




Whatever
Next?

Public Engagement in 2022

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Foreword

You may have noticed. The world is changing.

The pace of change can feel especially daunting when your job is engaging the public in good causes. Our community, colleagues and clients seem to talk of little else these days. How audiences are changing. How the media is changing. And then the bigger changes being felt both by charities and their beneficiaries, caused by the social and political upheavals we are going through right now.

When CharityComms and Eden Stanley were approached by the head of strategic communications from a large international charity, tasked with figuring out what public engagement might look like for them in five years, we saw an opportunity. We decided to create something the whole sector could use. And this report is it.

The future is a big topic, to say the least. We tackled it using two approaches. First, we did some in-depth desk research to find trends in demographics, behaviours, technology, and media - using both Eden Stanley's data, and a wide range of other sources you'll find listed at the back of this report. Second, we brought together people at the leading edge of public engagement, from the charity sector

and beyond, at a series of discussions, where we fed them sandwiches and they told us about the changes they were grappling with, and how they were responding.

We found lots of agreement about the challenges we face as a sector. But it was clear different charities are addressing these in diverse ways, and are at different points in their journey. And that was great, because we all agreed that for charities to survive and thrive in the coming years, we will need to innovate, and try out a variety of strategies, to stay ahead.

So, over to you. What are you doing? How will your charity respond to changing times? And if you're still figuring that out, where will you start? We hope the facts, stats, trends, thoughts, charts, examples, quotes, ideas and tips in this report will provide food for thought to help you find the right answer for you. Dig in!

Vicky Browning, former director, CharityComms
Joe Barrell, executive director, Eden Stanley

About the author



Sarah Fitzgerald is a brand and communications consultant with non-profits, and a former charity head of communications. She is director of Self Communications, and an associate consultant with Eden Stanley. Sarah wrote the first tone of voice guide for charities, *Perfect Pitch: Linking voice and values*, for CharityComms, and is chair of the Miscarriage Association.

Introduction

Why should people engage with charities?
That question is becoming harder to answer.

Charities help people solve problems in the world. If you believe more people should survive cancer, or want more girls to attend school in Kenya, there's a charity with a solution, ready to turn your support into action. You give your money, time or voice, and charities harness this to create positive change. And you feel good, knowing you've made a difference.

But just as we are questioning many old certainties about the world, the position of charities in the public psyche is under pressure too. The business of doing good has opened up and become more market-driven. Suddenly, there is competition from private companies with a social purpose, often more adept at distilling a simple and compelling consumer proposition.

Doing good is good business, and charity no longer holds the monopoly.

“As a sector, we are quite ripe to be disrupted. What's driving that disruption is a change in the public's expectations. New ways are being found to solve their problems.”





Individuals can do good right now without any direct involvement from your charity. They can buy coffee from a brand that funds training for Honduras farmers, recycle books through their school, volunteer at their local Parkrun, contribute to crowdfunding projects, or just post an awareness-raising Facebook update about an issue they care about.


These actions show that, for at least a section of the public, doing good matters – but increasingly on their own terms and often without a charity brand acting as intermediary. Some charities are responding to this by offering platforms for **direct interactions** that put the supporter rather than themselves at the heart of the


story – like Alzheimer’s Research UK, whose Sea Hero Quest offers the appeal of a fun mobile game, while also generating data for dementia research¹.


But if people can satisfy their sense of social purpose without signing up as a card-carrying charity supporter, what does that mean for the sector’s financial future, or capacity to bring about systemic change? Advocating to change policy, securing state funding and support, influencing behaviour change – all these depend on mobilising a constituency, and demonstrating your legitimacy to speak and act for a broader group.


For charities to continue successfully engaging supporters – as donors, volunteers, activists and networkers – the sector will need to develop new propositions to keep up with changing attitudes and expectations. You need to find a new answer to the question, ‘Why engage with us?’ that provides a clear and credible line of sight from the action a supporter can take, to the change it brings about. And you need to continually update the knowledge and assumptions your answer draws on.

You must be prepared to rethink your proposition to the world, starting with an honest appraisal of why some people support you (and why others don’t), and how their support makes a difference. And you’ll need to get serious about innovation – deliberately and systematically – so that you’ve already moved forward by the time the old methods stop working.

 In this report, we **share insights** to help inform your thinking: about your supporters, the channels you use to reach them, and what you can offer that builds confidence in your solutions, in a volatile and uncertain world.

