

Social Network Survey for Nonprofits

Benchmarking adoption of social networks within the nonprofit sector

Hashtag: #NSNS

NTEN Webinar
July 1, 2009



Survey Sponsors



Download the survey at:

NonprofitSocialNetworkSurvey.com

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Survey Methodology

- **Instrument:** A 50-question online survey was fielded from February 20 to April 15, 2009, including 980 respondents representing nonprofit professionals from small, medium and large nonprofits, and all major segments of the industry.
- **Margin of error:** $\pm 3.13\%$ 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.
- **Community Size - Commercial Social Network:** Number of fans, friends, subscribers or readers
- **Community Size - House Social Networks:** Number of registered profiles
- **White Label Social Networking Software:** A programmable social networking platform and database used to build a house social network.
- **Universal ID Protocols:** Technical standard for exchanging member's profile and network information between communities.

Part 2

BIG THEMES

Big Themes from Social Networking Survey

- Nonprofits are embracing social networks
 - Early adopters are squarely in place
 - Many small communities are materializing
 - Initial (small) budgets are allocated
 - More resources (staff & budget) are coming

Big Themes from Social Networking Survey

- Social Networks are Marketing & Comms. Initiatives
 - Marketing & communications departments typically own the social networking initiative
 - Social networks are most often being used for marketing organization's programs, events, etc.
 - Budgets are still relatively small

Big Themes from Social Networking Survey

- Some Nonprofits are Generating Revenue from Social Networks
 - Fundraising, advertising, underwriting and sponsorship are a source of revenue
 - Average revenue volume is low: <\$10,000 annually
 - Small number of nonprofits generating big dollars

Big Themes from Social Networking Survey

- Promotion Focused Mostly on Traditional Tactics and Small Budgets
 - Traditional channels such as the organization's web site, email list, and events most popular for promoting communities.
 - Twitter and other social networks used to lesser extent
 - Little or no budget allocated to promoting the communities

Part 3

A CLOSER LOOK

Commercial Social Networks

- Facebook is the most popular commercial social network, with **74.1%** of nonprofits indicating they have a presence on FB.
- Average Facebook community size is **5,391** members.
- **94.4%** of nonprofits have been on Facebook for less than 2 years.

Staffing & Budget- Commercial Social Networks

- **Four-fifths** of nonprofits committed at least $\frac{1}{4}$ FTE to commercial social networking over last 12 months.
- More than **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 **8.3%** allocated \$10K or more budget for external resources over the last 12 months.

Traditional Media Most Prevalent for Promotion

- Organization's website and email house list are used by **75%** of nonprofits to promote their social networking communities.
- Twitter (**44%**) and Other Social Networks (**40%**) play a smaller role in promotion.
- **48%** of nonprofits manage social networks in the communications or marketing departments. Fundraising (**10%**) and executive management (**9%**) are next most likely owners.

ROI from Social Networks

- Fundraising is a part of nonprofit communities on Facebook (**39%**), MySpace (**12%**), Change.org (**8%**), Twitter (**7%**), YouTube (**5%**), LinkedIn (**2%**).
- Facebook leads in fundraising: **39%** of nonprofits are raising money, but **29%** have raised \$500 or less.
- **One-quarter** of nonprofits with house social networks are fundraising. **One-third** of these fundraisers accumulated \$10K or more over the last year.

House Social Networks

- **One-third** of nonprofits operate one or more house social networks. **14%** of npo's with house community(s) have two and **9%** have three or more communities.
- Nearly **9 out of 10** nonprofits with house communities have 10,000 members or less.
- When queried about the value of their house social network, **three-quarters** indicated they are very or somewhat valuable.

White Label Social Network Software

- Respondents indicate that Ning (ning.com) is being used by **19%** of nonprofits with house social networks.
- Fifteen other vendors (commercial & open source) are each being used by **5% or less** of respondents.
- Annual budgets for social networking software:
 - No budget (**40%**)
 - \$1-\$10,000 (**45%**)
 - \$10,000+ (**16%**)

Commercial vs. House Social Networks

Question	Commercial	House
Does your org. have one?	86.2% replied YES	30.6% replied yes
Primary purpose?	Marketing (80.5%)	Marketing (55.9%)
Staff time (last 12 months)?	1/4 to 1/2 FTE (64.5%)	1/4 to 1/2 FTE (51.5%)
Ext. resources budget (last 12 months)?	None (59.3%) \$1-\$10,000 (32.2%)	None (34.0%) \$1 - \$10,000 (40.7%)
# of community members?	Average: 5,3912*	10,000 or less (86.6%)
How old is your community?	1-24 months (93.8%)*	1-24 months (72.6%)
Fundraising revenue (last 12 months)?	Not Fundraising (61.1%) Fundraising - raised \$0 - \$10,000 (37.8%)*	Not Fundraising (74.7%) Fundraising - Raised \$0 - \$10,000 (16.5%)
Revenue from paid promotion (last 12 months)?	Not Advertising (94.8%)* Advertising and received \$0-\$10,000 (4.7%)	Not Advertising (85.3%) Advertising and received \$0-\$10,000 (8.9%)
Why don't you have one?	Do not have the expertise in-house (44.3%)	Do not have sufficient budget (47.0%)

*Facebook

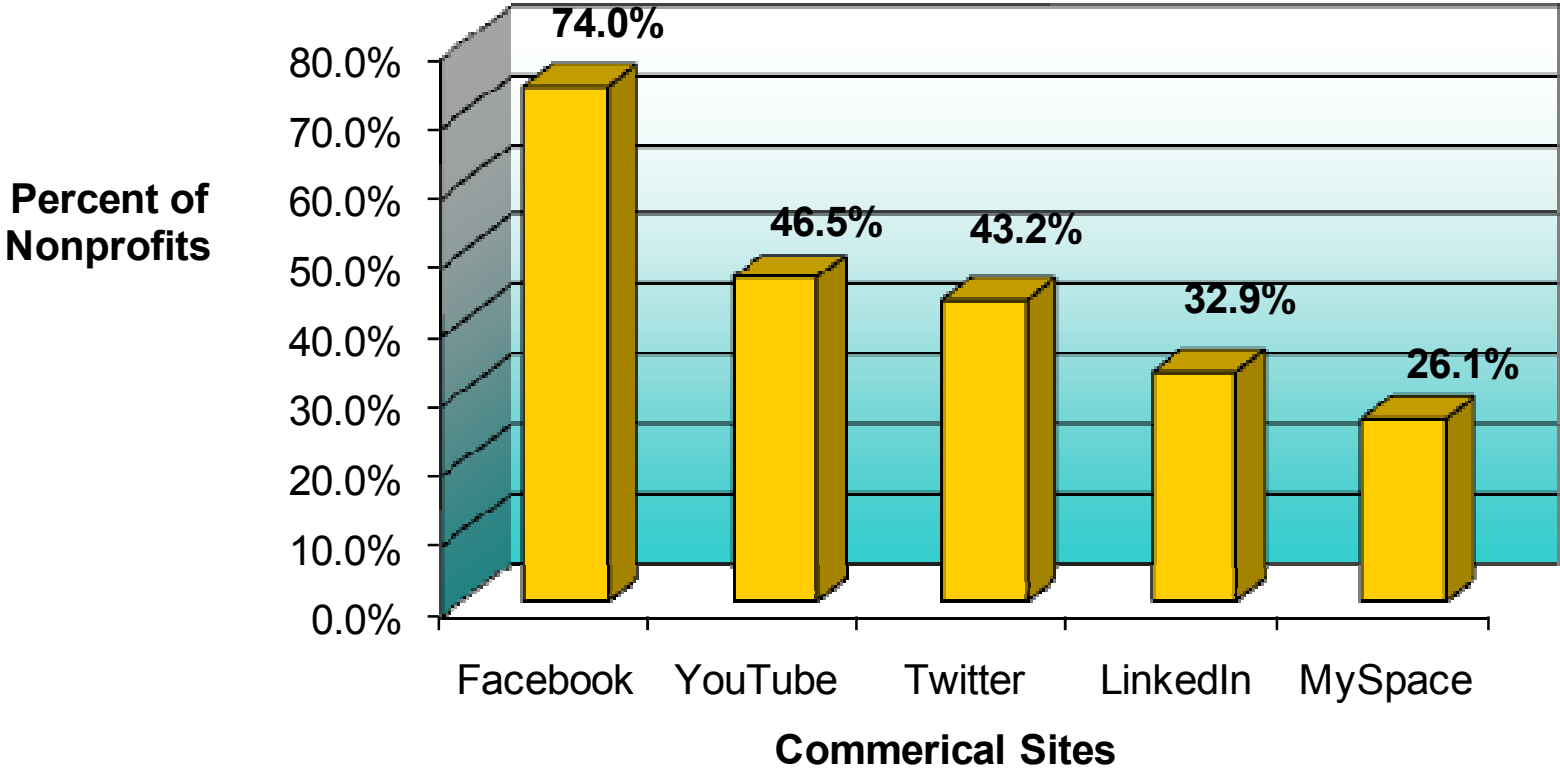
Universal ID Protocols

- Among nonprofits with house social networks, **70%** are using no universal ID protocol.
- Of the **30%** using one of the protocols, **17%** are using Open Social (MySpace, Yahoo, Google) and **13%** are using Facebook Connect (Facebook).

