



HELLO, WE LOVE YOU!

"Study is like the heaven's glorious sun...." - Love's Labour's Lost

Our annual Benchmarks Study is a labor of love. And for the past few months, the emphasis has been on *labor*: working closely with partner organizations; collecting and collating data; poring over the numbers to spot trends, insights, and surprises; double- and triple-checking our information; and making it all look pretty. That's the labor; now let's take a moment for the *love*.

First, those partner organizations. This year, 53 nonprofits generously volunteered to share their data to help give a broad and diverse look at the online fundraising and advocacy world in 2013. And then: the diligent, patient staff at each of those nonprofits helped compile, code, and verify results from over 2.1 billion email messages, 5.6 million donations, 7.5 million online actions, and countless supporter interactions. Our thanks go out to every one of our partners. We love you.

We also love the Nonprofit Technology Network (NTEN) for a whole host of reasons, not least of which is its continued support of this study and assistance in recruiting participants.

And you, reading this. You're interested in making your nonprofit more successful, moving your cause forward, building better relationships with activists, donors, and supporters, and making the world a better place. We have so much in common! We love you, too.

So who's this "we"? The 2014 Benchmarks Study was written by M+R's Cameron Lefevre, Will Valverde, and Sarah Vanderbilt. Theresa Santangelo led a team including Jonathan Benton, Mark Fritzel, Cameron Lefevre, and Karen Hopper to collect, aggregate, and analyze the data in this study. Sarah DiJulio and Madeline Stanionis added brilliant insight and made sure we didn't duck any of the hard questions. Tom Giordano, Katie Heller, Michael King, and Charles Yesuwan designed the study and accompanying website, mrbenchmarks.com.

ABOUT M+R

M+R is 100 smart people who help nonprofits achieve real, lasting change. We mobilize supporters, raise money, and move the media, the public, and decision-makers. We only work with clients we believe in. We take risks. We work hard. We're leaders, we're organizers, and we don't stop until we win. 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 study is available for free download online at www.mrbenchmarks.com. For more information about the report, please contact M+R at 917-438-4634 or benchmarks@mrss.com.





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Table of Contents

The Big Picture	1
(Some of The) Big Questions	2
A Little More Conversation, and Also More Action .	3
There's No Time Like The Present	4
Deep Dive on December	5
The Composition of Attrition	7
What's Not in This Study	8
How to Use This Study	11
The Data	12
Email Messaging	12
Overall email metrics	13
Fundraising messages	19
Advocacy messages	22
Newsletter messages	25
Fundraising	26
Website Engagement	33
Social Media	38
Other Stuff	44
Glossary of Terms	44
Study Methodology	47
Participants	51

THE BIG PICTURE

Here's the thing: we don't just obsess about online metrics once a year, for Benchmarks. We obsess about the numbers *constantly* – day by day, email by email, dollar by dollar. We can't help it.

If you're like us, diligently monitoring the trends throughout the year, here's what you might have noticed in 2013. Email open rates continuing the long-term slide we've all come to know and sort of dread. Click-through rates and email page completion rates following suit – leaving email response rates with nothing to do but go down. For fundraising messages, response rates were down 11% from 2012 levels to 0.07%, and for advocacy messages they declined 25% to 2.0%.

And yet. Even if all that sounds eerily familiar to your own experience, we're guessing you weren't seized by despair over the past year. At least not often, we hope. For one thing, email lists are still growing – up 14% over 2012 levels.

And the increase in email audience size means that even with a decline in some key metrics, email continues to account for about a third of online fundraising revenue.

And that's not all: email metrics don't capture the full picture of how email subscribers give online. Analysis of a handful of M+R clients shows that email subscribers may donate up to two to three times more revenue online through non-email channels (driven by search, social media, or just going straight to a nonprofit's website). That's not in the study (YET!). For now, we encourage you to take a look at *overall online giving* by subscribers, in addition to giving directly sourced to email.

Online giving among study participants increased 14% over 2012 totals. More gifts are coming in online – and just as exciting, more of that revenue is coming in the form of regular, reliable monthly giving. **Monthly giving revenue** grew 25% in 2013, and accounted for 16% of total online giving.

Nonprofits are also benefiting from increased website participation. **Monthly website traffic for study participants grew by 16% in 2013.** On average, 0.69% of website visitors made a gift, bringing the average value of a visit to \$0.60. Visitors who made it to a nonprofit website's primary donation page converted at a rate of 15%.

Supporters aren't just checking email and visiting our websites – they are also becoming our friends and fans. Social media audiences continue to grow at a much faster rate than email or website traffic. Nonprofits in our study grew their number of Facebook fans by 37%, and Twitter followers by 46%. While email continues to dwarf social media – both in audience numbers and as a driver of revenue – more and more nonprofit supporters are connecting with the causes they care about on Facebook, Twitter, and the rest.

That's the big picture: nonprofits are reaching more people through email, their own websites, and social media.

But it's the little picture, the details and nuance, that really tell you how your program is doing, how your supporters are responding, and how your organization can thrive. We encourage you to use this study as a guide to which numbers matter most and what your peers are experiencing – and then develop your own benchmarks to measure your progress, confront your challenges, and identify your best opportunities.

Not just once a year, but day by day, email by email, dollar by dollar.

(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.

