Nonprofit Communications Trends

2014

#nptrends14

For Additional Infographics: npmg.us/2014
Most of the questions we get at Nonprofit Marketing Guide from nonprofits are some version of “Are we normal?” or “Are we making good choices?” or “I’m having a disagreement with a colleague – who’s right?”

With this fourth annual edition of the Nonprofit Communications Trends Report, we put some real data behind our answers to those questions.

We can’t tell you if what you are doing is the right thing for your organization without talking to you, but we can tell you what other nonprofits are doing.

We can also use this survey data to highlight potential sources of conflict within your organization, so that you can be more aware, and perhaps question some of your own assumptions.

Watch for these boxes, which identify some of these potential sources of conflict that you might want to discuss within your organization.

If you need help responding to any of the trends you see in this report, we at Nonprofit Marketing Guide are here for you. We provide training, practical advice, and coaching services to nonprofits on communications, marketing, and fundraising. You can learn more at nonprofitmarketingguide.com.

You can reach Kivi Leroux Miller, president of NonprofitMarketingGuide.com and author of this report, for interviews at (336) 870-0251, kivi@ecoscribe.com or @kivilm.

Get this report and additional infographics at NonprofitMarketingGuide.com/2014 or npmg.us/2014
Here are some highlights from the report, each in a tweetable 140 characters or less:

**On Goals**


Only 34% of nonprofit executive directors picked donor retention as a top comm goal for 2014. [http://npmg.us/2014 #nptrends14](http://npmg.us/2014 #nptrends14)

Only 16% of nonprofit communications directors picked donor retention as a top comm goal for 2014. [http://npmg.us/2014 #nptrends14](http://npmg.us/2014 #nptrends14)

Large nonprofits more likely to prioritize brand awareness and thought leadership than smaller ones. [http://npmg.us/2014 #nptrends14](http://npmg.us/2014 #nptrends14)

Small nonprofits more likely to prioritize volunteer recruitment and retention than larger ones. [http://npmg.us/2014 #nptrends14](http://npmg.us/2014 #nptrends14)

Does nonprofit size, mission, region, or staff’s age or title alter the comm plan? Sometimes. [http://npmg.us/2014 #nptrends14](http://npmg.us/2014 #nptrends14)

**On Challenges**

Lack of time, money, clear strategy top list of challenges for nonprofit communicators in 2014. [http://npmg.us/2014 #nptrends14](http://npmg.us/2014 #nptrends14)

57% of nonprofit communicators feel overworked. 5% are underworked. 38% say just right. [http://npmg.us/2014 #nptrends14](http://npmg.us/2014 #nptrends14)
2014 Highlights, Continued

On Favorite Communications Channels

Nonprofit communicators to spend most time on e-newsletters, Facebook, and event marketing in 2014. http://npmg.us/2014 #nptrends14


In-person events more important to smaller nonprofits than larger ones. http://npmg.us/2014 #nptrends14

Media relations and print marketing more important to larger nonprofits than smaller ones. http://npmg.us/2014 #nptrends14

On Social Media

Most important social media for nonprofits? Facebook (95%), Twitter (64%), YouTube (38%), LinkedIn (26%) http://npmg.us/2014 #nptrends14

Nonprofits most likely to experiment with Instagram and Pinterest in 2014, then YouTube and LinkedIn. http://npmg.us/2014 #nptrends14

On Email

A third of nonprofits will email fundraising or advocacy appeals at least monthly in 2014. http://npmg.us/2014 #nptrends14

Most nonprofits (59%) will send an e-newsletter at least once a month in 2014. http://npmg.us/2014 #nptrends14

Associations communicate with members via email more frequently than other types of nonprofits. http://npmg.us/2014 #nptrends14

On Print/Direct Mail

Twice a year direct mail fundraising is most popular with nonprofits for 2014. 15% won’t do it at all. http://npmg.us/2014 #nptrends14


Religious organizations more likely to favor print communications than other types of nonprofits. http://npmg.us/2014 #nptrends14
Who Completed the Survey?