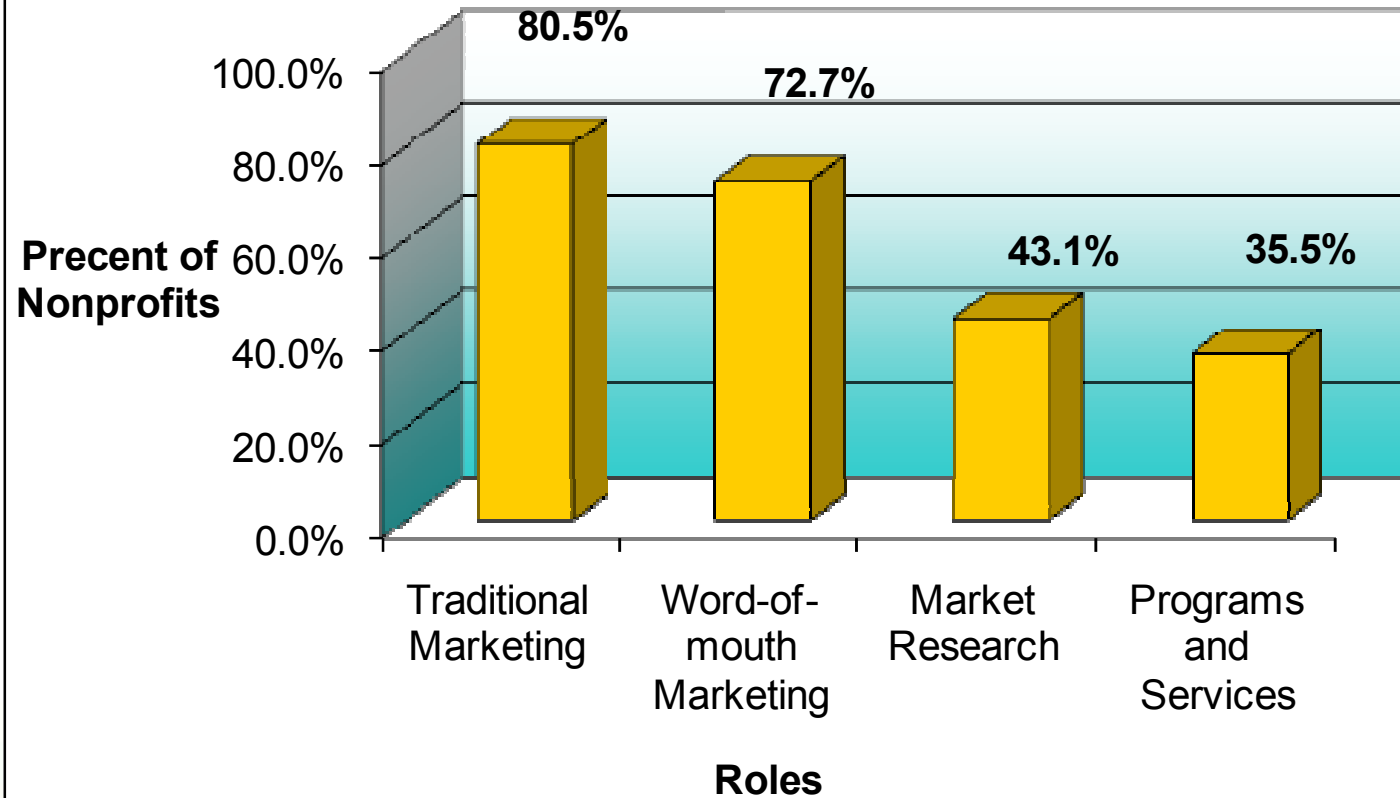
Part 4

DEEP DIVE ON STATISTICS

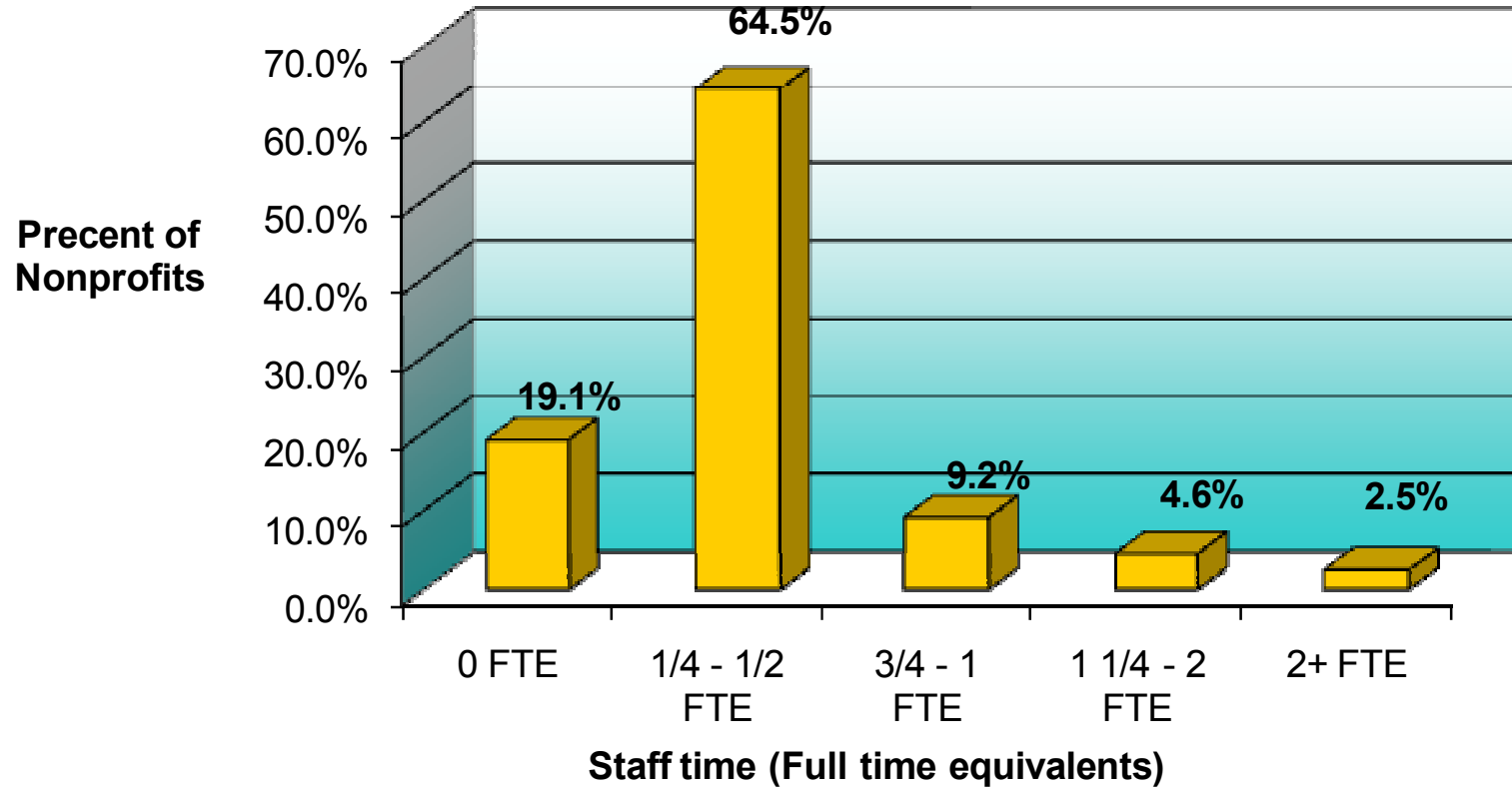
Popularity of Commercial Social Networks



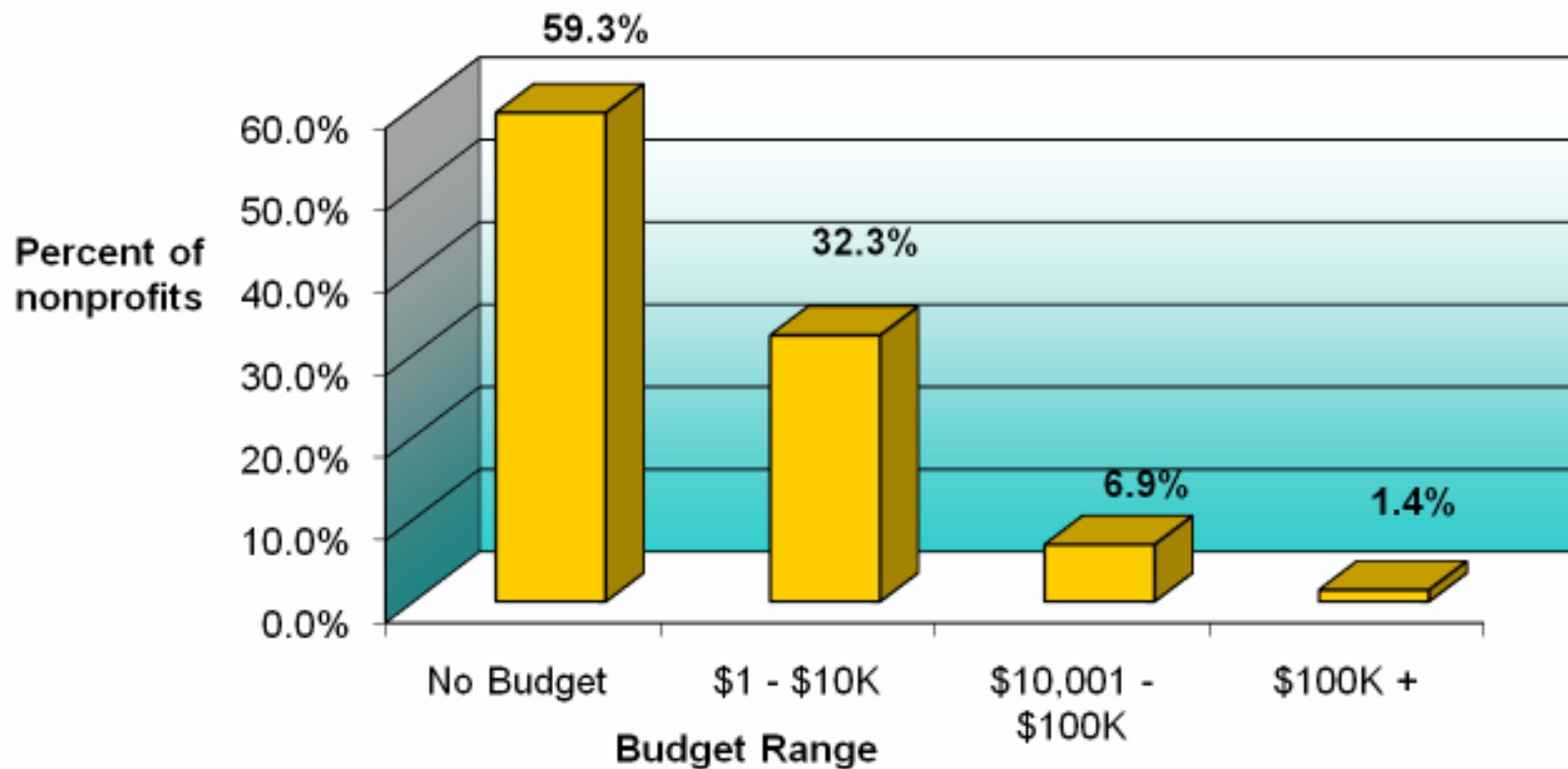
Role of Commercial Social Networks



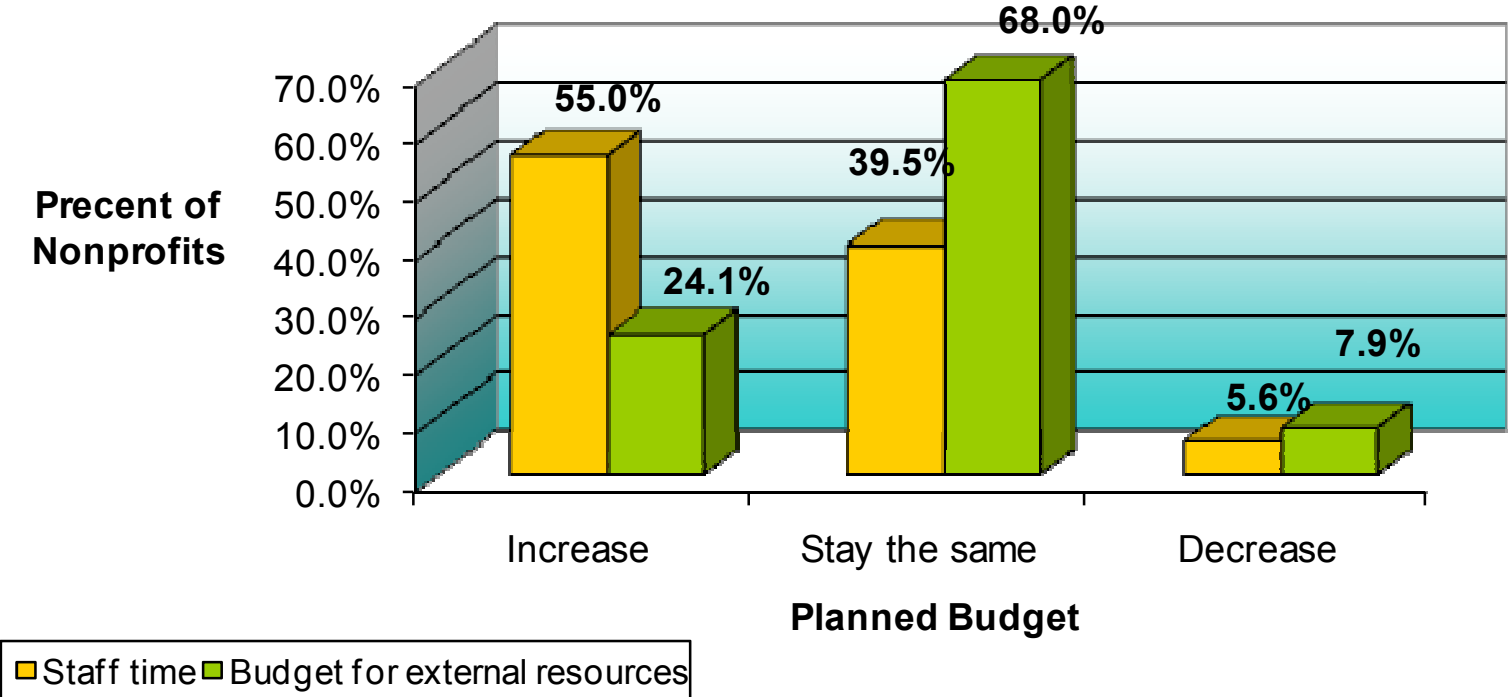
Staff Time Allocated to Commercial Social Networks (Last 12 months)



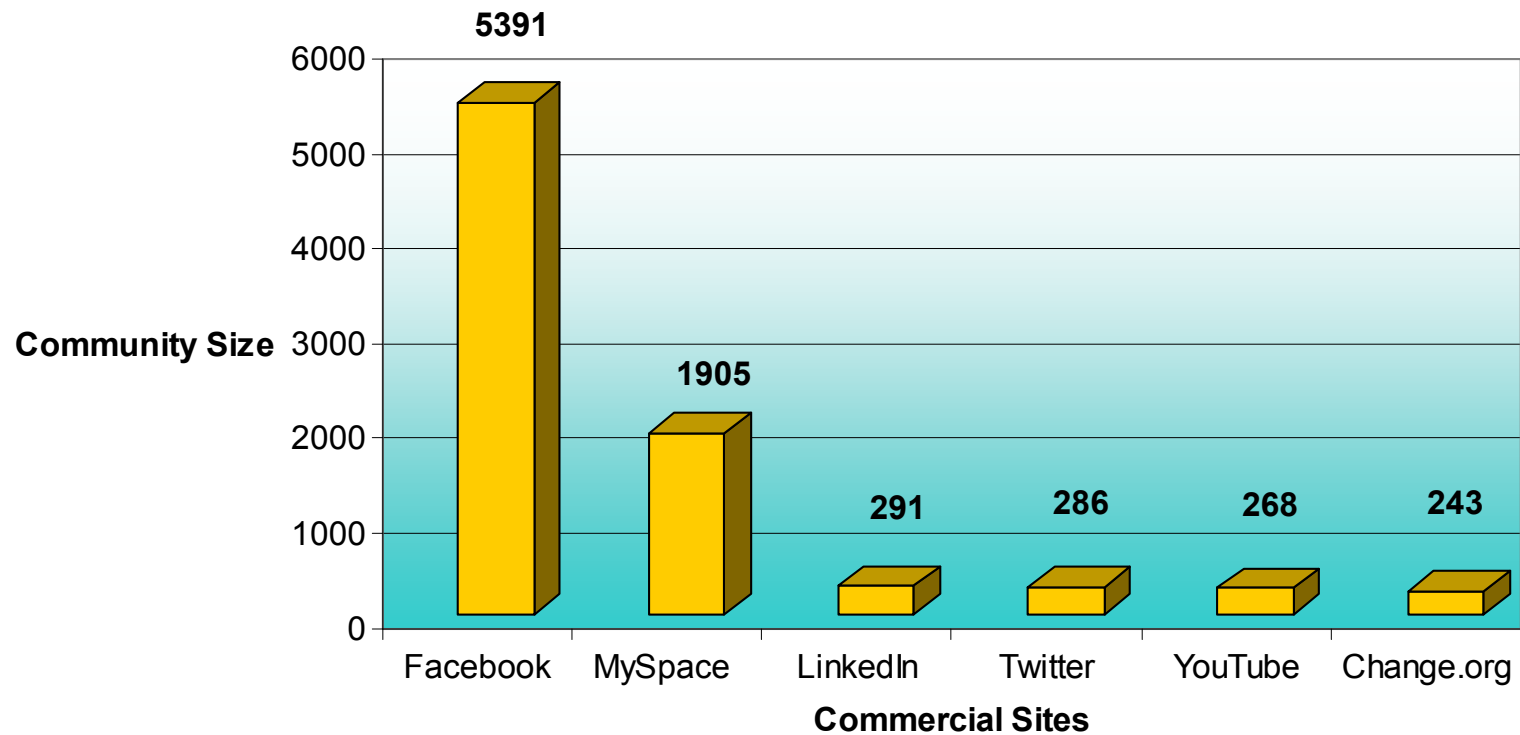
Budget for External Resources Allocated to Commercial Social Networking (Last 12 Months)