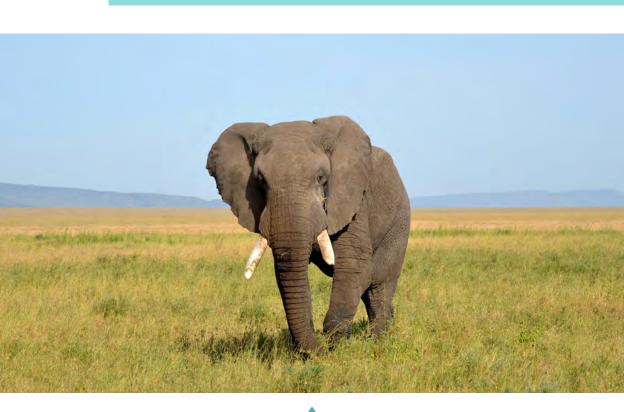
WHAT'S THE RIGHT MIX OF ADVOCACY MESSAGING?

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?



A LITTLE MORE CONVERSATION, AND ALSO MORE ACTION

What's the right mix of advocacy messaging?

There's a reason we call them nonprofits. They don't exist to make money – they're here to change the world. And creating change often means providing supporters with an outlet for courage, speech, and action.

Nobody did that quite like Environmental groups in 2013, and there are important lessons in the approach they took to advocacy messaging last year.

First, an average email subscriber for Environmental groups received more advocacy messages (33) than fundraising messages (27) in 2013. That is in stark contrast to other nonprofits – the average ratio in our study was 9 advocacy messages to 24 fundraising messages per subscriber.

Big deal, right? Of course Environmental groups working on legislative issues, climate change, deforestation, and the whole range of issues affecting our planet sent a higher percentage of advocacy messages than groups in the International sector focused on aid and development. Different issues, different missions, and different approaches. But this isn't just about what nonprofits do; it's about what supporters do.

Environmental groups didn't just send more advocacy messages – they also saw higher email advocacy response rates than any other sector. By a lot! The average response rate for an advocacy email from an Environmental group was 4.2%. Across all nonprofits, that number was 2.0%. (For more on email advocacy results, see pages 22-24.)

Where you might expect diminishing returns, or subscribers getting fatigued by a large number of calls to action, we saw the opposite. Across the full study, we saw a strong positive correlation between advocacy message volume and email response rates: **the more advocacy messages groups sent**, **the higher their advocacy response rates tended to be**.

Sure, some of this is probably about audience. Environmental groups put out a lot of opportunities to take action online. People who are excited about taking action online join their lists, and those people continue to respond well to further advocacy opportunities.

If you're a group that engages in advocacy work, the lesson might be: go for it. Don't be afraid to experiment with a higher advocacy messaging volume. It might just be what your supporters need – and what you need to help power your cause.

As Archimedes might have said: "Give me an email list long enough and a CRM from which to send messages, and I shall move the world."

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.

DEEP DIVE ON DECEMBER

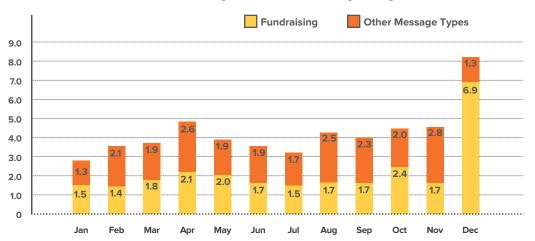
What's the deal with end-of-year fundraising?

It's the most wonderful time of the fundraiser's year (and by "wonderful" we mean "exhaustingly, nail-bitingly, occasionally-panic-inducingly hectic"). As human beings, we love December for the glorious flood of donations that flows toward the causes we care about. But as data nerds, we love December because every single one of those gifts is a data point, and the whole month is a treasure trove of information.

Let's dig a little deeper into how nonprofits – and donors – acted in December, how this special month compares to the rest of the year, and what it all means for your strategy next year-end. It's a fascinating look at the interplay between nonprofit strategy, message volume, and key metrics.

To begin with – and this will surprise nobody with an email address and functioning internet connection – nonprofits send way more fundraising messages in December than at any other time of year. In fact, the average number of fundraising messages per subscriber sent in December 2013 was just about 7. No other month reached even half that volume.

MESSAGE VOLUME: MESSAGES PER MONTH PER SUBSCRIBER



And an interesting side note: although it may have felt like the December deluge was particularly intense in 2013, we found message volume unchanged from December 2012. That's right – **organizations in our study sent just as many December messages in 2012 as they did in 2013.**

So, that's what nonprofits were doing in December: sending a ton of fundraising messages (along with a relatively small number of non-fundraising messages – 1.3 per subscriber). How did supporters respond?

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.



THE COMPOSITION OF ATTRITION

What can we learn from churn?

To everything (churn, churn, churn), there is a season (churn, churn, churn). As it happens, 2013 was a season for churn rates to go down. And while the precise causes aren't clear, taking a closer look at the numbers leads us down some interesting paths.

To calculate churn, we add the number of deliverable email addresses at the end of 2013 to the number who became unreachable over the course of the year. We then divide the number who became unreachable by that number. Essentially, it's the percentage of people who you had but lost at some point in the year. "Lost" can happen in a couple of ways.

The most obvious is unsubscribes – subscribers receiving an email, clicking the unsubscribe link down in the footer, and opting out of the your email list (or logging in to a user account on your website and opting out there). That is, a supporter actively removing herself from your file.

The other major element of churn is bounce – email addresses that become unavailable to receive your message. You could have supporters who subscribed via a work email address, then switched jobs. Someone might abandon an old AOL email account in favor of Gmail (or vice versa, though we've personally never witnessed that happening). In any case, bounce isn't about a supporter opting out, it's about an email address becoming unreachable.

