

2010 Nonprofit Social Network Benchmark Report (2nd Annual)

*An industry-wide look at the adoption of social networks
within the nonprofit sector*

NTEN Webinar

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Survey Sponsors



Speakers

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Survey Methodology

- **Instrument:** A 50-question online survey was fielded from February 3 to March 15, 2010, including 1,173 respondents representing nonprofit professionals from small, medium and large nonprofits, and all major segments of the industry
- **Margin of error:** $\pm 2.86\%$ with 95% confidence

Part 1

TERMINOLOGY

Terms Used in Presentation

- **FTE:** Full-time equivalent; one full-time staff employee
- **Commercial Social Network:** Social networking community built on a commercial platform with an existing audience
- **House Social Network:** Social networking community built on a nonprofits own web site. Term derived from direct mail *house* list
- **White Label Social Networking Software:** A programmable social networking platform and database used to build a house social network.
- **Community Size - Commercial Social Network:** Number of fans, friends, subscribers or readers
- **Community Size - House Social Networks:** Number of registered profiles

Part 2

BIG THEMES

Big Themes from Social Networking Report

- Nonprofits increase use of commercial social networks Facebook and Twitter
 - More nonprofits using **Facebook** for first time
 - Nonprofits already on **Facebook** extend their use
 - Average community size on **Facebook** is smaller than in 2009
 - **Twitter** usage up significantly from 2009 and average community size grew dramatically

Big Themes from Social Networking Report

- Other commercial social networks trend flat or down
 - LinkedIn, YouTube usage remain steady
 - Past market leader MySpace drops sharply

Big Themes from Social Networking Report

- Selected nonprofit sectors have *very strong* (higher than average) presence on Facebook
 - International
 - Environment & Animal Welfare
 - Arts & Culture
 - Education

Big Themes from Social Networking Survey

- Staffing for Social Networks
 - Budgets and staff devoted to maintaining social networks are still relatively small
 - 1/4 to 1/2 staff person most commonly allocated to maintaining social networks
 - About half of organizations plan to increase employee staffing, but less for external resources
 - Nonprofits with 2+ staff dedicated to commercial networks report greater value

Big Themes from Social Networking Survey

- Mixed Picture on Fundraising
 - Fundraising reported as second most important role of social networks (after Marketing)
 - Fundraising / Development departments are increasingly involved in managing social networks
 - While more nonprofits are raising money on Facebook, most (78%) raised \$1,000 or less
 - Only 3.5% of organizations raised \$10,000 or more on Facebook

Big Themes from Social Networking Survey

- Mixed Picture on House Social Networks
 - 28% drop in nonprofits using house social networks
 - Groups with house networks say they are valuable
 - Average house network size is 50% higher than the average Facebook community size
 - Fundraising results comparable to commercial social networks
 - No one software platform is dominant

Commercial vs. House Social Networks

Question	Commercial	House
Does your org. have one?	90%	22% (1+ communities)
Primary purpose?	Marketing (92%)	Marketing (57%)
Staff time (last 12 months)?	1/4 to 1/2 FTE (67%)	1/4 to 1/2 FTE (57%)
Ext. resources budget (last 12 months)?	None (59%) \$1-\$10,000 (33%)	None (38%) \$1 - \$10,000 (42%)
# of community members?	Average: 2,440*	Average: 3,520
How old is your community?	1-24 months (87%)*	1-24 months (62%)
Fundraising revenue (last 12 months)?	Not Fundraising (60%) Fundraising - raised \$0 - \$10,000 (39%)*	Not Fundraising (68%) Fundraising - Raised \$0 - \$10,000 (22%)
Revenue from sponsorship, underwriting, advertising (last 12 months)	Not Advertising (99%)* Advertising and raised \$0 - \$10,000 (1%)	Not Advertising (87%) Advertising and raised \$0 - \$10,000 (10%)
Why don't you have one?	Lack of expertise (47%) Insufficient budget (32%)	Insufficient budget (46%) Lack of expertise (46%)

*Facebook

Part 3

A CLOSER LOOK

Commercial Social Networks - Facebook

- Facebook continues to be the most popular commercial social network, with **86%** of nonprofits indicating they have a presence on FB. (*74% last year*)
- Average Facebook community size is **2,440**, down from **5,391** last year
- **86.7%** of nonprofits have been on Facebook for less than 2 years (*94.4% last year*)

Commercial Social Networks - Twitter

- 60% of Nonprofits are on Twitter, up 38% from 2009
- Average Twitter community size is 1,792, up 627% from last year
- 77% of nonprofits have been on Twitter for less than 1 year (94% last year)

Staffing / Budget - Commercial Social Networks

- **85%** of nonprofits committed at least $\frac{1}{4}$ FTE to commercial social networking over last 12 months
- About **half** of nonprofits plan to increase staff commitment over the next 12 months
- Only **4 out of 10** organizations have any budget for external resources for commercial social networks
- Just **8.1%** allocated \$10K or more budget for external resources over the last 12 months

Promoting Social Networks

- Organization's website (**83%**) and email marketing (**76%**) most common outlets used to promote presence on commercial social networks
- Organization events (**54%**) and Twitter (**52%**) play a smaller role in promotion
- For house networks, email marketing (**77%**) and organization website (**75%**) are mainly used to promote constituent participation

Departments Managing Social Networks

- Mostly Communications (**27%**) and Marketing (**20%**) manage commercial social networks
- Fundraising / Development department is increasingly involved (**20%**)
- Information Technology manages only **3%** of communities
- For House Networks, Marketing (**57%**) and Program Delivery (**49%**) have largest management roles

Fundraising from Social Networks

- Fundraising is mostly done on Facebook (**40%**), but **78%** have raised under \$1,000
- Fundraising also reported on Twitter (**12%**), YouTube (**5%**), Change.org (**3%**), MySpace (**3%**)
- **One-third** of nonprofits with house social networks are fundraising (up from one-quarter last year)
- **One-third** of these fundraisers accumulated \$10K or more over the last year

House Social Networks

- **22%** of nonprofits have one or more house social networks (31% last year)
- Average community size is **3,520**, 50% higher than average Facebook network size
- **17%** of nonprofits with house community(s) have two and **5%** have three or more communities
- **93%** of nonprofits with house networks have 10,000 members or less
- **Three-quarters** indicated house networks are valuable

House Social Network Software

- Ning and Drupal (**12%** each) are most popular platforms for house social networks, followed by ThePort (8%)
- Custom software is in use by **23%** of nonprofits to build house social networks
- Wide variety of other vendors (commercial & open source) were reported by almost **half** of respondents

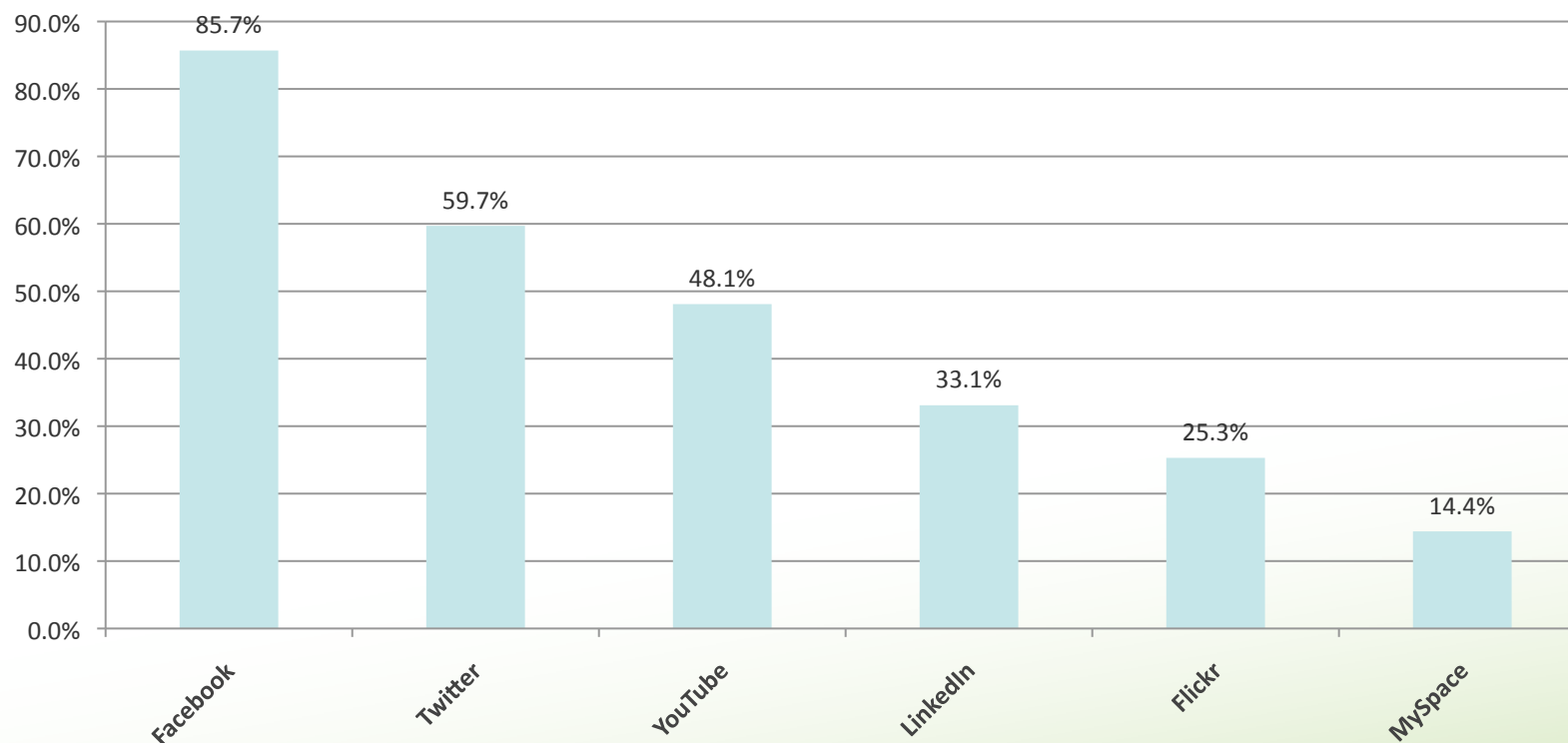
Thanks!