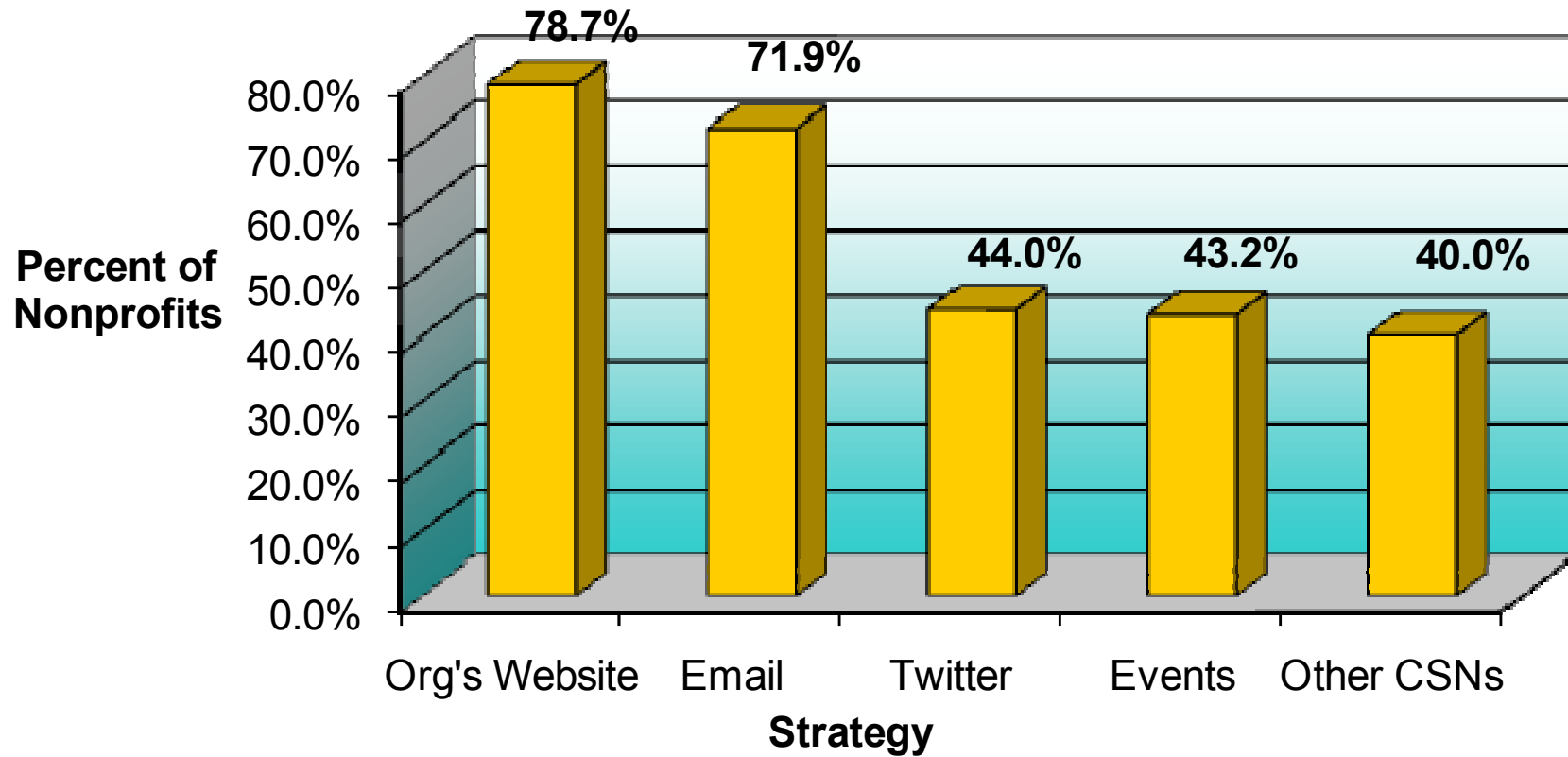
Plans for Resource Allocation to Commerical Social Networking (Next 12 Months)



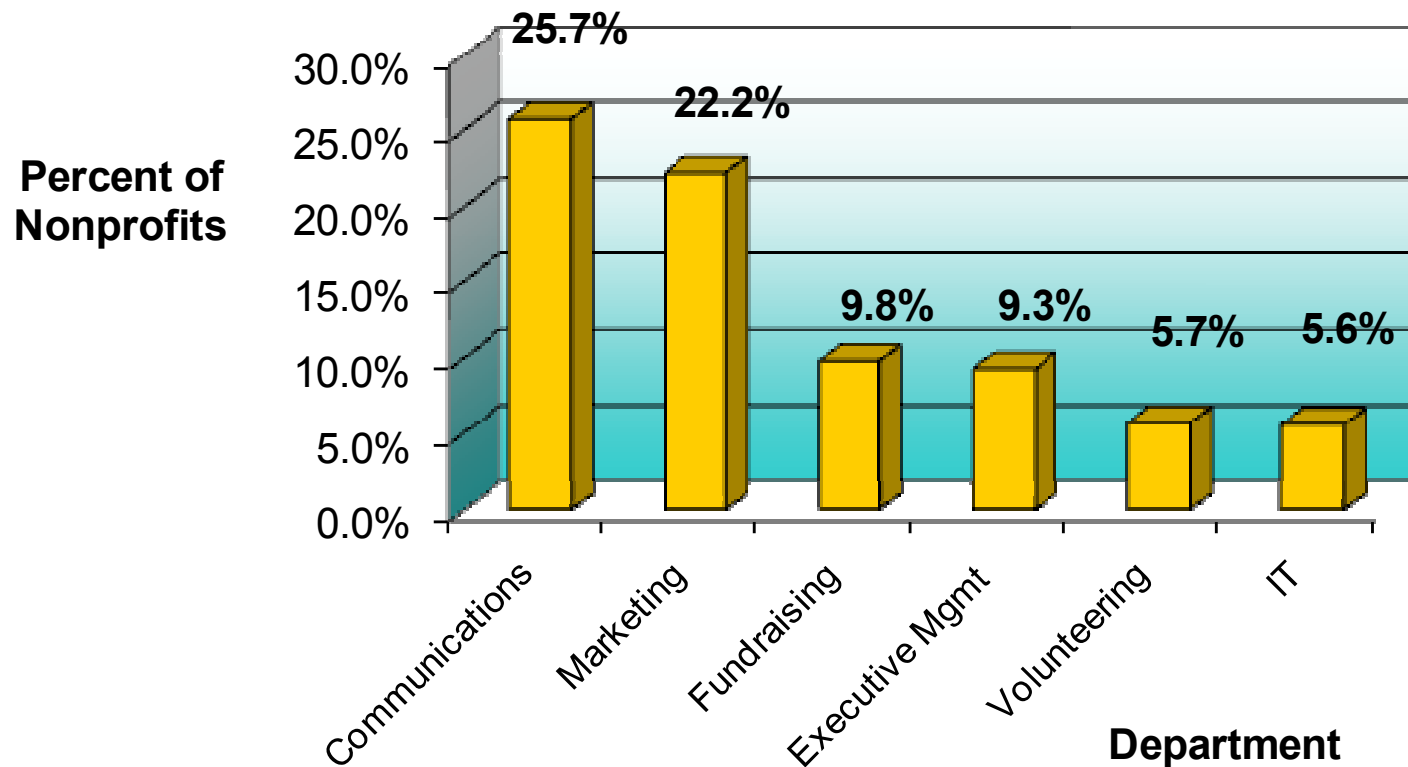
Average Community Size of Nonprofits on Commercial Social Networks



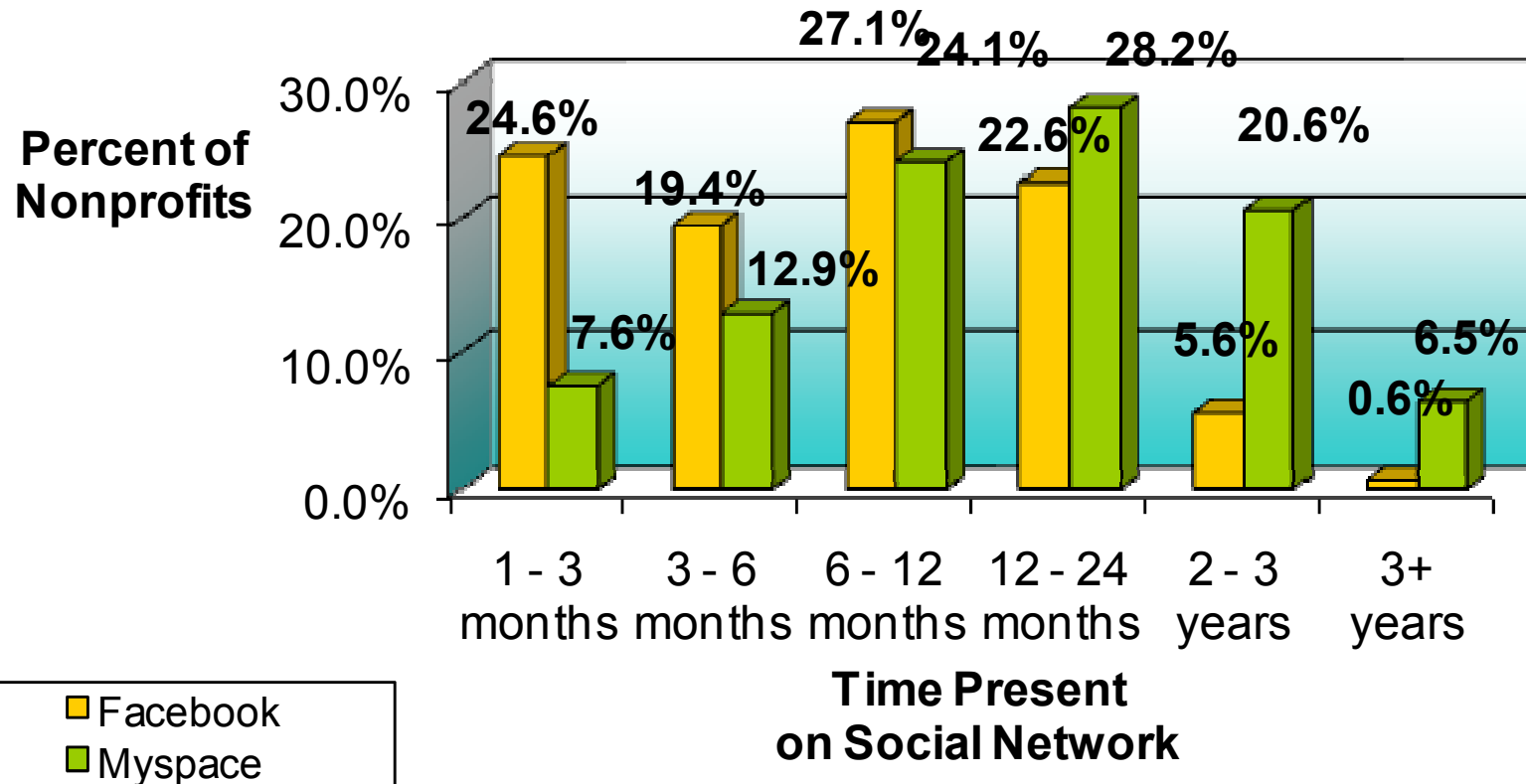
Strategies for Promoting Nonprofits' Commercial Social Network Communities



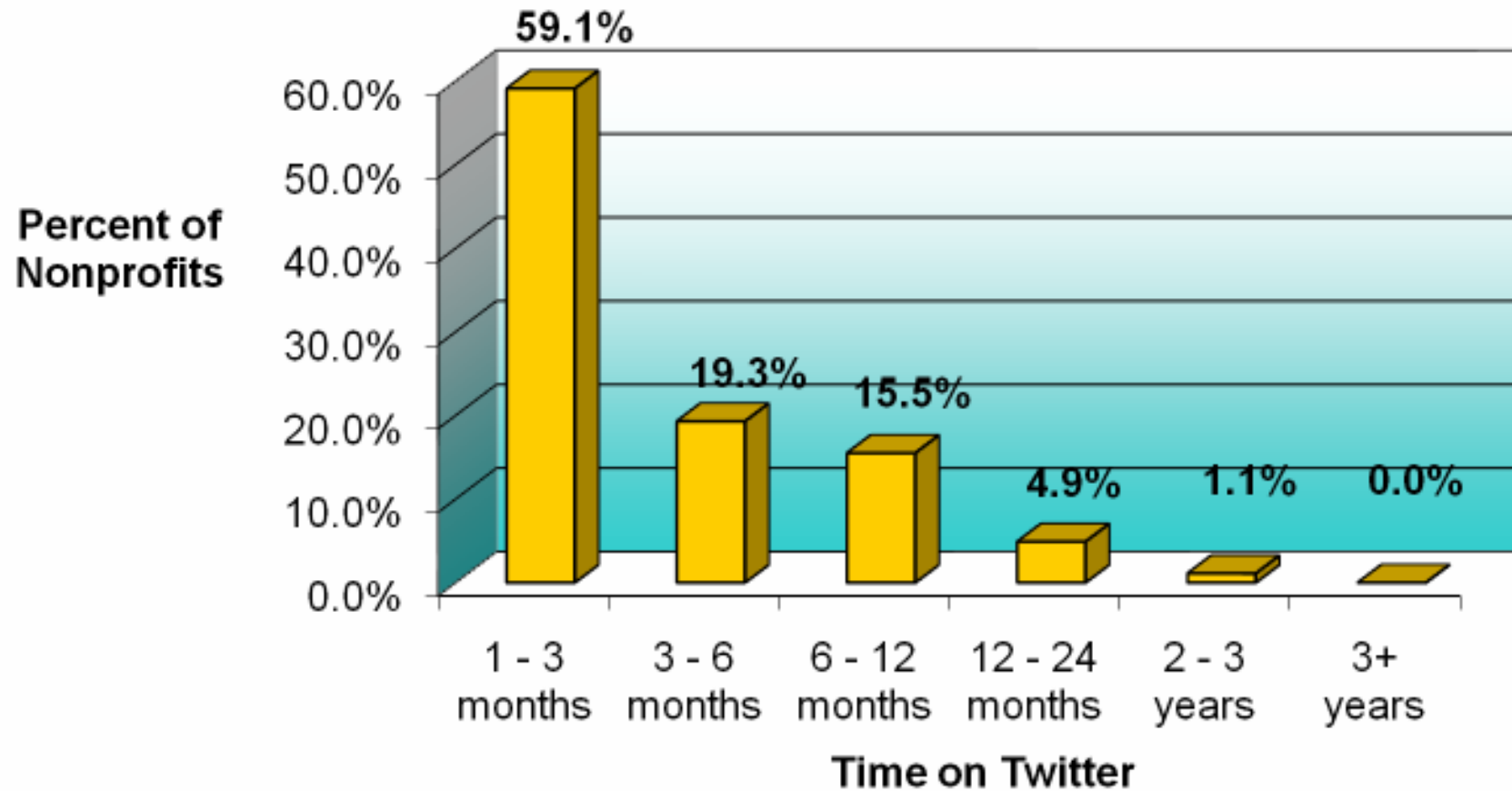
Departmental Responsibility for Commerical Social Networks