Why did churn rates drop?

In 2013, the average churn rate for study participants was 13% – down 3.5% from the previous year. The interesting thing is that bounce rates remained more or less steady. It was unsubscribes that dropped, down over 9%.

Taking a closer look, we found a negative correlation between email volume and the overall email unsubscribe rate. That is, as nonprofits send more email messages, their unsubscribe rates go down. It's a bit counterintuitive, but it shows that high message volume doesn't necessarily lead to mass abandonment of an email list.

One partial explanation for the decline in unsubscribe rates could be that more nonprofits are thinking about list hygiene and adopting a more sophisticated segmentation approach: removing unresponsive subscribers or suppressing them from some messaging, perhaps. That means targeting those supporters most likely to engage on a given issue – and less likely to unsubscribe.

At the same time, we saw a 4% decline in open rates from 2012 levels. It's hard to unsubscribe to an email that you haven't opened, so even if lower open rates aren't good news they could still lead to lower churn.

Each of these factors pulls in a different direction, with the overall impact being a drop in the churn rate. It's a reminder that even when the data looks crisp and clear, the reasons behind it can be complex. When you think about your unsubscribe rates – or any other key metric – be sure to explore all the factors that could cause changes, and plan your strategies accordingly.

(For more on churn rates, see page 14.)

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.

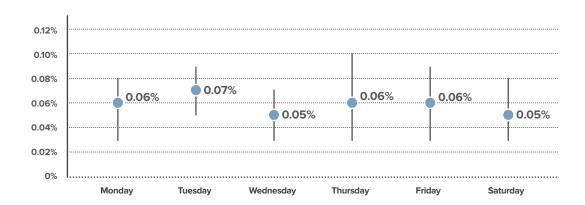
Ooh I Need to Fundraise, 8 Days a Week

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



The tricky thing here is that the aggregate data may be misleading: just because it didn't show a difference on this metric doesn't mean a Wednesday send and a Saturday send are interchangeable. If Saturdays really are bad for fundraising, but nonprofits reserve only the strongest messages for Saturday, then on balance response rates will look okay. In the absence of rigorous head-to-head tests, we simply don't know—which is why this data was denied admittance to the Chart Party.

So, when is the best time to send a fundraising message? When it's ready. No, really. It's not about what the calendar says, it's about making sure you say something timely, powerful, and relevant to your supporters.

(You might notice that the chart on the previous page doesn't include Sunday. As it happens, we had way too little data on Sunday fundraising messages to include the results here. Nonprofits are extraordinarily hesitant to send on Sunday – which means the playing field could be wide open for anyone willing to buck the trend. Could this be an opportunity for adventurous marketers?)

Immobilized

This study includes a single data point on mobile text messaging programs: for every 1,000 email addresses on file, nonprofits in our study had 13 mobile text subscribers. While many nonprofits have made growing a mobile text program – and in particular text-to-give – a priority over the past few years, these efforts have not been widespread enough among participants to provide our study with solid data.

From year-over-year audience growth, to message volume, to response rates, the limited data we received from study participants told no coherent story. Maybe that will change in the future, in which case we'll report on these numbers in a future Benchmarks Study. Or maybe not. Maybe cell phones will go the way of pagers and instead we'll be reporting on Google Glass giving. (Hmmm. Not so sure about that last one....) Until then, all we can tell you is this: 13 mobile subscribers per 1,000 email addresses.

That doesn't mean the mobile medium doesn't matter – in fact, as email and the web become increasingly accessible on mobile devices, optimizing your user experience for mobile users is more important than ever. But it may be that most nonprofits in the U.S. never invest as heavily in mobile text communications as their counterparts around the globe.

The limits of our data set

It pains us to admit it, but we don't know everything. The data presented in this study is based on the most complete and accurate information our 53 nonprofit partners were able to make available. Our goal is to provide the nonprofit community with only the most dependable data and rigorous analysis.

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.

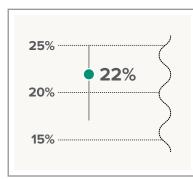
Just the facts, ma'am

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.



HOW TO USE THIS STUDY

The data in this study comes from a diverse mix of 53 nonprofits of various sizes who have partnered with us to provide a snapshot of their online performance in 2013. It covers a range of topics, from email performance, to overall online fundraising, advocacy, and engagement, to website traffic, to social media. Our hope is that it helps you gauge your organization's performance and guide your strategy.



HOW TO READ THE CHARTS

The 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.

For email and website data, participating organizations are broken down by sector and by email list size. The median email list size for all participants in the study was 540,927. Because of the work required to code the data, many truly small nonprofits were unable to participate, which means that our overall data tends to reflect the experience of nonprofits with larger email lists.

For social media data, organizations are broken down by the number of Facebook fans and Twitter followers.

As you review the findings, pay special attention to the numbers for your sector and size: these are your closest peers in the study. See page 47 for details on methodology, including size breakdowns, and page 51 for a complete list of participants by sector.

Keep in mind that this data is a starting point, the beginning of a conversation. We'd love to hear your thoughts and questions – visit us at mrbenchmarks.com or tweet @mrcampaigns.

HOW NOT TO USE THIS STUDY

This is our eighth annual Benchmarks Study, and probably our favorite (don't tell the previous years) – but we urge you not to compare it to past studies. This year's study includes nonprofits that may or may not have participated in previous years – which means you can't make reliable comparisons to previous years' data sets.

