Give as you Live™

Digital Giving Review 2012

Give as you Live™

Institute of Fundraising

Executive summary

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Give as you Live and the Institute of Fundraising launched the Digital Giving Review 2012 to uncover the latest trends in digital fundraising.

Over 500 charities took part in the survey and results have been broken down to reflect findings across all charities as well as by small, medium and large organisations.

- **Across all charities, online audiences are now as large as traditional offline audiences: 51% online, 49% offline**

- **In less than a decade, Facebook and Twitter audiences combined have grown to equal 35% of the overall charity audience**

- **Yet, despite this rapid growth, online channels represent only 30% of the overall income received, with 70% of charity income still generated through offline channels**

- **All charities communicate with their online audiences more frequently than their offline audiences**

- **However, larger charities are 1.51 times more likely than smaller charities to communicate daily with their online audiences**

- **The primary barriers to successful online fundraising were identified as internal resources (37%) and donor resistance (24%)**

The findings of the Digital Giving Review 2012 have answered many questions around audience size and the frequency of online communications; however, the findings have also sparked many new questions.

In the autumn, Give as you Live will be launching a further survey to charity donors, exploring questions around desired frequency and the content of communications. The purpose of the donor survey is to help us understand the critical balance between channel, frequency and message.

If you would like to contribute questions to this survey, please join the conversation at **www.giveasyouliveblog.com/donorsurvey**

For your charity's donors to be included in this survey so you can benchmark them against other charity's donors please email **donorsurvey@everyclick.com**

Charity audiences

Charity audiences

Sample

Over 500 charities took part in the survey. Results have been broken down to document general trends as well as those specific to small, medium and large charities.

Findings

On average, across all charities, online audiences are now as large as their traditional offline counterparts. The combination of Facebook, Twitter and email audiences now accounts for 51% of the overall charity audience.

Average audience size

39,241   22,342   12,902   5,581

● **Offline** ● **Facebook** ● **Email** ● **Twitter**
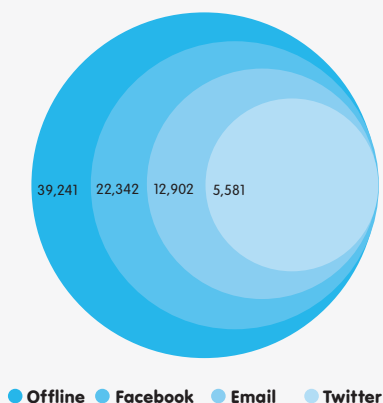
Source :
Give as you Live™

Although offline supporters are still the largest single segment (49%), online channels represent a fast growing audience. In less than a decade Facebook and Twitter audiences combined have grown to equal 35% of the overall charity audience.
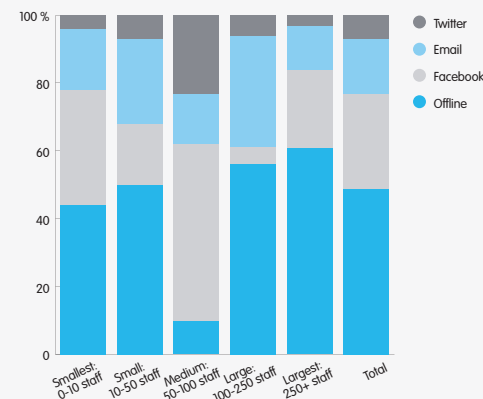
Facebook launched in 2004 and the first "Tweet" was sent in 2006. In less than a decade Facebook and Twitter audiences combined have grown to equal 35% of the overall charity audience.

Charity audience by small, medium and large charities

Smaller charities lean more heavily towards online supporters than larger charities. For the smallest charities (0-10 staff members) 56% of their audience are online, whilst only 39% of the audience of the largest charities (250+ staff members) are from the online segments.

Of the 17 medium sized charities surveyed (50-100 staff members) the online audience averaged a staggering 91%. When the results were expanded to include small/medium and medium/large charities (10 – 250 staff members) results levelled out to show an online audience of 51%, matching the overall average.

