The State of Social Media Use in Australian Non Profit Organisations

WIRTH CONSULTING

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Introduction

In a population of over 22 million people, Australia has an estimated 600,000 non profit organizations. Of these, the Australian Bureau of Statistics (ABS) estimates that 59,000 are “economically significant” with a contribution of $43 billion to our GDP and filling 8% of employment.

With a persistent perception that non profits are underfunded, under resourced and constantly walking the budget tightrope, new low cost technologies that enable communication of their message - such as social media - are an attractive alternative to expensive traditional marketing campaigns.

Take the example of “Charity Water”, a non profit organization in the United States (U.S.) that is estimated to have generated over $15 million in funding mainly through social media marketing, and has 228,000 FaceBook Likes and more than 1.3 million Twitter followers.

Considering the fact that Charity Water has more followers on social media than many popular celebrities, it would seem to reinforce the idea that social media is a boon for non profit organizations. But is this realistic and achievable for the average Australian non profit using social media?

This report has analyzed 595 non profit organisations from a range of industries and aims to answer the following questions:

- Is social media use really prolific in the Australian non profit sector?
- Which social media technologies have the strongest use?
- Who are the top ranked non profit organizations using social media in Australia?
- How do non profits typically use social media?
Key Findings

- 97 per cent of Australian not for profit organizations have an online website presence.
- Unsurprisingly, LinkedIn, FaceBook, Twitter and YouTube topped the list of most frequently used social media technology.
- 50 per cent of YouTube and Twitter accounts belonging to Australian not for profits were customized and/or branded. The figure was marginally lower for FaceBook – 32 percent.
- On average, not for profits posted 3 times a week on FaceBook compared to 8 times on Twitter.
- FaceBook not for profit accounts had more fans on average (2,500 fans) compared to Twitter (570 followers).
- Twitter had the lowest abandonment rate (3 percent of accounts had no posts in the preceding 90 days) while blogs had the highest (31 percent).
- Organizations with more than 1,000 staff were the least likely to use blogs as a means of engaging with customers and the wider public.
- There have been a number of missed branding and information dissemination opportunities in LinkedIn Company Profiles and in the customisation of social media accounts.
Oz-wide: Facebook is king...as usual

From an overarching Australian statistics perspective:

As the world's number one social networking portal, it is perhaps not surprising that FaceBook enjoys the highest number of local users.

Facebook.com attracts 13.9 million unique visitors in Australia each month though it only has 10.9 million users registered in Australia. The substantial disparity between the two stats is likely attributable to the use of Facebook in multiple locations and across multiple devices, and the inability to pinpoint certain people to a specific location due to IP address obfuscation and lack of profile details.

Google+ is relatively new to social media royalty but is eager to take the king's crown. Recently they announced over 170 million users...but Australian specific and 'actual use' statistics are lacking.

Twitter enjoys a global retinue of over 500 million accounts but admits only 140 million accounts are active, while LinkedIn (aka 'Facebook for grown-ups') draws a crowd of 2.1 million in Australia.
Who are you?

During the development of this research, Wirth Consulting analysed the online use of social media in 595 Australian non profit organisations with annual revenues up to $253 million and who employ up to 9800 employees.

The majority of non profit organisations came from the Health and Human Services sector including aged care, disability support services, Indigenous support, and humanitarian aid to name a few. Overall the analysis included organisations from most major sectors.
What is in your online kitty?

Across all sectors, it wasn’t a surprise to find organisation’s websites, LinkedIn and Facebook with the highest presence for online properties, with MySpace sitting at the bottom position, echoing the sad international decline of its use.
Environment and Wildlife organisations came out on top with the highest use of social media across Facebook, YouTube and LinkedIn, while Arts/Culture/Humanities/Recreation had the lowest use across Twitter, YouTube and LinkedIn. Surprised?

For whom the bell tolls
Apparently it does. But not necessarily in the way you would think.

Organisations with revenue over $5 million were most likely to use LinkedIn and YouTube. However if they had more than 1000+ employees, they were also least likely to use blogs.

Organisations with revenues between $100,000 and $250,000 were least likely to use social media, while those earning revenues less than $100,000 were the most likely to use Facebook.
Well, not really in time. But in volume.

Of all the organisations analysed, these organisations hit the peak in the number of posts made (in a one month period) and in the number of followers attracted.

The number of posts were counted based on posts made by the organisation themselves and not retweets or fan posts.
State Wars

It’s not just a football war.

The popularity of each social media technology had a correlation to the location of the organization’s headquarters.

Twitter attracted the highest use among organizations headquartered in Queensland.

New South Wales and Victoria came equally tops on FaceBook use, while institutions with their head offices in New South Wales took the honors for Google+ and YouTube.

