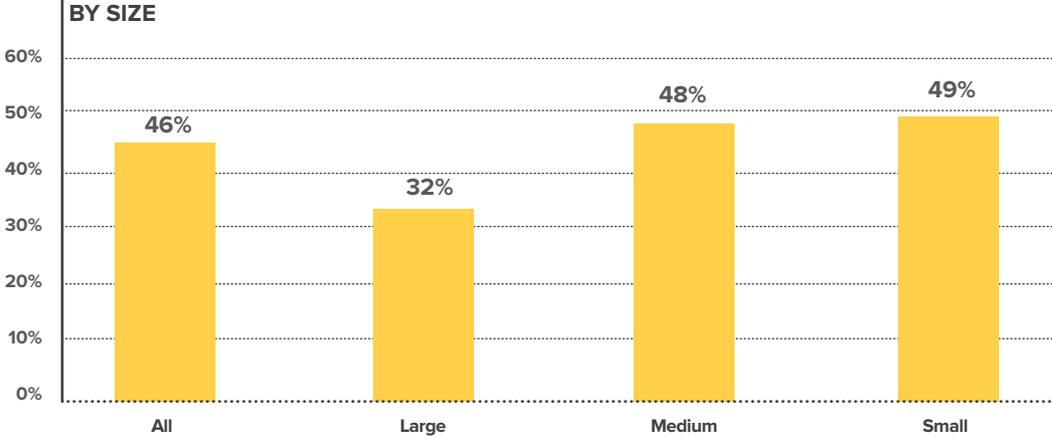
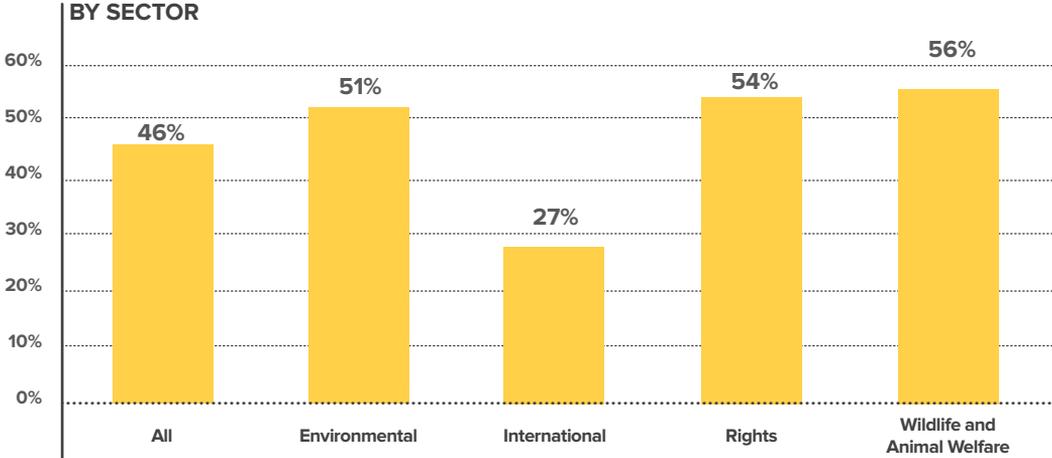
A note on social media data: Charts on pages 39 through 43 divide organizations by their number of Facebook fans or Twitter followers, not by email list size (unless noted). An organization listed as Large earlier in the report may not fall in the same category in this section of the study. Pay close attention to chart labels, especially where groups are broken down by size.

FACEBOOK PAGE FANS



This chart groups organizations by their email list size.

TWITTER FOLLOWER GROWTH



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 online action. For the purposes of this study, advocacy email does not include higher-bar actions like making a phone call or attending an event, largely because tracking offline response is inconsistent across organizations. 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. “Delivered” email messages may land in a user’s inbox, spam folder, promotions tab, or custom folder.

FANS, FACEBOOK

People who “like” a nonprofit’s Facebook Fan page.

FOLLOWERS, TWITTER

People who “follow” a nonprofit’s Twitter account.

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.

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 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.

UNSUBSCRIBE RATE

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

WEBSITE VISITORS PER MONTH

The number of monthly unique visitors to a participant’s main website.

WEBSITE REVENUE PER VISITOR

Calculated as the total revenue from one-time online gifts, plus the value of initial monthly gifts, divided by the total number of website visitors for the year. Depending on retention, the long-term value of monthly gifts may be substantially higher.

WEBSITE DONATION CONVERSION RATE

Calculated from the number of donations to a participant’s website, including donations from all traffic sources (email, paid ads, organic, search, etc), divided by the number of unique website visitors.

WEBSITE DONATION PAGE CONVERSION RATE

Calculated from the number of donations to a participant’s main donation page, divided by the number of unique pageviews of that page. We only included data for the one-time donation page, if a separate donation page existed for monthly gifts.



Hey.

Thanks for making it through the whole study! You even read the methodology section! We think that makes you pretty cool. Like, dog-wearing-sunglasses-cool. So here's a picture of one, just for you.