Average audience size (All charities)

● Twitter
● Email
● Facebook
● Offline

Smallest: 0-10 staff   Small: 10-50 staff   Medium: 50-100 staff   Large: 100-250 staff   Largest: 250+ staff   Total

Source :
Give as you Live™

Online audiences by channel

The combination of email, Facebook and Twitter audiences make up 51% of the overall charity audience. The largest of these segments is Facebook, accounting for 55% of the total charity online audience.

Facebook supporters represent:

• **60% of the online audience for small charities (0- 10 staff members) (34% of overall audience)**

• **58% of the online audience for medium charities (50 – 100 staff members) (52% of overall audience)**

• **60% of the online audience for large charities (250+ staff members) (23% of overall audience)**

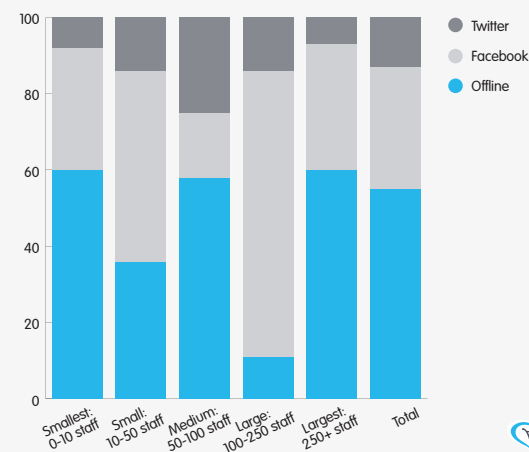### Twitter supporters represent:

• **8% of the online audience for small charities (0- 10 staff members) (5% of overall audience)**

• **25% of the online audience for medium charities (50 – 100 staff members) (23% of overall audience)**

• **8% of the online audience for large charities (250+ staff members) (3% of overall audience)**

Twitter makes up the smallest portion of the online audience at 14% overall.

Email supporters represent:

• **32% of the online audience for small charities (0 - 10 staff members) (18% of overall audience)**

• **17% of the online audience for medium charities (50 – 100 staff members) (15% of overall audience)**

• **33% of the online audience for large charities (250+ staff members) (13% of overall audience)**

Online audience % by charity size

Legend: Twitter, Facebook, Offline

X-axis: Smallest: 0-10 staff, Small: 10-50 staff, Medium: 50-100 staff, Large: 100-250 staff, Largest: 250+ staff, Total

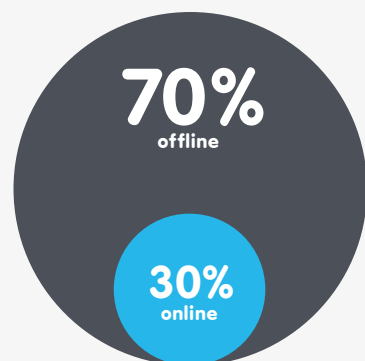Source : Give as you Live™

Donation channels

Donation channels

Across all charities, 70% of donations are received via offline channels, with donations from online donation platforms, email and Facebook combining to represent 30% of the overall income received.
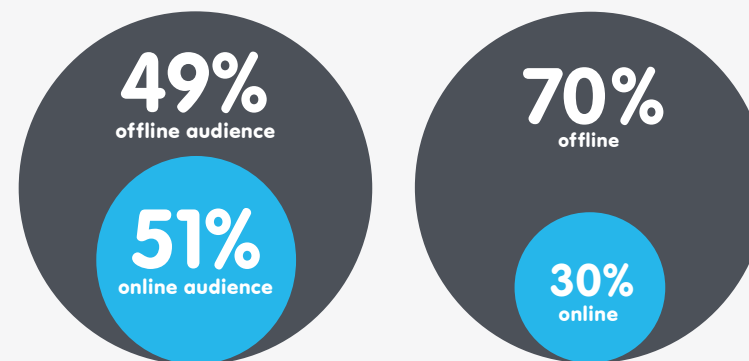
Of this 30%, online donation platforms make up the majority of this income at 90%, with email accounting for 7%, Facebook 3%, and notably 0% of donations received from Twitter across all charities.

