

Still Setting the Pace in Social Media: The First Longitudinal Study of Usage by the Largest US Charities

Conducted by:

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Introduction

The University of Massachusetts Dartmouth [Center for Marketing Research](#) recently completed one of the first statistically significant, longitudinal studies on the usage of social media by United States charities.

The new study compares organizational adoption of social media in 2007 and 2008 by the 200 largest charities in the United States as compiled annually by Forbes Magazine. For complete details on Forbes Magazine's list of the largest charities, please visit their website at Forbes.com.

In 2007 (using the 2006 Forbes list), the first study of this group's use of social media was released. It revealed that these large non-profits were leading both corporations and universities (see our [previous research](#)) in their familiarity with, usage of, monitoring of and attitude towards social media.

This new research shows that charitable organizations are still outpacing the business world and academia in their use of social media. In the latest study (2008) a remarkable eighty-nine percent of charitable organizations are using some form of social media including blogs, podcasts, message boards, social networking, video blogging and wikis. A majority (57%) of the organizations are blogging. Forty-five percent of those studied report social media is very important to their fundraising strategy. While these organizations are best known for their non-profit status and their fundraising campaigns, they demonstrate an acute, and still growing, awareness of the importance of Web 2.0 strategies in meeting their objectives.

The University of Massachusetts Dartmouth [Center for Marketing Research](#) conducted a nationwide telephone survey of the nonprofits named by Forbes Magazine to their list of the 200 largest US charities for 2006 and again in 2007 under the direction of researchers [Eric Mattson](#) and [Nora Ganim Barnes](#). All interviews took place in 2007 and again in 2008. Thirty-eight percent (76) of the Forbes 200 list participated in the 2007 study and the same number in 2008, making this research statistically valid.

Forbes Magazine's [list of the 200 largest US charities](#) is compiled based on the amount of private, nongovernmental support a charity received in the latest available fiscal year. The list excludes academic institutions, nonprofits that are either funded by a tiny number of donors (such as most private foundations) or don't solicit, and religious organizations that don't report numbers.

The analysis that follows is based on detailed interviews with the 76 charities that responded each year. Those that participated are diverse in mission, average gifts, and total revenue. They are some of the best-known charities in the country including the Salvation Army, American Red Cross, Catholic Charities USA, Habitat for Humanity International and Easter Seals. On the Forbes list, 3 of the responding organizations were in the top 10 in 2007, 4 of them in 2008. Five were in the top 25 in 2007 and 8 in 2008. The participating non-profits have headquarters in every major US city including New York, Washington DC, Chicago, Boston, Atlanta and San Francisco.

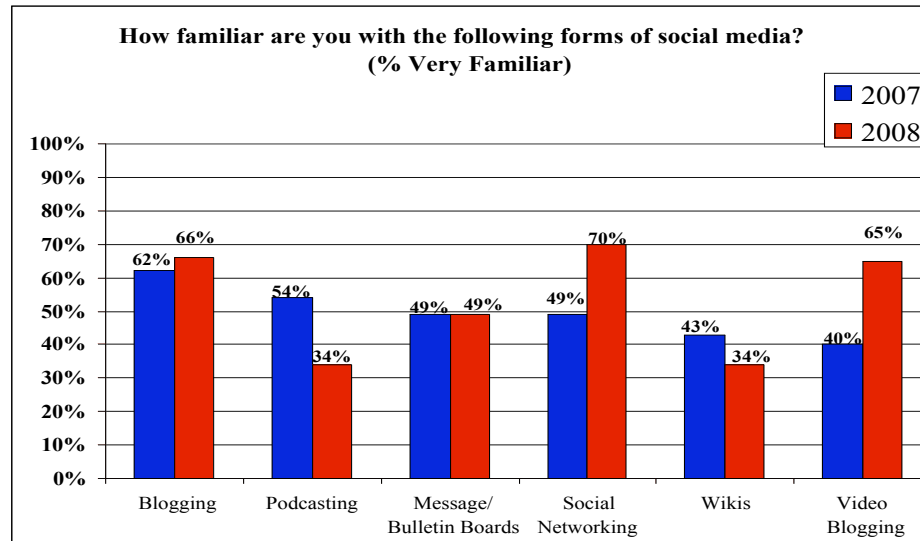
The 76 charity executives who responded were asked about social media and their organization's usage of it. In order to enable a valid comparison, this study followed a similar pattern to our [first study of charities](#) as well as our research into social media usage in [corporate](#) and [higher education](#) environments and asked detailed questions about the organizations' familiarity with, usage of, monitoring of and attitude towards six common forms of social media (blogs, wikis, podcasts, online video, message boards and social networking). Given the frequently uncertain definitions of these media, common understanding was sought by providing definitions from Wikipedia at the time of the survey.