Victoria wasn’t going to be left behind, coming in number one on Blogging and LinkedIn.
On average, FaceBook accounts have the highest number of fans/followers compared to non profit accounts on other social media platforms. However, FaceBook trailed both Twitter and Google+ in the average number of posts per week.

What is perhaps most surprising is Google+ having the highest number of posts per week - 16. But considering Google+ is the newest kid on the social media block, this high posting frequency per account is likely due to a considerable amount of experimentation and a slight data skew based on the comparative number of accounts.

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<tr>
<th>PLATFORM</th>
<th>POSTS PER WEEK</th>
<th>FOLLOWERS</th>
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<td>2538</td>
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<tr>
<td>Google+</td>
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The non competition in video

YouTube, the second most visited website on the planet is, as would be expected, miles ahead of Vimeo as far as degree of use is concerned.

Close to 1 in every 4 not for profits in Australia have a YouTube account compared to approximately 1 in 33 for Vimeo.

And about half of all not for profit YouTube accounts are customized with non-standard backgrounds, colours and logo.

23% of all NFPs use YouTube

32 Average number of YouTube videos per NFP

5110 Average number of YouTube Channel views

47% have customised layouts

1-40 number of videos
At 47-48 percent, Twitter and YouTube top the list of customized social media accounts for Australian non-profits.

FaceBook is a little lower down the rungs with just 1 in 3 accounts customized and branded.

Interestingly, the hugely successful FaceBook app Causes (http://www.facebook.com/causes) has not attracted as much attention from Australian NFPs – just 5 percent currently use it.

Perhaps this is because one can only raise money on Causes for a non-profit registered in the U.S. or Canada.

However what it does emphasize is a lack of Facebook application integration to raise donations within this platform in Australia. A missed opportunity?
Abandonment Rate

Anyone who has ever built a successful blog knows it takes nothing short of blood, sweat and tears. Unlike FaceBook and Twitter accounts where non profits have the benefit of riding their online campaign on the back of recognised brands, blogs require a lot more work to build from the ground up. Little wonder that blogs\(^1\) showed the highest abandonment rate – 31 per cent of blogs had their most recent post older than 3 months.

YouTube\(^2\) follows with 20 per cent – not surprising given the time, resources, skill and bandwidth necessary to regularly upload quality and relevant videos. Google+ at 14 per cent clearly continues to suffer the curse of user experimentation that’s characteristic of any new product. In fact, in that context, an abandonment rate of 14 per cent is fairly respectable.

Twitter\(^3\) has weathered plenty of criticism for reducing communication to just 140 characters per message – but possibly this brevity is a key reason why this social networking technology has been so successful. Its abandonment rate of just 3 percent among Australia’s non profits (the lowest rate of the social media platforms assessed during this survey) only reaffirms its strength. Facebook does not fair too badly. It has a 6 per cent failure rate.
Twitter Sharability

On average, Australia’s non profits tweet roughly once a day and re-tweet once every three days.

These numbers are not too different from Twitter’s global statistics where the 500 million users are responsible for about 400 million tweets per day as of June 2012.

Only 1 in 10 Australian NFPs use Twitter hashtags, indicating a lost opportunity to gain greater coverage from individuals and organisations that use hashtags to monitor news and information delivered through this classification mechanism.

The low rate of non profits in Lists also indicates that this research and classification mechanism isn’t being encouraged as a method of branding exposure.

- Average number of tweets per month: 33
- Average number of re-tweets per month: 10
- Percentage of NFPs that use hashtags: 11%
- Percentage of NFPs that are “Listed” by others: 17%
The (Missed) Link in the Chain

The naturally serious and professional amongst the group, LinkedIn enables organisations to spruik their wares and brand their own Company Page. But only 32 percent have a Company Profile.

Within this 32 percent, over half of all non profits aren’t taking advantage of the full functionality, with only a “basic profile” in place - i.e. a couple of paragraphs of text about the company and no logo to reinforce branding.

37 percent of non profits had an ‘intermediate’ profile - i.e. a complete profile page and logo.

As little as 14 percent of non profits were taking full advantage of ‘advanced’ features such as a Careers page, a Products page and linking their blog to their LinkedIn Company Page.

Our recommendation? Get on LinkedIn and forge your organisation a new profile right now - it will take less than 10 minutes, we promise.
LinkedIn Groups provide the opportunity to bring together supporters, sponsors, donors and corporate partners. But only 5 percent of nonprofits have a LinkedIn Group that they control.

Of this 5 percent, 62 percent have made their groups ‘members-only’ making it harder (and possibly not worth the effort) to join the discussion and participate in supporting the organisation’s goals.