QUESTIONS?

Appendix

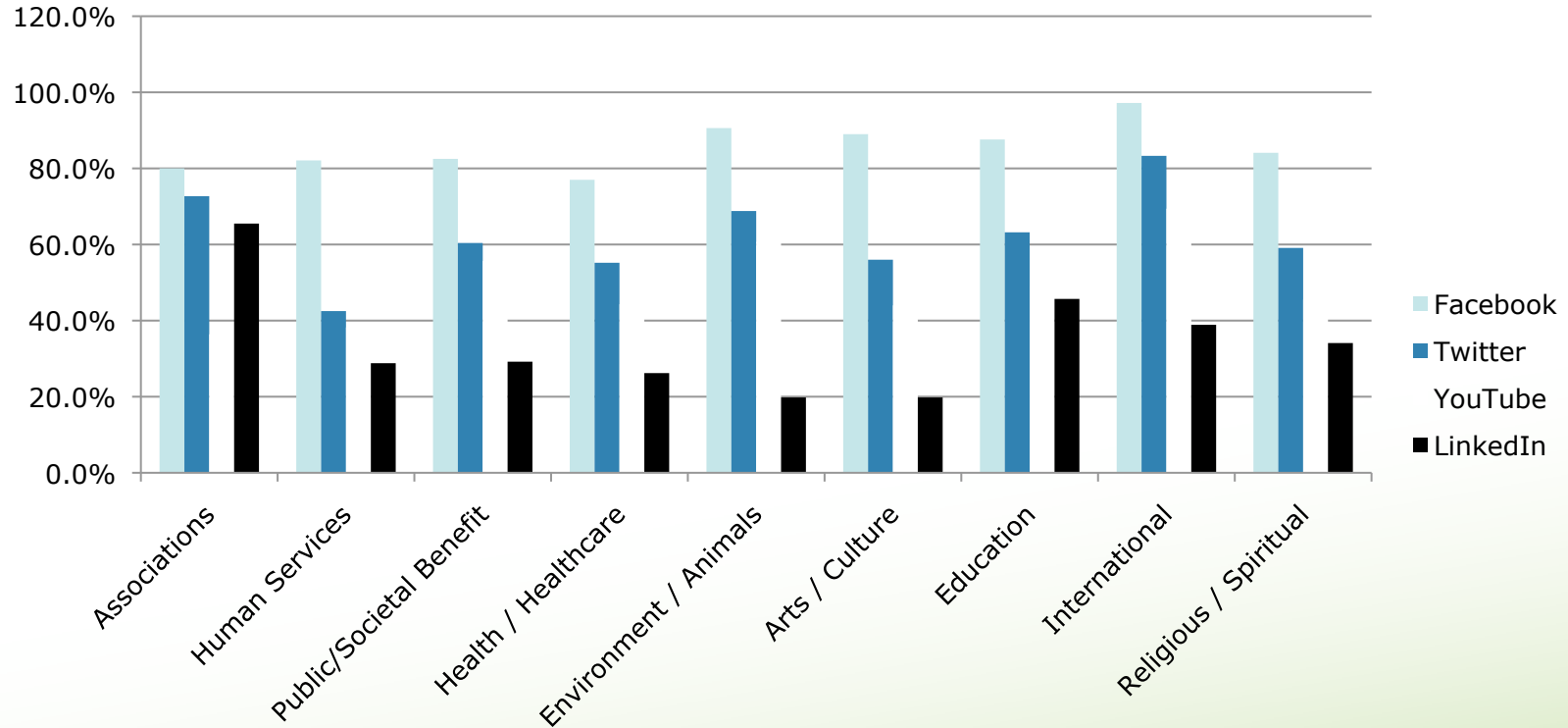
DEEP DIVE ON STATISTICS

Nonprofits on Commercial Social Networks



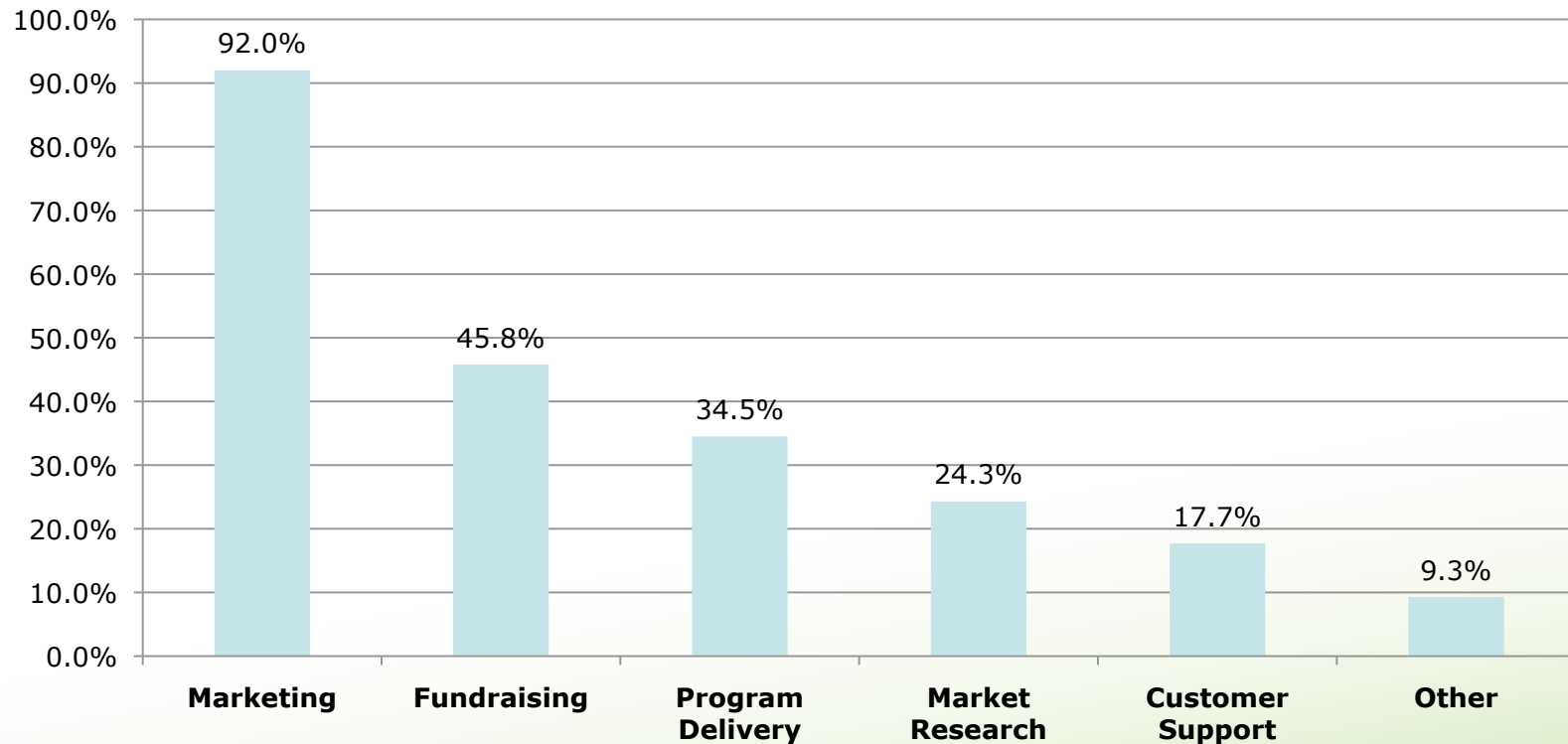
Facebook still leads, but Twitter is gaining fast

Vertical Segments on Commercial Social Networks



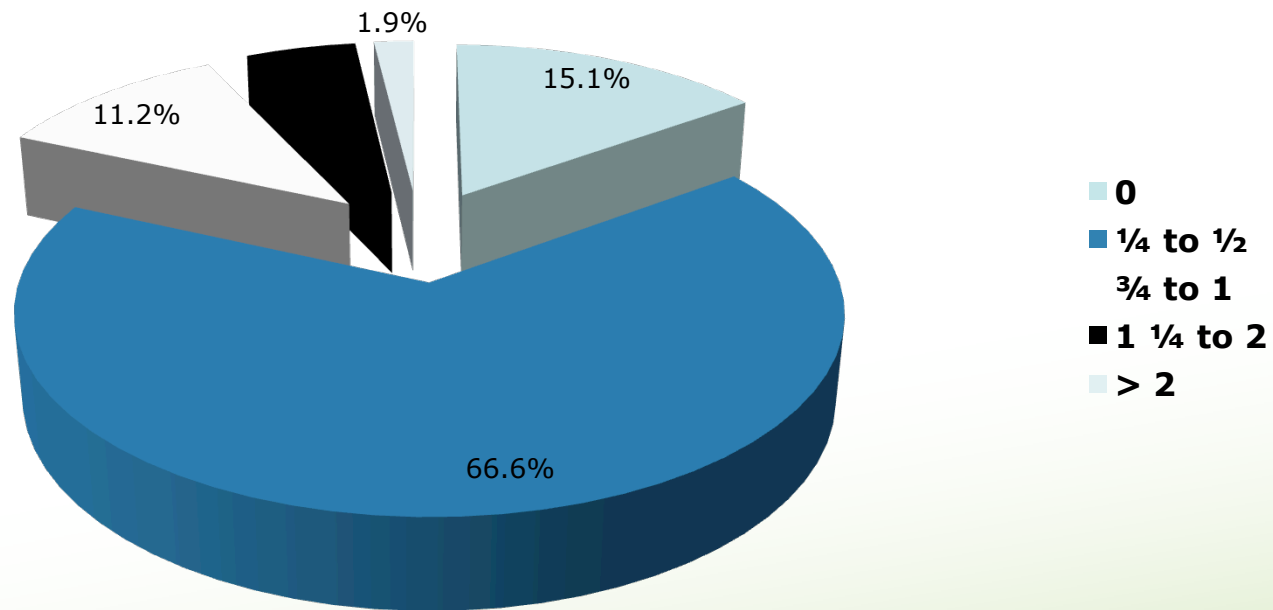
International organizations lead in use of Facebook and Twitter