Familiarity

The survey examined the familiarity of the respondents with six prominent social media (blogging, podcasting, online video, social networking, wikis, message boards). The social media that is most familiar to the Forbes 200 charities in the 2007 study was blogging with 62% of respondents claiming to be very familiar with it. One year later however, it is social networking that enjoys the most familiarity with 70% saying they are very familiar with this channel, an increase of 21%. It should be noted that these charities are making good use of both audio and visual technologies to help tell their stories and get their message out. Familiarity with using video in their blogs jumped from 40% in the 2007 study to 65% the following year.

In the 2007 study, familiarity and usage were not directly related. That changed in the 2008 study. The executives we spoke to were very familiar with blogging, social networking and video blogging and these were also the tools they were most likely to be using. See Figure 1 for results on how familiarity with social media has changed among charity executives.

Figure 1



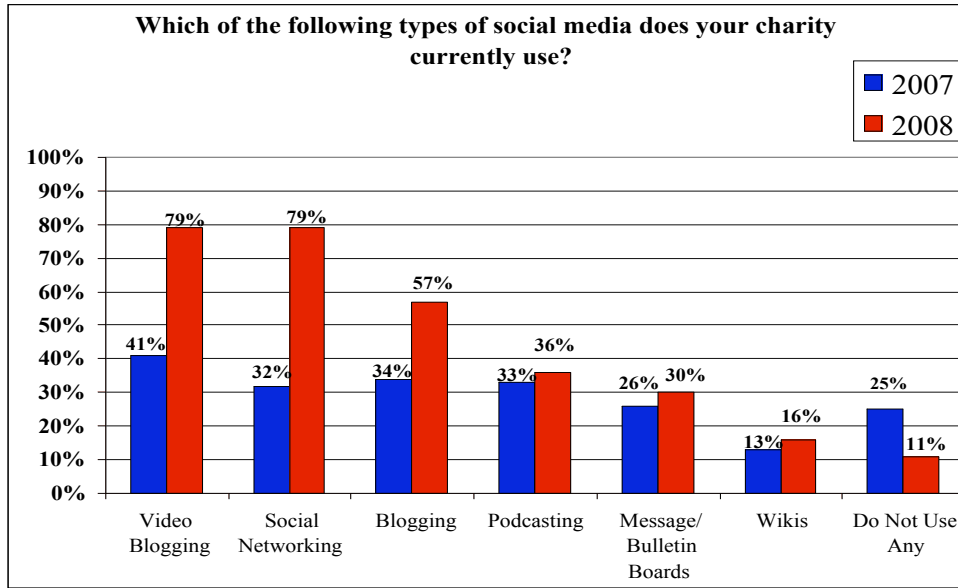
Usage

From familiarity the survey moved into examining actual usage of social media by the charities. Seventy-five percent of the respondents in 2007 reported they use at least one form of social media. One year later, 89% of them are using at least one form of social media. Usage is up for every tool studied.

According to the latest study social networking and video blogging are now the most common tools used with 79% of charities using each of them. Fifty-seven percent are blogging and 36% are podcasting. Sixteen percent are using wikis. Almost all of those using a blog are using other forms of social media as well.