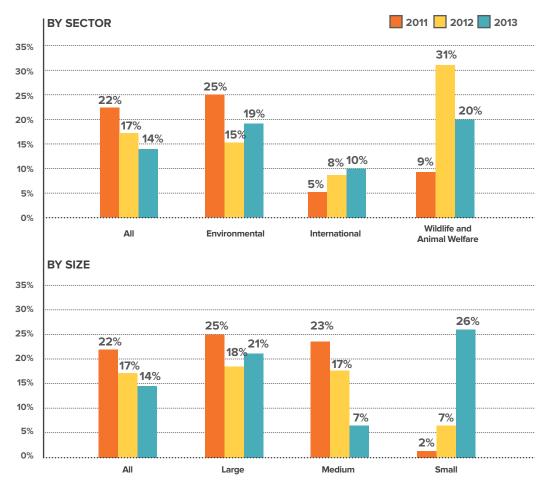
We collected data for 2012 and 2013 from this year's participants where possible, and all comparisons to 2012 in this study are based upon these data, rather than the data collected during past years' studies.



TL;DR (KEY FINDINGS)

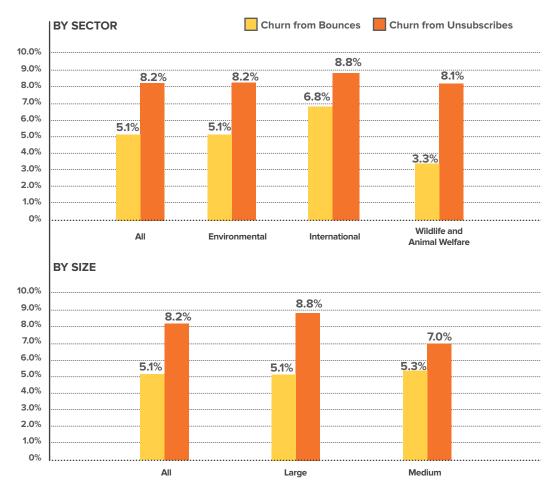
- 1. **Email list size** for study participants grew by 14% in 2013. Small groups saw the highest rate of list growth at 26%.
- 2. **Open rates** were consistent across sectors and types of messaging with a 13% overall open rate. This is a decline of 4% overall from 2012.
- 3. **Click-through rates** 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 GROWTH



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

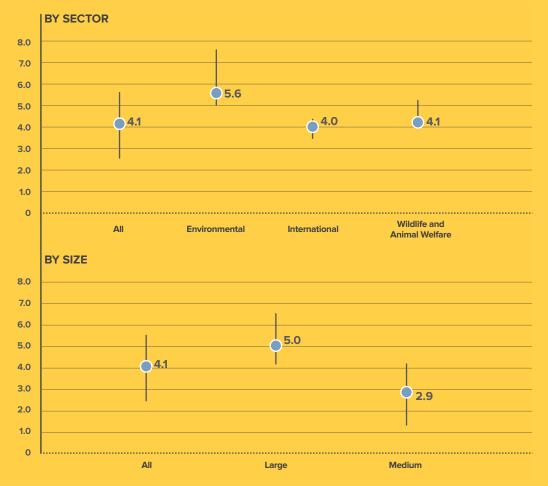
EMAIL LIST CHURN



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

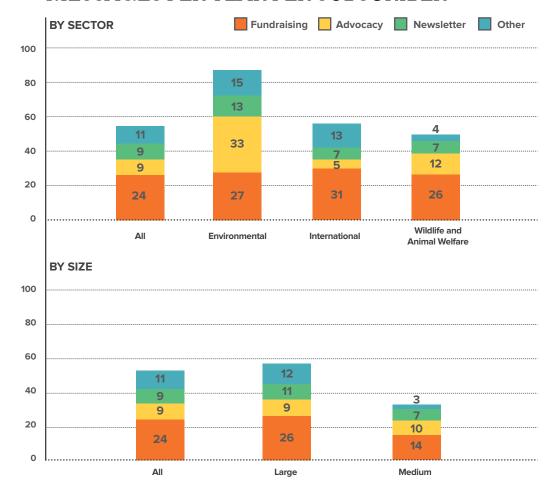
For more on churn rates, see page 7.

EMAIL VOLUME: MESSAGES PER MONTH PER SUBSCRIBER



Due to a small sample size, we did not calculate message volume for Rights organizations or Small organizations.

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 RATES BY MESSAGE TYPE

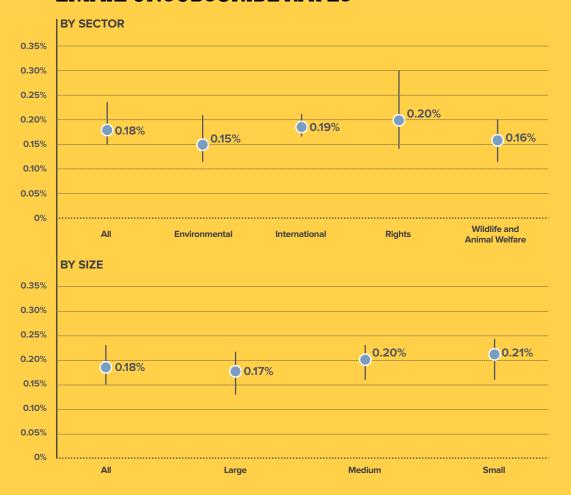
The numbers in parentheses represent the percentage change in rate since 2012.