The trends you’ll find in this report come from a survey fully completed by 2,135 nonprofits.

This year we asked two new demographic questions about the survey participant’s job title and age, in addition to their organization's budget size, location, and mission.

**Budget:** 50.2% have annual organizational budgets under $1 million; 49.8% have annual budgets over $1 million.

**Location:** 88% are in the United States, 6% in Canada, and 6% in 42 other nations.

**Mission:** 23% are in Human Services, Housing, Food, Jobs; 16% are in Education; 10% are in Health, Disease, Medical Research.

**Job Title:** 60% are executive directors, communications directors, or development directors. 40% are in communications/marketing; 20% are in development/fundraising.

**Age:** All age groups in the workforce are well-represented.

The survey was conducted online in November 2013 by NonprofitMarketingGuide.com, using SurveyMonkey.com, with additional statistical analysis by MarketSight.com.
Big Picture Goals

Why Are Nonprofits Communicating?

This year we asked about goals in two ways. First we asked which broad category of goals was most important to success in their position. Our previous research and coaching with clients tells us that many disagreements about nonprofit communications are really about unclear or conflicting goals, especially related to the relative importance of short-term fundraising.

A little more than half of survey participants felt like they were responsible for a combination of fundraising, marketing or community engagement, and programmatic or service goals.

On the other hand, a little less than half felt their success was more directly linked to one type of goal: marketing or community engagement (18%), fundraising (16%), and programmatic or service goals (7%).

If you feel responsible for a combination of goals, try to get some clarity about priorities.

Which goal is really most important to your success in your position?
Strategic Communications Goals

What Are Nonprofits Trying to Achieve?

Next, we asked survey participants to select up to three of their most important goals for their communications strategies in 2014. As in 2013, we see a blend of fundraising and community engagement or marketing goals in the top responses.

**Acquiring new donors (53%)**, **engaging our community (49%)** and **general brand awareness (39%)** were the clear stand-out answers, just as they were in 2013.

Not surprisingly, **communications staff and managers believe that engaging their community** is most important, while **development staff and managers believe that acquiring new donors** is most important. Executive directors also believe that donor acquisition is the top priority.

It’s important to value both fundraising and community engagement for long-term success.

Talk openly about how your nonprofit can work on both at the same time, with consistent messaging.
Everyone’s Talking about It . . .

What About Donor Retention?

Donor retention continues to be a hot topic . . . But are nonprofits doing more than talking about it? In our 2013 report, acquisition beat retention as a goal by nearly 2 to 1. In 2014, the number of nonprofits selecting retention as a top three goal held steady at 30%, while acquisition as a top three goal fell from 57% to 53%.

Larger organizations are more likely to strike a balance between the two (the orange/yellow bars are closer in height to the blue ones in the chart.) That’s probably because bigger organizations tend to have more development and communications staff who can think more strategically about these questions, and larger organizations don’t usually have quite the same start-up or fundraising crisis-survival mentalities that smaller nonprofits often do, which leads to more focus on acquisition.

It’s a common mistake to assume that the best way to raise money is always to get more new donors. In fact, donor retention strategies (additional gifts from current donors) often produce better results. For long-term success, you must do both.

Who believes donor retention is a top goal?

Development Directors – 64%
Executive Directors – 34%
Communications Directors – 16%

That’s a big difference, so talk about it in your nonprofit to avoid conflict.
Communications Tactics

Which Communications Tools are Most and Least Important?

We asked participants to select up to three communications tools that were most important, somewhat important, and least important.

The Big Six Hold Firm

As in 2011, 2012, and 2013, nonprofits identified as “very” important the same top six communications channels for 2013.

Websites, email marketing, and social media other than blogging are the most important tools, followed by in-person events, media relations/PR, and print marketing.