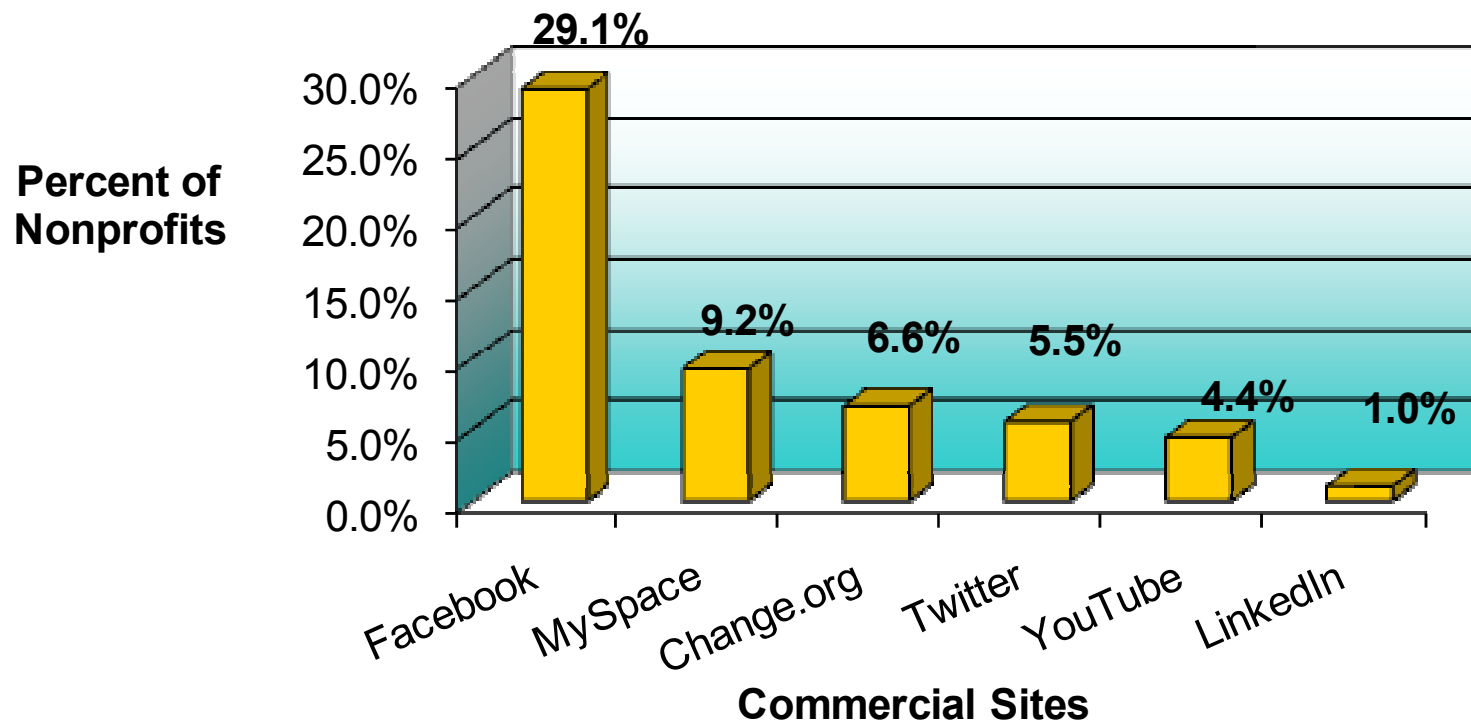
Adoption of Commercial Social Networks by Nonprofits



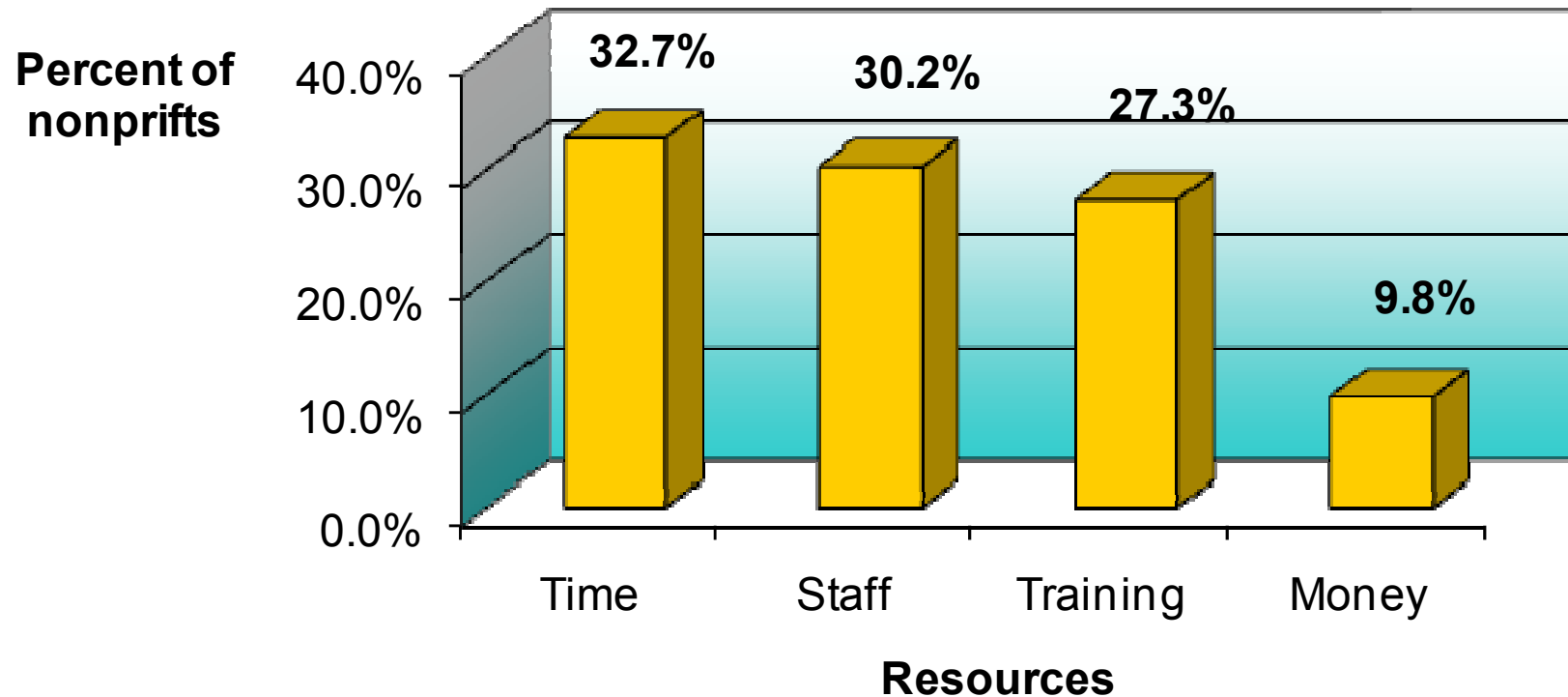
Adoption of Twitter by Nonprofits



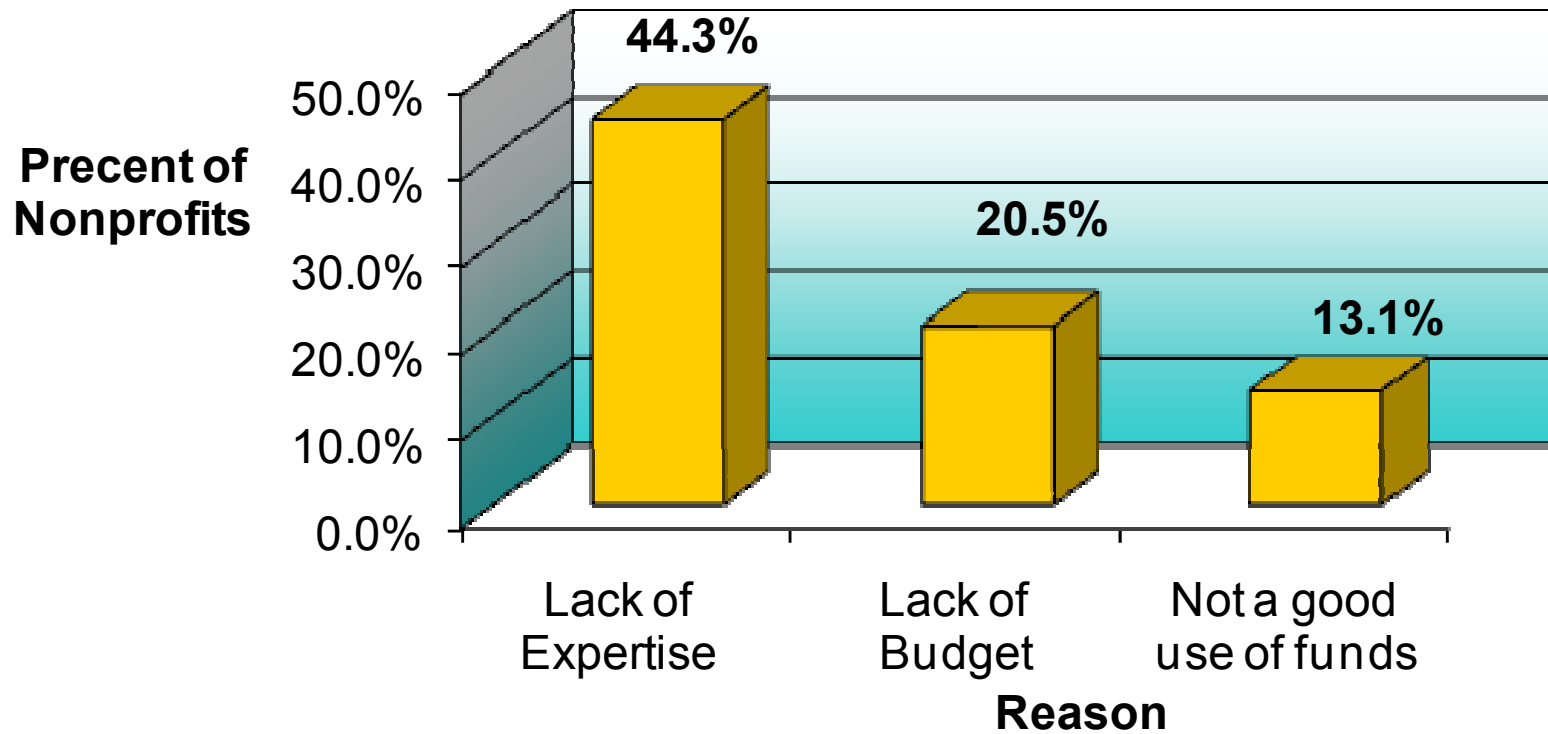
Fundraising Revenue on Commercial Social Networks (last 12 months)



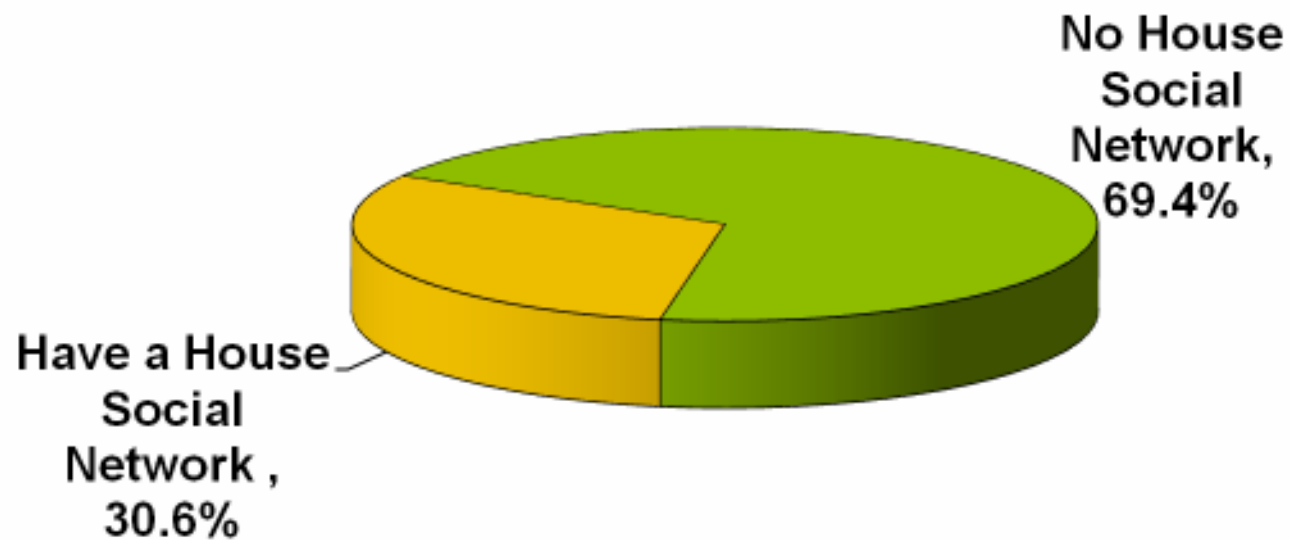
Productivity Gains with Commercial Social Networks