Role of Commercial Social Networking Community



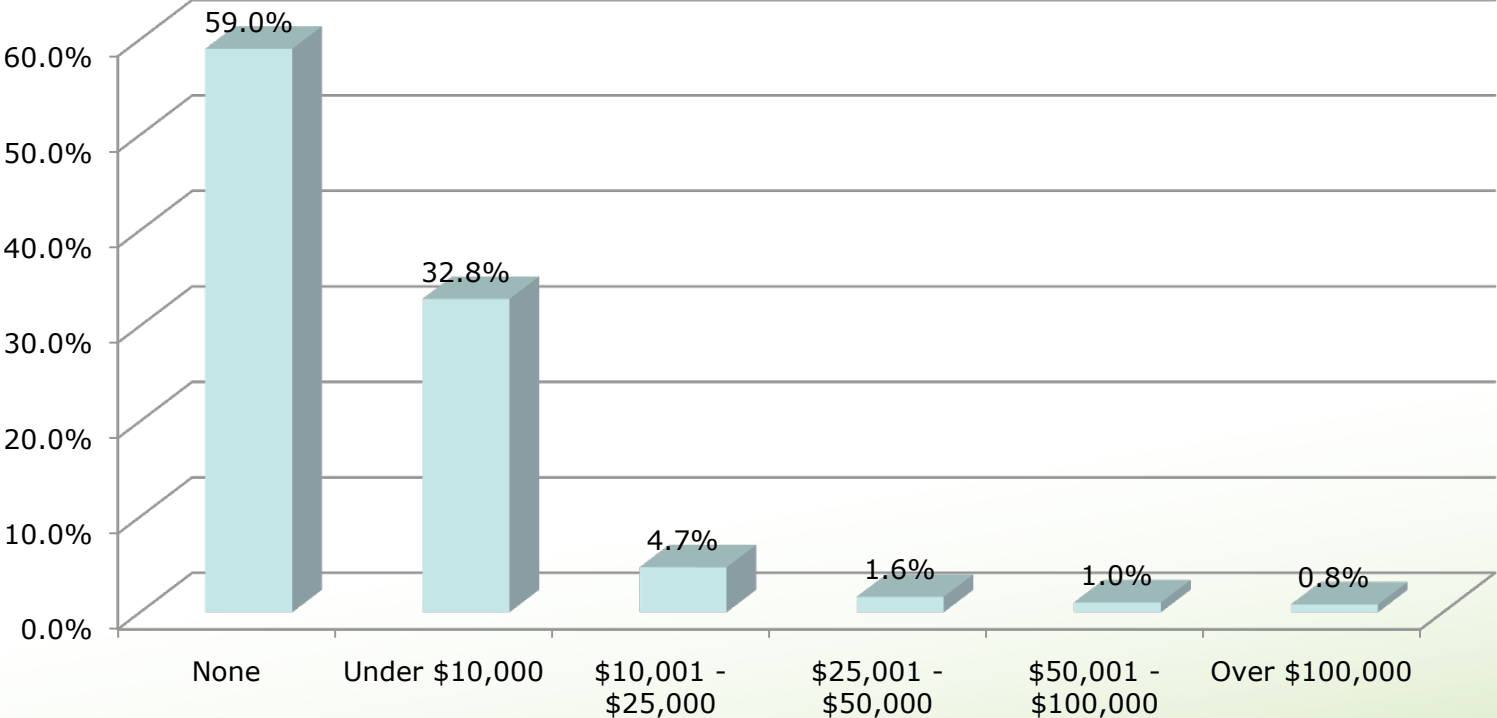
Marketing still leads, but Fundraising now second

Staff Time Allocated to Commercial Social Networks



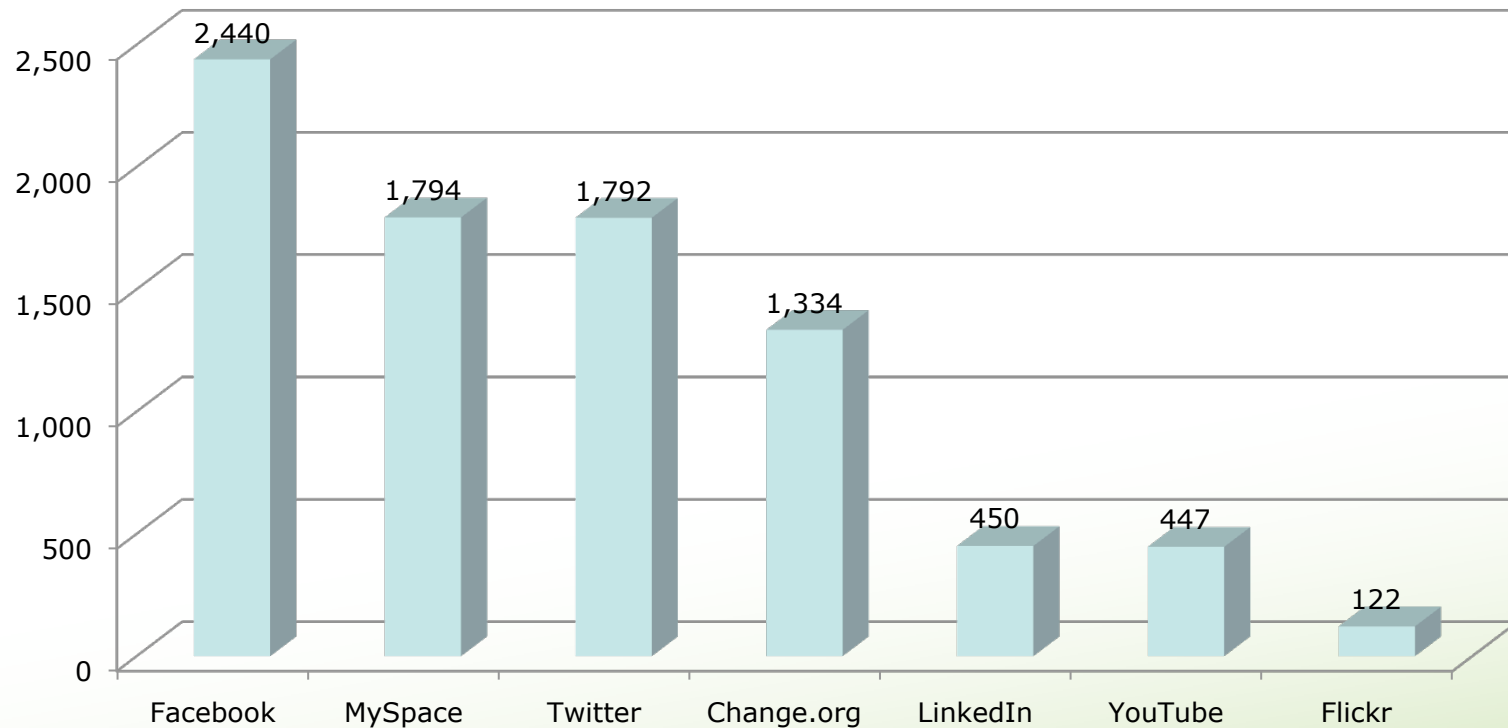
Two thirds of nonprofits allocate $\frac{1}{4}$ to $\frac{1}{2}$ of person

External Resources Allocated to Social Networking



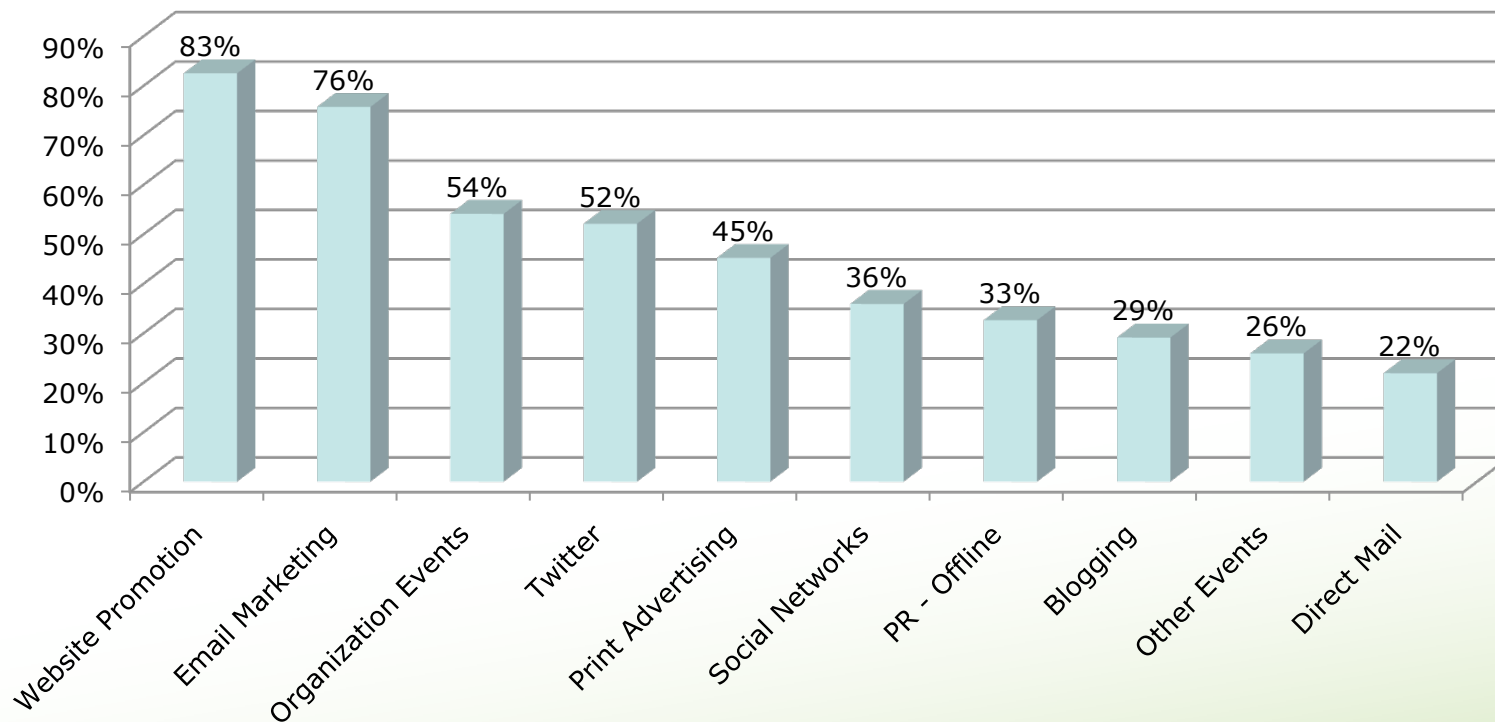
6 of 10 nonprofits don't use external resources