	OPEN RATE	CLICK- THROUGH RATE	RESPONSE RATE	PAGE COMPLETION RATE	UNSUBSCRIBE RATE
All	13% (-4%)	1.6% (-16%)	-	-	0.18% (-12%)
Fundraising	12% (-3%)	0.4% (-13%)	0.07% (-11%)	22% (-5%)	0.18% (-14%)
Advocacy	13% (-6%)	2.9% (-17%)	2.0% (-25%)	83% (-2%)	0.16% (-10%)
Newsletter	13% (2%)	1.8% (-4%)	-	-	0.16% (-7%)

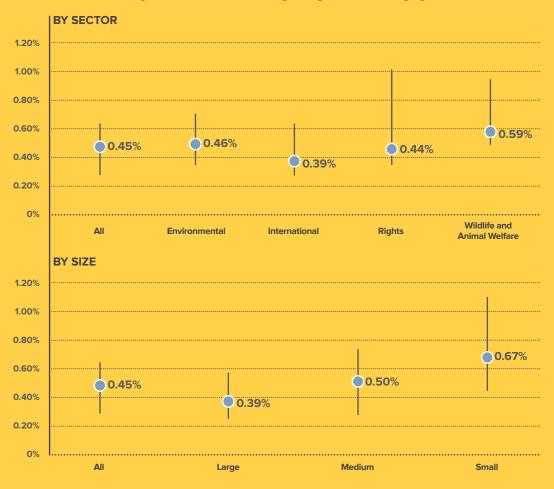
EMAIL OPEN RATES



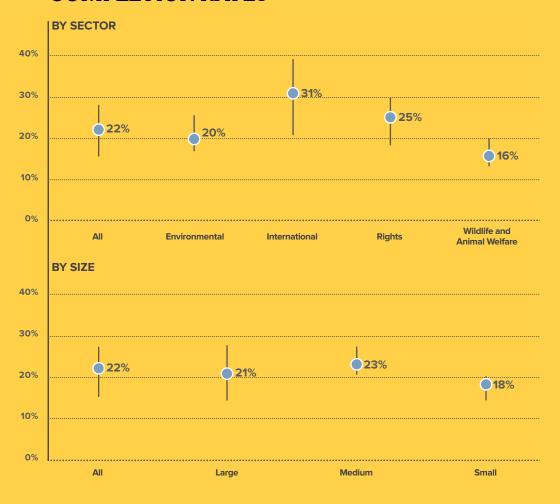
EMAIL UNSUBSCRIBE RATES



EMAIL FUNDRAISING CLICK-THROUGH RATES



EMAIL FUNDRAISING PAGE COMPLETION RATES



EMAIL FUNDRAISING RESPONSE RATES



EMAIL ADVOCACY CLICK-THROUGH RATES



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

EMAIL ADVOCACY PAGE COMPLETION RATES



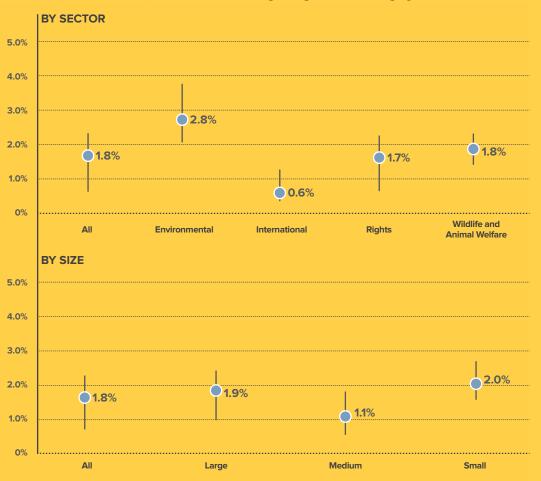
Due to a small sample size, we did not calculate email advocacy page completion rates for Small organizations

EMAIL ADVOCACY RESPONSE RATES



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

EMAIL NEWSLETTER CLICK-THROUGH RATES

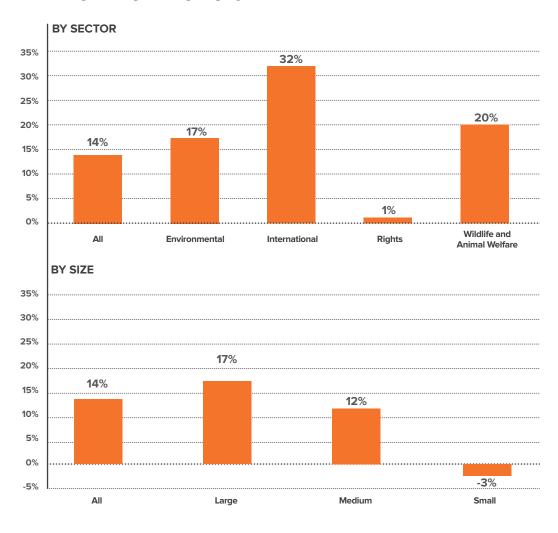




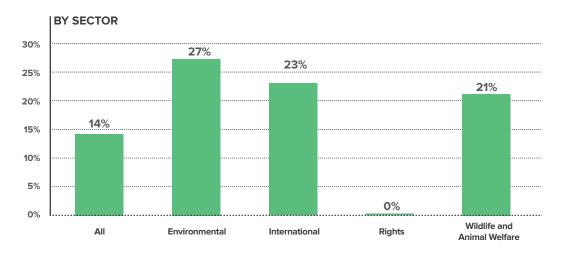
TL;DR (KEY FINDINGS)

- 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.