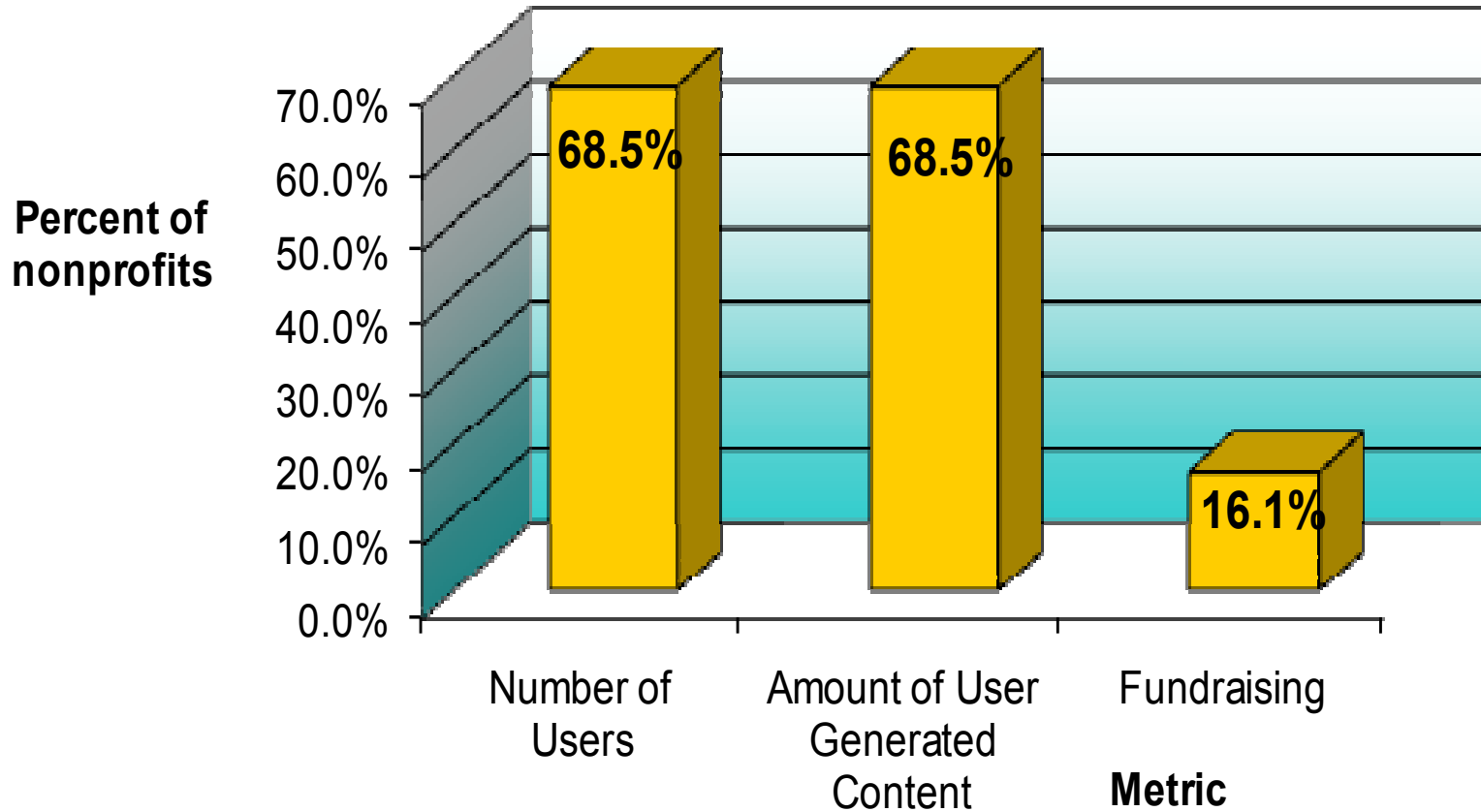
Reasons for Not Having a Presence on Any Commercial Social Network



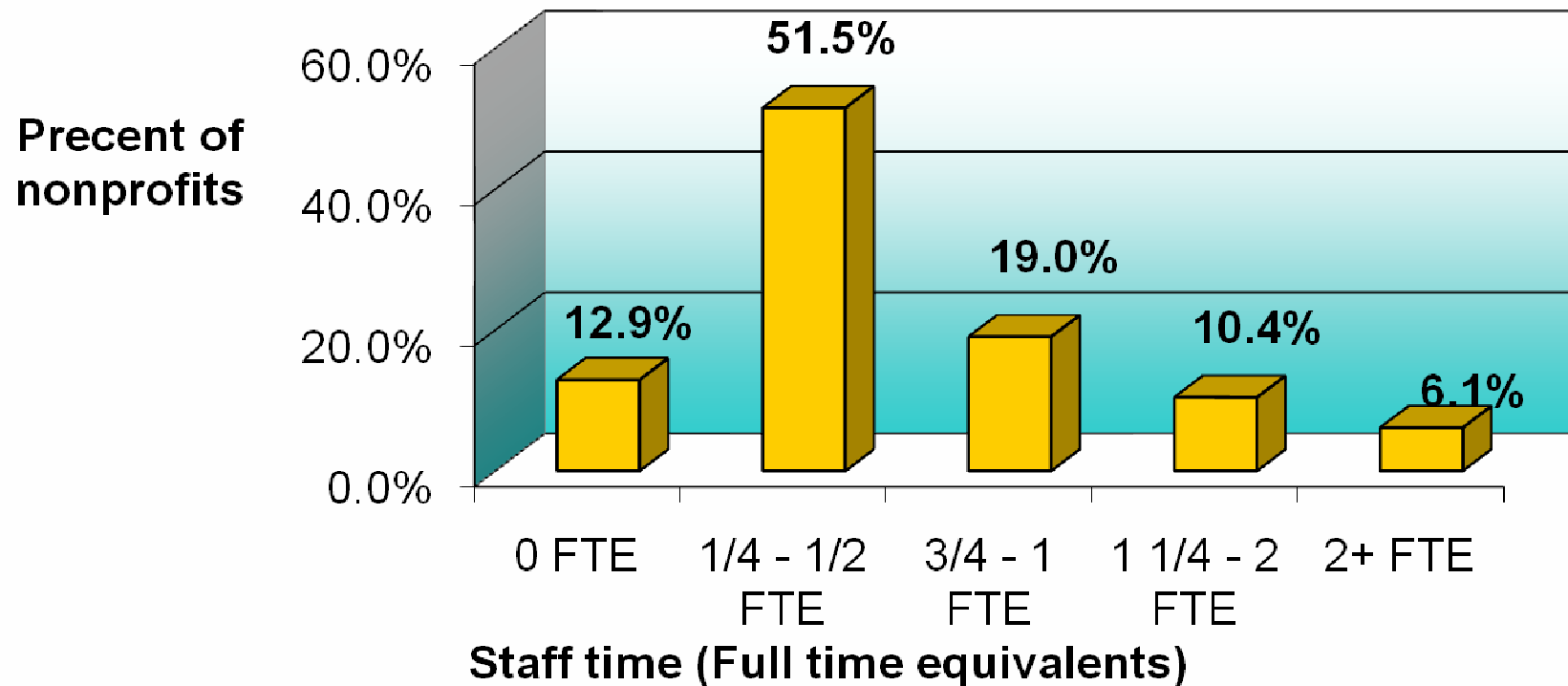
Percent of Nonprofits with a House Social Network



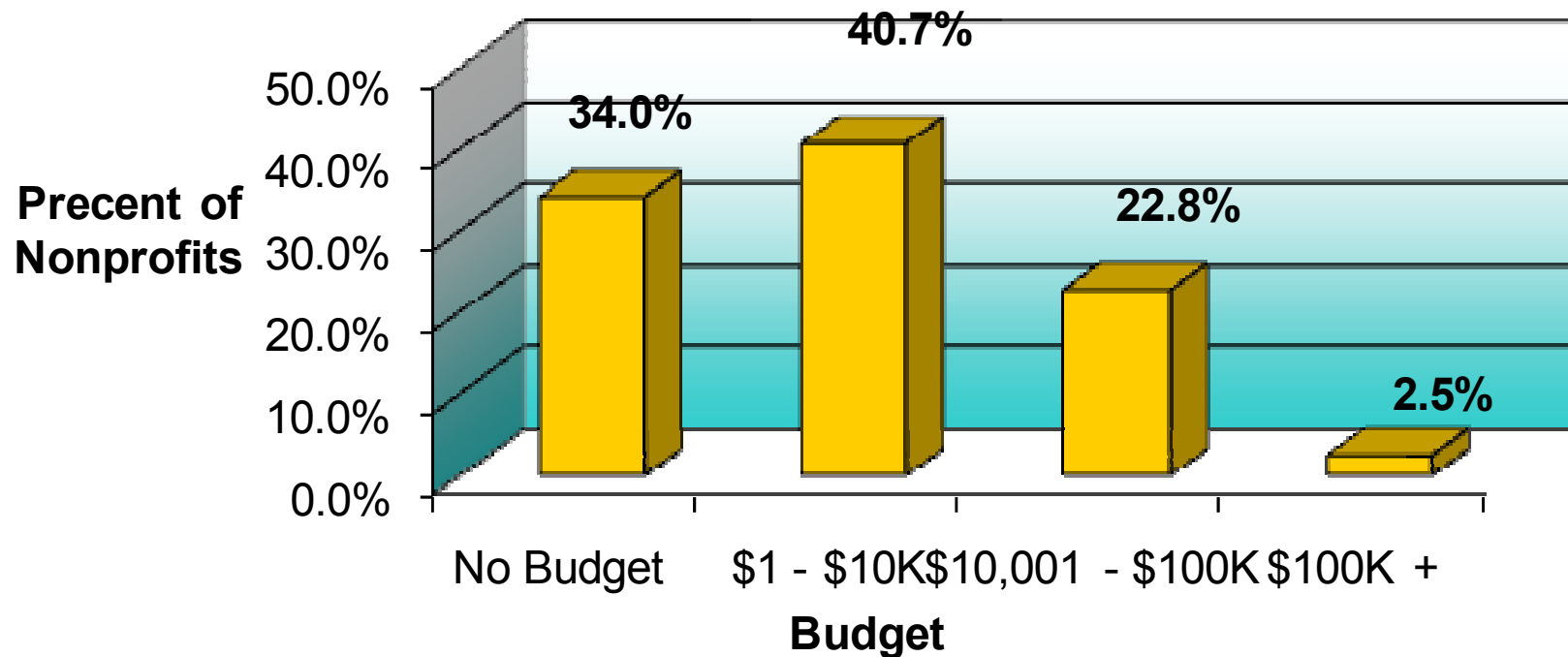
Metrics Used to Evaluate Success of House Social Networks



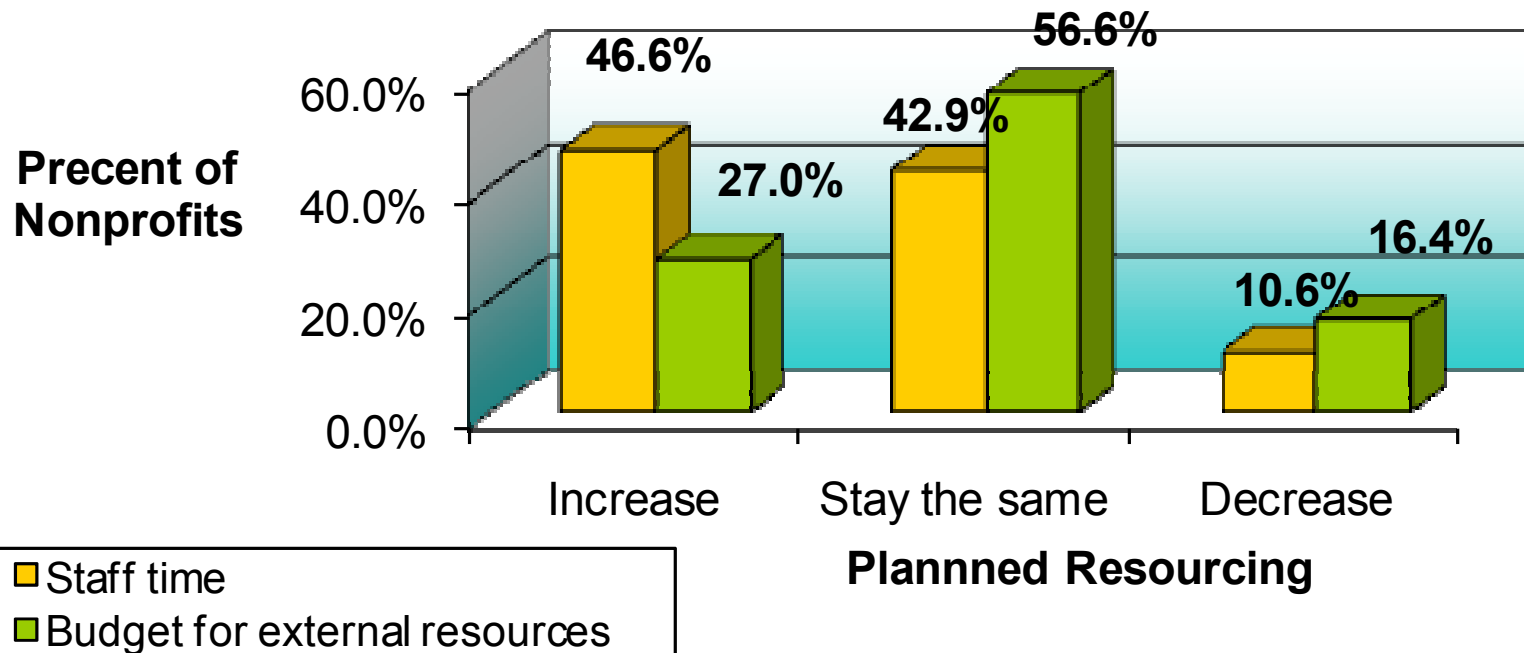
Staff Time Allocated to House Social Networks (Last 12 Months)



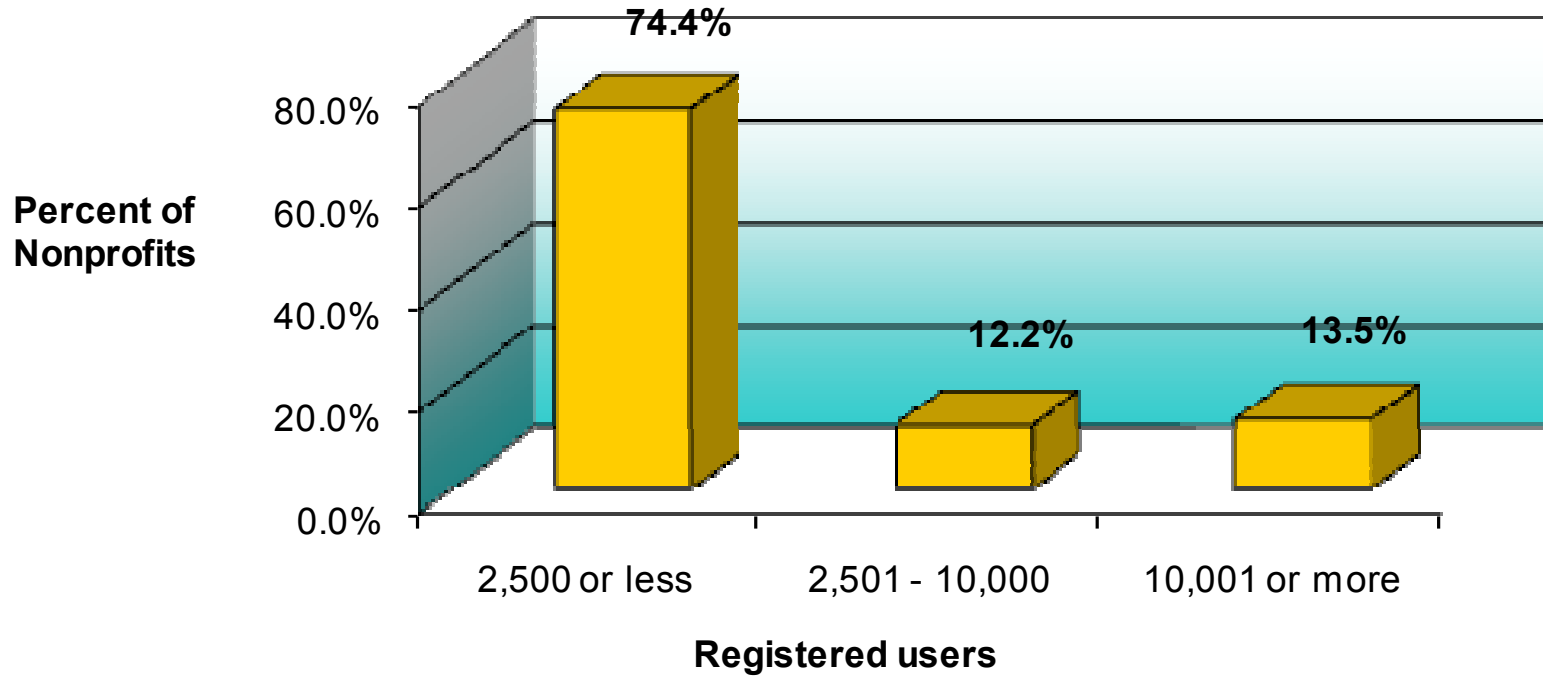
Budget for External Resources Allocated to House Social Networks (Last 12 Months)