Average Community Size on Commercial Social Networks



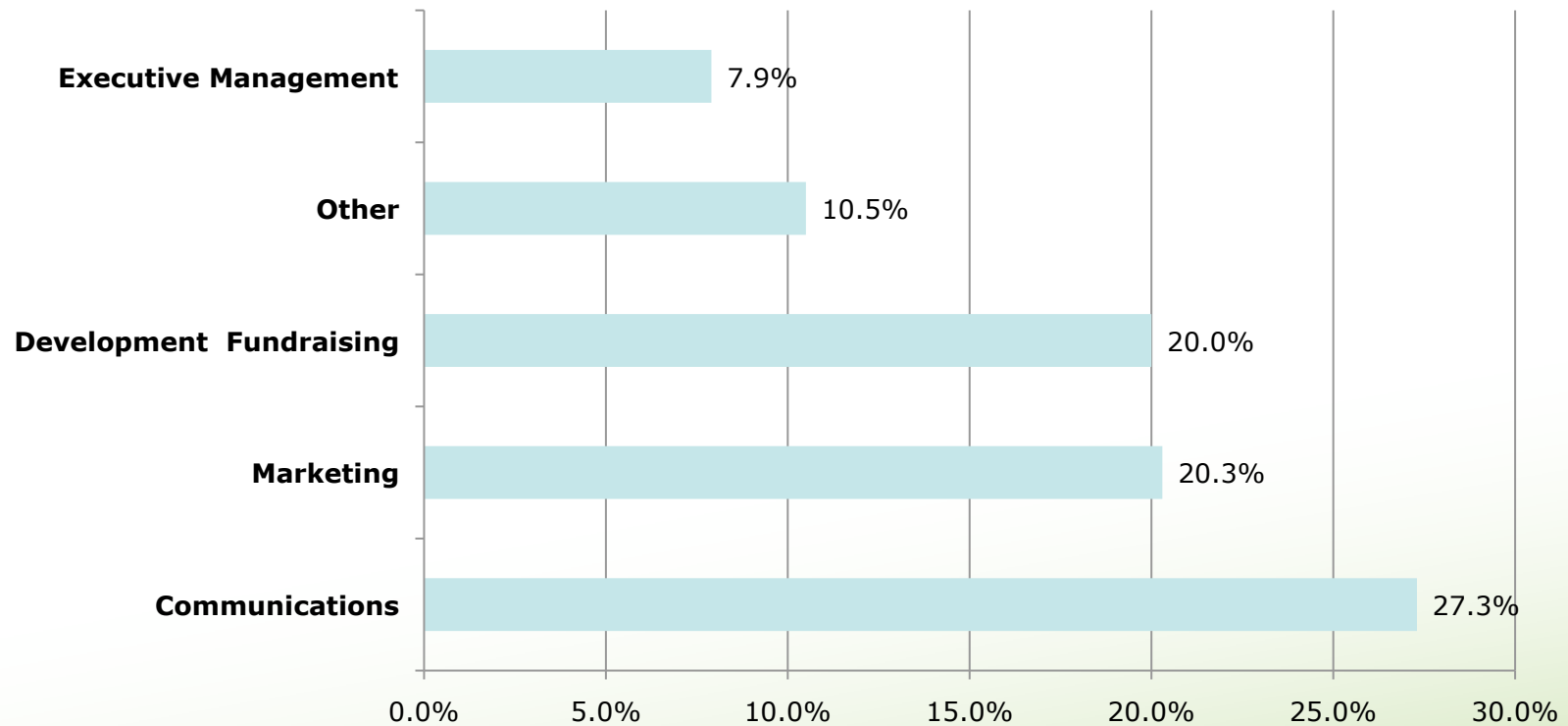
Facebook still leads but Twitter is gaining

Promoting Commercial Social Networks



Website and Email Marketing Used Mostly for Promotion

Dept with Primary Responsibility for Commercial Social Networks



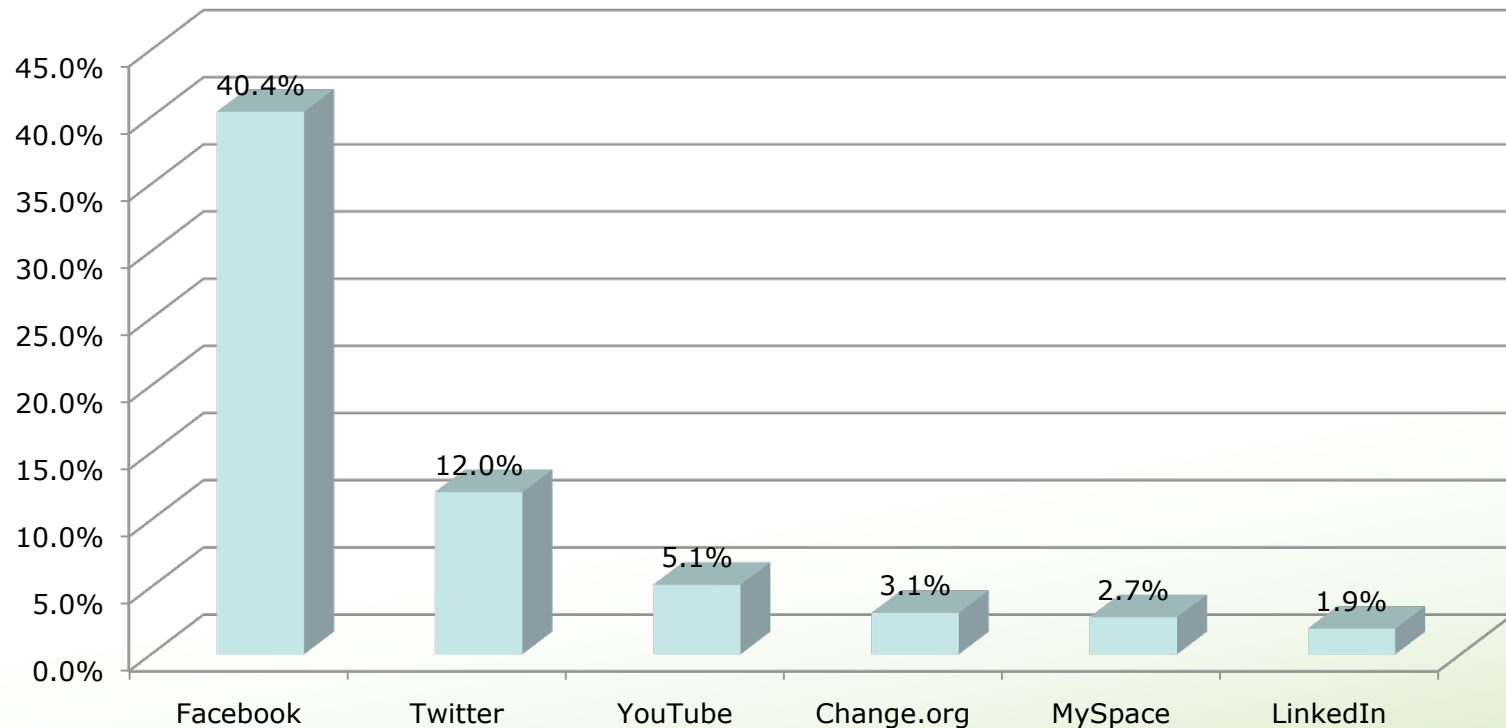
Communications most often manages social networks

Length of Presence on Commercial Social Networks – 2010

	No Presence	1 - 3 months	3 - 6 months	6 - 12 months	12 - 24 months	2-3 years	Over 3 years
Facebook	3.61%	9.7%	15.0%	25.4%	33.1%	11.2%	2.1%
Twitter	21.96%	13.9%	15.1%	26.5%	20.0%	2.5%	0.1%
YouTube	32.02%	8.1%	9.9%	14.9%	21.5%	11.7%	1.8%
LinkedIn	48.30%	9.1%	7.9%	11.1%	17.0%	5.0%	1.6%
Flickr	58.38%	4.0%	4.8%	8.6%	14.9%	7.1%	2.2%
MySpace	74.14%	1.7%	1.1%	3.2%	8.0%	8.8%	3.2%