 We offer **facts and observations**, but no single ‘correct’ solution. This is food for thought, **to help you develop the strategies that work for you.**

 We’ve drawn on a **range of sources**, both past research and future forecasts, and talked to senior communicators from some of the UK’s leading charities. You’ll find their words throughout, and a full list of contributors at the end.

 Finally, we **offer suggestions** for how your charity can make use of these insights.

To set the scene, here are some of the trends within and beyond the sector that are already challenging you to rethink your proposition.



Meaningful brands: the business of doing good

More and more commercial brands want to show they care as much about society's interests as their own bottom line. These are 'purpose driven brands', like old hands John Lewis, whose core focus is 'the happiness of all its members, through their worthwhile and satisfying employment in a successful business', or Proctor & Gamble, whose Like a Girl campaign aimed to empower more girls and women.

Of course it's not pure altruism driving this. According to the Havas Meaningful Brands study, brands like Ikea and Samsung, that focus on community and employee wellbeing as well as commercial performance, outperformed the stock market by 133% in 2015. Their top 25 scorers delivered an annual return of nearly 12% - over six times the global average².

Ongoing interest in corporate social responsibility creates opportunities for charities, from employee fundraising and volunteering schemes, to Christmas TV ads and on-pack tie-ins. According to the Institute of Fundraising, **corporate partnerships still hold untapped value to both commercial companies and charities**. In 2015, 95% of charities viewed corporate fundraising as an area of growth, and 64% were planning to increase investment³.

But as more commercial brands pursue 'meaning', the distinctions between charities and business become blurred, with each claiming the 'do good' space. With so many players in the cause arena, how do you communicate what makes you different and worth supporting?

As one communications director told us:

“As a sector, we are quite ripe to be disrupted. What's driving that disruption is a change in the public's expectations. New ways are being found to solve their problems.”



64%

of charities are planning to increase investment in **corporate fundraising**.

0.5%

of UK giving is via **crowdfunding**.

43%

of charities, community groups and social entrepreneurs are now looking at **crowdfunding** as an income source.

Getting out of the way: a more connected world

Consumers are now used to Skyping relatives in Sydney, playing Minecraft with a stranger in Bangalore, or chatting on Facebook with someone they once met on a trek in the Andes.

Annual global internet traffic exceeded 1 zettabyte in 2016, and is forecast to reach 2.3 zettabytes in 2020, as we reach 4.1 billion global internet users⁴ (a zettabyte, in case you're wondering, is about one trillion gigabytes). Thanks to this explosion in internet traffic and connectivity, consumers now expect to communicate more directly, and in real time, with people or brands wherever they are, and to enjoy more fluid, reciprocal interactions.

For charities that have traditionally acted as the link, mediating relationships between supporters and beneficiaries, this poses an existential challenge as well as a practical one. Far fewer of us now turn to travel agents to book our holidays, so why look to charities when it comes to doing good with our money or time?

The UK alternative finance sector, which includes crowdfunding, peer-to-peer lending and other forms of investment outside of traditional loans and stocks, grew 84% in 2015 and is now worth £3.2 billion⁵. Despite this growth, crowdfunding still makes up less than 0.5% of giving in the UK⁶. **Engaging supporters in 2022 means embracing more of these new modes of support.** According to NCVO and Nesta, 43% of charities, community groups and social entrepreneurs are now looking at crowdfunding as an income source⁷.

Staying relevant in a more connected world means finding new ways to bring supporters closer to the cause, while making sure you are adding real value and not developing cosmetic, costly or unsustainable engagement approaches.

Rebuilding trust: telling a better story about charity

Public trust and confidence in charities is fragile. Between 2014 and 2016, according to Charity Commission research, 33% of the public said their trust and confidence in charities had decreased, though almost two thirds (61%) said it had stayed the same⁸.

We're all aware of the media stories that have contributed to this crisis in trust, from regulator fines confirming many people's disdain for public fundraising practices, to disquiet about CEOs on six-figure salaries. This has been compounded by a more general decline in trust in institutions.

Qualitative research in 2016 by the Understanding Charities Group showed the trust issue is 'real and cannot be ignored'⁹.

“ There was a sense of nostalgia for 'the good old days', when charity was felt to be simpler, more local and more fun. Crucially, too, charity supporters are more frustrated than non-supporters, and more likely to be critical. ”
Group member Vicky Browning, chief executive of ACEVO

This frustration and scepticism among supporters we might expect to be the sector's allies does give cause for concern. Three-quarters (75%) of supporters of international NGOs, for example, agree with the statement, 'Corruption and waste mean that aid doesn't reach the people that need it most', only slightly fewer than the general public (78%). This suggests **support for international causes is often driven by a belief in the moral duty to act, more than a belief that donations are making a difference** – and this must be a fragile support indeed.