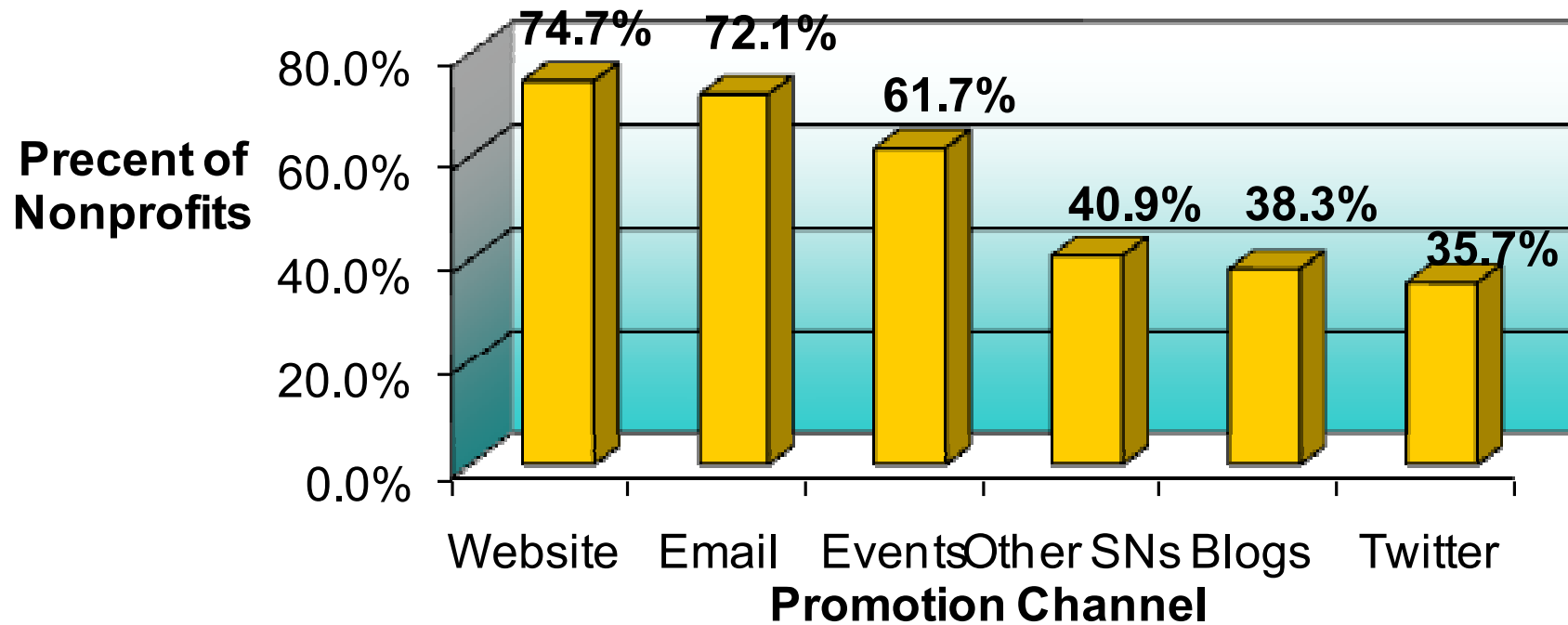
Plans for Resource Allocation to House Social Networks (Next 12 Months)



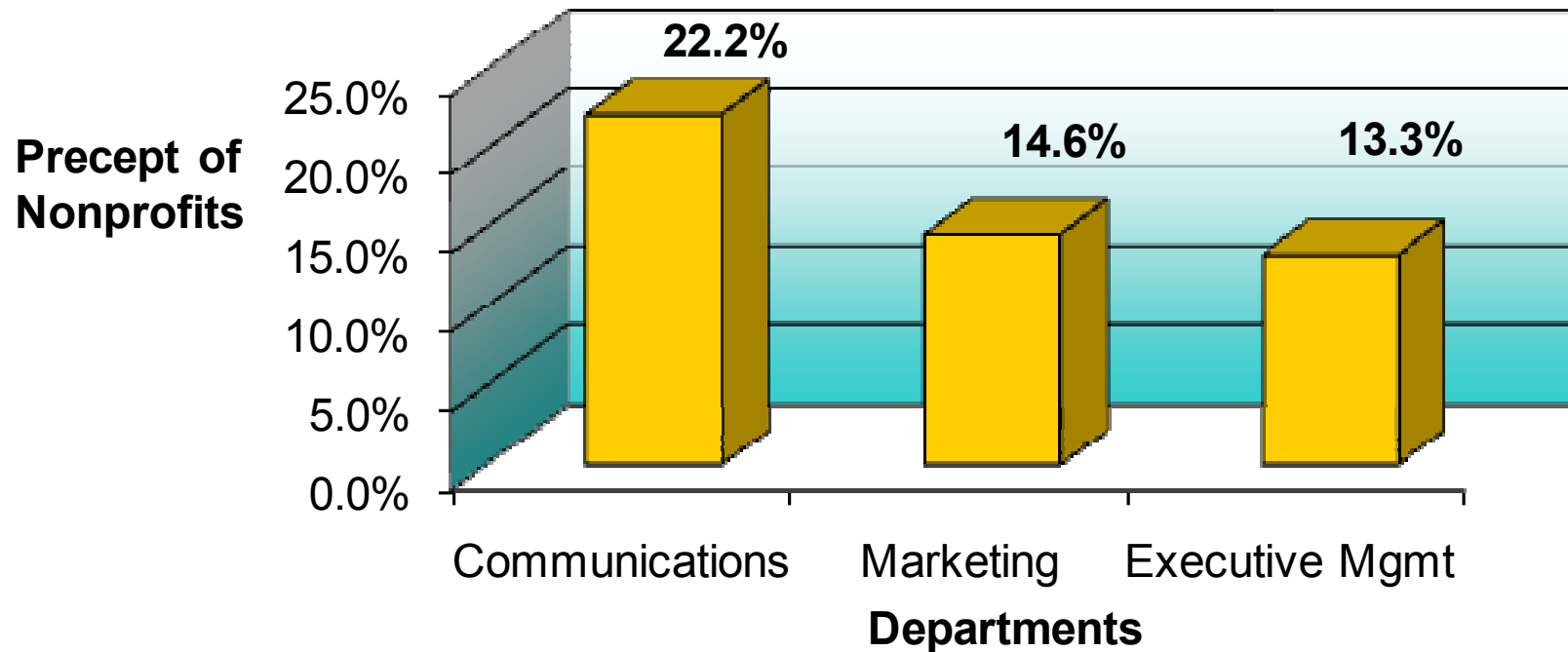
Size of Communities on Nonprofits' House Social Networks



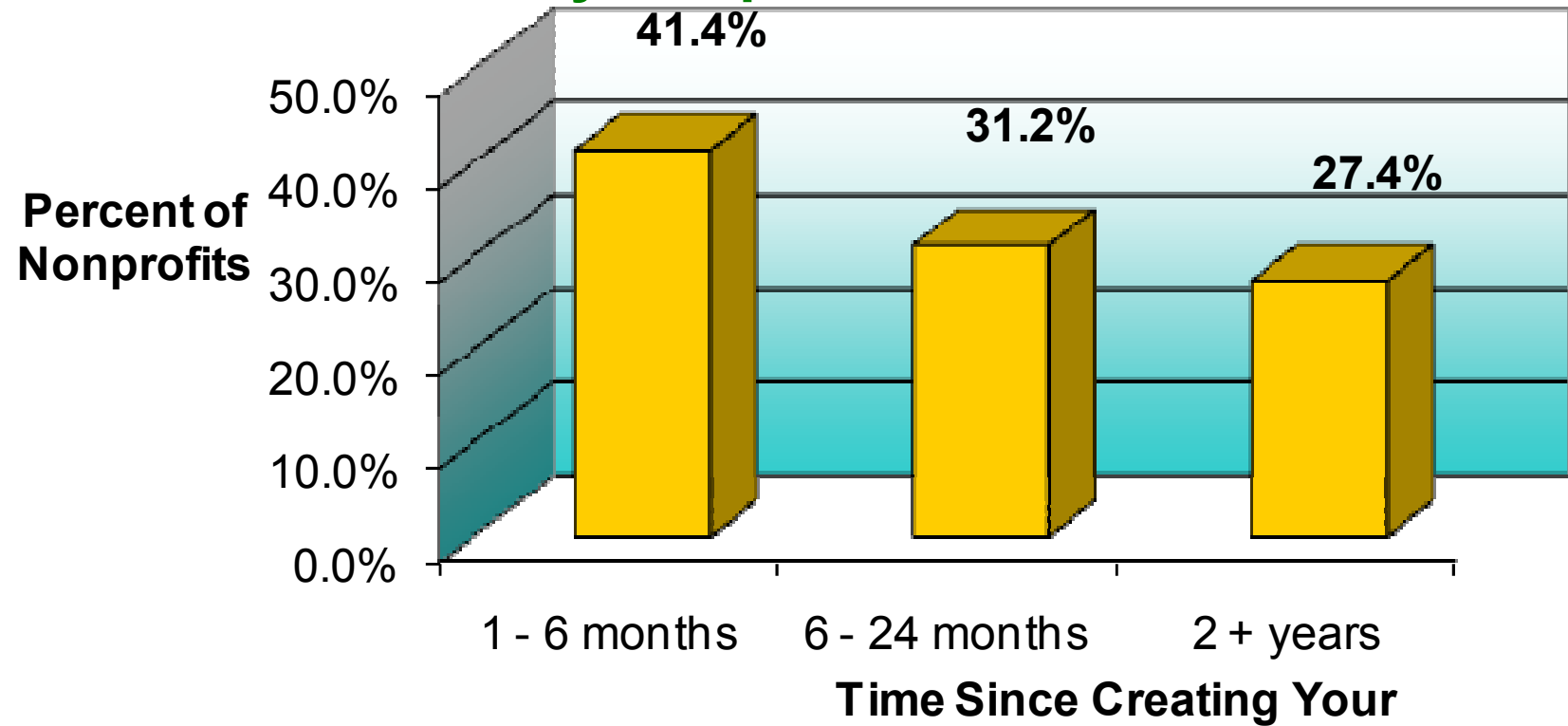
Strategies for Promoting Nonprofits' House Social Networks



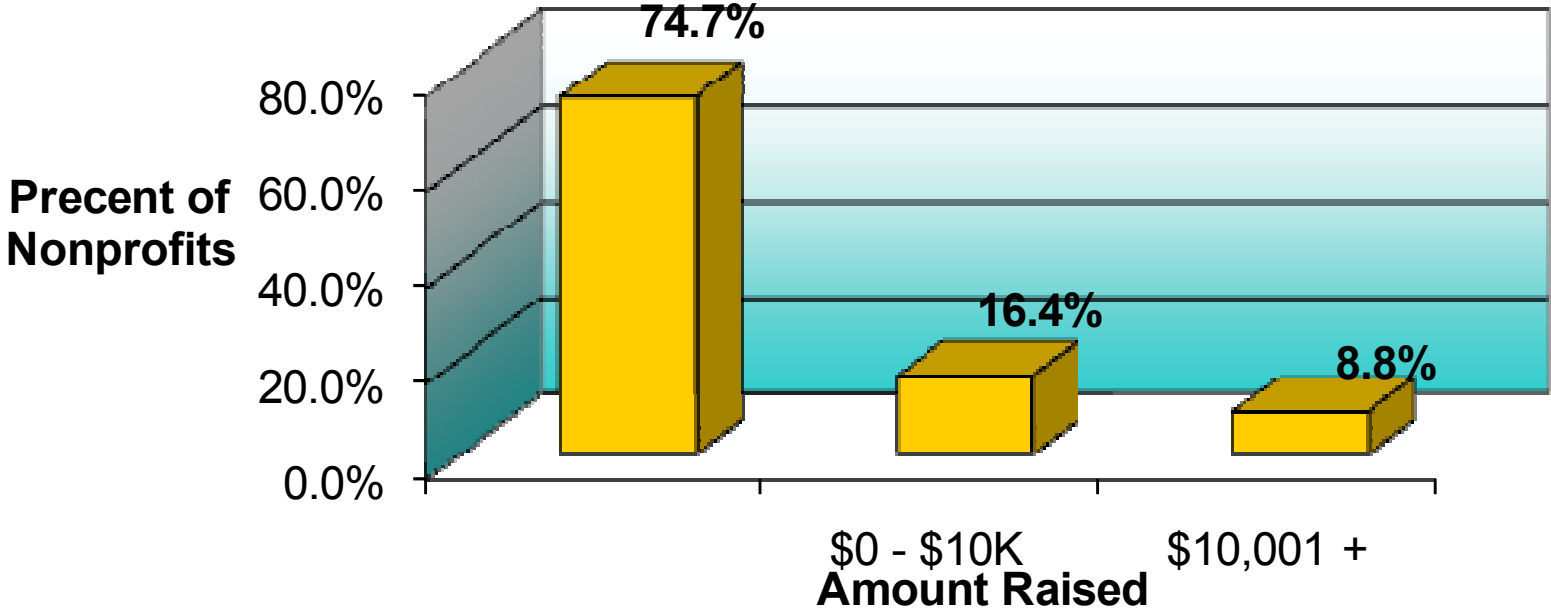
Departmental Ownership of House Social Networks