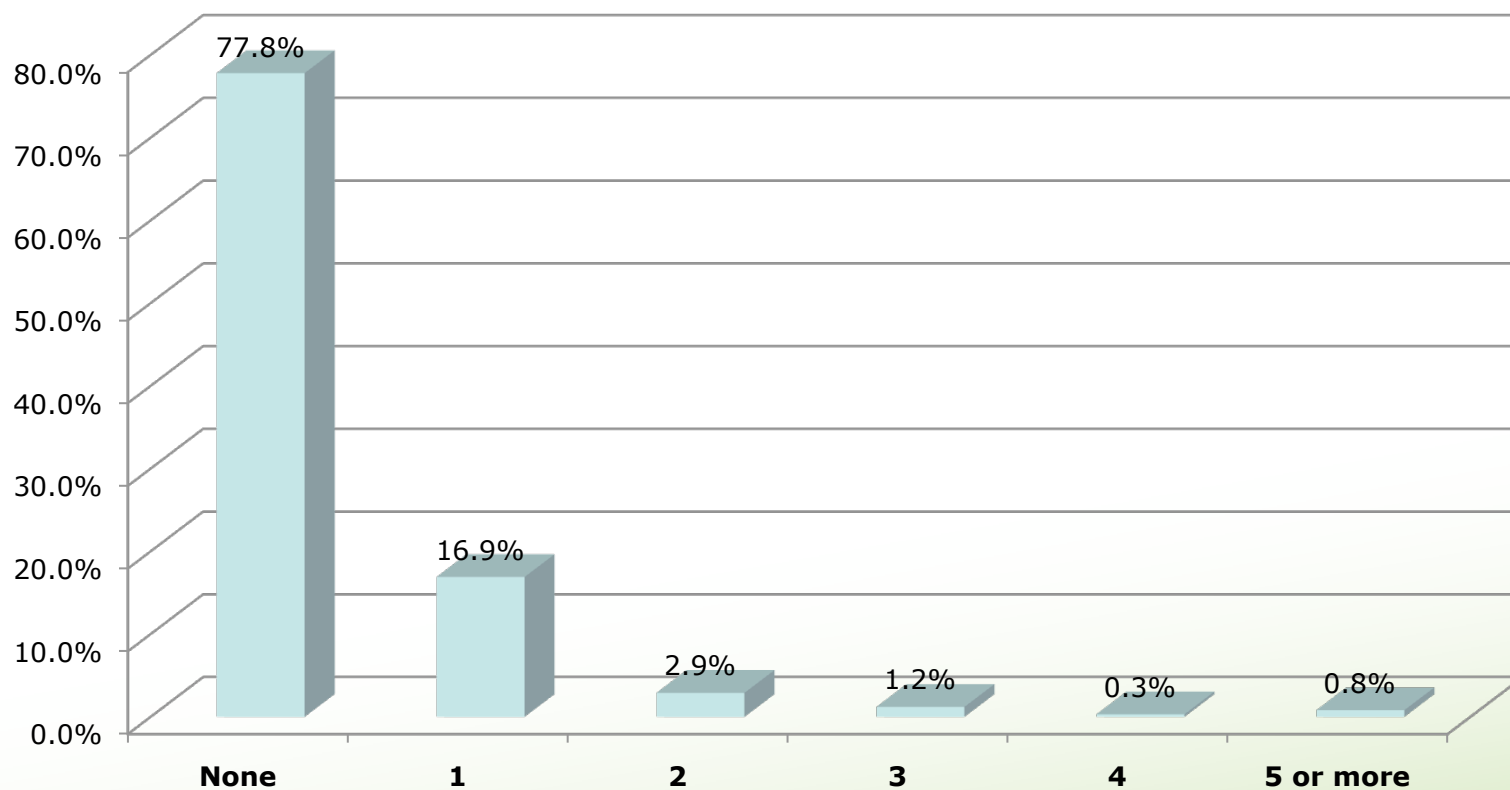
Most communities in use 12 – 24 months

Fundraising on Commercial Social Networks



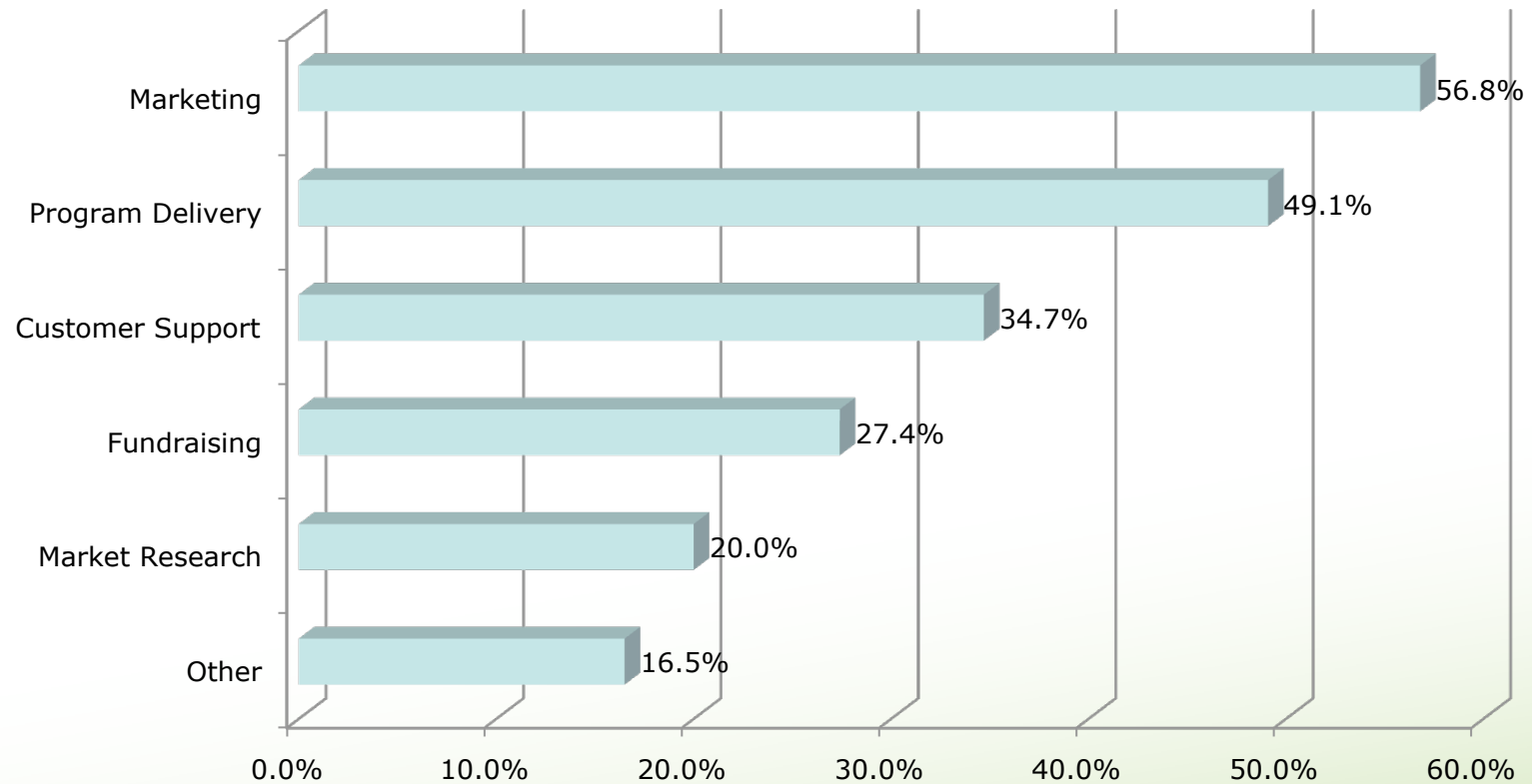
Mostly Facebook is used for fundraising so far

Number of House Social Networks



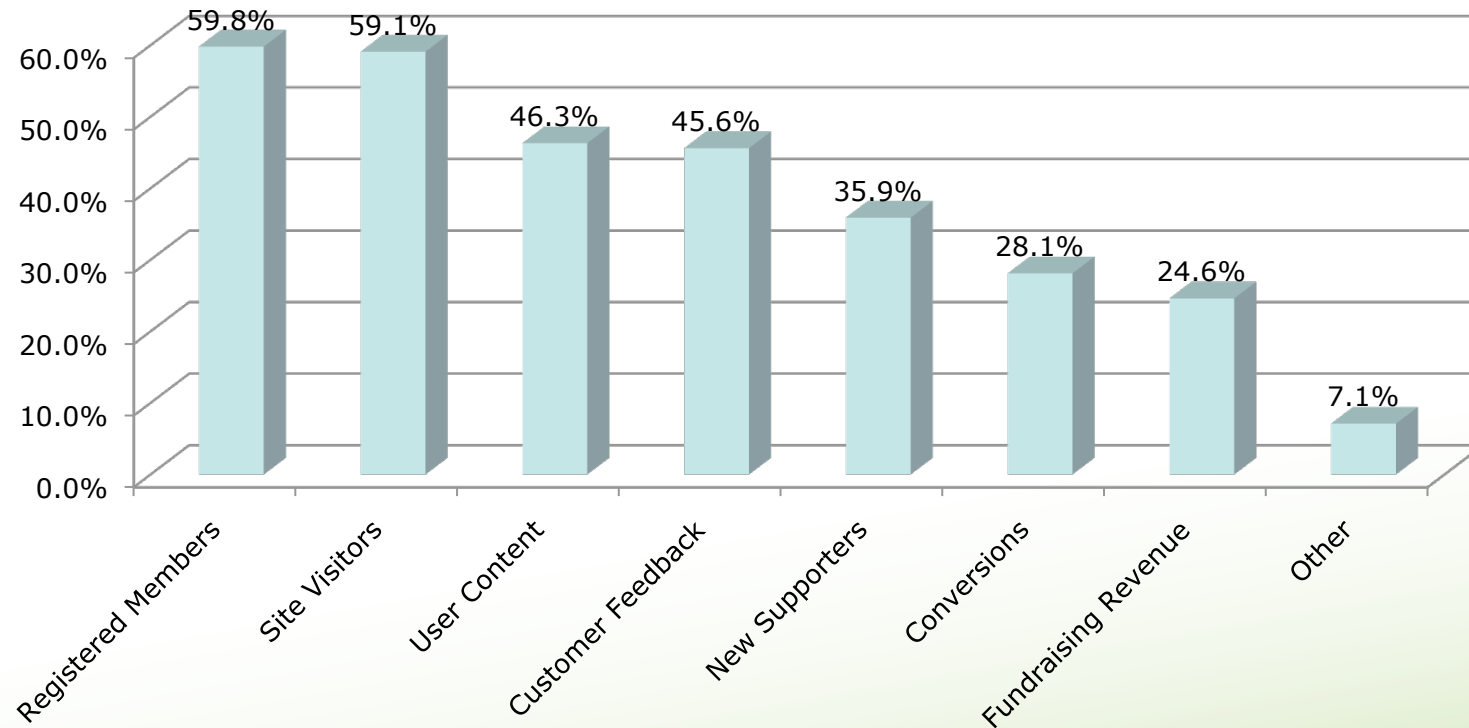
22% of nonprofits have house social networks

