



Part 1: performance benchmarks

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Credits

The 2009 eCampaigning Review was only possible with the work and contributions of a number of people:

- Graham Covington, Jonathan Purchase, Jason Meyers and Mark Swope from Advocacy Online for putting in the work to make this possible by getting Advocacy Online clients to participate and agree to contribute their data as well as the extensive time required to put the data into the required format.
- Jess Day who conducted the qualitative best practices survey and comparison aspects of the review and editing comments when there was time
- Duane Raymond who processed millions of rows of data into insightful benchmarks and shared qualitative benchmarking methodologies with Jess
- Participating organisations, who's data is essential for this to exist
- Interested readers: hopefully you can turn what your learn into more effective campaigning

1 Summary

This Performance Benchmarks study compares the performance of 55 organisations in 9 countries on a range of measures relevant to the email-to-action e-campaigning (e-advocacy) model. These measures relate directly to campaigning objectives so that the contribution of e-campaigning activity to the campaign is clear to support decision-making on campaigning strategies, priorities and tactics.

This is the first of year of a planned annual eCampaigning Review (of which the Performance Benchmarks are part one of three) and acts as a baseline against which future e-campaigning performance can be compared and a model for measuring e-campaigning performance.

eCampaigning Review for:

- senior managers of organisations that campaign
- all types of e-campaigning practitioners
- staff collaborating on delivering e-campaigning activities
- consultants, freelancers, developers and other suppliers of e-campaigning services and support

The general findings are that:

- Mobilisation: a mean participation rate (of those emailed) was 7% with some organisations exceeding 20% (see 3.2)
- Recruitment: e-campaigning actions had a mean of 44% of the participants being new supporters (see 3.3)
- Development: less than 10% (mean) of overall supporters were active for ¾ of organisations (see 3.4)
- Retention: only 38% (mean) of *active* supporters had taken an online action in the 4 months before 1 Sept. 09 (see 3.5)
- Overlap: only 6-7% of supporters were on more than one organisations' online supporter base (see 3.6)

This means that while recruitment is reasonably strong, mobilisation, development and retention are weak. This creates a problem in that all recruitment success is quickly lost due to low repeat participation until most supporters lapse.

To get the benefits of e-campaigning, organisations need to apply a range of best practices at all stages of email-to-action activities. These need to be applied at a consistently high adherence to best practices.

This Performance Benchmarks report is part one part of a three-part eCampaigning Review downloadable from FairSay (fairsay.com/ecr09) or Advocacy Online (advocacyonline.net/ecr09)

These results, in conjunction with the eCampaigning Action Comparison, the eCampaigning Practices Survey and in-depth knowledge of the sector suggest many organisations' e-campaigning activities are trying to do too much with too little time, expertise, analysis, budget and prioritising. Due to this, the e-campaigning that does occur is under performing and not delivering the potential benefits. A few organisations are achieving at higher levels and thus demonstrate it is possible.

The 2009 eCampaigning Review focuses only on the most common e-campaigning model: **emailings supporters to take actions online**

2 Background

Over the last decade, campaigning (advocacy) on the Internet and other interactive media has grown significantly. Today most organisations with campaigning activities have an online presence. Yet despite this significant growth in campaigning online (e-campaigning), there is still little understanding about what are good performance levels and practices or good performance measures.

Individually, some organisations have addressed this by initiating or commissioning reviews¹ of their e-campaigning. While these can compare public practices, they suffer from two constraints:

1. they have no direct way of comparing performance vs. their peers since the data is private
2. the results cannot be published for the benefit of others in the sector due to being confidential

2.1 The eCampaigning Review

The eCampaigning Review addresses these constraints through three independent quantitative and qualitative research initiatives:

1. an analysis of the e-campaigning emailing and action data
2. a comparison of public e-campaigning practices
3. a survey of e-campaigning internal practices

To achieve consistency between organisations, the eCampaigning Review focuses only on the most common e-campaigning model: **emailings supporters to take actions online**. This model is primarily focused on mass-activism: getting existing supporters to take action and recruiting new supporters. This model accounts for between 75% and 100% of each organisations e-campaigning activity and thus is a good candidate for this first eCampaigning Review. However there are *many* other e-campaigning models of e-campaigning that are both worthwhile and appropriate for the different campaigning objectives but are beyond the scope of this e-campaigning review.

The studies are insightful for four key e-campaigning stakeholders:

1. **senior managers** of organisations that campaign
2. all types of **e-campaigning practitioners**: e-campaigning specialists, campaigning specialists, Internet specialists, communications specialists, etc.

¹ Duane Raymond of FairSay has been conducted 10 e-campaigning reviews for UK and international organisations

3. **staff collaborating on delivering e-campaigning activities:** fundraising, press officers, designers, analysts, supporter care, etc.
4. **consultants, freelancers, developers and other suppliers** of e-campaigning services and support

2.2 The Performance Benchmarks

The performance benchmarks are the data analysis aspect of the eCampaigning Review is an aggregated analysis of how 55 organisations are performing with their e-campaigning emails and actions. It looks at data from three related areas of supporter communication and participation:

1. emails: who was sent what, when and what happened
2. actions: who has done what, when
3. supporters: who is active and how long have they been

The primary benchmarks are organised around common campaigning objectives. They relate directly to organisational goals like mobilisation and recruitment – not technical measures like ‘hits’ and open rates.

The primary benchmarks are organised around seven areas that are most relevant to this specific e-campaigning model:

1. **Mobilisation:** what proportion of subscribers are participating in each individual action
2. **Recruitment:** how effective are organisations at attracting new subscribers with each action
3. **Development:** what proportion of supporters participate in multiple actions and more involving actions
4. **Retention:** how effective are organisations at retaining subscribers and at what rate are subscribers lost
5. **Overlap:** how many subscribers are on other organisations’ lists
6. **Subscriber base:** how many subscribers are on the email lists of organisations
7. **Supporter Experience:** how effective organisations are at getting supporters from reading an email to participating in an action

Note:

- ‘subscribers’ are people whom the organisation has permission to email and is considered equivalent to unique email addresses
- ‘participants’ are people who have taken one or more past action
- ‘supporters’ are people who have has some contact with the organisation before. e.g. taken an action, subscribe to emails, participated in event

The performance benchmarks only provide one perspective on e-campaigning activity. To get a more complete insight, this analysis needs to be viewed with the:

1. eCampaigning Actions Comparison
2. eCampaigning Practices Survey

Downloaded all three reviews from either:

- FairSay site: <http://fairsay.com/ecr09>
- Advocacy Online: <http://advocacyonline.net/ecr09>

3 Findings

Overall, the performance benchmarks indicate that most organisations have the e-campaigning basics in place. However it also strongly suggests that while a few organisations are doing reasonably well, most are underperforming on multiple key performance indicators.

The biggest surprise is the low proportion of supporter overlap between organisations since this had never been measured before. Also surprising is the recruitment ratio of actions as it is higher than had been measured in the past. This strengthens the case for actions being a good recruitment channel.

These results aren't surprising since it is not only the first public benchmark for the involved organisations and countries. It is symptomatic of the absence of comprehensive, continuous analysis in each organisation to identify and address underperformance. It also parallels the results from numerous private e-campaigning reviews FairSay has conducted for a range of organisations over the last decade.

The best news is that raising performance is relatively simple with the right priorities; principles and practices are adopted and applied consistently.

The results strongly suggest that while a few organisations are doing reasonably well, most are underperforming on multiple key performance indicators

3.1 Using these findings

These findings express results in ranges so that low performance doesn't obscure high performance. It shows organisations what is achievable and nudges them to make significant improvements to their e-campaigning activities.