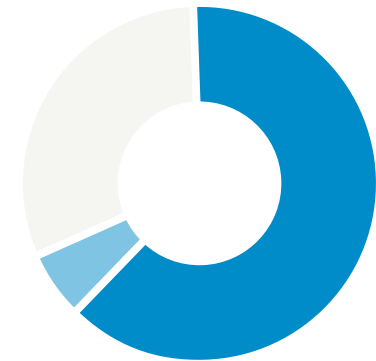
We now have new regulation, changes in fundraising and data practices, and initiatives like NCVO's Constructive Voices¹¹, promoting positive stories about the sector, and the howcharitieswork.com website which looks to answer common questions about charities. But trust levels are notoriously volatile, and confidence in the sector will still be vulnerable in 2022.

The hammering the sector has experienced in the media in recent years is having an impact. One third (33%) of people in the UK believe that charities overpay their staff, compared with only 24% who disagree. Almost two-thirds (63%) believe charity fundraising should be more strongly regulated¹⁰.



People that work in charities are overpaid

- Agree 33%
- Disagree 24%
- Don't know 43%



Charity fundraising should be more strongly regulated

- Agree 63%
- Disagree 6%
- Don't know 31%

75% of supporters of NGOs think 'corruption and waste mean that aid doesn't reach the people that need it most'.

Taking risks: safe routes to innovation

The view among senior communicators we spoke to is that much of our sector still lacks appetite for innovation, or the culture to achieve it.

At a time when public funding for charities is shrinking, and consumer confidence is fragile, **short-term fundraising targets have become the focus for many boards and executive teams**. Most lack the cash for longer-term investments in new activities, which may not pay back for years, if they succeed at all. So many hang on to proven methods, and live with their diminishing returns.

And yet, as we've seen with other sectors, **failure to innovate makes you vulnerable to challenge – and not just from other charities** (once again: you don't hold the monopoly on doing good). So your challenge will be to innovate new modes of engagement with minimal risk to the status quo.

It's a tough brief. One way to address it is via **portfolio-based innovation programmes, where multiple projects are pursued simultaneously, each broken down into small steps with metrics that allow quick learning and decisions on whether to keep going¹²**.



The future is foggy

Who can say with certainty what the future will bring?

We are already looking back at 2016 as a year of seismic change and significance: a year that made us see the world differently, when the impact of big changes hit home, from globalisation to the rise of social media.

MBA students and business school professors use the acronym 'VUCA' to describe how the world is changing. It's an ugly word (try it: there's really no nice way to pronounce it) but it's hard to deny that our world has become *volatile, uncertain, complex and ambiguous*.



That doesn't mean we should give up trying to make sense of it. After all, a game of chess has almost infinite possible outcomes, but we still open the game with our best moves. It means understanding and predicting trends in supporter behaviour, content and media, to give ourselves the best chance of success.

Fortunately there are some trends that we think will persist - and that you should not ignore.

Generation shift

Your supporters in 2022

Goodbye Dorothy

Dorothy Donor, our sector's beloved archetypal supporter, was born before the Baby Boomers, her attitudes shaped more by our colonial past than the civil rights movements that followed it. She has been the mainstay of the donor market for longer than most fundraisers have been working. But by 2022 Dorothy's day will have passed, if it hasn't already. To thrive in 2022, you will need to understand and engage with emerging and new groups of supporters.

“A lot of what we need to do to get it right now will also help us bring in future supporters.”



In 2022, Millennials, AKA Generation Y, will be turning 40, have got their kids into school, and reached the life-stage where they can enter the fundraising market in a serious way.

This is where we're already seeing the biggest generational shift compared with older groups - in terms of attitudes, values and expectations. One communications director told us:

“It's clear there's a difference in attitudes between over 70s and the Baby Boomer generation. That's even more true with Millennials. They're not looking just to give. They'll volunteer, but they'll do it for their CV. There's definitely a shift towards asking: what do we get back if we give you our money or our time?”

A word of caution: **just because people fit into the same age bracket, obviously it doesn't mean they'll all share the same attitudes and values.** But we've drawn out some general findings that appear to show differences between generations. Still, nothing beats getting to know your own current or potential supporters.

Baby Boomer

Born in the years after World War Two - generally accepted as between 1946 and 1964. Named after a marked post-war increase in the birth rate.



Generation X

Born 1965 to 1980. Name popularised by a 1991 Douglas Copeland novel.