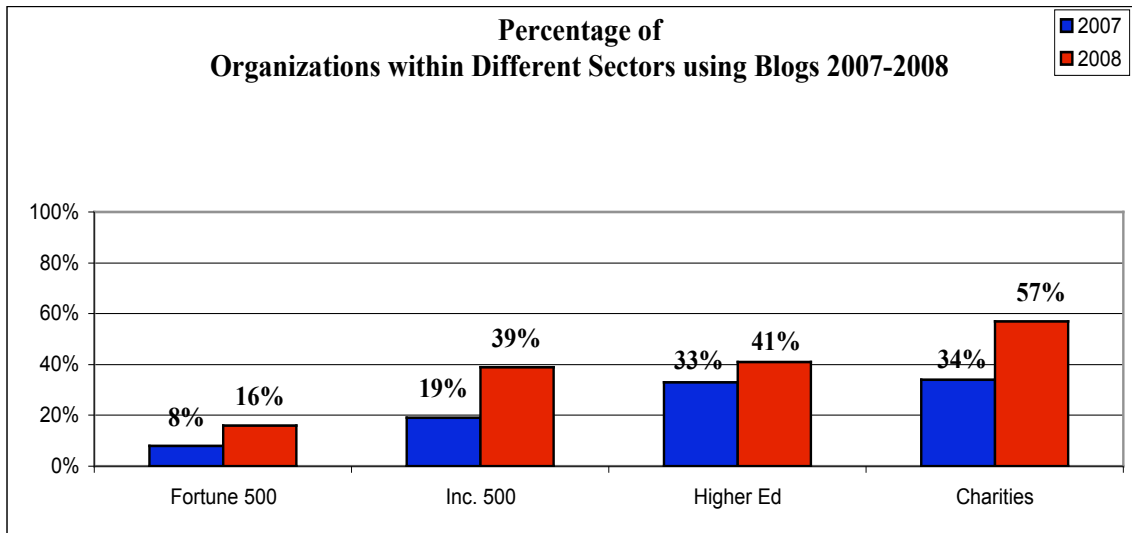
The use of social networking sites, video blogging, and blogging have increased dramatically. Video is up 38%, social networking 47% and blogging 23%. (Twenty-six percent of those with blogs are using Wordpress software as a platform.) In addition, the charities studied are also using micro-blogging sites like Twitter and uploading video to YouTube. See Figure 2 for more details.

Figure 2



Research on blogging across sectors shows clearly the extensive involvement of these not for profits with this particular channel. While the Fortune 500, the Inc. 500, US colleges and universities and charities have all increased their adoption of blogging between 2007 and 2008, charities are “out-blogging” them all for the second year in a row. Our latest research shows the Fortune 500 with the least amount of corporate blogs (16%), the Inc. 500 with 39%, colleges and universities blogging at 41% and charities now reporting 57% with blogs. See Figure 3.