To make best use of these performance benchmarks:

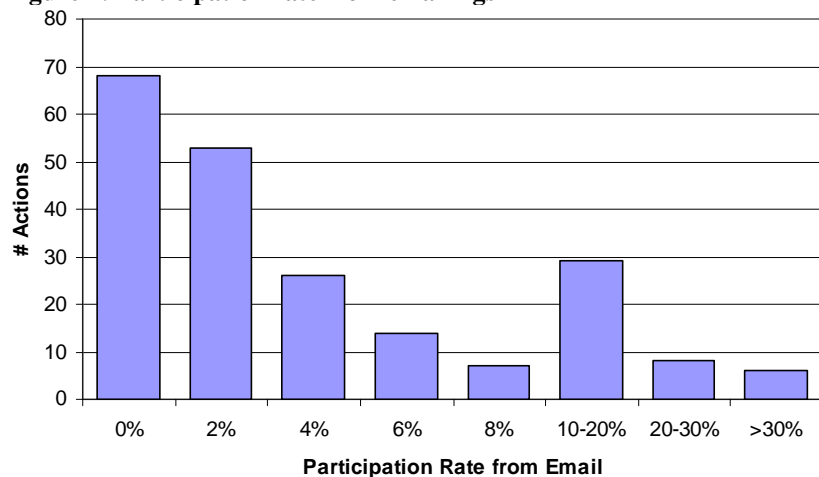
1. **Calculate** your organisations' performance on the same measures with the same methodologies as used here
2. **Compare** how your organisation is performing on each measure with the benchmark ranges
3. **Identify**:
 - a. where your organisation's performance is **ranked**
 - b. where your organisation's is **underperforming**
 - c. what is the range of the **top performance**
4. **Develop** a plan to improve performance in the identified areas
5. **Re-calculate** your organisations' performance after a suitable timeframe and compare it with both the previous measures and the benchmark
6. **Repeat** until you are in the top performance range of all areas that are important to your campaigning objectives.

3.2 Mobilisation

Mobilisation is usually the principle objective of a public campaigning action. Thus participation rate is a key measure on how effective an organisation's e-action is at getting existing email subscribers to mobilise around the campaign asks.

The average participation rate (the proportion of supporters who are emailed and take the action) is low, with a mean of 7% and a median of 3%. While this is still likely above the participation rate of an offline action, higher rate of 25-35% have been seen in studies for individual organisations to be achievable and repeatable. This is supported by the fact that some organisations' actions are achieving participation rates above 20%. This in turn suggests that most organisations are underperforming.

Figure 1: Participation rate from emailings



Participation rate is driven by a number of factors, including:

1. **email type:** e.g. single ask (higher) vs. newsletter (lower)
2. **action type:** e.g. petition/pre-written letter (high) vs. self-written letter (lower)
3. **recipient profile:** e.g. campaigning supporter (higher) vs. donor (lower)
4. **relevance:** e.g. segmented or related to daily news (higher) vs. unsegmented or related to old/unfamiliar news (lower)
5. **regular list cleaning:** e.g. removal of bounces and lapsed supporters (higher) vs. no list cleaning (lower)

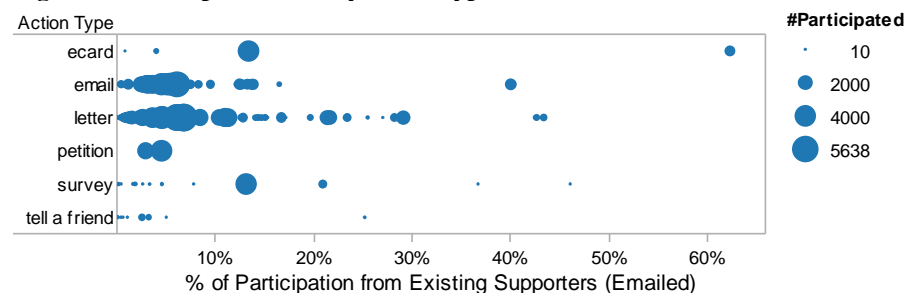
Given the continued reliance of many organisations on email newsletter for all email communications, the low use of segmented emailings and the lack of any list cleaning, it is likely that most of the sector is performing well below their potential on participation rates.

The mean participation rate (of those emailed) was 7% with some organisations exceeding 20%

When grouped by action type, most actions are still below 10-15% participation rates. The fact that a few are able to achieve above this level suggests that higher participation rates are achievable if a wide range of best practices are consistently applied.

It is also interesting to note that the actions with the lower participation rates had higher absolute number of participants (Figure 2), presumably because the organisations running the action has larger lists and those with the large lists are less effective at retaining and engaging their supporters.

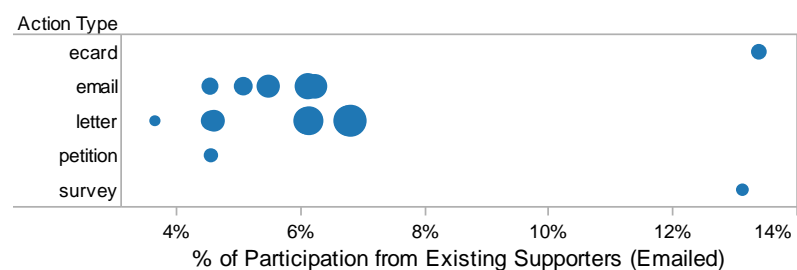
Figure 2: Participation rate by action type



Actions with the lower participation rates had higher absolute number of participants (Figure 2), presumably because the organisations running the action has larger lists and those with the large lists are less effective at retaining and engaging their supporters

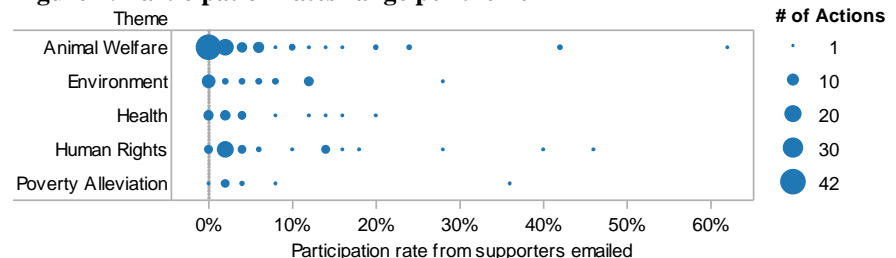
When actions are filtered to include only those sent to more than 10,000 people and completed by more than 3,000 people (Figure 3), a few actions still perform above 10%.

Figure 3: Only actions emails to 10,000+ and with 3,000+ participants



When grouped by theme (Figure 4), animal welfare organisations seemed to have the most actions but with relatively low participation rates. Organisations in the environment and human rights had fewer actions but each had a moderate-sized group of actions that performed about 10% participation rates.

Figure 4: Participation rates range per theme



The ranges for Canada (Figure 5) and the UK (Figure 6) showed a similar wide range of participation rates.