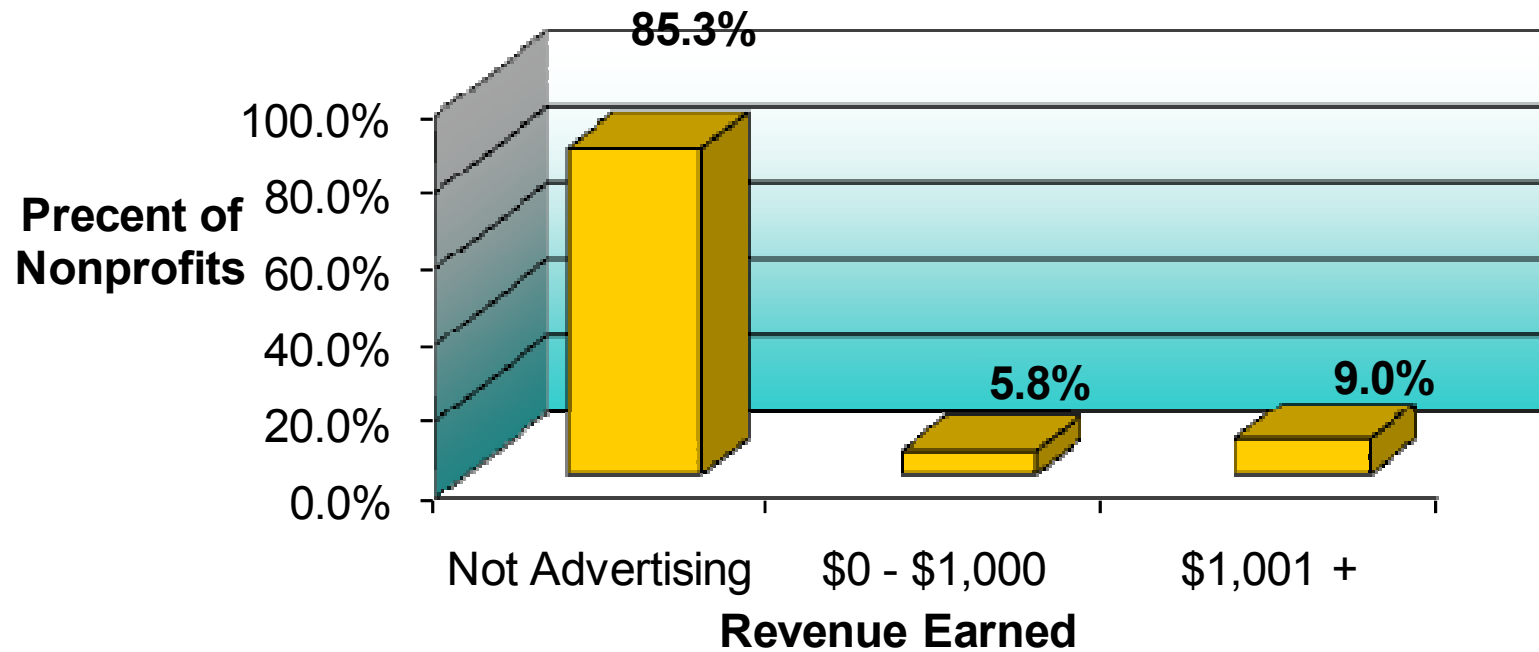
Adoption of House Social Networks by Nonprofits



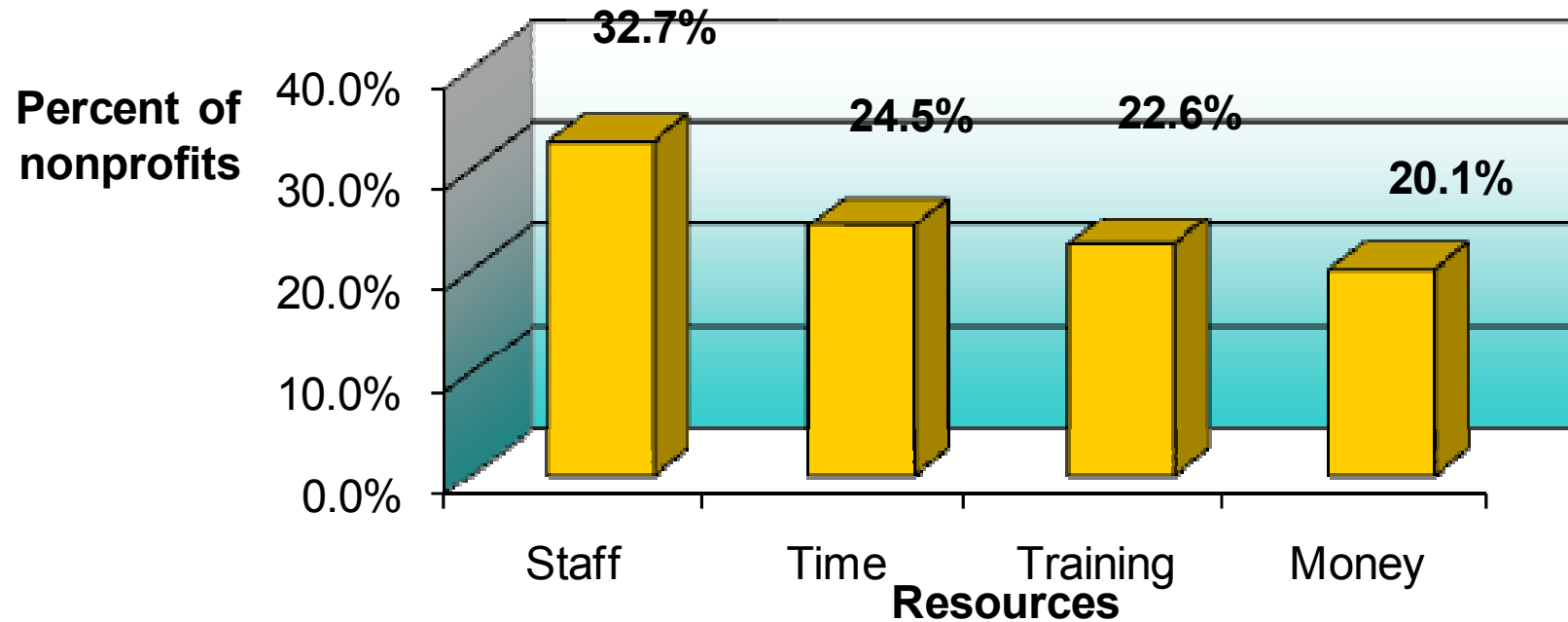
Fundraising on Nonprofits' House Social Networks



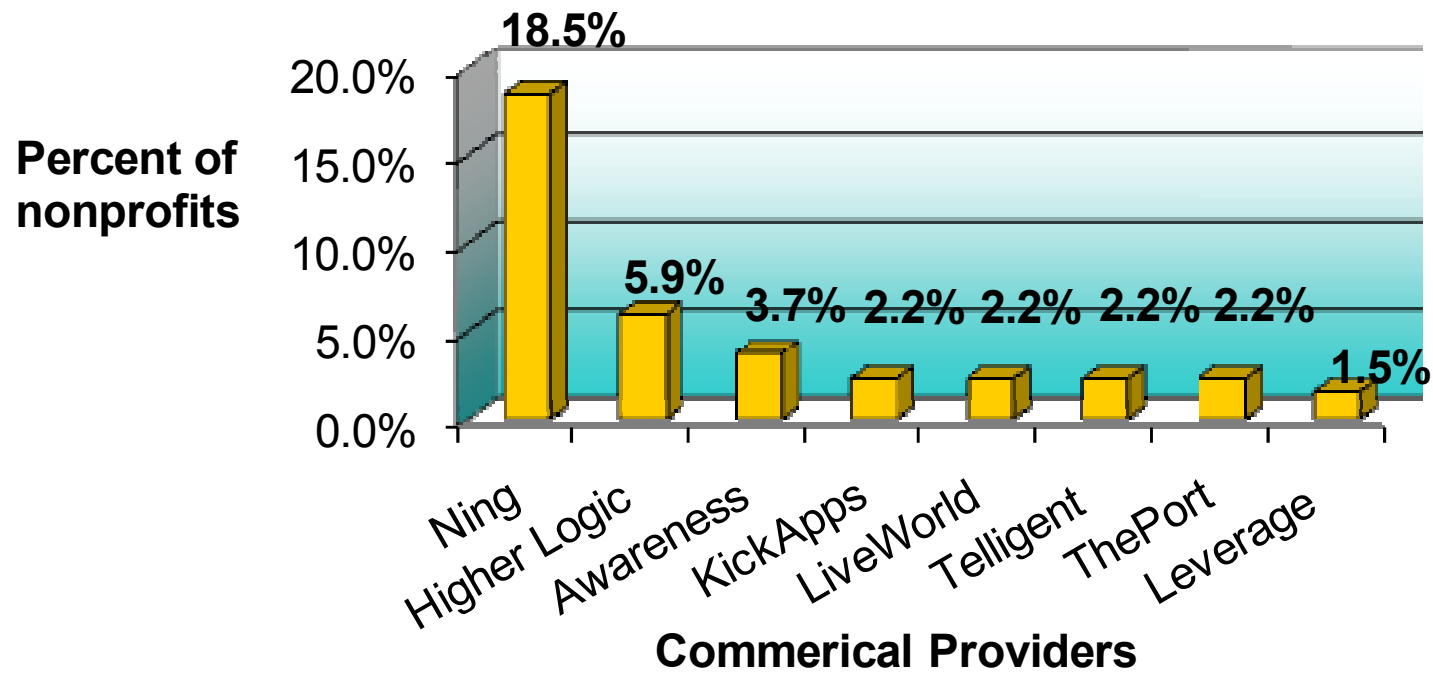
Advertising Revenue on Nonprofits' House Social Networks



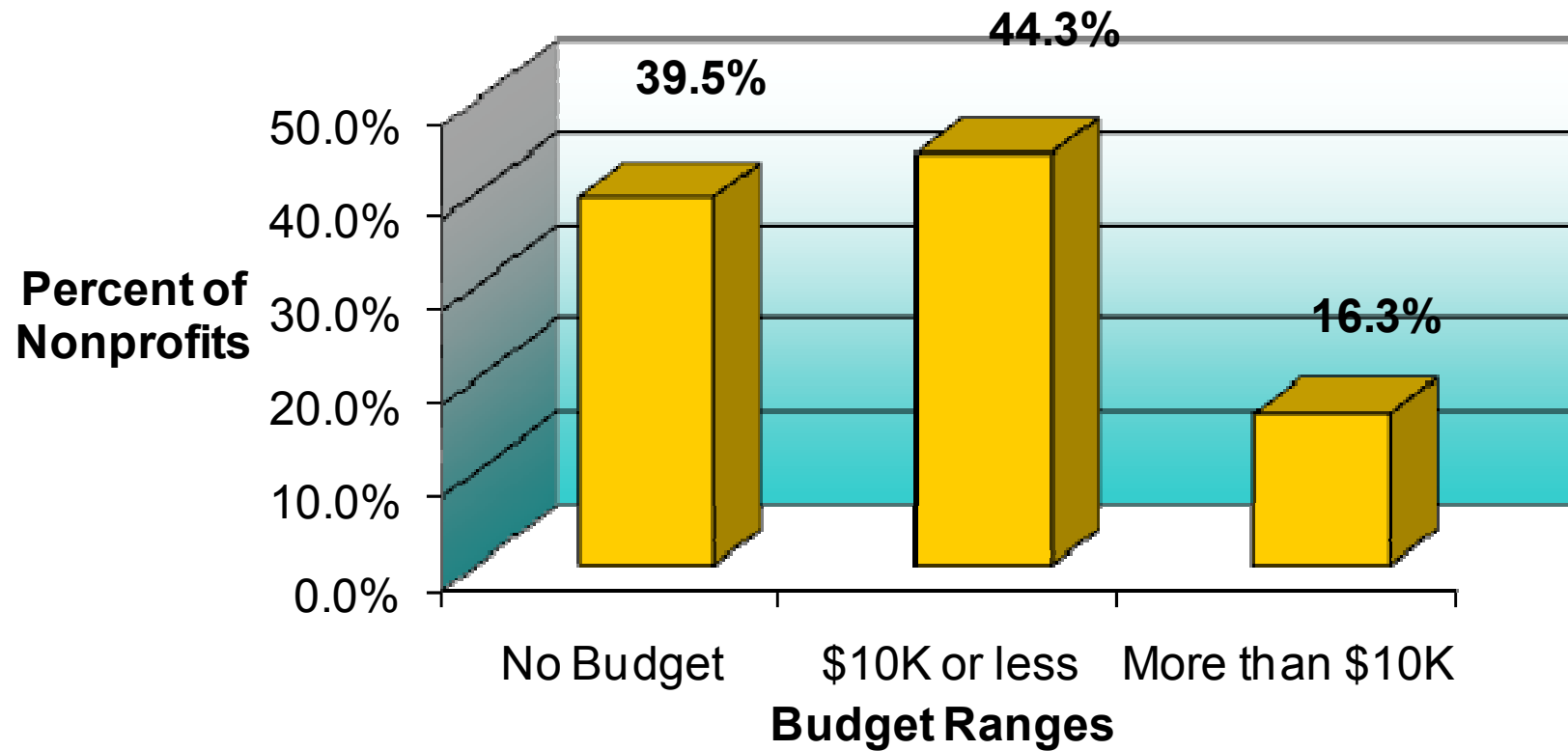
Desired Additional Resources for House Social Networks