Donations raised Offline vs Online

70% offline

30% online

Source : Give as you Live™

Audience size vs donation channel

49% offline audience
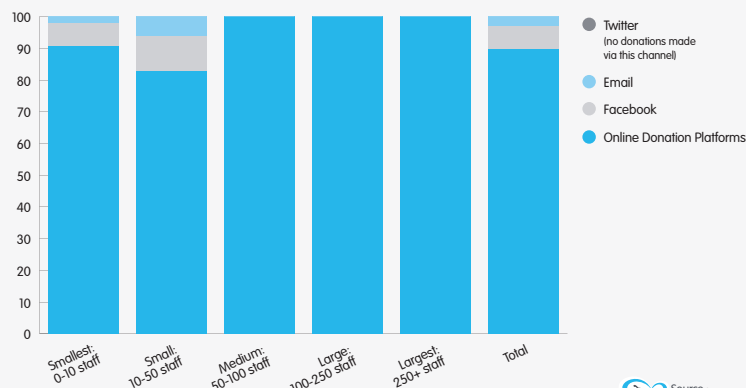
51% online audience

70% offline

30% online

Source : Give as you Live™

Online donation channels

Online donations generate 30% of the overall donations received; yet the online audience accounts for 51% of the total charity audience.

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Online donations by channel

Legend:
- Twitter (no donations made via this channel)
- Email
- Facebook
- Online Donation Platforms

Source: Give as you Live™

Although the Facebook audience accounts for over half the size of the total online audience (55%), it generates only 1% of all donations received.

Facebook, whilst able to deliver great numbers of audience, delivers only 1% of the total income received across all charities.

Overall, a vast majority of the income received online is collected through online donation platforms such as JustGiving, Everyclick and Virgin Money Giving. These platforms make up 27% of the total income received (both online and offline) and 90% of all online donations received.

Online donation platforms such as JustGiving, Everyclick and Virgin Money Giving make up 27% of total income
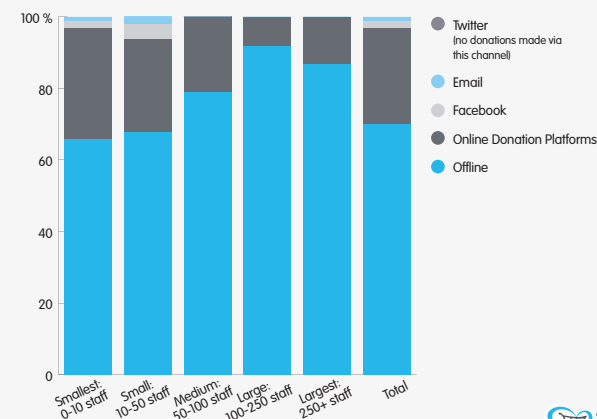
For small charities, 34% of their total donations come from online channels. Medium and large charities receive 21% and 13% respectively from online channels.

Broken down across small, medium and large charities, Facebook donations are responsible for 1% of the overall donations received by small charities and, notably, 0% of all donations received for medium and large charities.

Medium and large charities receive 0% of their overall donations through Facebook audiences.

When comparing the importance of online donation platforms across small, medium and large charities, small charities receive 31% of their overall income from online donation platforms, medium sized charities get 21% from online donation platforms and large charities get only 13% from online donation platforms.

Most donations by channel (by size)

Legend:
- Twitter (no donations made via this channel)
- Email
- Facebook
- Online Donation Platforms
- Offline