Role of House Social Network



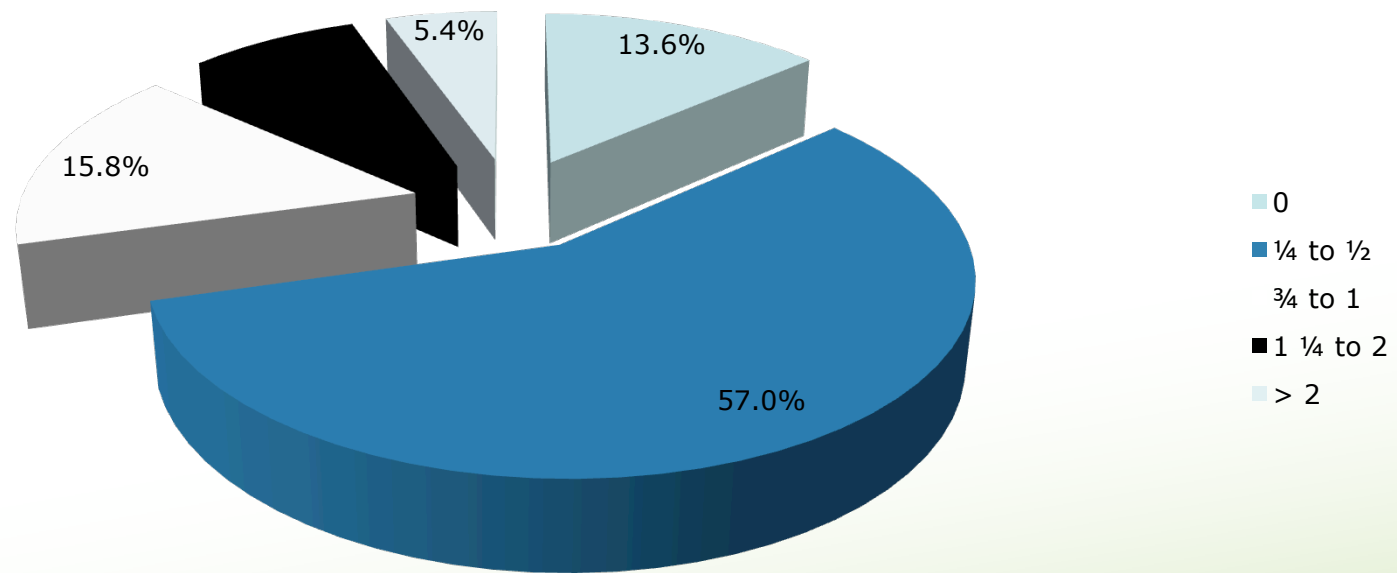
As with commercial social networks, marketing is primary

Metrics to Measure Success of House Social Networks



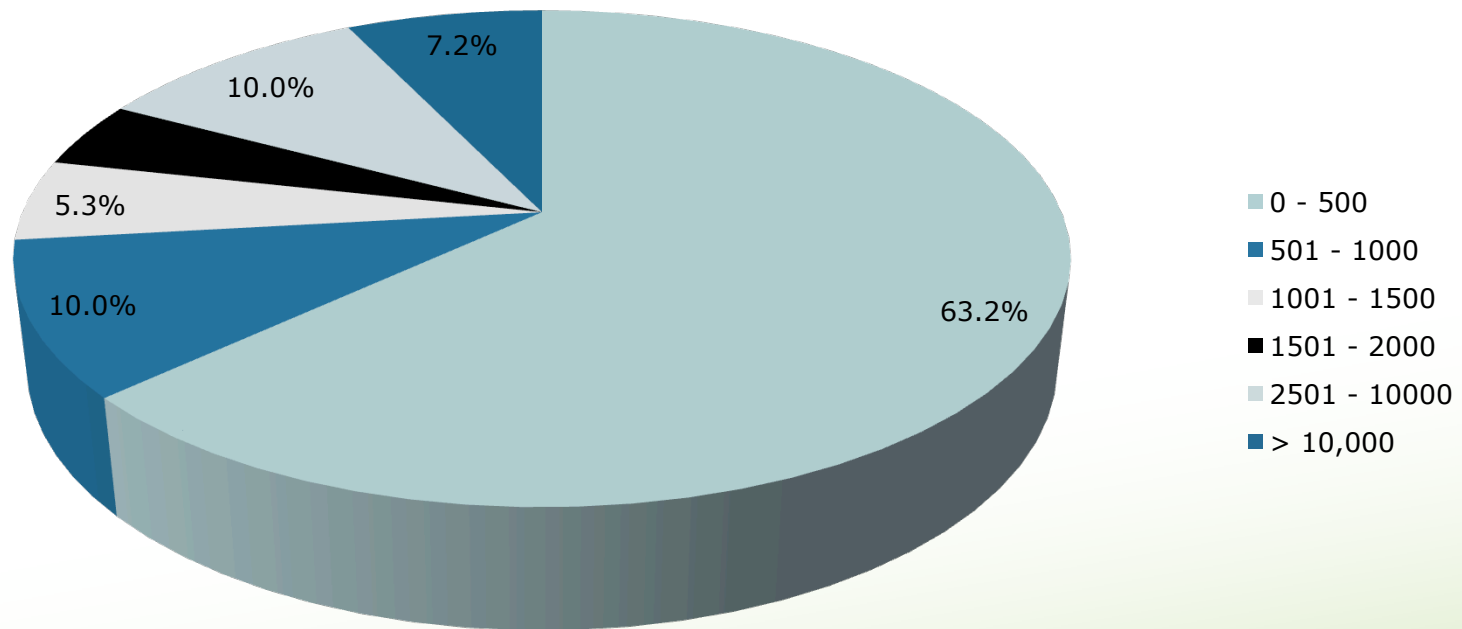
Fundraising used by $\frac{1}{4}$ to measure house network success

Staff Allocated to Working on House Social Networks



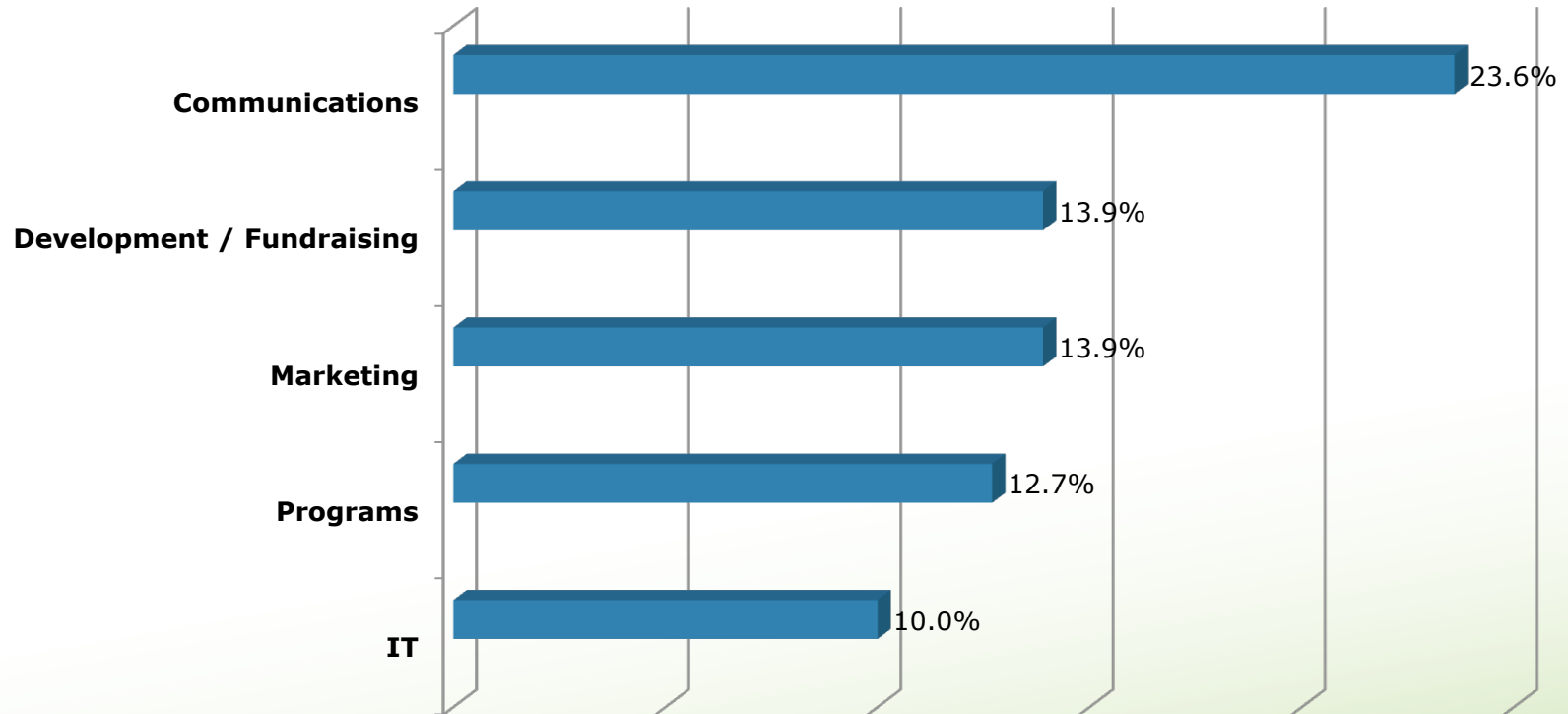
Most allocate only 1/4 to 1/2 person to managing house networks