THANK YOU TO OUR NONPROFIT STUDY PARTNERS



Memorial Sloan Kettering Cancer Center™



Audubon



Partners
In Health



Smithsonian



IFAW

International Fund for Animal Welfare



LEAGUE OF
WOMEN VOTERS®



FREEDOM
TO MARRY



OXFAM
America



AMERICAN
LUNG
ASSOCIATION®

AARP®
Real Possibilities



PBS

RedRover
Bringing Animals from Crisis to Care



THE OFFICIAL SPONSOR OF BIRTHDAYS.®

Union of
Concerned Scientists
Science for a Healthy Planet and Safer World

FAMILIESUSA
THE VOICE FOR HEALTH CARE CONSUMERS

unicef
united states fund



SIERRA
CLUB
FOUNDED 1892



FEEDING
AMERICA



NOKID
HUNGRY®
SHARE OUR STRENGTH

ALASKA
WILDERNESS
LEAGUE



rails-to-trails



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

ENVIRONMENTAL

- Alaska Wilderness League
www.alaskawild.org
- Audubon
www.audubon.org
- Environmental Working Group
www.ewg.org
- Food & Water Watch
www.foodandwaterwatch.org
- Golden Gate National Parks Conservancy
www.parksconservancy.org
- Greenpeace
www.greenpeace.org/usa/en/
- League of Conservation Voters
www.lcv.org
- National Parks Conservation Association
www.npca.org
- The Nature Conservancy
www.nature.org
- Oceana
www.oceana.org
- Rails-to-Trails Conservancy
www.railstotrails.org
- Save Our Environment
www.saveourevironment.org
- Sierra Club
www.sierraclub.org
- Union of Concerned Scientists
www.ucsusa.org

INTERNATIONAL

- CARE
www.care.org
- Enough Project
www.enoughproject.org
- International Rescue Committee
www.rescue.org
- Mercy Corps
www.mercycorps.org
- ONE
www.one.org
- Operation Smile
www.operationssmile.org
- Oxfam America
www.oxfamamerica.org
- Partners In Health
www.pih.org
- Pathfinder
www.pathfinder.org
- U.S. Fund for UNICEF
www.unicefusa.org

RIGHTS

- Amnesty International USA
www.amnestyusa.org
- Communications Workers of America
www.cwa-union.org
- Freedom to Marry
www.freedomtomarry.org
- Human Rights Campaign
www.hrc.org
- Human Rights Watch
www.hrw.org
- League of Women Voters
www.lwv.org
- Planned Parenthood Federation of America, Inc.
www.plannedparenthood.org
- Planned Parenthood Action Fund, Inc.
www.plannedparenthoodaction.org

WILDLIFE AND ANIMAL WELFARE

- 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
- People for the Ethical Treatment of Animals
www.peta.org
- RedRover
www.redrover.org
- Wildlife Conservation Society
www.wcs.org

OTHER

- AARP
www.aarp.org
- AARP Foundation
www.aarp.org/aarp-foundation/
- American Cancer Society, Inc.
www.cancer.org
- American Heart Association
www.heart.org
- American Lung Association
www.lung.org
- Boston Children's Hospital
www.childrenshospital.org
- Drug Policy Alliance
www.drugpolicy.org
- Families USA
www.familiesusa.org
- Feeding America
www.feedingamerica.org
- Memorial Sloan Kettering
www.mskcc.org
- National Women's Law Center
www.nwlc.org
- PBS
www.pbs.org
- PeopleForBikes
www.peopleforbikes.org
- Share Our Strength
www.nokidhungry.org
- Smithsonian Institution
www.si.edu

Metrics for Online Advocacy, Fundraising, and Newsletter Emails

Rate	Type of Message	All Sectors	Environmental	International	Rights	Wildlife and Animal Welfare
Open Rate	Advocacy	13%	15%	12%	13%	12%
	Fundraising	12%	13%	12%	11%	12%
	Newsletter	13%	15%	12%	12%	11%
Click-Through Rate	Advocacy	2.9%	4.9%	1.7%	2.2%	3.2%
	Fundraising	0.45%	0.46%	0.39%	0.44%	0.59%
	Newsletter	1.8%	2.8%	0.6%	1.7%	1.8%
Page Completion Rate	Advocacy	83%	87%	78%	84%	68%
	Fundraising	22%	20%	31%	25%	16%
Response Rate	Advocacy	2.0%	4.2%	1.5%	1.8%	2.8%
	Fundraising	0.07%	0.08%	0.08%	0.05%	0.07%
Unsubscribe Rate	Advocacy	0.16%	0.14%	0.15%	0.13%	0.17%
	Fundraising	0.18%	0.18%	0.20%	0.17%	0.15%
	Newsletter	0.16%	0.13%	0.18%	0.13%	0.16%
Average Gift - One-time		\$68	\$57	\$191	\$91	\$55
Average Gift - Monthly		\$21	\$16	\$30	\$22	\$20

For every 1,000 Email subscribers, nonprofits have...



199 Facebook Fans



110 Twitter Followers



13 Mobile Subscribers



And that's all I have to say about that.