Source: Give as you Live™

Frequency of communications

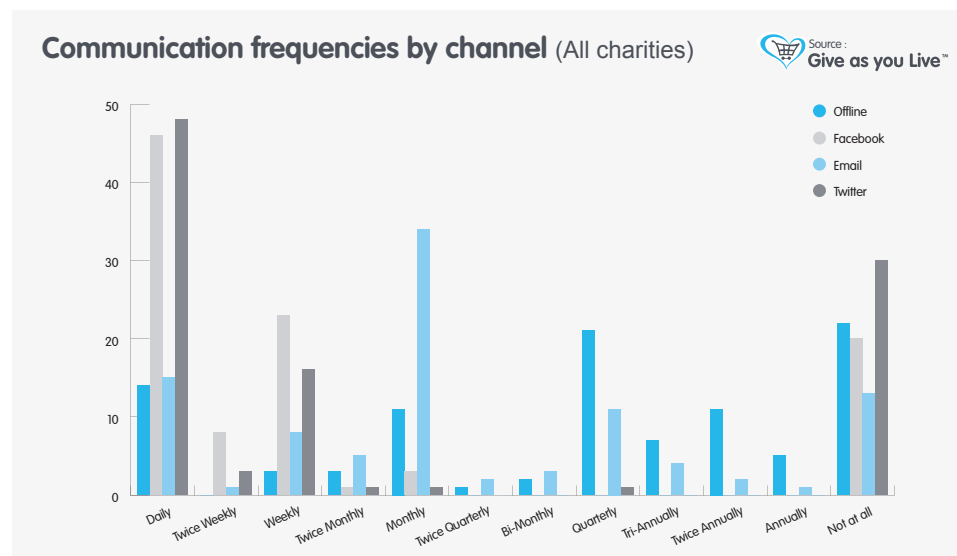Institute of Fundraising

Frequency of communications

All charities, from the smallest to the largest, are communicating with their online audiences more frequently than their offline audiences.

Communication frequencies by channel (All charities)

Source : Give as you Live ™

- Offline
- Facebook
- Email
- Twitter

Offline communications

When asked about the frequency that charities communicate with their offline supporters, 43% of all charities claim to communicate with their offline supporters quarterly or less frequently with 22% claiming to not communicate with their offline supporters at all.
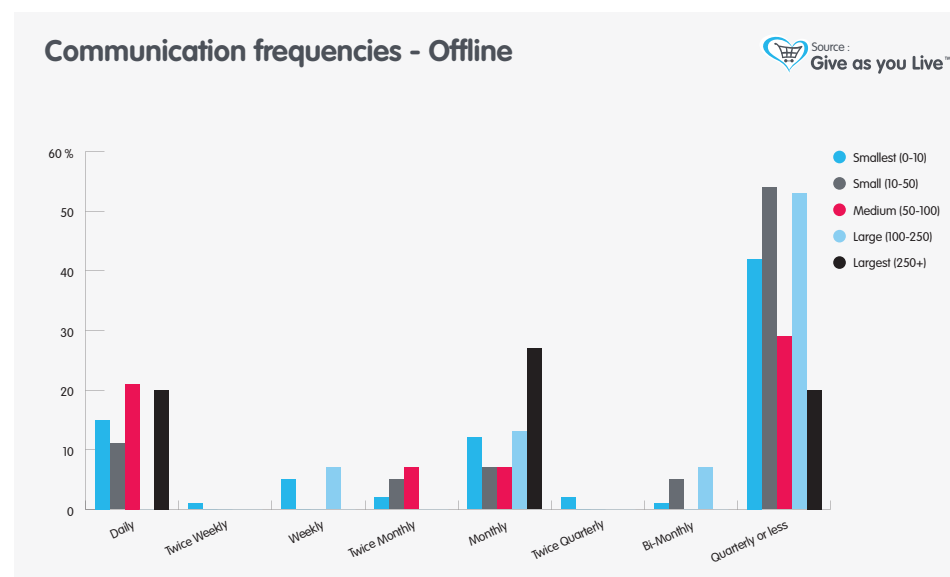
Exploring this further:

- **42% of small charities (0 – 10 staff members) are communicating with their offline audiences quarterly or less frequently**

- **29% of medium charities (50 – 100 staff members) are communicating with their offline audiences quarterly or less frequently**

- **20% of large charities (250+ staff members) communicate with their offline audiences more frequently**

Of those charities that claim to not communicate with their offline supporters:

- **21% of small charities (0 – 10 staff members) claim to not communicate with their offline supporters**

- **36% of medium charities (50 – 100 staff members) claim to not communicate with their offline supporters**

- **33% of large charities (250+ staff members) claim to not communicate with their offline supporters**

Communication frequencies - Offline

Source : Give as you Live ™

- Smallest (0-10)
- Small (10-50)
- Medium (50-100)
- Large (100-250)
- Largest (250+)

Online communications

47.5% of all charities communicate with their social media audiences daily, reflecting the instant nature of these channels, compared to 13% of charities that communicate offline with their supporters daily.

64% of all charities communicate with their audiences via email monthly or more frequently (34% only monthly), yet only 31% of charities communicate with their offline audience as frequently (11% only monthly).