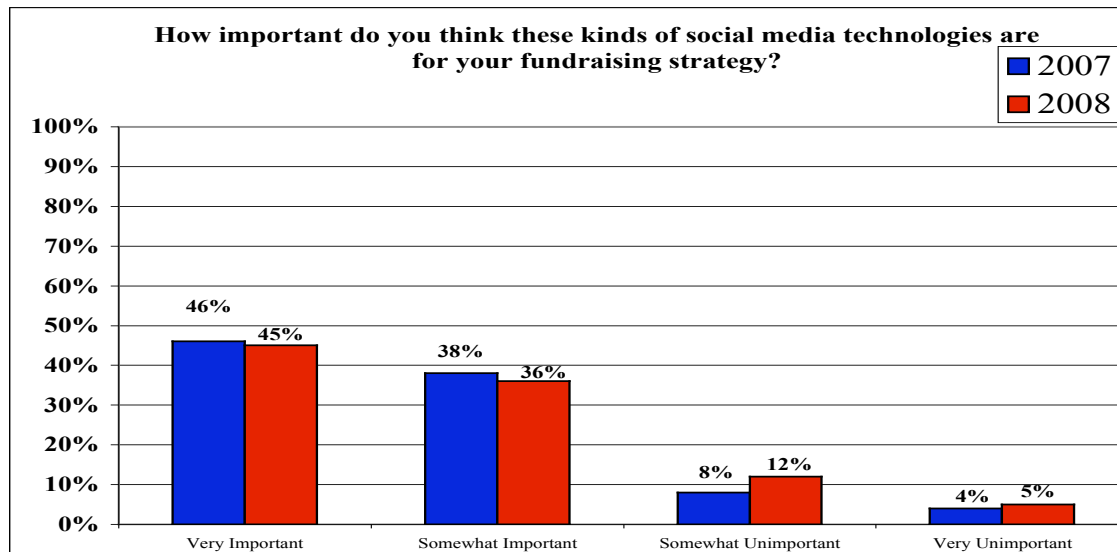
Figure 3



Importance

The adoption of social media by charities is being driven by familiarity and their recognition of the increasingly important role of social media in today's world. It is worth noting that 81% of those studied feel that social media is at least "somewhat important" to their future strategy. See Figure 4.

Figure 4



Are charities using social media effectively?

Comments

The extent to which these not for profits are using social media appears to be a case study in the timely adoption of new technology. A closer look shows how they maximize the effectiveness of these tools. Comparing the 2007 and 2008 data, it becomes clear that there has been significant improvement as we look at the implementation of the most popular tool, blogging.

The survey asked about blog logistics like accepting comments, allowing RSS feeds or email subscriptions, promoting the blog and planning for the future of the blog. The answers to these and other questions from charities with blogs are interesting as it becomes clear they are learning about and using social media more effectively one year later.

The mantra of the blogosphere is "conversation." Blogs that are unattended lose their audience. In the 2007 study 85% of those charities with blogs accepted comments and 88% in 2008. These organizations realize the importance of the conversation and want to engage their audience.

For volunteers/donors looking to have a conversation online about particular aspects of the charity's mission, this increased interaction through comments can be significant. With more and more non-profits moving into multiple channels of social media, those that don't allow for conversation will quickly be passed by. Charities are clearly learning to use social media more effectively.

Subscriptions

Another blog characteristic that allows ease of conversation and increases participation is the use of "RSS" feeds and other notification methods like email or text message. This simplifies the blogosphere for readers who may want to keep up with a certain conversation or be informed of new information without having to check the blog of interest every day to see if there is something new.

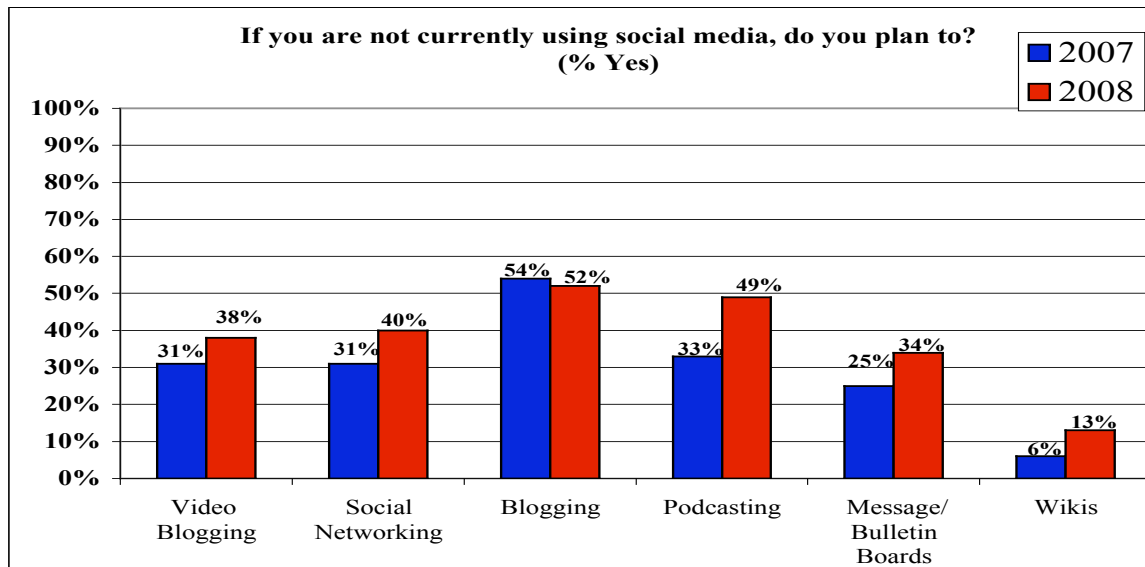
In the 2007 study, 58% of charities had an RSS feed available and 23% allowed email subscriptions. In 2008 those numbers rose to 67% and 56% respectively. The increase in both subscriptions methods shows increased sophistication in the use of this particular tool.