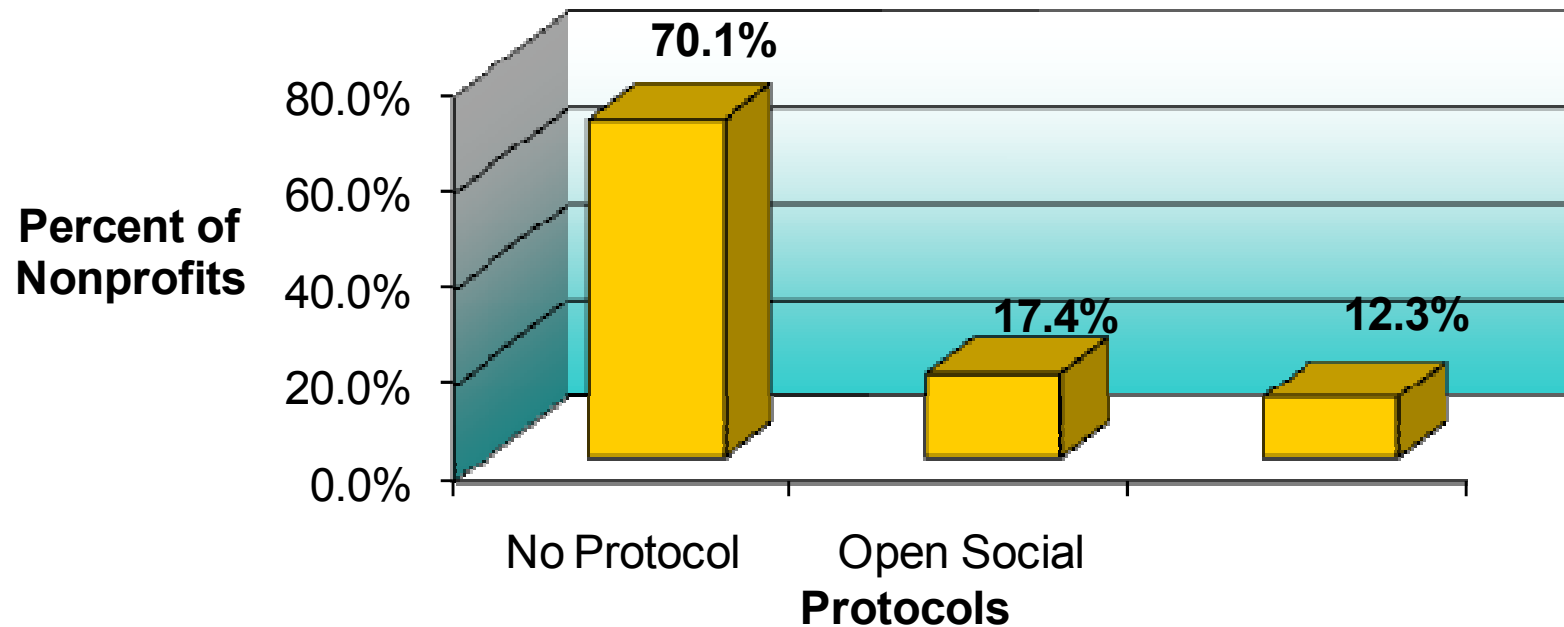
Popularity of Commerical Software for Building House Social Networks



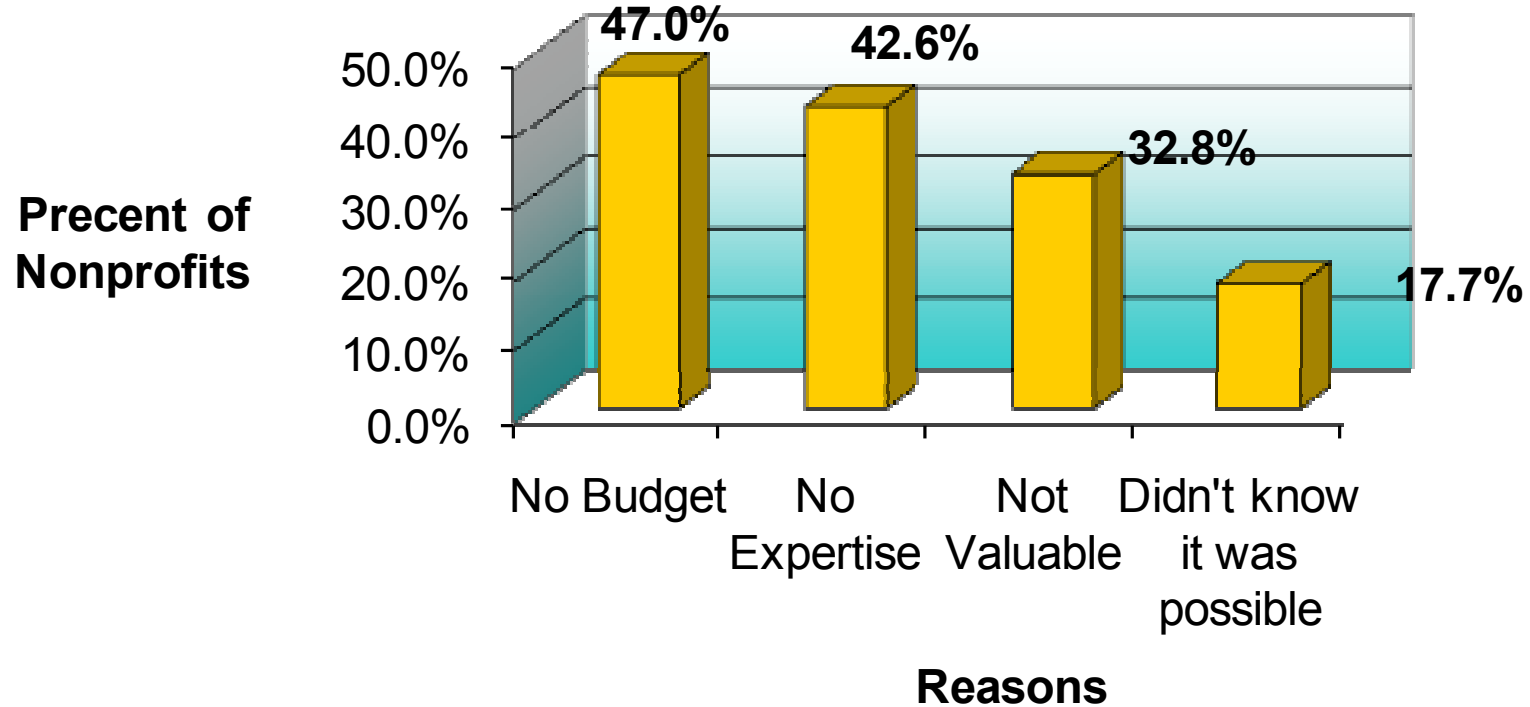
Budget for Social Networking Software



Universal ID Protocols on Nonprofits' House Social Networks



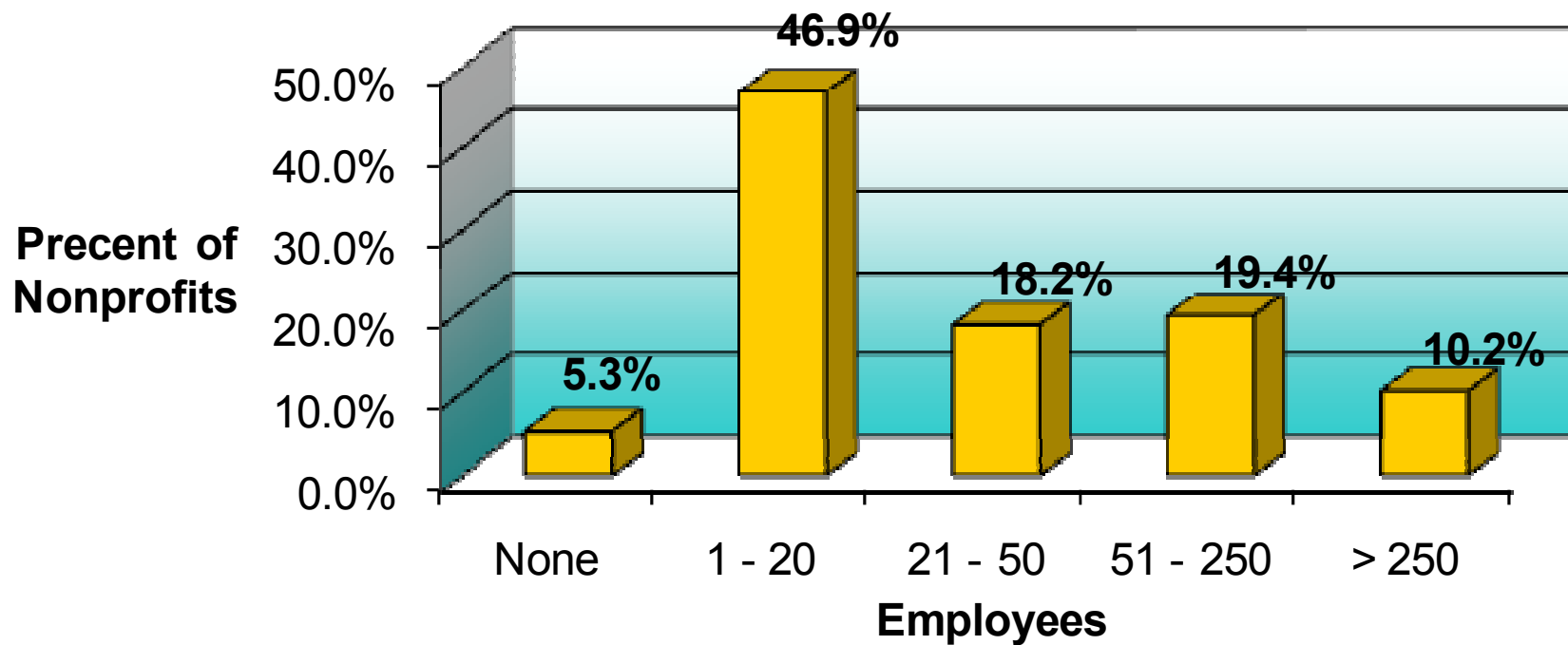
Reasons Nonprofits Have Not Built Social Network Communities



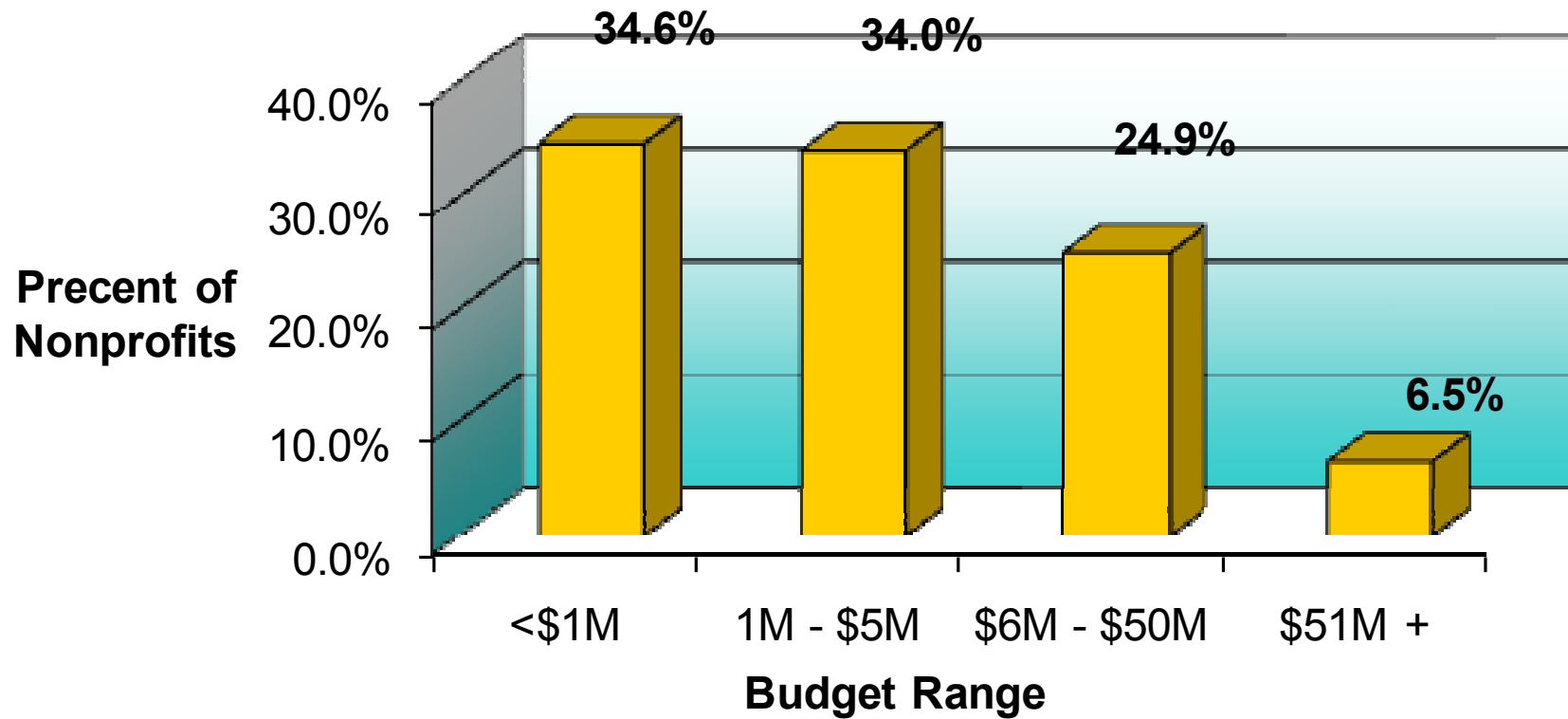
Part 5

RESPONDENT PROFILES

Number of Employees



Annual Budget



Organization Types

Public and Societal Benefits – *Civil rights and advocacy, community organizing, philanthropy* **21.2%**

Human Services – *Crime and legal, employment, agriculture and nutrition, housing, public safety, youth and recreation* **20.2%**

Health & Healthcare **13.4%**

Association **9.9%**

Environment & Animals **9.1%**

Arts & Culture **6.5%**

Education K – 12 **4.6%**

Organization Types

International – *Foreign affairs, international human rights, national security, and diplomacy* **4.5%**

Higher Education **3.3%**

Religious & Spiritual **2.4%**

Media **9.9%**

For Profit Business **1.4%**

Mutual Benefit – *Insurance and retirement services, fraternal societies, and burial services* **1.0%**

Labor Union **0.3%**

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