Every day:

• **47% of all charities communicate to their Facebook audience**

• **48% to Twitter audience**

• **14% to email audience**

• **13% of charities communicate with their offline supporters**

Every month or more:

• **80% of all charities communicate to their Facebook audience**

• **69% to Twitter audience**

• **64% to email audience**

• **31% of charities communicate with their offline supporters**
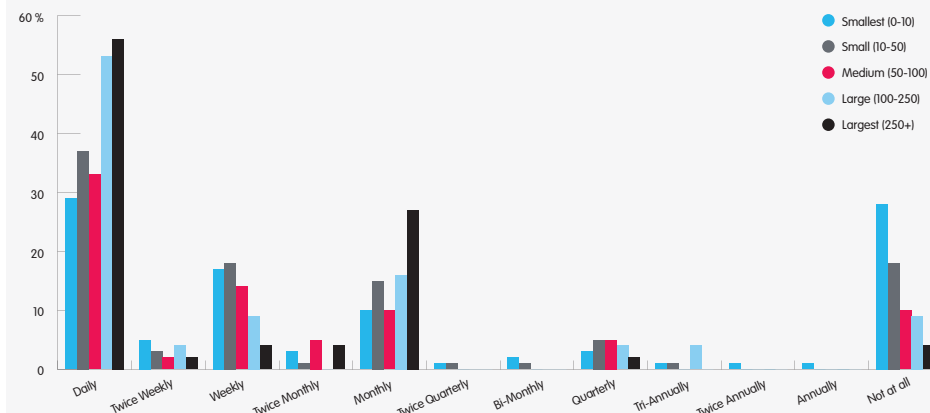
Every quarter or more:

• **80% of all charities communicate to their Facebook audience**

• **70% to Twitter audience**

• **80% to email audience**

• **55% of charities communicate with their offline supporters**

Communication frequencies - Online

Source :
Give as you Live ™

Legend:
● Smallest (0-10)
● Small (10-50)
● Medium (50-100)
● Large (100-250)
● Largest (250+)

56% of larger charities communicate with their entire online audiences daily (including Facebook, Twitter and Email), compared to 33% for medium sized charities and 29% of small charities.

20% of small charities surveyed said that they do not communicate with their social media audiences at all (Facebook and/or Twitter). 7% of medium charities said that they do not communicate with their social media audiences at all, but 100% of large charities said that they communicate with their social media audiences through either Facebook, Twitter or both channels.

The larger the charity, the more frequently they will communicate with their online supporters via social media and email.
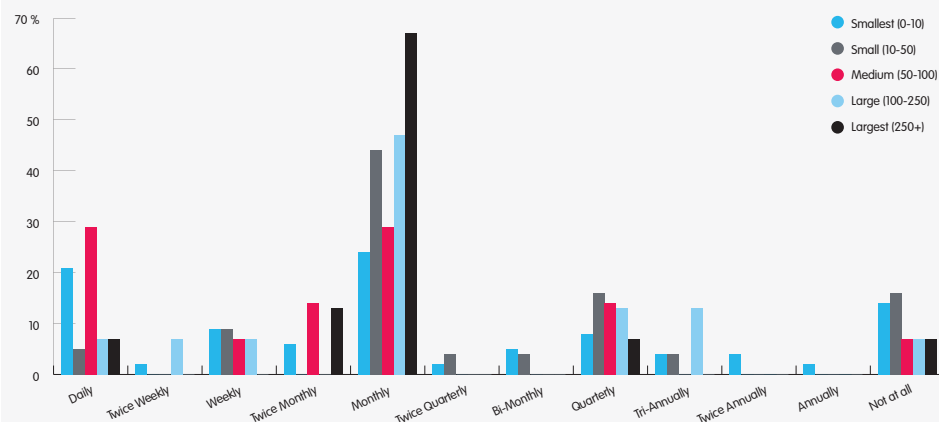
Email frequency

Email has proven to be a popular communication channel for all charities, with a significant number (64%) communicating through this channel monthly or more frequently (34% only monthly).