Number of Members on House Social Networks



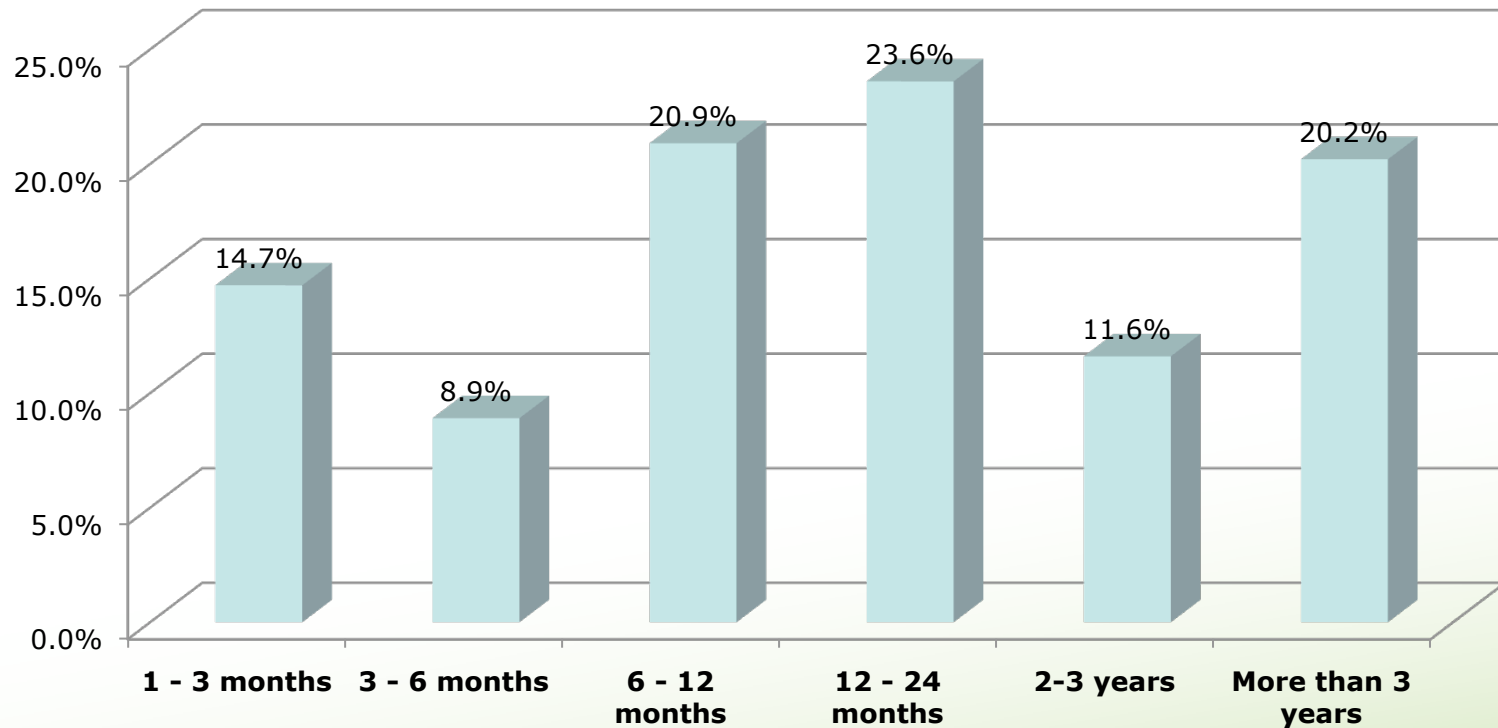
Almost 2/3 of house networks have under 500 members

Department Managing House Social Networks



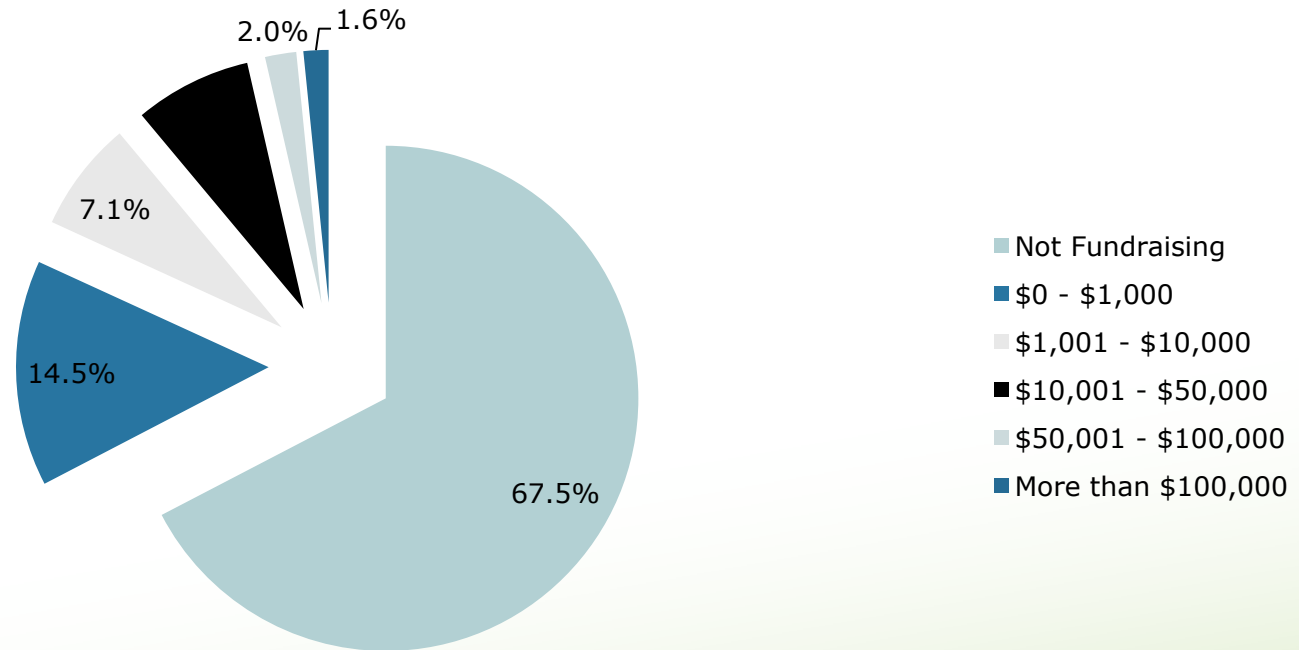
Fundraising now manages social networks as much as Marketing

Community Duration House Social Networks



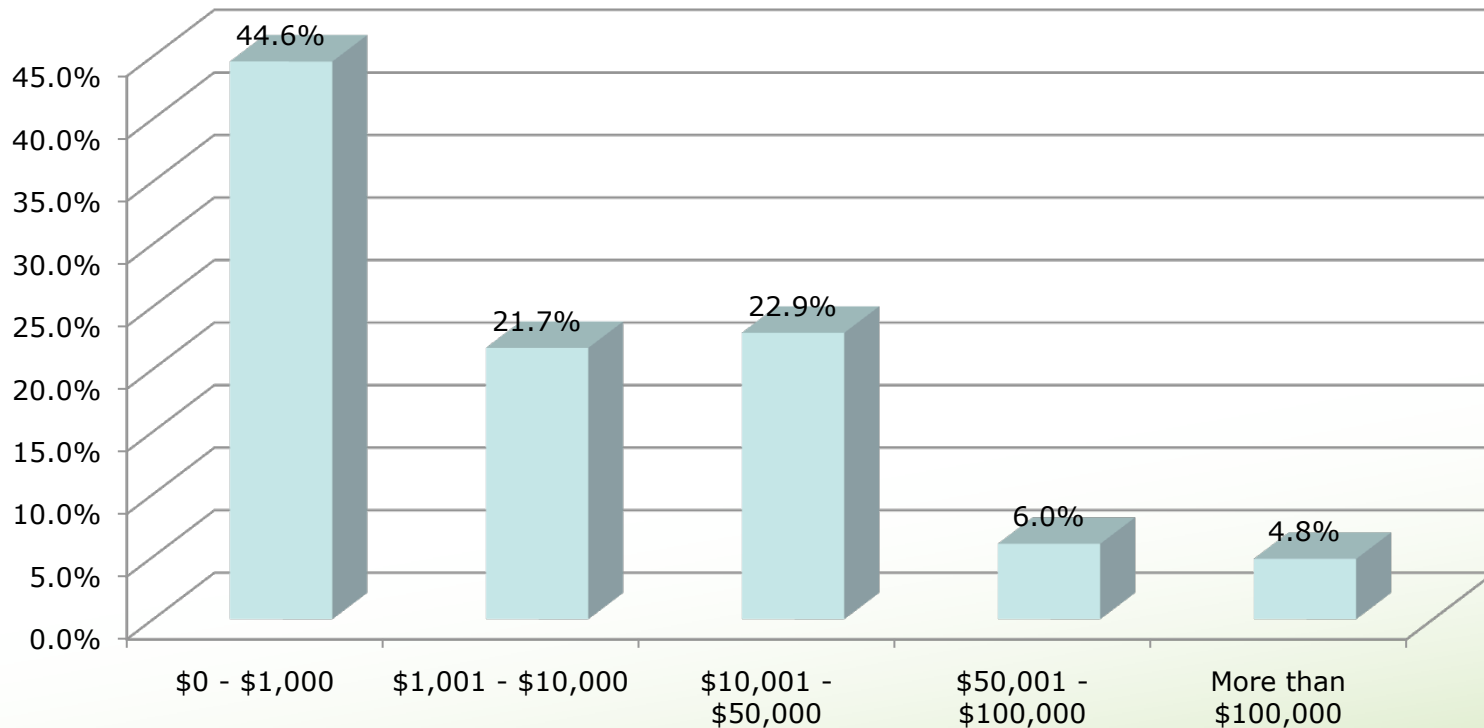
Over 20% of house networks used more than 3 years