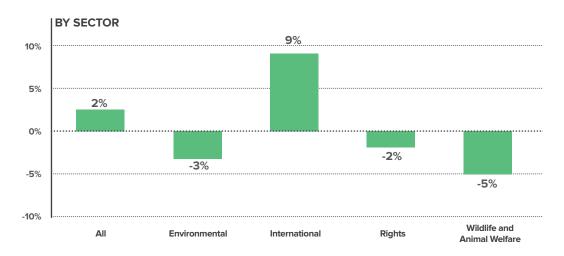
CHANGE IN ONLINE REVENUE FROM 2012 TO 2013



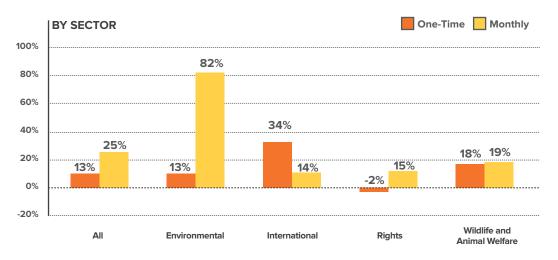
CHANGE IN NUMBER OF ONLINE GIFTS FROM 2012 TO 2013



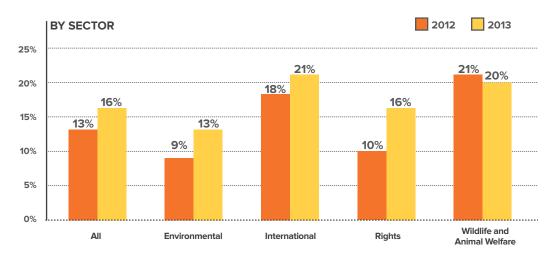
CHANGE IN AVERAGE ONLINE GIFT SIZE FROM 2012 TO 2013



CHANGE IN ONLINE REVENUE BY TYPE FROM 2012 TO 2013



MONTHLY GIVING AS A PERCENTAGE OF TOTAL ONLINE REVENUE

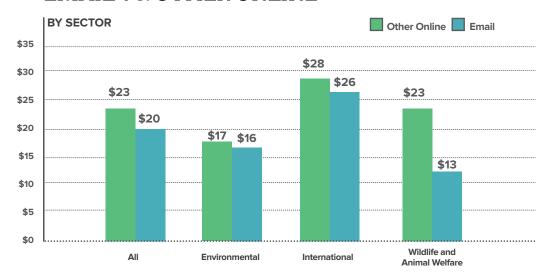


In every sector except Wildlife and Animal Welfare, monthly giving made up a higher percentage of total online revenue this year compared with 2012.

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

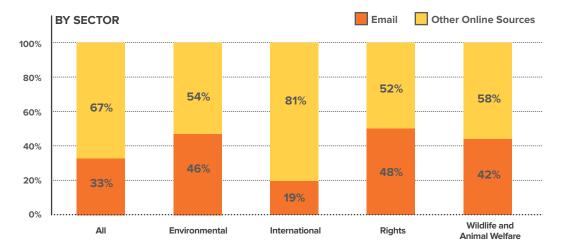


AVERAGE MONTHLY GIFT SIZE: EMAIL VS. OTHER ONLINE



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

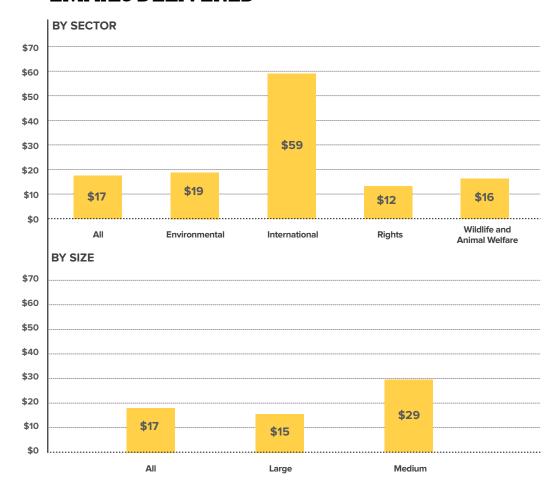
ONLINE FUNDRAISING SHARE BY SOURCE: EMAIL VS. OTHER ONLINE SOURCES



Overall, email accounted for one third of online revenue in 2013, but there was a lot of variation among sectors. For Environmental and Rights groups, email made up nearly half of all revenue raised online, while International groups received the vast majority of their online revenue from other sources.

Note, however, that online revenue from email subscribers across all channels may have been significantly higher than email-only totals (which has been the experience for some M+R clients – see page 1 for a bit more on this). This will be a trend to watch in future studies.

EMAIL REVENUE PER 1,000 FUNDRAISING EMAILS DELIVERED



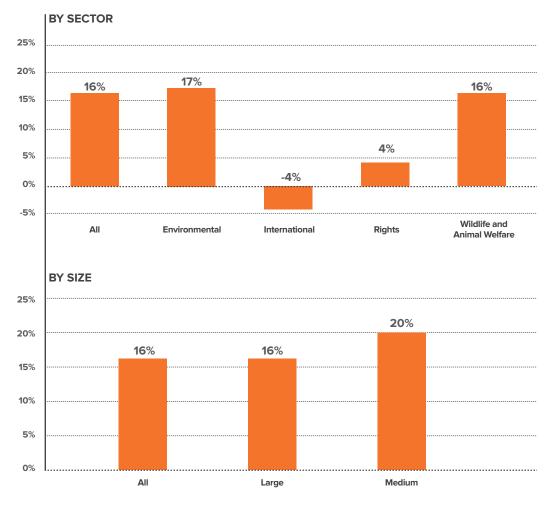
Due to a small sample size, we did not calculate email revenue for Small organizations.