• **62% of small charities (0-10 staff members) communicate with their email audience monthly or more frequently**

• **79% of medium charities (50-100 staff members) communicate with their email audience monthly or more frequently**

• **87% of large charities (250+ staff members) communicate with their email audience monthly or more frequently**
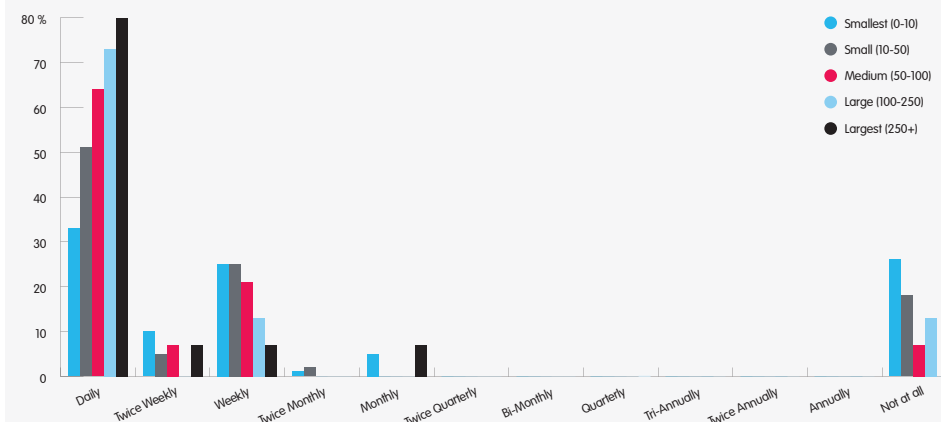
Facebook frequency

80% of charities communicate with their Facebook audience once a month or more frequently.

• **75% of small charities (0-10 staff members) communicate with their Facebook audience at least once a month**

• **93% of medium charities (50-100 staff members) communicate with their Facebook audience at least once a month**

• **100% of large charities (250+ staff members) communicate with their Facebook audience at least once a month**

Communication frequencies - Email

Source :
Give as you Live ™

Smallest (0-10)
Small (10-50)
Medium (50-100)
Large (100-250)
Largest (250+)

Communication frequencies - Facebook

Source :
Give as you Live ™

Smallest (0-10)
Small (10-50)
Medium (50-100)
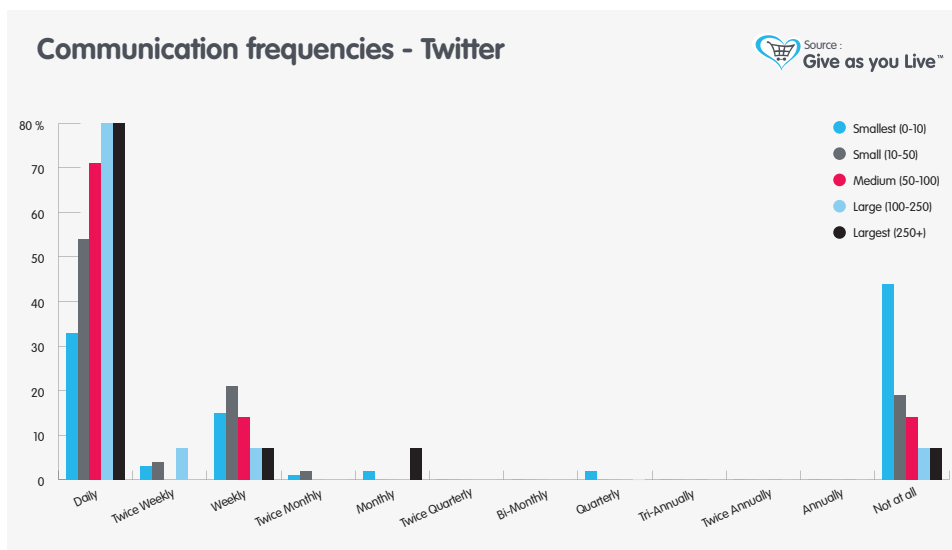Large (100-250)
Largest (250+)

Twitter frequency

69% of charities communicate through Twitter once a month or more frequently.