The bottom line: if you have a LinkedIn Group, and there isn’t a need to restrict access, open it up and share the love around. And get all that comes with it - branding exposure, interaction with the people you need to support your organisation and potential to promote your activities to a broader audience.
Learn from the Top Twenty

We couldn’t wrap up the last of the stats without telling you which organisations are doing it really well. These are the top 20.

So how did we rank them? Factors we analysed and attributed ‘points’ to included: a modern website structure, number of fans / followers / subscribers, posts per week, customisation, and continuity in posting consolidated across all social media platforms.

We should note however that success comes in many forms and not all social media platforms will suit every organisation. We are not advocating you join every social media platform out there. In fact, we encourage the opposite.

Our advice: choose carefully based on the presence of your target market, invest time wisely & measure success (or failure - and then move on and test another platform).
As a case study for this report Oxfam Australia (one of the top 20) lent us their thoughts on their implementation and use of social media.

**Tell us about Oxfam Australia’s mission and goals?**

Oxfam Australia has been working with communities for more than 50 years, and we have learnt that simply giving hand outs is not the answer. Instead, we provide people with the skills and resources to help them create their own solutions to poverty. We fund long-term projects around the world and we work in a range of areas, from water and sanitation to education and health, to bring about positive change in people’s lives.

But poverty isn’t just about lack of resources. In a wealthy world it’s about bad decisions made by powerful people. We form part of a global movement of people committed to achieving a fairer world by:

- Partnering with Australians to campaign on the issues that matter – more than 50,000 Australians took action with us in the 2010/2011 financial year
- Empowering communities in developing countries to realise their rights and improve their lives
- Engaging with organisations and governments to change policies that cause poverty and inequality

We also do important humanitarian work, because people need help in an emergency – fast. We save lives, swiftly delivering aid, support and protection; and we help people prepare for future crises.

**Why did you implement social media in your organisation?**

The OAus digital communications strategy is aligned to three central goals:

- increase awareness of our work
- promote active citizenship
- increase online donations
Engagement with social media offers many compelling benefits in support of these goals:

- Learn what our supporters are saying and sharing about our organization.
- Drive traffic to our various web properties — websites, blogs, etc.
- Drive visitors to online donation pages.
- Enable supporters to distribute messages about our organization through their social web presence.
- Empower our most passionate and influential supporters to promote our organization.
- Enable grassroots movements in real-time and rapidly respond to unforeseen events.
- Humanize our organization by not limiting communications to traditional methods or messages.
- Acquire new contacts and build our supporter database.
- Increase trust and loyalty from our supporters by allowing them to share their voice through feedback forums.

Who was the driving force behind implementing social media in Oxfam Australia?

Primarily the Digital Communications team which sits within Marketing.

What issues did you face internally in your social media implementation?

Coordinating a social media presence of professional calibre when staff who contribute to our social media output are scattered across different departments and interstate offices, and who often have competing or conflicting priorities.
What key issues did you face externally in your social media implementation?

Substantially growing our Facebook and Twitter following in a field already crowded with other NGOs and non-profits -- standing out in the crowd.

What are the top three areas you believe a social media policy should cover?

1. **Publishing model**: Who's responsible? Who contributes? What level of access and accountability do different departments or key figures across the organisation have?
2. **Rationale**: Why are we investing in each platform that we’ve chosen to be on? If we’re ignoring a major platform, why? If we’re investing in a smaller, less well-known platform, what’s our logic for doing so?
3. **Identity**: What is our brand voice on social media, and how does it relate to our existing brand identity? What is our approach to user-generated content and community moderation? What relationship are we seeking to build with our followers -- why are we here?

Why did you select the social media technologies you have implemented? And how do you believe social media has helped your organisation?

Essentially we undertook research on the best social media tools for our particular goals. We believe it has helped us increase revenue, increase brand awareness, increase website traffic and search rankings, and increased engagement with our target market.

Can you share any learnings from implementing social media in your organisation?

It’s important to educate all parts of the organisation about the nature of social media. Immediacy and transparency -- it’s crucial that your key players understand the importance of these concepts. Make sure they know what astroturfing is (and that it’s a bad thing).
Case Study: Oxfam Australia cont...

**What are your top tips for gaining new fans / followers on Facebook &/or Twitter?**

Post relevant, quality content -- and don’t make it all about you. Share links that relate to your area of work without always directly promoting it; demonstrate that your organisation is a leader in its field. Always give your followers something of value -- new information, a thank you for their support, a chance to contribute their thoughts. Make it worth their time to follow you, and they will reward you with shares and retweets that gain you greater exposure and more followers.