Planning/Promotion/Measuring Success

When asked what the future plans are for the organization's blog in 2007, the most popular answer was that there were NO future plans for the blog. This was disconcerting considering the swift movement and evolution of blog technology. In the 2008 study however, the most popular response was to expand the blog. Many charities now include audio podcasts, video and live chats as part of their blog and others are sure to follow. There were also several organizations that mentioned looking for better analytics to measure their effectiveness over the next year or so.

Those not currently using social media, or a particular tool, were asked if they planned to in the future. Fifty-four percent of those without a blog in the 2007 survey planned to add one and 52% of the respondents to the 2008 survey still without a blog said they planned to add one in the future, making blogs the most popular tool now and for the foreseeable future. Podcasting and video will probably be added quickly as part of the blog growth. Forty-nine percent of charities surveyed reported using additional forms of social media including micro-blogging sites like Twitter and uploading video on YouTube. See Figure 5.

Figure 5



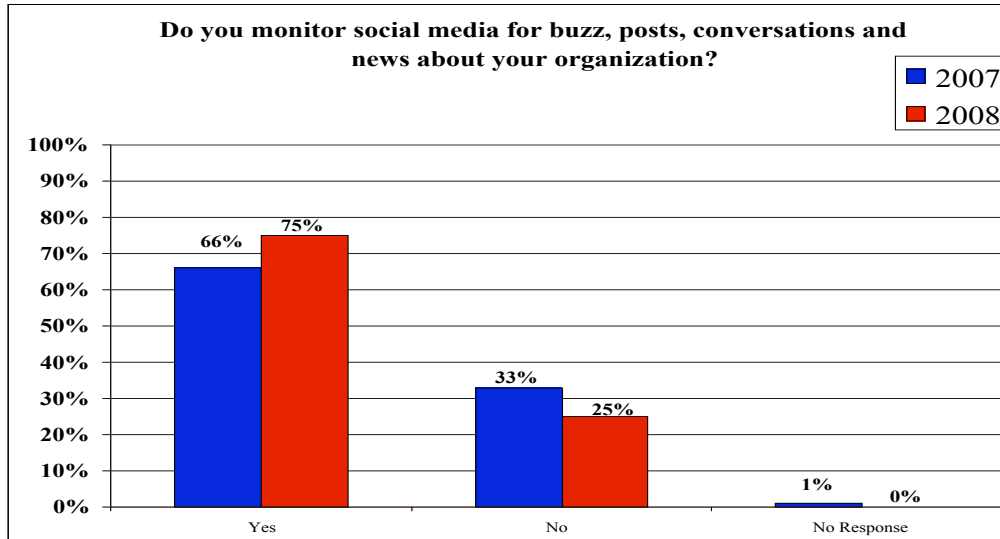
When asked how they promoted their blogs, the most popular response was through a link on their homepage, newsletters or email. In 2007 a popular answer to that question was “we issued a press release”. In 2008, that response was replaced by a movement to social networking sites where the non-profits issued their own posts or announcements in a less formal way.