- **54% of small charities (0-10 staff members) communicate with their Twitter audience at least once a month**

- **86% of medium charities (50-100 staff members) communicate with their Twitter audience at least once a month**

- **93% of large charities (250+ staff members) communicate with their Twitter audience at least once a month**

Communication frequencies - Twitter

Source : Give as you Live™

Legend:
- Smallest (0-10)
- Small (10-50)
- Medium (50-100)
- Large (100-250)
- Largest (250+)

Barriers to successful
online fundraising

Barriers to successful online fundraising

The largest barrier facing charities is internal resource.

Across all charities internal resource is declared as the primary barrier to a charity's success in online fundraising. Second with 24% was donor resistance.
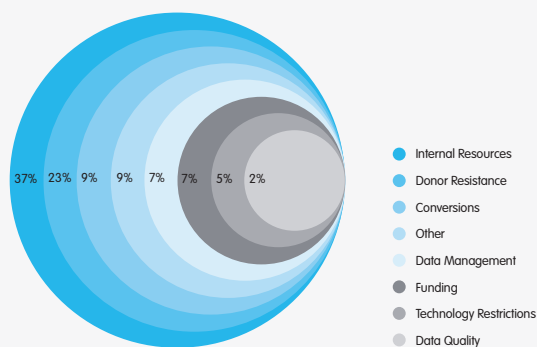
Technological restrictions and data quality both ranked very low on the list of barriers.

All charities, from the smallest to the largest, face the same barriers.

There was almost no difference in the barriers to success between the smallest and largest charities. Internal resource was highlighted as the main barrier across all charity sizes.

Biggest challenges to fundraising online

Source :
Give as you Live™

37%   23%   9%   9%   7%   7%   5%   2%

- Internal Resources
- Donor Resistance
- Conversions
- Other
- Data Management
- Funding
- Technology Restrictions
- Data Quality

Biggest challenges

Source :
Give as you Live™

- Smallest (0-10)
- Small (10-50)
- Medium (50-100)
- Large (100-250)
- Largest (250+)

Conversions | Data Managment | Data Quality | Donor Resistance | Funding | Internal Resources | Other | Technology Restrictions
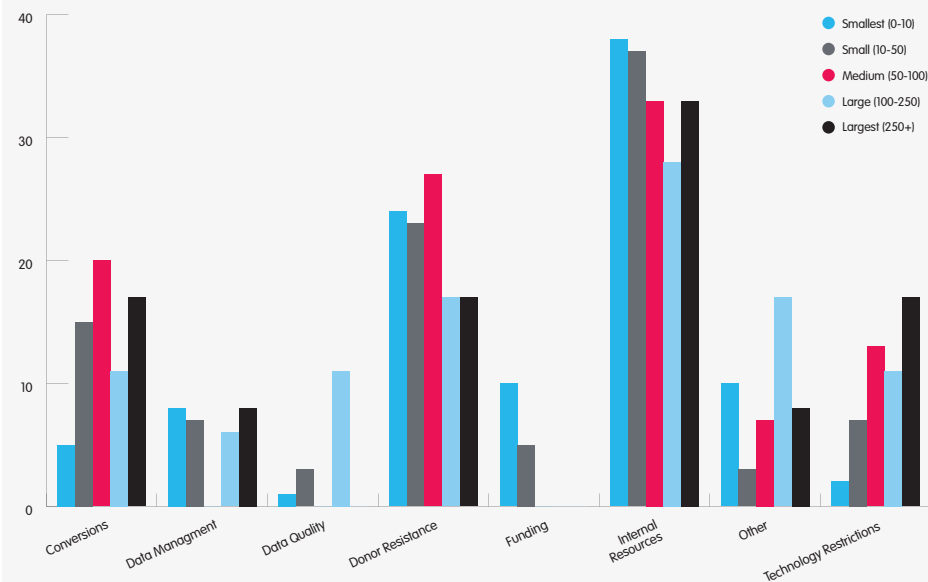
Conclusion

Conclusion

- **The online charity audience is approximately the same size as the offline audience, and it is growing quickly**

- **Yet, despite this growth, offline audiences continue to bring in the majority of charity donations (70%)**

- **Of the 30% of income received via online channels, 90% of this is collected through online donation platforms**

- **Charities communicate far more frequently with online audiences than offline audiences**

- **For all charities, internal resource is the major barrier to successful online fundraising**

In order to better understand the motivations behind supporters donating online, Give as you Live will be launching a donor survey in the Autumn of 2012. Questions will focus on the frequency and content of messaging.