Figure 5: Canadian participation rates range

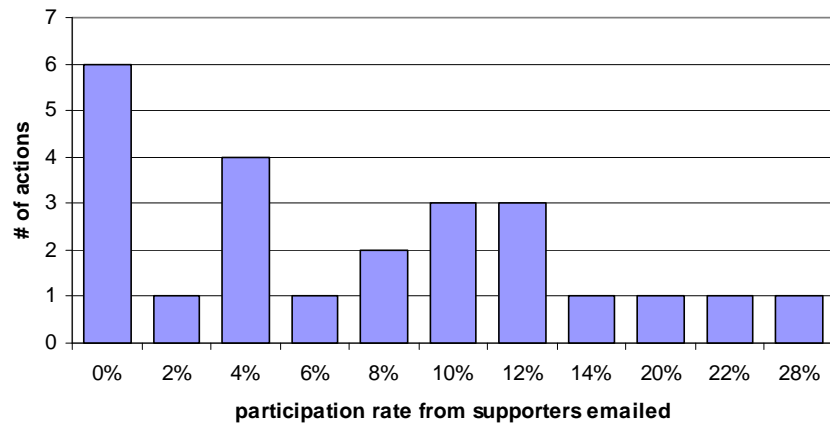
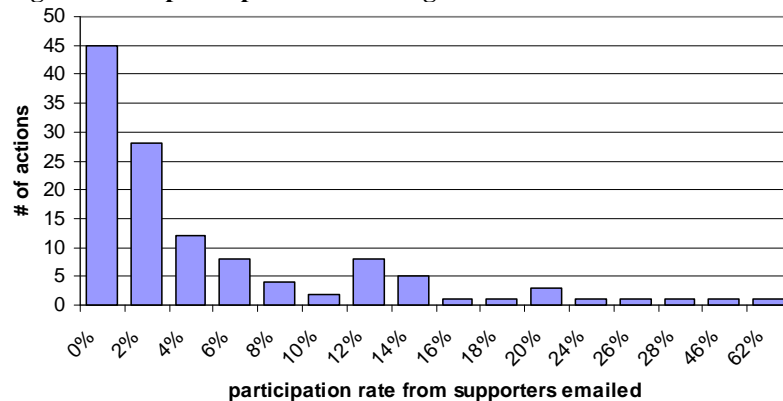


Figure 6: UK participation rates range



Participation rates are lower and less consistent than expected. Previous individual analysis has found that participation rates of 25-35% are possible and repeatable if most or all best practices are consistently applied.

What is particularly surprising about all the different angles of the participation rates analysis is not only how low they were, but how inconsistent. This suggests that:

- best practices aren't being consistently applied
- email newsletters (vs. single-ask action alerts) are being overly-relied upon for promoting actions
- there is 'dirty' data that has entries that skew the results to the low end (e.g. test actions, test emailings)

While all of these are contributing factors, A and B are likely the primary factors since otherwise there would be more actions with higher action rates.

3.3 Recruitment

Recruitment is usually the secondary objective (after mobilisation) behind why organisations adopt the email-to-action e-campaigning model. On average, actions had a median of 37% of participations being new (action recruitment ratio), or, expressed differently, a median of 0.6 new supporters for every pre-existing supporter taking the action (action recruitment new-to-existing ratio).

The recruitment averages were:

Recruitment ratio			Recruitment new-to-existing		
Mean	Median	Range	Mean	Median	Range
44%	37%	0-100%	18.6	0.6	0-1900

Note that:

1. Different types of action (e.g. petition, letter, member-get-member) will differ in their recruitment average depending action simplicity
2. The recruitment new-to-existing ratio values for mean and median are very different since a few high values skew the mean.
3. The averages and charts to show that a *repeatable* best practice performance level is a recruitment ratio of 37-44% or a recruitment new-to-existing ratio of 0.6.

Average recruitment rates were higher than expected. Previous individual analysis had suggested 33% was consistently achievable. Yet the averages were 37% (median) and 44% (mean).

The “action recruitment ratio” is the proportion of action participants who take the action who were new: not emailed and not already on the supporter base. These people find the action either through the website or by being told about it by friends, family or colleagues.

It is possible for the action recruitment ratio to be many times above 100% since that would mean many more new people took the action than existing supporters. In practice this is rare unless there is widespread promotion or publicity around an action or campaign like a top news story and/or joint campaign or action (e.g. Make Poverty History). It could also be high if an action isn't promoted to existing supporters and thus it will have a relatively higher proportion of new participants. Most time the action recruitment ratio will be under 50%.

Figure 7: Action recruitment ratio

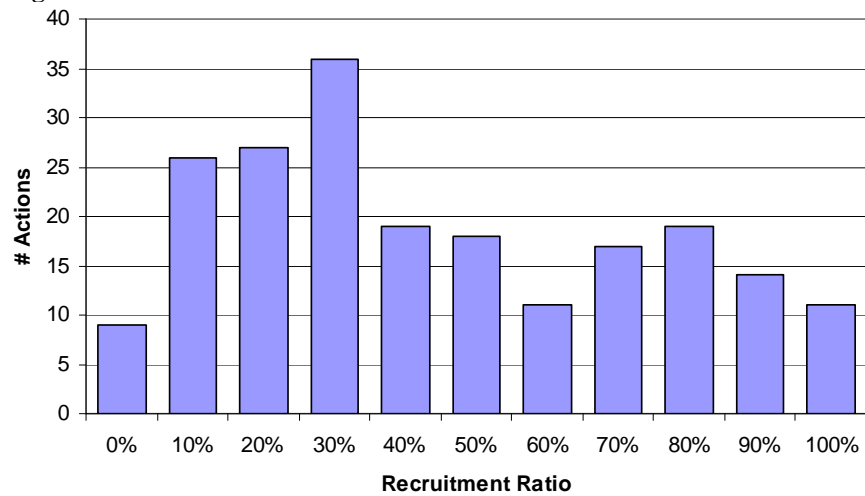
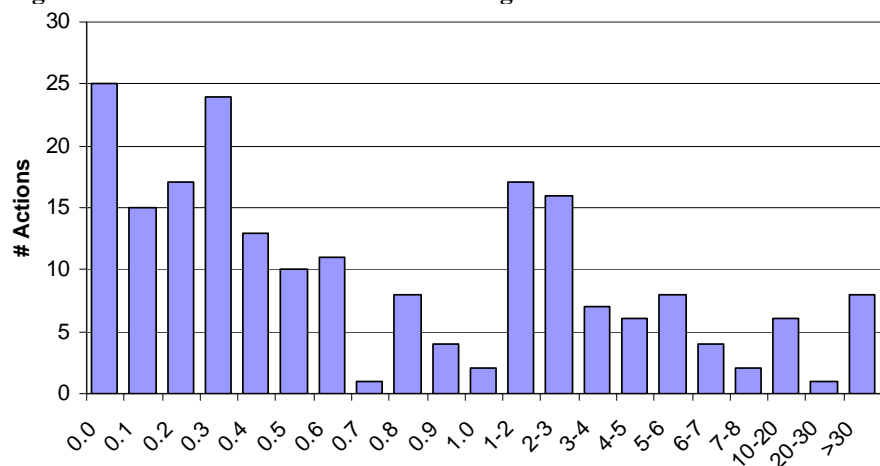


Figure 8: Action recruitment new to existing ratio

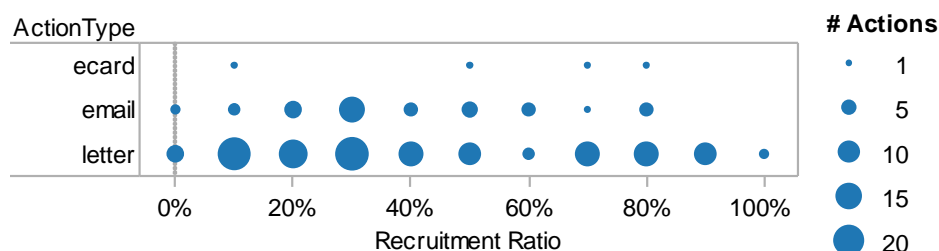


A surprising number of actions have a new-to-existing ratio above one meaning they had more new participants than were originally to take the action.