Social media and email continue to toggle back and forth in second and third place, with email beating social media in 2014.
<table>
<thead>
<tr>
<th>Tool</th>
<th>Very Important + Somewhat Important</th>
<th>Very Important</th>
<th>Somewhat Important</th>
<th>Least Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>91%</td>
<td>62%</td>
<td>29%</td>
<td>0%</td>
</tr>
<tr>
<td>Email Marketing</td>
<td>86%</td>
<td>54%</td>
<td>32%</td>
<td>2%</td>
</tr>
<tr>
<td>Social Media Other Than Blogging</td>
<td>86%</td>
<td>50%</td>
<td>36%</td>
<td>1%</td>
</tr>
<tr>
<td>In-Person Events</td>
<td>73%</td>
<td>41%</td>
<td>32%</td>
<td>4%</td>
</tr>
<tr>
<td>Media Relations/PR</td>
<td>63%</td>
<td>29%</td>
<td>34%</td>
<td>5%</td>
</tr>
<tr>
<td>Print Marketing</td>
<td>58%</td>
<td>21%</td>
<td>37%</td>
<td>12%</td>
</tr>
<tr>
<td>Video</td>
<td>36%</td>
<td>11%</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>Blog</td>
<td>28%</td>
<td>9%</td>
<td>19%</td>
<td>24%</td>
</tr>
<tr>
<td>Paid Advertising</td>
<td>18%</td>
<td>4%</td>
<td>14%</td>
<td>51%</td>
</tr>
<tr>
<td>Phone Calls/Phone Banks</td>
<td>17%</td>
<td>6%</td>
<td>11%</td>
<td>42%</td>
</tr>
<tr>
<td>Photo Sharing</td>
<td>14%</td>
<td>2%</td>
<td>12%</td>
<td>23%</td>
</tr>
<tr>
<td>Mobile Apps or Texting</td>
<td>11%</td>
<td>3%</td>
<td>8%</td>
<td>50%</td>
</tr>
<tr>
<td>Podcasting</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
<td>65%</td>
</tr>
</tbody>
</table>

Source: NonprofitMarketingGuide.com/2014
Facebook remains king of nonprofit social media with 95% identifying it as a top social media site. Twitter was selected as a most important social media site by 64% of nonprofits, followed by YouTube at 38% and LinkedIn at 26%. These results are very similar to the 2013 report.

We do see some significant changes between 2013 and 2014 in where nonprofits say they will add or experiment with social media. Instagram surged from fifth place in 2013 to first place in 2014, with Pinterest falling to second place. YouTube and LinkedIn surpassed Google+, where the three were tied for third place in 2013.
Email Fundraising and Advocacy

How Often Do Nonprofits Send Email Appeals?

In previous surveys, we asked generally about email frequency. To better understand how nonprofits are using email, this year, we split the question into two: how often will you send an email appeal (fundraising, advocacy or other direct call to action) and how often will you send an email newsletter (or other informational update).

Quarterly email appeals are the most popular frequency at 26%.

A third (33%) of nonprofits will email appeals at least monthly.
How Often Do Nonprofits Send E-Newsletters?

Monthly email newsletters are the most popular frequency at 42%.

Most nonprofits (59%) will send an e-newsletter at least once a month.
Direct Mail Fundraising and Advocacy

How Often Do Nonprofits Send Direct Mail Appeals?

As with email, in previous surveys, we asked generally about direct mail frequency. To better understand how nonprofits are using direct mail, we changed the question in the same way we did for email: how often will you send a direct mail (or print) appeal (fundraising, advocacy or other direct call to action) and how often will you send a direct mail (print) newsletter (or other informational update)?

Twice a year print appeals are the most popular frequency at 29%.

15% of nonprofits don’t plan to send print appeals in 2014.
Direct Mail Marketing

How Often Do Nonprofits Send Print Newsletters?

Quarterly print newsletters are the most popular frequency at 24%.