TL;DR (KEY FINDINGS)

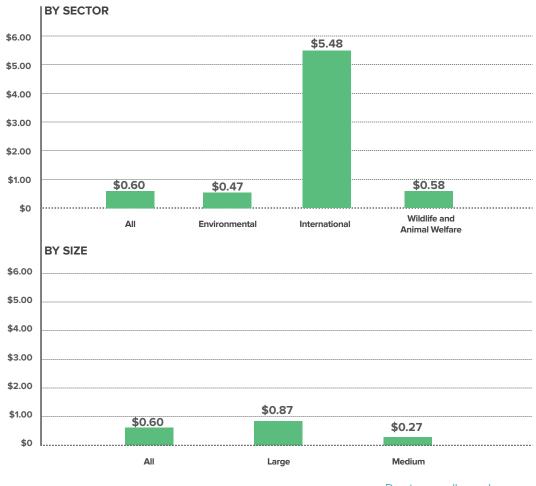
- 1. Website visitors per month grew by 16% over 2012 totals.
- 2. **Website donation conversion rate** the percentage of web visitors who make a gift was 0.69% in 2013. This metric varied widely depending on sector and group size.
- 3. **International groups** experienced a slight drop in website traffic, but also received by far the highest revenue per visitor of any sector. Bear in mind that because the website traffic metric is calculated on a monthly basis, a massive spike in traffic during Typhoon Haiyan would be smoothed out if other months saw lower average traffic. See page 4 for details on how humanitarian crises might affect revenue and conversion metrics for International groups.

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.

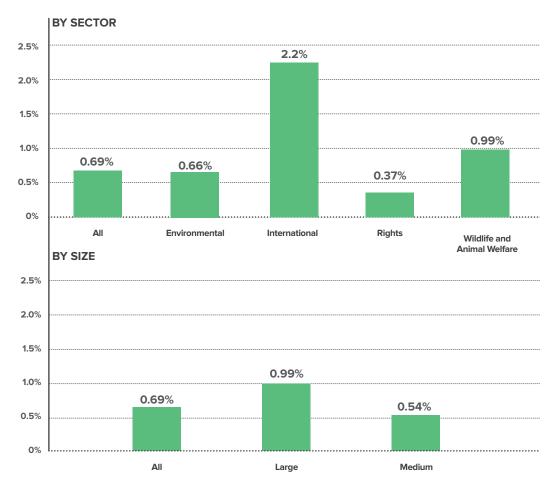
WEBSITE REVENUE PER VISITOR



Due to a small sample size, we did not calculate website revenue per visitor for Rights or Small organizations.

For visitors who make sustaining gifts, only the value of the initial gift is included in these totals. Depending on retention, the value of these gifts may be substantially higher.

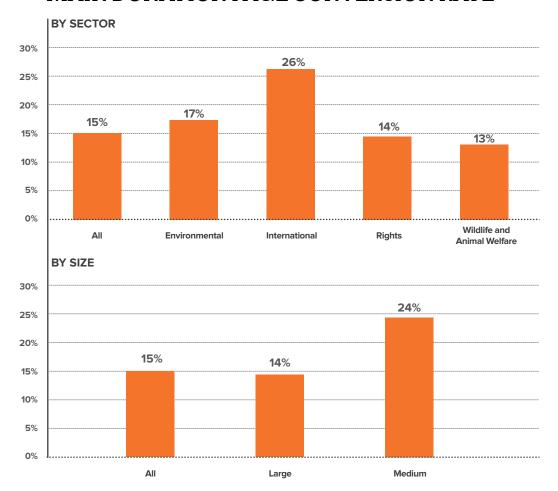
WEBSITE DONATION CONVERSION RATE



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.).

MAIN DONATION PAGE CONVERSION RATE



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



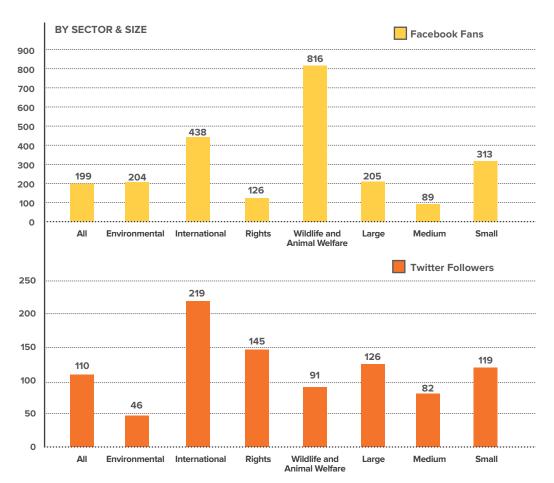
TL;DR (KEY FINDINGS)

- 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.

Anoteon 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.

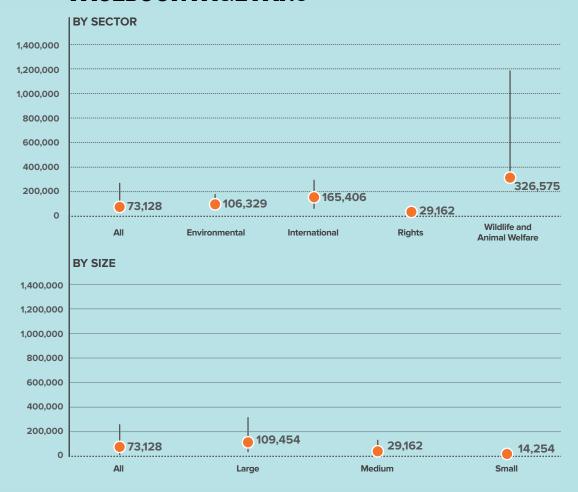
FOR EVERY 1,000 EMAIL SUBSCRIBERS, NONPROFITS HAVE...