Revenue Generation on House Social Networks



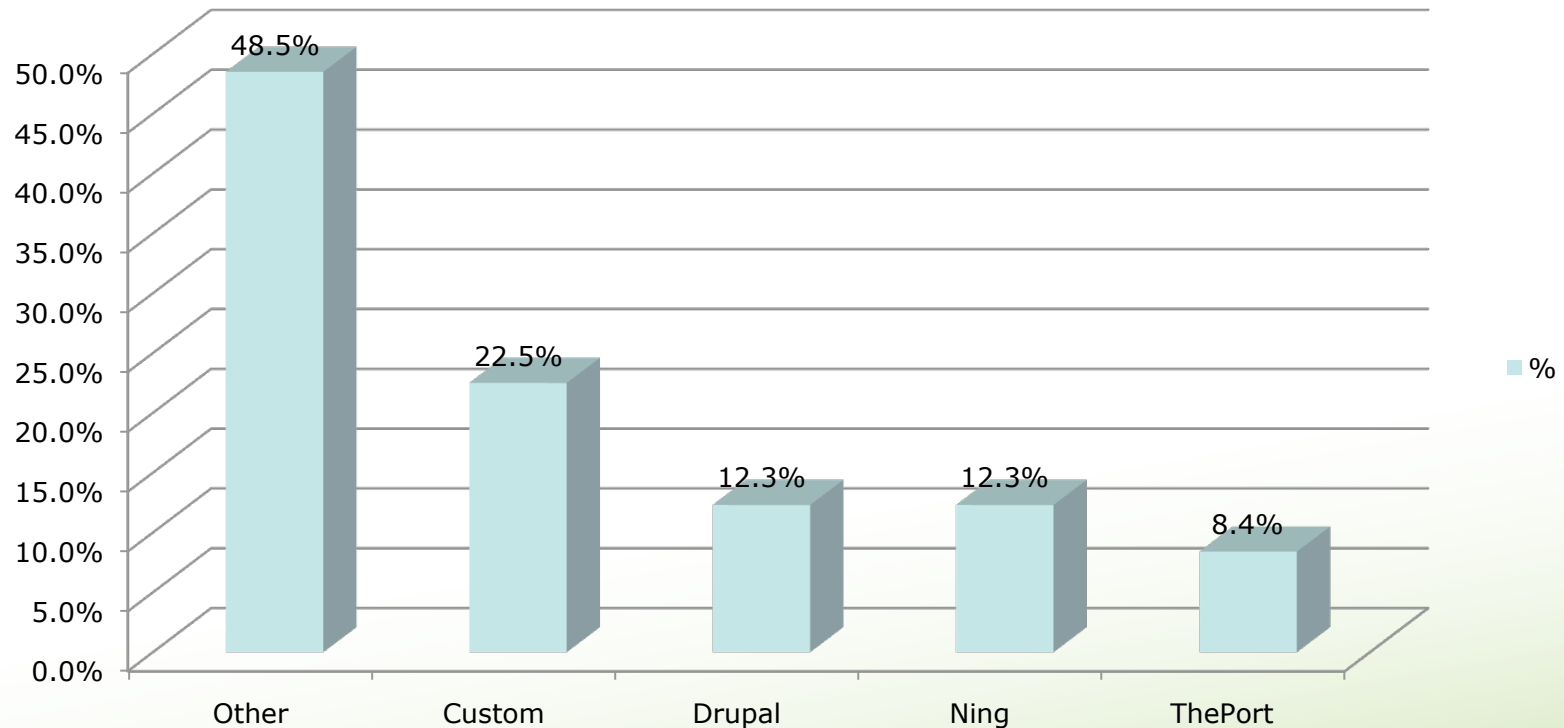
Two thirds of house networks are not fundraising

Fundraising Results on House Social Networks



Above results for 1/3 of house networks that ARE fundraising

House Social Network Software Platform

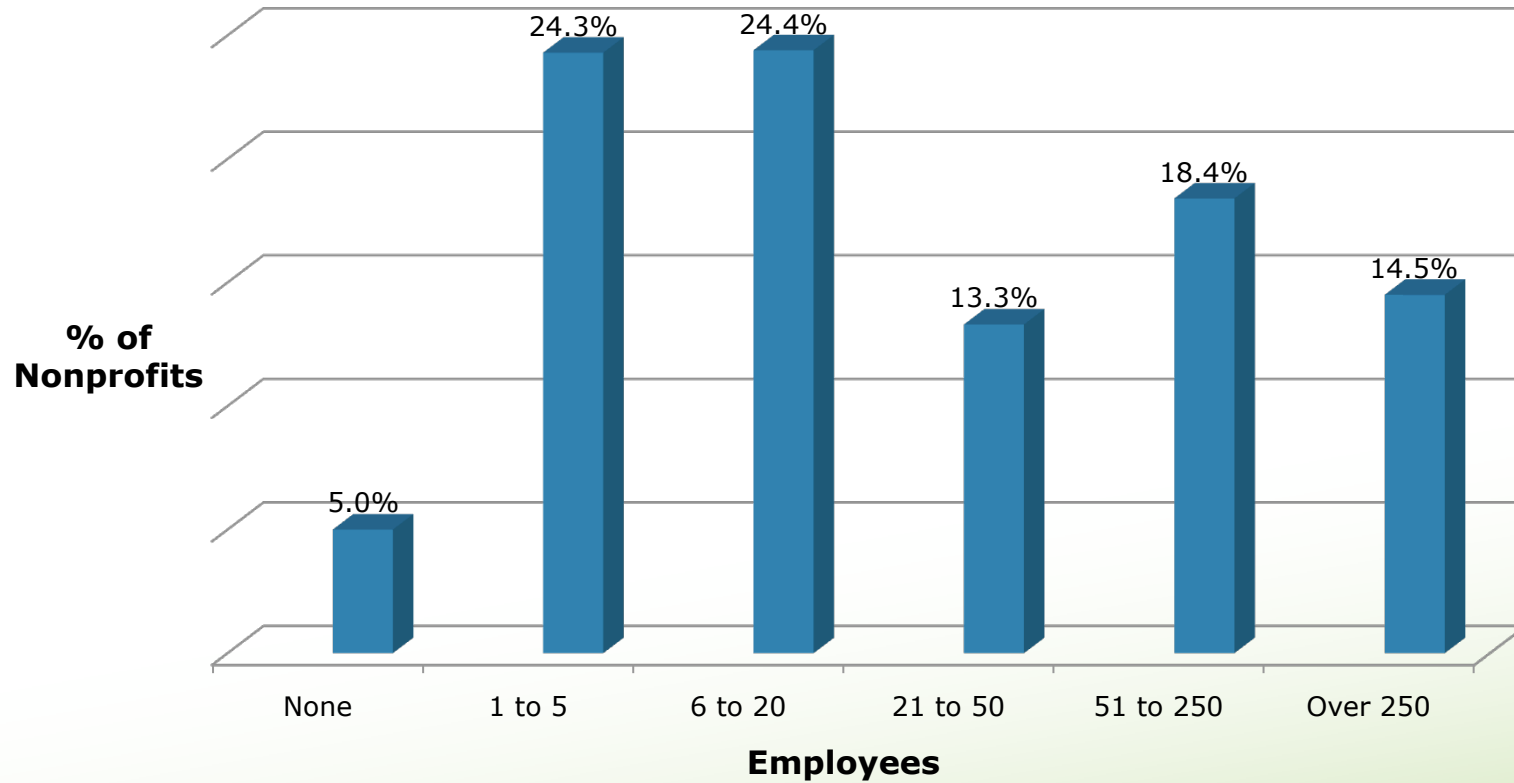


No vendor is dominant, >70% use custom or 'other' software

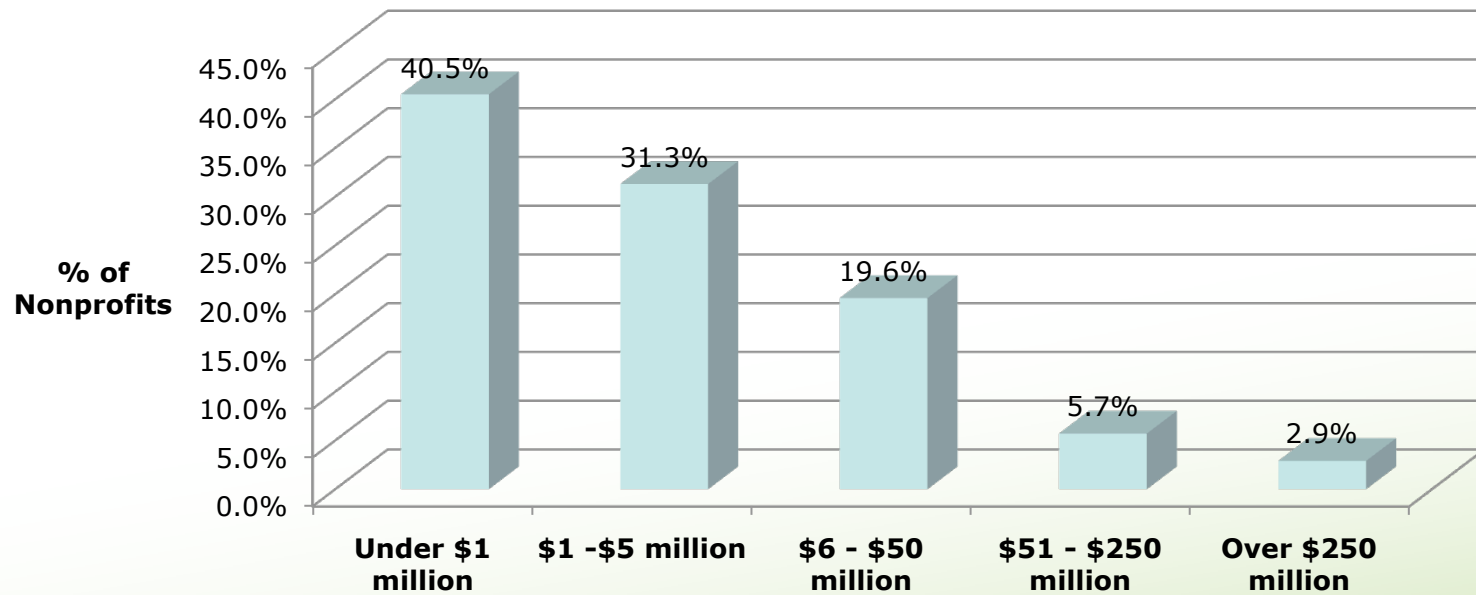
Part 5

RESPONDENT PROFILES

Size of Nonprofits Surveyed



Annual Budget



Appendix

DETAILS OF SURVEY RESPONDENTS

Organization Types

Human Services – *Crime and legal, employment, agriculture and nutrition, housing, public safety, youth and recreation* **22.7%**

Education – *Higher education, K-12* **18.8%**

Public & Societal Benefit – *Civic rights and advocacy, community organizing, philanthropy, science and technology, social sciences and government* **16.9%**

Health & Healthcare – *Mental health, diseases, disorders, and research* **14.5%**

Environment & Animals – *Environmental and animal welfare* **7.6%**

Arts & Culture – *Museums, community theatres, cultural centers and preservation societies* **7.2%**

Organization Types

Association - *Professional and trade* **4.3%**

Religious - *Religious and spiritual development* **3.5%**

International - *Foreign affairs, international human rights, national security and diplomacy* **2.8%**

Other - *Media, labor union, mutual benefit and for profit businesses* **1.8%**

Complete 2010 Nonprofit Social Network Benchmark Report Available Now

Download at www.nonprofitsocialnetworksurvey.com

Thank you!