A third (31%) of nonprofits don’t plan to send print newsletters in 2014.
After seeing reports about how overworked development directors feel, we decided to ask a question about workload too.

A majority of survey participants in every position and every age group said they feel overworked.
What Gets in the Way

What are the Biggest Challenges for Nonprofit Communicators?

As in 2013, lack of time and money top the list of challenges for nonprofit communicators. The order of the remaining challenges did shift somewhat from 2013 to 2014: Lack of strategy is now in third place instead of inability to measure effectiveness.

Challenges nonprofits expect to have in 2014

- Lack of time to produce quality content: 42%
- Lack of budget for direct expenses: 37%
- Lack of clear strategy: 31%
- Inability to measure effectiveness: 25%
- Producing engaging content: 22%
- Difficulty integrating communications channels: 18%
- Producing enough content: 17%

Why is she complaining?

Your position may affect which problems you think need the most attention.

Executive directors picked lack of budget for direct expenses as their top challenge.

Communications and development directors/managers selected lack of time to produce quality content as their top challenge.

Communications and development coordinators/assistants said lack of clear strategy was their top challenge.
As in 2013, email newsletter articles, Facebook updates, and event marketing top the list of time-consuming communications activities for nonprofits. The overall order remains the same as 2013 with one exception: press releases dropped from sixth place to ninth place in the list for 2014.

Types of content nonprofits expect to spend most of their time producing in 2014

<table>
<thead>
<tr>
<th>Type of Content</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Newsletter Articles</td>
<td>39%</td>
</tr>
<tr>
<td>Facebook Updates</td>
<td>33%</td>
</tr>
<tr>
<td>Event Marketing</td>
<td>32%</td>
</tr>
<tr>
<td>Website Articles</td>
<td>21%</td>
</tr>
<tr>
<td>Email Fundraising or Advocacy Appeals</td>
<td>21%</td>
</tr>
<tr>
<td>Print Fundraising Appeals</td>
<td>19%</td>
</tr>
<tr>
<td>Print Newsletter Articles</td>
<td>16%</td>
</tr>
<tr>
<td>Presentations Delivered In Person</td>
<td>16%</td>
</tr>
<tr>
<td>Press Releases</td>
<td>15%</td>
</tr>
<tr>
<td>Annual Report</td>
<td>15%</td>
</tr>
</tbody>
</table>

Why is she spending so much time on that?

Communications directors are more likely to spend time on website articles, blog posts, press releases, and videos than others.

Development directors are more likely to spend time on print and email appeals and annual reports than others.

Executive directors are more likely to spend time on presentations delivered in person and on Facebook updates than others.
We asked the Nonprofit Marketing Guide community for suggested survey questions and this was a favorite: What one type of content do you think is most effective for your organization, regardless of the amount of time you spend producing it? **Presentations in person, email newsletter articles, and print fundraising appeals** topped the list.

**The most effective types of content**

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presentations Delivered in Person</td>
<td>14%</td>
</tr>
<tr>
<td>Email Newsletter Articles</td>
<td>12%</td>
</tr>
<tr>
<td>Print Fundraising Appeals</td>
<td>11%</td>
</tr>
<tr>
<td>Facebook Updates</td>
<td>9%</td>
</tr>
<tr>
<td>Event Marketing</td>
<td>9%</td>
</tr>
<tr>
<td>Email Fundraising or Advocacy Appeals</td>
<td>6%</td>
</tr>
<tr>
<td>Print Newsletter Articles</td>
<td>6%</td>
</tr>
<tr>
<td>Website Articles</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Does that really work?**

- **Executive directors** picked presentations delivered in person as most effective.
- **Communications directors** picked email newsletter articles as most effective.
- **Development directors** Picked print fundraising Appeals as most effective.
Here was another community-suggested question we added this year: What one thing would you stop producing if you could?