Facebook Fan page and Twitter Follower sizes are defined as: Small - Under 25,000; Medium - 25,000-100,000; Large - Over 100,000.

FACEBOOK PAGE FANS

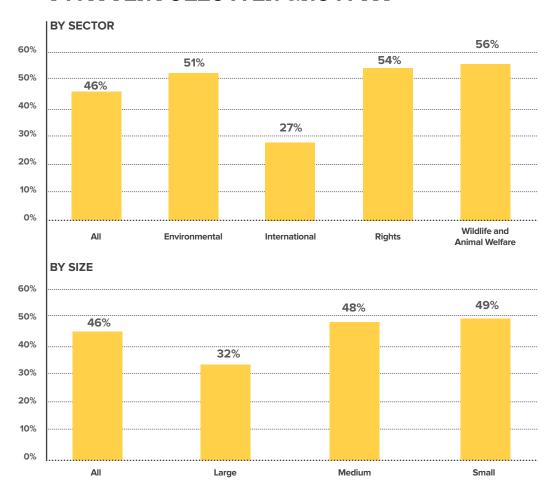


This chart groups organizations by their email list size.

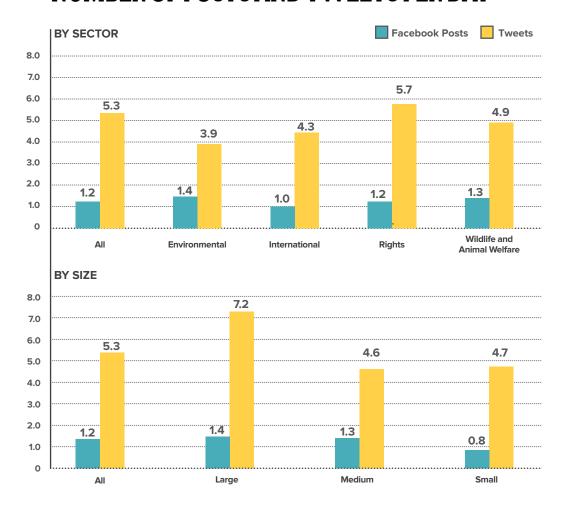
FACEBOOK PAGE FAN GROWTH



TWITTER FOLLOWER GROWTH



NUMBER OF POSTS AND TWEETS PER DAY



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.

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 bounce are not included.

PAGE COMPLETION RATE

Calculated as the number of people who completed a form divided by the number of people who viewed that form. For email-driven fundraising and advocacy forms, we used the number of people who clicked on the link in the email to get to that form as the number of people who viewed the form.

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.

TARGETED EMAIL

A segment of the full email file selected purposefully, such as by geography or past action. For example, 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.

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.

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

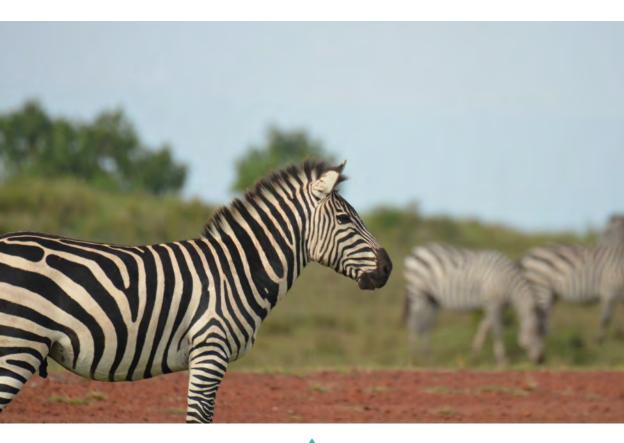
Calculated as the total revenue from one-time online gifts, plus the value of initial monthly gifts, divided by the total number of website visitors for the year. Depending on retention, the long-term value of monthly gifts may be substantially higher.

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.



STUDY METHODOLOGY

The 2014 M+R Benchmarks Study collected data about email messaging, email list size, fundraising, online advocacy, website traffic, Facebook, Twitter and mobile programs from 53 U.S.-based national nonprofits for the calendar year of 2013. We analyzed the results of over 2 billion email messages sent to over 41 million list subscribers; more than \$324 million of online donations from over 5.6 million online gifts; and 7.5 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 median 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 2012 and 2013. 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; 16 study participants met this standard.

We want to emphasize that the 2014 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 trends from 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 at the end of 2013 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 and Twitter Follower size groups were determined by looking at the page size and number of followers at the end of 2013 and grouping nonprofit participants into three categories, as follows:

Small – under 25,000; Medium – 25,000-100,000; and Large – over 100,000.

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







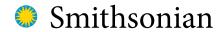
Memorial Sloan Kettering Cancer Center...



































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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.orq
- The Nature Conservancy www.nature.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

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.operationsmile.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, fundraisins, and Newsletter Ernails

\$30
\$191
0.18%
0.20%
0.15%
0.08%
1.5%
31%
78%
0.6%
0.39%
1.7%
12%
12%
12%
International

For every 1,000 Email subscribers, nonprofits have... 199 Facebook Fans





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