You are invited to help shape the survey by contributing questions and debating the results found here at **www.giveasyouliveblog.com/donorsurvey.**

Survey questions

Survey questions

1. **What is your charity name?**

2. **How many staff does your charity have?**

3. **Are you able to confirm the size of audience you have for the following?**
   Email
   Facebook
   Twitter
   Offline

4. **How often do you communicate via the following?**
   Email
   Facebook
   Twitter
   Offline

5. **Do you use YouTube, Flickr or other online web services to host pictures and videos?**

6. **Which of these channels do you collect donations from?**
   Check any that apply.
   Email
   Facebook
   Twitter
   JustGiving and other online donation sites
   Offline

7. **Which of those selected in the previous question do you collect the most donations from?**
   Check any that apply.
   Email

Facebook
Twitter
JustGiving and other online donation sites
Offline

8. **Which of these channels do you feel you garner the most support and influence from?**
   Check any that apply.
   Email
   Facebook
   Twitter
   JustGiving and other online donation sites
   Offline

9. **What % of your donations come through online channels?**
   0 - 5%
   6 - 10%
   11 - 15%
   16 - 20%
   21 - 25%
   26 - 30%
   31 - 40%
   41 - 50%
   50% +

10. **How do you collect your donations?**
    Check any that apply.
    Your own website
    JustGiving
    Virgin Money Giving
    BT
    JustTextGiving

Everyclick
Sponsorship
Paypal
The Big Give
Cheques
Legacy
Payroll Giving
Direct Debit
Events
Cash
Face to Face
Other

11. **From which of the above gives the most donations?**
    Check any that apply.
    Your own website
    JustGiving
    Virgin Money Giving
    BT
    JustTextGiving
    Everyclick
    Sponsorship
    Paypal
    The Big Give
    Cheques
    Legacy
    Payroll Giving
    Direct Debit
    Events
    Cash

Face to Face
Other

12. **Order these mechanisms of fundraising in order of priority for you and your charity.**
    Local Fundraising Events
    National Fundraising Events (eg: Marathons)
    Owned Events (eg: Sport Relief, Moonwalk)
    Street Collections
    Driving Donations Through Social Media
    Actively Promoting Third Parties to Encourage Fundraising (Such as JustGiving)
    National Initiatives (eg: Movember, Breast Cancer Awareness Month)
    Product and Brand Partnerships

13. **What is the biggest challenge you face with online fundraising?**
    Choose one of the following answers.
    Internal resources
    Funding
    Conversions
    Donor resistance
    Data management
    Data quality
    Technology restrictions
    Other

14. **In 2012, please tell us what is your major online or offline fundraiser? (e.g. Marathon, Coffee morning etc.)**

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Give as you Live

Give as you Live are proud sponsors of the Digital Giving Review 2012, in partnership with the Institute of Fundraising.

Give as you Live brings together thousands of stores that have signed up to donate a percentage of every purchase your supporters make online - at no extra cost.

When your supporters discover and download Give as you Live they can shop directly with their favourite online stores (including John Lewis, Tesco and Expedia) and a percentage of every purchase they make will be donated to your charity - at no cost to you and at no cost to your supporters.

The average Give as you Live shopper raises £2.10 per month in recurring, unrestricted income. As an added bonus, until the end of 2012, Give as you Live will reward charities with an extra £5 for every new shopper who spends their first £10 online.

5 simple steps to get started:

1. **Email:** Simply email **bonus@everyclick.com** to register your interest in the £5 bonus for every new shopper campaign.

2. **Plan:** You will be appointed an Account Manager who will explore your online activity and current campaigns to see how your charity can promote Give as you Live.

3. **Share:** We will provide you with emails and other communications to help you share Give as you Live with your supporters.

4. **Review:** Your Account Manager will stay in regular contact to update you on your shoppers and any new marketing collateral.

5. **Shop:** Get everyone within your charity shopping, tell your volunteers, friends, family and close network to use Give as you Live and raise money for your charity.

Thousands of stores have signed up to donate a percentage of every purchase your supporters make online - At no extra cost.

To find out more visit www.giveasyoulive.com