Many people elaborated in their specific choices with their organizations in the “Other” field, but from the list of content choices provided, print newsletter articles, press releases, and print fundraising appeals topped the list.
Does budget size or mission of the nonprofit change the survey results? What about the job title or age of the person who took the survey?

Why do we care?

Because in our training and coaching programs, these factors are often mentioned as barriers (rightly or wrongly) that get in the way of good communications strategy and tactics.

So this year, for the first time, we did some heavy-duty statistical analysis of the data (confidence level=99%, correcting for Type I errors, the whole bit). We found that in most cases, there were few differences.

On the next few pages, we highlight the statistically significant differences we did find.
Variations in Communications Based on Budget Size

Does Size Matter?

We compared nonprofits with organizational budgets under and over $1 million and found the following significant differences* related to top communications goals and “very important” communications tools.

Larger organizations are more likely to select brand awareness and thought leadership as top goals than smaller nonprofits. Larger organizations are also more likely to say that media relations/PR and print marketing are very important communications tools, compared to small nonprofits.

Smaller organizations are more likely to prioritize acquiring new members, and acquiring and retaining volunteers than larger nonprofits. Smaller nonprofits are also more likely to say that in-person events as a very important communications tool, compared to large nonprofits.

<table>
<thead>
<tr>
<th>Selection as a Top Three Goal</th>
<th>Under $1 million</th>
<th>Over $1 million</th>
<th>Full Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Awareness</td>
<td>36%</td>
<td>43%</td>
<td>40%</td>
</tr>
<tr>
<td>Thought Leadership</td>
<td>19%</td>
<td>25%</td>
<td>22%</td>
</tr>
<tr>
<td>Acquiring New Members</td>
<td>17%</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Acquiring Volunteers</td>
<td>11%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Retaining Volunteers</td>
<td>4%</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Selection of “Very Important” Communications Tools</th>
<th>Under $1 million</th>
<th>Over $1 million</th>
<th>Full Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-person Events</td>
<td>46%</td>
<td>37%</td>
<td>42%</td>
</tr>
<tr>
<td>Media Relations/PR</td>
<td>26%</td>
<td>33%</td>
<td>29%</td>
</tr>
<tr>
<td>Print Marketing</td>
<td>18%</td>
<td>23%</td>
<td>21%</td>
</tr>
</tbody>
</table>

*Statistical significance confidence level = 99%.
Variations in Communications Based on Organizational Mission

Does Mission Matter?

We asked survey participants to select from 10 categories of nonprofit missions. We found some interesting statistically significant* differences in half of those categories.

Human Services, Housing, Food & Jobs

Most likely compared to other missions to . . .

• Select acquiring new donors and retaining current donors as top goals

Least likely compared to other missions to . . .

• Select acquiring new participants or new members as a top goal
• Pick email marketing as a very important communications tool
• Say that they will not send an direct mail appeals or print newsletters

Environment and Animals

Most likely (along with Associations) compared to other missions to . . .

• Select acquiring new members and retaining current members as top goals

*Statistical significance confidence level = 99%.
Religion

Most likely compared to other missions to . . .

• Pick print marketing as a very important communications tool
• Send a print newsletter monthly

Least likely compared to other missions to . . .

• Select getting media coverage as a top goal or media relations/PR as a very important communications tool
• Select LinkedIn as a most important social media site

Association, Membership & Mutual Benefit

Most likely compared to other missions to . . .

• Select acquiring new members and retaining current members as top goals
• Select thought leadership/positioning as an expert as a goal
• Send email appeals (fundraising, advocacy or other direct call to action) and e-newsletters several times a week or weekly
• Select LinkedIn and SlideShare as most important social media sites

Least likely compared to other missions to . . .

• Select Facebook as a most important social media site

*Statistical significance confidence level = 99%.*
Arts, Cultural and Humanities

Most likely compared to other missions to . . .

- Select acquiring new program participants as a top goal
- Pick Pinterest as a most important social media site

Least likely compared to other missions to . . .