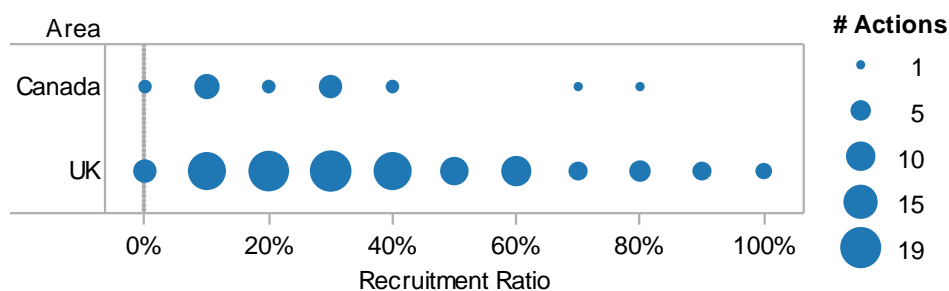
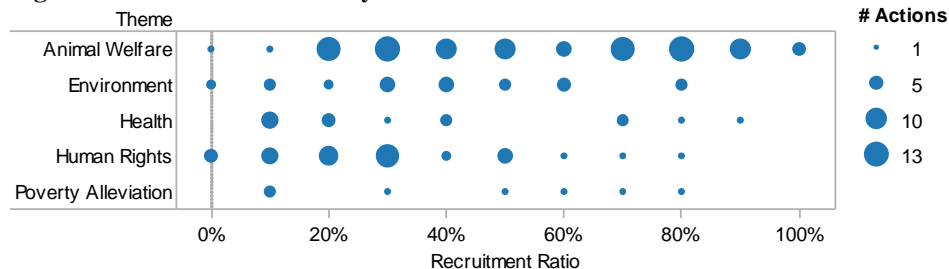
The “action recruitment new-to-existing ratio” is the proportion of new action participants to pre-existing action participants:

- above 1 means the action had more new participants than pre-existing
- below 1 means the action had more pre-existing action participants than new action participants

The proportion of new participants that give permission to receive email updates determines the email list growth. However for this analysis, the direct data to determine this didn’t exist in the data. While it can be inferred through the changes in list size between emailings, to do this requires knowing what segment each emailing was sent to and this information also didn’t exist for this analysis.

Figure 9: Recruitment ratio by action type

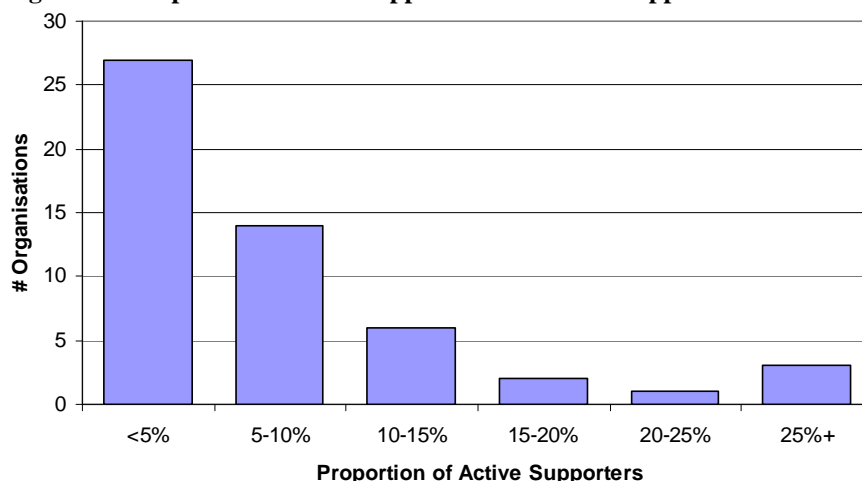
Grouping the recruitment ratios by area, action type and theme doesn't show any obvious clusters that apply to a particular area, action type or theme. This suggests that applying best practices may be more important for recruitment than an individual action characteristic.

Figure 10: Recruitment ratio by area of operations**Figure 11: Recruitment ratio by theme**

3.4 Development

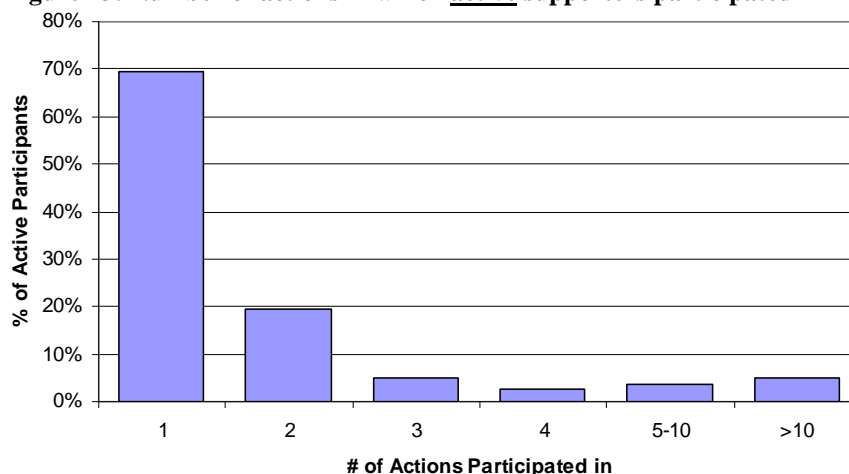
Overall, half of organisations have only 5% of their total supporter base² active³ (Figure 12) and 75% have less than 10%. Of these active participants, 70% had only taken one action (Figure 13). The fact that a few organisations can have over 20% of their supporters active may mean that most organisations are dramatically underperforming in this area.

Figure 12: Proportion of active supporters of the total supporter base



Once supporters are recruited, keeping them engaged and active is crucial not only to help achieve the campaign objectives, but ensuring minimising them lapsing. The finding that 90% or more of 'supporters' are inactive in 75% of the organisations suggests that organisations' development and retention activities is either non-existent or with serious gaps.

Figure 13: Number of actions in which active supporters participated



Failure to apply best practice across the full email-to-action supporter journey results in the classic case of "one step forward, two steps back"

² Total supporter base is a) anyone who is on their list b) anyone who has taken a campaigning action online or c) anyone on their online supporter base

³ Active is defined as having taken one or more campaigning actions

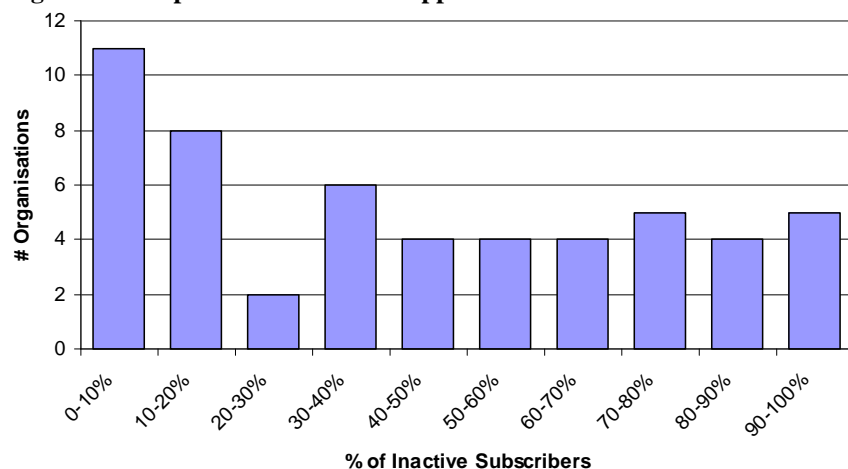
Improving repeat participation is a vital for many organisations' e-campaigning.