**Can you describe one particular social media campaign that was successful for your organisation?**

On World Food Day 2011 (October 16) Oxfam Australia ran a nationwide event with participating restaurants to raise money for our East Africa Food Crisis Appeal. The event, Shout the Horn, encouraged diners to donate the cost of an additional meal to help people affected by famine in the Horn of Africa. Most of the participating venues also made a donation of their own to the appeal.

The social media campaign for Shout the Horn had several phases. As the event was executed on a fairly tight turn-around, from inception to execution, the first phase of our social media campaign was to get the word out about the event to our existing supporter base and encourage them to ask their favourite local restaurants to become participating venues. Nationwide we were able to grow the number of participating restaurants to more than 77 in the span of several weeks, through a combination of staff efforts and social media outreach.

The second phase of the campaign aimed to raise public awareness of the event, among and beyond our existing supporter base. The specific goal was to encourage people to make bookings at participating venues. For this phase we continued to connect with our existing supporters. We also reached out to well-known food bloggers, and to chefs with Twitter accounts who ran the kitchens of the most high-profile participating venues. Celebrity chef Julie Goodwin, an Oxfam Australia ambassador, also lent her support to the campaign via Twitter and Facebook posts from her official accounts.
The third phase of the campaign introduced a prize draw for people who tweeted their dining plans for Shout the Horn, again with the aim of increasing awareness and encouraging bookings. We gave away five prize hampers at random to contest participants, stocked with fairtrade goods from Oxfam Shop.

The campaign ran for 6 weeks in total, including a follow-up week announcing prize winners and fundraising totals. We also used Facebook to post a large collection of images from the event, taken at various venues by professional photographers who donated their services.

We used Facebook and Twitter exclusively for the campaign, with more frequent updates to Twitter than to Facebook (particularly around the enrolment of new venues – which were targeted by location when we did make such posts to Facebook). The prize draw was only on Twitter. We considered incorporating Foursquare, as the location-based element of the event seemed an ideal fit, but ultimately we decided that the target demographic for the event was not invested enough in the Foursquare platform to make the effort worthwhile. (Especially as Oxfam Australia does not currently have an active presence on Foursquare.)

The campaign generated a considerable amount of engagement from a small group of dedicated supporters, who seem to have been quite effective in generating localized participation in the event.

Overall, Shout the Horn raised more than $64,000 for Oxfam’s East Africa Food Crisis Appeal. Factoring in the government’s matching scheme, which was announced shortly after the event was planned, STH actually raised $119,335 for the Horn of Africa. A success, indeed.

Finally, if you could impart one social media best practice to other non profits, what would it be?

Be real.
Conclusion

The number of FaceBook users is fast approaching 1 billion - about a sixth of the world’s population and close to half the planet’s 2.2 billion internet users. Similarly, Twitter, Google+ and LinkedIn are also seeing an exponential increase in user numbers. Social media use among Australia’s non profits is substantial. However, there is still plenty of room for growth.

The country’s non profits are yet to see the degree of fund raising and cause advancement success that non profits in Canada and the US have realised. As social media continues to grow in reach and influence in and outside Australia, organisations must identify how to target different demographics and best connect with relevant end users, for their specific target market.
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About Wirth Consulting

Wirth Consulting provides strategic technology and online consulting services to not for profit, government and commercial organisations. Our goal is to help these organisations to achieve their goals with fantastic online technology solutions and objective, strategic technology advice. We are renowned for banishing geek-speak and talking like ‘real humans’ while at the same time drawing upon our extensive technology knowledge.

Join the next research project

Participate in our next release of our non-profit, government, small business or ASX listed ‘State of Social Media’ or ‘State of Website Development Technology’ report and receive a free baseline summarising how your specific organisation compares to others in your industry.

Simply register your details online and we’ll contact you in the next round:

Register Now
End Notes:
1. Facebook, Twitter, Blogs and Google+ abandonment rates are based on no posts to the account within the three months prior to data sampling.
2. YouTube, Flickr, Vimeo abandonment rates are based on no videos posted to the account within the two years prior to data sampling.
3. Data on abandonment rates were gathered based on the presence of an account and the absence of posts or videos. Note that this means abandonment rates may be higher or lower on certain platforms because some accounts are easier to remove than e.g. a blog integrated into a website.

General Notes:
• Data was collected from publicly accessible websites and government reports between November 2011 to April 2012
• All efforts have been made to ensure accuracy however as with any statistics we recommend a good dose of cod liver oil and a grain of salt. Here's the official legal bit: Wirth Consulting makes no warranties, express, implied or statutory as to the accuracy of the information.
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Sources:
• Facebook (www.facebook.com)
• LinkedIn (www.linkedin.com)
• MySpace (www.myspace.com)
• Google+ (https://plus.google.com)
• YouTube (www.youtube.com)
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