- Select thought leadership/positioning as an expert as a goal

No significant differences were found for nonprofits in these mission areas:

- Health, Disease, and Medical Research
- Education
- Philanthropy or Grantmaking
- International
- Other Public Benefit Research or Advocacy

*Statistical significance confidence level = 99%.*
Variations in Communications Based on Position

Does Job Title Matter?

We took a closer look at how three positions – executive directors, communications directors, and development directors – answered the survey.

We found several – but not surprising – statistically significant differences* related to goals and “very important” communications channels.

Executive Directors are more likely than the others to say . . .

• Meeting a combination of fundraising, marketing, and programmatic goals is important to their success

Communications Directors are more likely than the others to say . . .

• Meeting marketing or community engagement goals are important to their success
• General brand awareness, thought leadership, and getting media coverage are top goals
• Websites, media relations/PR, and blogs will be very important communications tools

Development Directors are more likely than the others to say . . .

• Meeting fundraising goals is important to their success
• Acquiring new donors and retaining current donors are top goals
• Print marketing, in-person events, and phone calls/phone banks will be very important communications tools

There was no significant variation on the questions about communications frequency with the exception of the email newsletter. Communications directors are much more likely than development directors or executive directors to say they will send out the e-newsletter once or twice a month. Development directors and executive directors were more likely to pick less frequent distribution.

*Statistical significance confidence level = 99%.
Variations in Communications Based on Age

Does Age Matter?

Does the age of your communications director or any other staff member matter in how they would prioritize goals and communications channels? It’s a sensitive question, but one that is often raised privately. The potential bias cuts both ways: Are younger people more likely to excel at online tactics? Are older people more likely to make better strategic decisions?

Let’s put any assumptions aside and look at what the survey data says, which is that there are few statistically significant* differences in how people responded to the survey based on age.

Here are the few differences we did find:

Survey participants in their 20s are more likely than any other age group to select general brand awareness as a top three goal.

Survey participants 60 and older are more likely than any other age group to select acquiring new donors as a top three goal. They are also less likely than any other age group to pick social media as a very important communications channel.

On the importance of various social media sites, people 50 and older were less likely to say that Twitter was a most important social media site compared to people under 40.

On social media sites they would add or experiment with, people in their 20s were more likely to pick Instagram. People in their 40s were more likely to pick Tumblr.

That’s it.

What would you assume?

In December 2013, we previewed the Trends Report results on a webinar hosted by Guidestar, with more than 500 people participating live. Before revealing results, we asked a few poll questions.

73% of webinar attendees assumed that the age of the survey participant would affect which communications tools were “very important.”

69% of attendees thought age would influence which social media sites people would like to add or experiment with in 2014.

*Statistical significance confidence level = 99%.
Does Geography Matter?

Does the region of the U.S. where you work make a difference in your communications strategy? Nope.

The only statistically significant* difference we found when reviewing the data by the four U.S. Census regions was that nonprofits in the Midwest are more likely than those in other regions to select acquiring new program participants as a top three goal (at 21% versus 14% in the West and South, and 15% in the Northeast).

States with Most Survey Participants
1. California (227)
2. New York (128)
3. Texas (117)
4. Pennsylvania (86)
5. North Carolina (75)

States with Fewest Survey Participants
1. South Dakota (1)
2. Wyoming (3)
3. Hawaii (4)
4. North Dakota (4)
5. Rhode Island (4)

*Statistical significance confidence level = 99%.
What Excites You about 2014?

In the answers to this open-ended question, we saw these primary themes:

• New opportunities to reach people and the potential to expand their impact
• Learning about new strategies and tools
• Improving communications practices and taking them to new levels
What Scares You about 2014?

In the answers to this open-ended question, we saw these primary themes:

- Lack of time and funding to do a good job
- Unrealistic management expectations about what can be achieved with any particular communications strategy or tactic – and failing to meet those expectations
- Being overwhelmed by the demands of the job
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