This means that all the benefits of applying mobilisation and recruitment best practices are quickly lost when supporters fail to be involved beyond their initial contact. More than any finding, this demonstrates the imperative for organisations to apply best practices across the full email-to-action supporter journey. Failing to apply best practice across the full email-to-action supporter journey results in the classic case of "one step forward, two steps back": successes are offset by failures.

The fact that a few organisations have over 25% of their supporter base active is an indicator that this is achievable. Thus, in addition to improving the participation rate, improving repeat participation is a vital for many organisations' e-campaigning.

40% of organisations also had 50% or more inactive supporters⁴ (Figure 14). Many of these could have participated before the period the data covers (generally from early 2008). Even accounting for this potential skew of the inactive analysis, it still means that since early 2008, high numbers of supporters have not taken action.

Figure 14: Proportion of Inactive Supporters



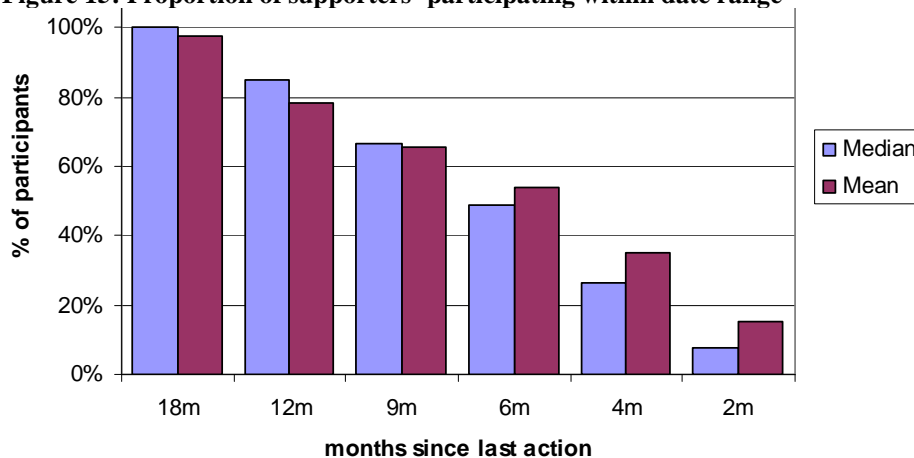
⁴ Inactive supporters are email addresses that are on an organisations records but for which there is no record of them having taken a campaigning action.

3.5 Retention

Supporters are considered retained when they are still taking actions within a reasonable time, otherwise they are considered lapsed. For the purposes of this review⁵, it will explore scenarios where there was further participation within a range of dates before the data cut-off date of 30 August 2009.

On average, a median of 85% of active supporters had participated in the last twelve months and this fell to 8% for the last two months (Figure 15).

Figure 15: Proportion of supporters' participating within date range



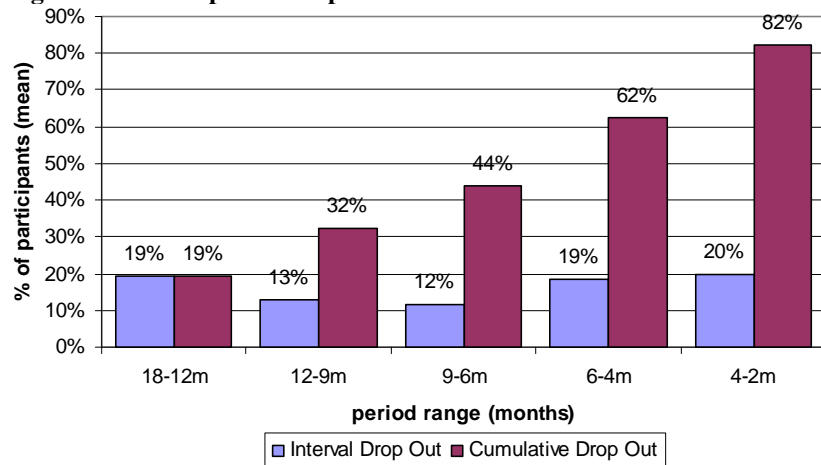
The finding that 62% of active supporters had not been active in the last 4 months suggests drop-off (or drop-out) is very high for most organisations.

A mean of 82% of active supporters had not taken action in the last two months since 30 August 2009 and 62% had not taken action in the last 4 months (Figure 16). 20% of active supporters who had participated four months ago did not participate in the last two months – suggesting a drop-out rate of 20% over two months (Figure 16).

Since 70% of supporters who only took one action (Figure 14), it demonstrates that the first action is the critical time to act to retain supporters and get them to re-participate.

⁵ Ideally it would be no further actions after three campaigning emails. While absolute periods of time likely affect lapsing, most engagement is triggered by an email.

Figure 16: Participation drop out rate over time



The findings suggest there is 20% drop-out of active supporters every 2 months.

Lapsing occurs in a variety of ways:

1. they stop finding the emails engaging enough to participate
2. the email address becomes invalid (e.g. move jobs/school)
3. the email address never was valid (by mistake or on purpose)
4. they stop using that email address
5. they unsubscribe from emails
6. receiving email stops due to it being falsely flagged as spam
7. the emailing system stops send emails to them due to being falsely flagged as invalid (e.g. after series of soft bounces)

Thus all across the email-to-action cycle there are opportunities for minimising lapsing supporter. The most critical phase of which is the time immediately after participating in the first e-campaigning action

3.6 Supporter overlap

Overall, only 4% of supporters are on other organisations' email lists (Figure 17). For the Canada, UK and international organisations (the three groupings with more than two participating organisations) the overlap rate (Figure 18) varies from 6.9% for the UK to 1.4% for the international organisations.

Overlap between organisations' supporter bases is relatively small at between 6-7% for Canada and the UK and only 1.4% for internationally focused activities.

The higher overlap rates in the UK and Canada may be due to the fact that both had coalitions for Make Poverty History in 2005 and the UK has a number of active coalitions.