When asked if they felt their blogs were successful, approximately 90% of charities with blogs said yes. This finding is also consistent with studies in business and academia that have consistently shown those using social media are satisfied and feel it provides positive results. Most measure success by the number of hits or comments they receive, but in 2008 many reported donations coming in as a result of social media communications as an additional form of measurement.

Are they listening?

It is clear that not for profits are now communicating in new ways. The next question is: Are they listening to what’s being said about them online? Sixty-six percent of respondents in 2007 and 75% in 2008 report they monitor the Internet for buzz, posts, conversations and news about their institution. Most of these organizations realize the importance of knowing what conversation might occur around their cause, their name, their location or constituents. See Figure 6.

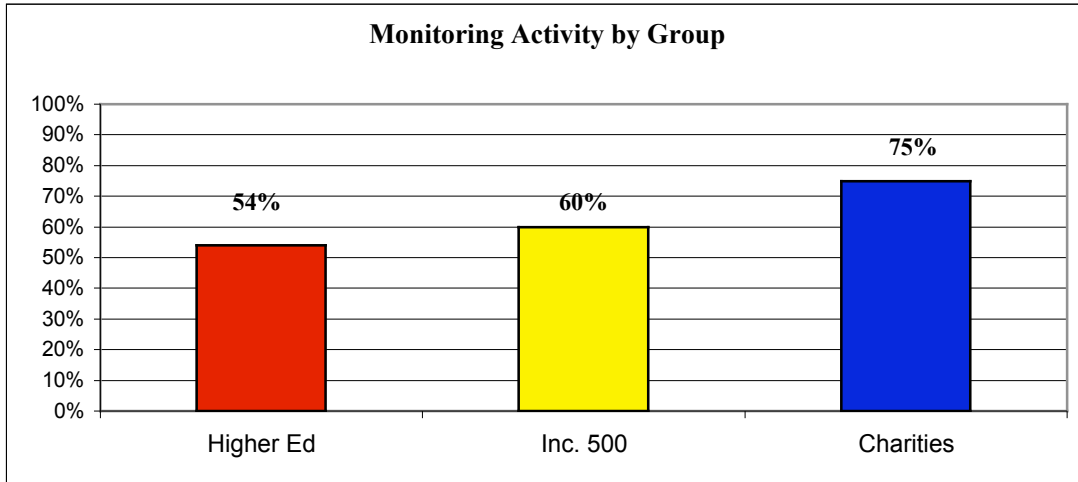
Figure 6



There has been movement among the charities in how they monitor buzz about themselves or their causes. In 2007, 42% did searches manually using basic search engines like Google and appropriate key words. In 2008, that dropped to 36% while the number of charities automating their searches climbed from 34% to 42%. Google alerts were the most popular automated searches.

When comparing charities with other sectors also using social media and monitoring their names, brands or products, these non-profits again stand out. In 2008, 54% of US colleges and universities monitored buzz online about their school, 60% of the Inc. 500 monitored their brands or name and 75% of the top charities monitored their names, causes or other pertinent information. This group is both active and sophisticated in their use of social media. See Figure 7.

Figure 7



Conclusion

This new study, a longitudinal look at social media usage among the nonprofit sector, reveals that social media has become an incredibly important part of the communication strategy for US charities. The largest non-profits are continuing to outpace businesses and even academic institutions in their familiarity, use, and monitoring activity. These top organizations have found a new and exciting way to win the hearts (and maybe the dollars) of potential donors.

To be added to our email distribution list so that you can stay abreast of our research and writings, please email us at eric@ericmattson.com or nbarnes@umassd.edu.

Bios & Acknowledgments

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Eric Mattson is the CEO of Financial Insite Inc., a Seattle-based boutique research firm focusing on technology innovation in finance and banking. He's also an independent social media scholar whose research has been covered online and in print by BusinessWeek, Inc. Magazine, the NY Times and a number of other publications.

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Nora has worked as a consultant for many national and international firms. Working closely with businesses in the Northeast US, Nora and her students have provided marketing research assistance to hundreds of small businesses.

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