Figure 17: Overall supporter overlap

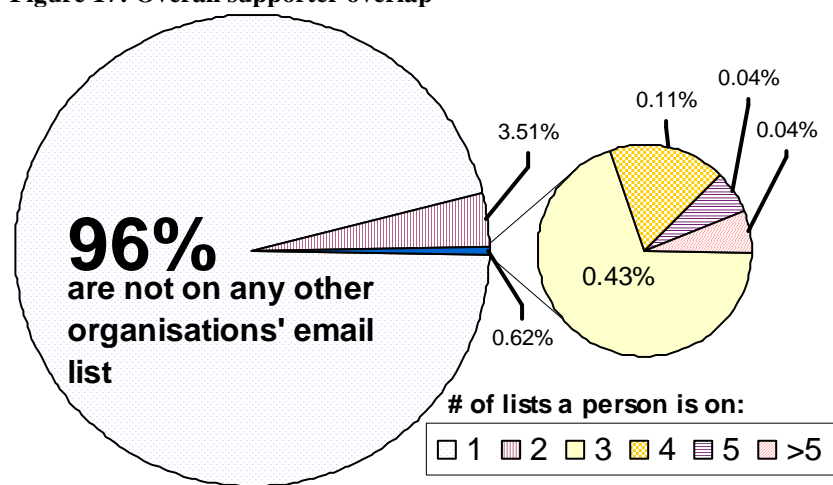
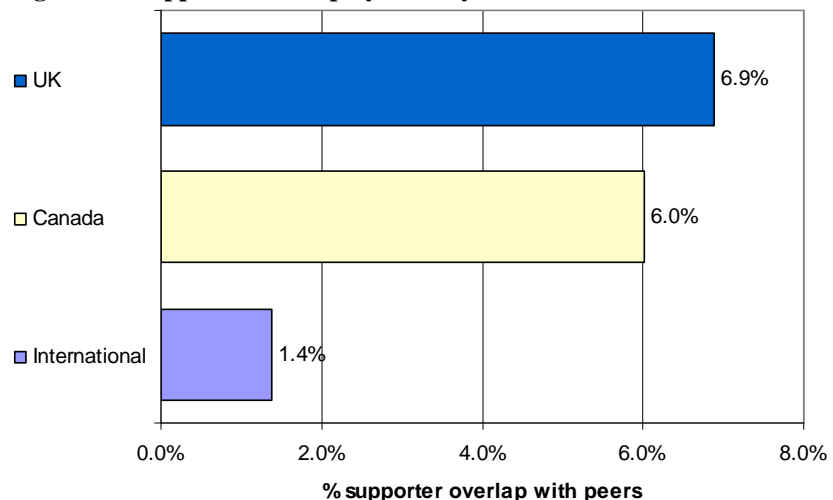


Figure 18: Supporter overlap by country



When emailing supporters, there has always been a concern about how many supporters may be on other organisations' lists. There are two extreme scenarios:

Campaigning emails aren't competing for attention with other organisation's campaigning emails. Most people are likely on the list because of an affiliation with the organisation as well as interest the issue.

1. most supporters could be the same across multiple organisations and thus not only is everyone competing for attention of the same people, but online campaigns are failing to attract new, first-time campaigners
2. very few supporters are active on other lists meaning that while there is no competition for attention from other organisations, the people on the list could be single-issues campaigners

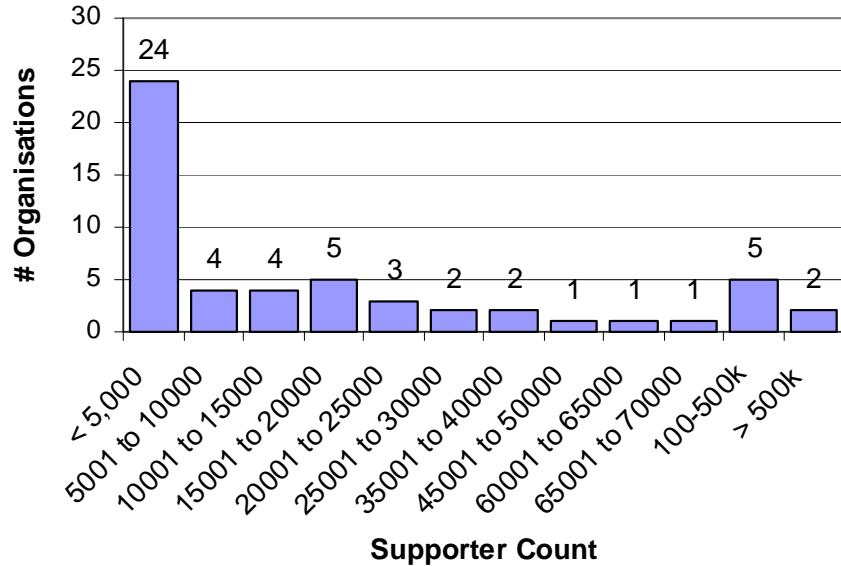
Until now, the proportion of supporters who might be on other lists has been only indirectly and inaccurately measurable via surveys. Now that we know that around 4% (depending on country) of supporters are likely to be on others' email lists, we can not only have confidence that campaigning emails aren't competing for attention with others' campaigning emails, but that most are on the list because of an interest in the organisation as well as the issue.

For those with very large email lists, identifying the proportion who are active on other's lists could help identify highly engaged supporters who are seeking more ways to be involved.

3.7 eCampaigning supporter base

51% the organisations (28) had less than 10,000 supporters⁶.

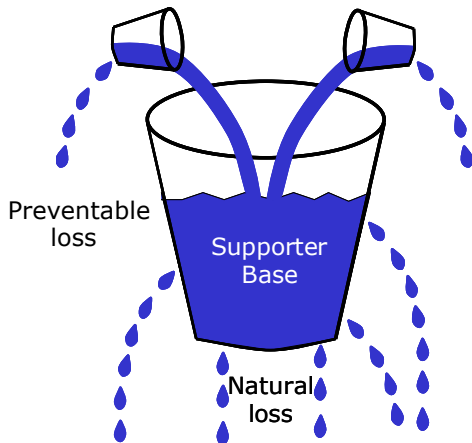
Figure 19: Supporter Base Sizes



Since many organisations initiate e-campaigning to attract new supporters, the supporter base size is an indication of the potential to mobilise that base for campaigning, fundraising or other related activities. When compared to the active and contactable supporter base size, it also helps understand how the potential of that supporter base has been utilised.

The primary value of knowing how many supporters other organisations have is to know how many others operate at the same scale and higher scales.

⁶ The 'supporter base' was a merge of everyone who has been emailed, everyone who has taken action and everyone in the supplied supporter base with all duplicates removed. It includes people with invalid email addresses from hard bounces and mistyped email address.



3.8 Supporter experience

Each step of a potential supporters' experience results in some not continuing. Imagine trying to fill a leaky bucket with water. It can only be done either by making the inflow faster than the outflow – and sustaining that – or plugging as many leaks as possible. The practice of the email-to-action e-campaigning model is similar. Minimising this drop-off (leaks) is critical in achieving higher performance on each of the campaign objectives.

In the email-to-action process, there are 5 potential failure points until a supporter participates:

1. **Receiving** the email: did it get into their inbox and opened?
2. **Reading** the email: is it clear and compelling enough?
3. **Clicking** through: obvious, functioning link and landing page?
4. **Action**: how obvious and easy is it to participate?
5. **Processing**: did the action technology work?

Measuring them is relatively easy:

- Receiving an email is inferred by the receive rate⁷
- Reading is inferred via the open rate⁸
- Clicking is measured with the click-through rate⁹ and a click-to-open rate, which is the drop-off between opens to clicks.
- Action completion rate measured with the action-to-click rate, which is the drop-off rate¹⁰ from clicking to participating
- Processing success is measured with a failure rate¹¹ (unmeasurable using the data from this review)

From Figure 20 we can see that Action alerts (only asking supporters to take one action in the email) and Update emails (telling supporters how the campaign is progressing, usually with a link to take action) are the best performing emails, While Newsletters are the poorest performing. This doesn't necessarily mean that email newsletters should be abandoned, as they can be useful for cross-promoting other campaigns and activities. However they shouldn't be used when the priority is to get people to take an action.

⁷ Receive rate: number of emails sent minus number with hard bounces

⁸ Open rate: the number opened vs. the number of emails received (counting those measured as clicked by not opened as opened too)

⁹ Click through rate: the number clicked vs. the number of emails received

¹⁰ Drop-off rate: the number of completed actions in the database vs. the number click-throughs. Alternatively, the number of visitors to the action page vs. the number of thank you page visitors)

¹¹ Failure rate is the proportion of failed submissions vs. total submissions

While the open rate tells us the drop-off rate between sending and 'reading' the email, the click-to-open rate tells us the drop-off rate between opening and clicking through to the action (or other link). Note:

- Open rates are highly unreliable as absolute measures, open rates are best compared within an organisation between similar emailings within the last 3-6 months. The value of open rates is in evaluating the effectiveness of pre-opening factors like subject lines, from lines and date/time sent.
- Click-through rates are very reliable and best for evaluating the effectiveness of convincing people to take the action once it has been opened and read.

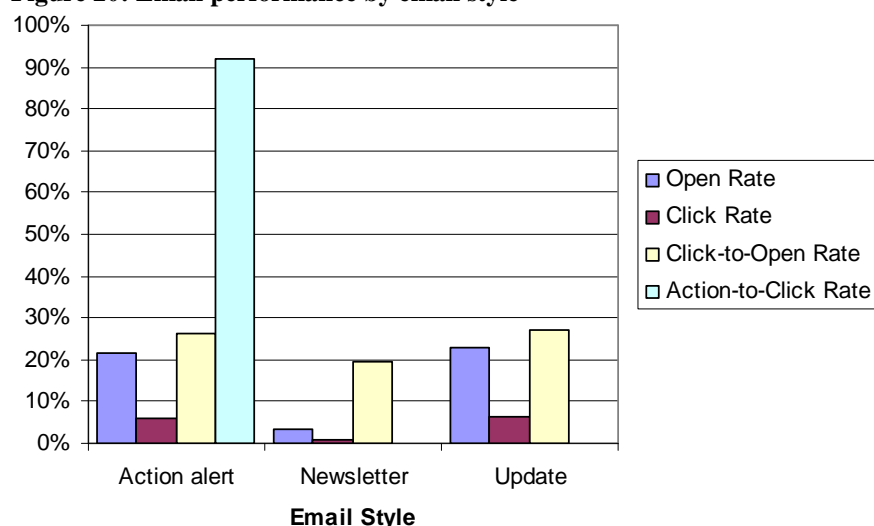
Note that for this analysis, a lot of the data was ignored due to it being suspicious (e.g. 100%+ open rates, only sent to under 100 people). Due to this, there was no data for some calculations. Furthermore, many organisations don't use Advocacy Online for emailings yet and only a few organisations supplied emailing data independently. Thus the data available for this analysis is limited.

Single ask action alerts has an mean open rates of 21% and a mean click rate of 6%.

The click-to-open rate was more consistent regardless of open and click rates, meaning that once people are convinced to open (read) an email, a reliable proportion will click-through.

For this analysis, 21% open rate was the mean for action alerts and 6% click-through rate, meaning 94% of those who received the email did not click through to take action (Figure 20). Of those who clicked, only 92% completed the action (or 8% drop-off). However this 92% seems a bit high and more analysis is needed to confirm it.

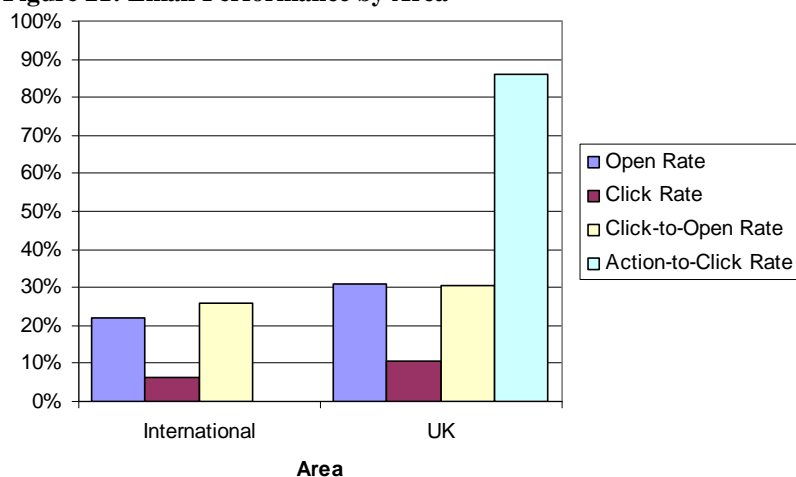
Figure 20: Email performance by email style



When broken down by organisational coverage area (Figure 21), International organisations had a slightly lower performance on the three email indicators than UK focused organisations. This seems reasonable since UK organisations could focus more on

the UK audience where-as internationally focused organisations need to cater to everyone unless they do country-segmented emailings.

Figure 21: Email Performance by Area



4 Appendices

4.1 *Benchmarking: What is it?*

The idea of "benchmarking" seems to be a concept that people love to throw around at work, but very often is misunderstood. I'd like to help demystify it. While I am no expert in benchmarking, almost a decade of doing benchmarking for a range of campaigning organisations has meant I have needed to research what it was, form a clear opinion on it and apply it in practice.

The idea (but not the application) of benchmarking is very simple: comparing common processes or metrics across different initiatives.



Benchmarking is comparing

Benchmarking helps determine how good the results you are achieving and the process you are using are. If you achieve 25% on something, is that great, average or poor? You don't know until you identify what are great, average and poor results - and that is benchmarking.

4.1.1 A benchmarking example

A good example is how we each present ourselves. There are elements of this we can choose (e.g. clothing, hair styles), elements we cannot choose (e.g. genetics) and elements we can influence (body shape, how we speak, how we behave, lifestyle). As "social" animals we are constantly comparing others and ourselves with others.

This could be called social benchmarking. How we look is not benchmarking, but how we look compared to others is. We can measure some aspects and can't easily measure others. But it is not the results of individual comparisons that make the real difference, but the package of comparisons and its impact on the end result.

4.1.2 What is *not* benchmarking?

- Measuring results of any one initiative (email, action, campaign)
- Analysis of how a single email or campaigning action performed
- Evaluating the impact/success of a single action or campaign
- Reporting on how any one initiative performed
- Listing best practices used in any single initiative
- The results of a single survey of supporters or the public
- Producing a single plan or strategy

While these can contribute to a benchmarking effort, they are not in themselves benchmarking because they do not compare the results to anything.

4.1.3 What *is* benchmarking?

- Comparing the results of multiple initiatives (email, action, campaign, survey)
- Analysis of how multiple emails or campaigning actions performed
- Comparing the evaluation/success of multiple actions or campaigns

- Comparing best practices between actions, campaigns or organisations
- Comparing strategies or plans across organisations

The hardest part of benchmarking is really ensuring there is common criteria that is comparable. This means consistency of approach between multiple initiatives and multiple organisations. While the analysis of each single initiative is the most time consuming, ensuring the consistency of analysis is critical for insightful benchmarking.

4.1.4 Why benchmark?

The basic reason for benchmarking is improvement. If you do regular benchmarking, it is thus for continuous improvement. The reason for improving is not only to be better in an area than others, but also to not get left behind and increase the benefits for a given cost and effort.

What this means in practice depends on what you benchmark. But for campaigning it usually means:

1. Having a greater campaigning impact (and ideally faster)
2. Recruiting more supporters (and not losing existing ones)
3. Cutting out ineffective activities (and the associated cost and effort)

4.1.5 Benchmarking approaches

There are generally a two different styles of benchmarking:

1. **Internal benchmarking:** where results are compared internally over multiple different activities, time periods, geographical areas, etc.
2. **Peer benchmarking:** where results are compared between organisations in the same sector

Internal benchmarking is relatively easy because the information required is readily available (if it exists). Peer benchmarking is more difficult because it requires either use of publicly available data that is either incomplete or over-aggregated. Collaborative benchmarking occurs when multiple organisations each contribute data for the benchmarking exercise.

Furthermore, benchmarking can either be:

1. **Quantitatively oriented:** where metrics are calculated and compared e.g. what is a good performance level and who was closest/furthest to it. This is generally data-right (more initiatives compared) but context-poor (less information about each initiative being compared).
2. **Qualitatively oriented:** where processes and perception is critiqued and compared e.g. what "best" looks and/or feel like and who was closest/furthest to it. This is generally data-poor (fewer initiatives compared) but context-rich (more information about each initiative being compared).

4.1.6 Benchmarking in practice

Producing the 2009 eCampaigning Benchmarking Report is thus a qualitative and quantitative collaborative peer benchmarking initiative.

The **quantitative analysis** requires four key steps:

1. **Identifying** the measures that are important and measurable
2. **Collecting** uniform input data in terms of what the data represents and how it is formatted
3. **Analysing** the input data in a consistent way (e.g. consistent formulas)
4. **Comparing** the results between emails, actions, organisations, themes, segments, countries, etc.
5. **Reviewing** the results, interpret their meaning and make recommendations based on the findings

The **qualitative analysis** more of a evolving cycle:

1. Determine what "good" looks/feels like and how to recognise it
2. Design a way to record and report the findings
3. Apply the current methodology to a few real initiatives
4. Review if the methodology is suitable and refine it as necessary
5. Apply the refined methodology to a few new real initiatives (and refine further if necessary)
6. Review the results, interpret their meaning and make recommendations based on the findings

You may already use forms of internal benchmarking such as:

- Split (A/B) Testing of email and website performance
- Comparing results between email and actions
- Looking at peer organisations' websites and seeing what they do different/similar
- Sharing normal performance statistics with people in other organisations

4.1.7 Ideas for benchmarking

Doing an eCampaigning Benchmarking Study is only one way you can use benchmarking. Other ways include:

- Surveying opinion (e.g. public, supporters, campaigning targets) before launching a campaign and then re-surveying them during and/or after the campaign and comparing the change in results
- Comparing your strategy with that of other organisations (or internally across departments, across time, etc.)
- Comparing campaigning communications (e.g. actions, emails, printed material, media coverage)

4.2 The Performance Benchmarks methodology

4.2.1 Data processing methodology

In order to get comparable results, the data needs to be processed in a number of ways. This processing is likely to produce different results for each individual organisation than would be generated in-house. This process generally involves:

- equating one email address 'fingerprint' (nor the email address itself) as one person
- removing all duplicate email address 'fingerprints'
- each organisations' supporter base is compiled from those a) who it emails or b) who have taken at least one action
- deriving country and language information where credible
- count only the first instance of each person participating in an action, even if they did it multiple times
- removing fake entries where it is obvious it is form-spam (fake entries by automated form-filling spam code), test entries and junk entries
- email soft bounces (e.g. out of office messages, mailbox full messages) are still counted as received despite some email systems not counting them as received
- recalculate email and action statistics based on this 'normalised' data
- filter out extreme or unlikely results (due to tiny sample sizes or implausibility) and remove obvious test entries

The result of this 'normalisation' process is that organisations might have:

- a much higher supporter count (if they haven't counted those who take actions but aren't on their email list) or slightly lower supporter count (due to removing duplicate and fake entries)
- fewer actions due to only counting a person one for each action and removing fake entries
- different email and action statistics due to a standard formula being used and changes in the numbers due to the normalisation process

Since the data from all organisations gets processed to the same standards, it makes it more comparable in the benchmarking process.

Furthermore, one of the most significant constraints on the analysis was the fact that many organisations did not have their emailing data included. This is because they use a separate system for emailing than for actions. While this data is relatively easy to extract and relate to the action data, in many cases it was not provided.

4.2.2 Data analysis methodology

The overall principle all analysis was conducted under was if the results would be 'actionable' by a reader: could they compare their results to the benchmarks and make some decisions that would improve their performance.

From this principle meant presenting the results on a scale rather than just averaging them. Averaging results in hiding the high performers with the low performers and giving a false impression of what performance levels are possible. Scales allow you to see where you are in the spectrum of performance and thus where you need to prioritise your efforts to improve in those areas.

4.2.3 Data scope

- 55 Organisations
- Operating in 9 different countries plus 5 operating worldwide
- More than 22 million emails sent as part of 2,300 emailings
- Asking more than 4 million supporters to participate in more 1,000 different actions

4.3 Participating organisations

4.3.1 International

- Care International
- Greenpeace International
- International Rescue Committee (IRC)
- WSPA International
- WWF International

4.3.2 Australia

- Amnesty International Australia
- WSPA Australia

4.3.3 Brazil

- WSPA Brazil

4.3.4 Canada

- Alzheimer's Society of Canada
- CNIB
- David Suzuki
- Friends of Canadian Broadcasting
- MS Society of Canada
- WSPA Canada

4.3.5 Germany

- Peta Germany

4.3.6 Denmark

- WSPA Denmark

4.3.7 France

- Peta France

4.3.8 United Kingdom

- Action for Children
- Advocates for Animals
- Age Concern England
- Bliss
- British Heart Foundation
- CAFOD
- Christian Aid
- Church Action Poverty
- Compassion in World Farming
- CPRE
- Diabetes UK
- Equality Trust

- Friends of the Earth England and Wales
- Guide Dogs
- Help the Aged
- LC Disability
- League Against Cruel Sports
- Macmillan
- Mencap
- National Autistic Society (NAS)
- National Housing Federation
- NSPCC
- Open Doors
- Peta United Kingdom
- Public and Commercial Services Union (PCS)
- Refugee Council
- Rethink
- Save the Children
- Stroke Association
- UNICEF UK
- Voluntary Service Overseas UK
- Which
- World Vision UK
- WSPA UK
- WWF UK

4.3.9 Netherlands

- Peta Netherlands
- WSPA Netherlands

4.3.10 USA

- WSPA USA

4.4 Theme groupings

Grouping organisations into one or two high level themes is fraught with sensitivities and technicalities. For instance, the terms 'poverty alleviation' is 'human right' that has an impact on physical and mental 'health' and the wider 'environment'. Technically, the groupings must be large enough to make any single organisation anonymous; similar enough to be comparable; and general enough to allow all organisations to belong to a group. The theme grouping below may not have achieved this – but it is a start. Suggestions are welcome to duane.raymond@fairsay.com

4.4.1 Animal Welfare

Advocates for Animals
Compassion in World Farming
Guide Dogs
League Against Cruel Sports
Peta France
Peta Germany
Peta Netherlands
Peta United Kingdom
WSPA Australia
WSPA Brazil
WSPA Canada
WSPA Denmark
WSPA International
WSPA Netherlands
WSPA UK
WSPA USA

4.4.2 Environment

CPRE
David Suzuki
Friends of the Earth England and Wales
Greenpeace International
WWF International
WWF UK

4.4.3 Health

Alzheimer's Society of Canada
Bliss
British Heart Foundation
CNIB
Diabetes UK
LC Disability
Macmillan
Mencap
MS Society of Canada
National Autistic Society (NAS)

Rethink
Stroke Association

4.4.4 Human Rights

Action for Children
Age Concern England
Amnesty International Australia
Help the Aged
NSPCC
Open Doors
Public and Commercial Services Union (PCS)
Refugee Council
Which

4.4.5 Media

Friends of Canadian Broadcasting

4.4.6 Poverty Alleviation

CAFOD
Care International
Christian Aid
Church Action Poverty
Equality Trust
International Rescue Committee (IRC)
National Housing Federation
Save the Children
UNICEF UK
Voluntary Service Overseas UK
World Vision UK