Millennials / Generation Y

Born 1981 to 1997. In the US, this group now outnumbers the Baby Boomer population.

Generation Z

People born after 1997, who'll be becoming adults over the next five years.

Playing the generation game

How far should you change what you do to reflect shifting demographics? For many of you, the bedrock of your mature donor market in 2022 will continue to be the tail end of the Baby Boomers, the youngest of whom will be turning 60 by this time, and Generation X, who'll be in their late 40s and 50s.

It's likely you've already experienced changes among your existing supporters, from Dorothy and the Baby Boomers to more demanding and less loyal Generation X and Millennials. **Your engagement approaches have probably evolved too - to a certain extent. You're bound to be doing more digital, and trying to make it pay.** You've likely developed new products and increased focus on demonstrating impact. But how much has really altered in the way you communicate with and engage supporters? If not much, you are not alone; according to the communicators we spoke to for this report, most charities still view supporters purely as 'value generators', whose role is to bankroll your work with as little fuss as possible.

By 2022, that will have to change. The squeeze being felt now by charities - between rising supporter recruitment costs and declining retention levels - are, for some, forcing a fundamental rethink about engagement approaches. For one senior manager we spoke to, this goes to the heart of his charity's strategy:

“We are not seeing retention levels these days that we would have expected in the past from our traditional supporters. We are recruiting now from a broader audience, but the retention is much poorer. We wonder if we have the whole proposition wrong.”

Many charities are still raising most of their voluntary fundraising income thanks to the generosity of older, loyal supporters - whether through cash or regular giving, or legacies. But understanding the younger end of your audience, and the relationship they want to have with charities and causes, is your best preparation for 2022.

As one communications head told us: "A lot of what we need to do to get it right now will also help us bring in future supporters."

'Brand me'

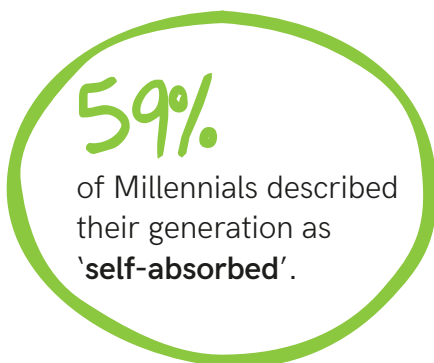
A marked shift from previous generations is Millennials' use of social media to live more of their lives in public, curating their digital self-image and sharing everything from their political beliefs to their favourite pizza toppings.

This is great for charities, as this group are:

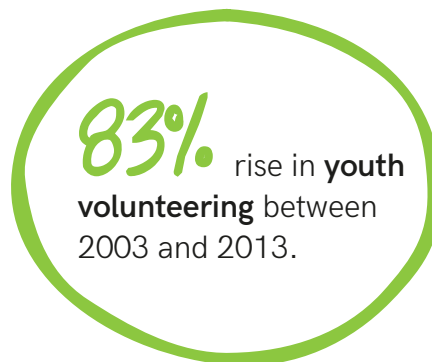
- **more likely to share their views on good causes through social media** – 38% compared with only 9% of Baby Boomers¹⁴.
- **much less likely than Baby Boomers to consider charity support a 'private matter'** (52% vs 71%¹⁵)
- **much more likely to engage in public fundraising activity or live experience**, whether posting Movember selfies, adopting Twibbons, or taking part in Tough Mudder-style running events.

As one communications director puts it:

“We are competing in a self-actualisation marketplace.”



vs.



Does being open about support for charities mean Millennials are more charitable? Cynical Baby Boomers are not so sure, labelling this kind of activity 'good selfishness'¹⁶. Even Millennials themselves say their generation is self-absorbed and wasteful. According to Pew Research Center, they have far more negative views of their generation compared with any other age group. More than half of Millennials (59%), described their generation as 'self-absorbed' while 49% said they were 'wasteful' and 43% said they were 'greedy'¹⁷.

Whether you believe Millennials are as civic-minded as their predecessors (and there's disagreement on this¹⁸), what's clear is that they are more likely to have chalked up time volunteering. **Youth volunteering increased by 83% between 2003 and 2013, the decade when this group were in their twenties¹⁹.** But for this generation, doing good in the world and looking after people's wellbeing is not the sole preserve of government and charity. Many expect, and seek to develop careers with, private sector employers who care about the wellbeing of their staff and where there is a purpose beyond the bottom line.

According to the Deloitte Millennial Survey 2016²⁰, businesses that have a 'profits first' rather than a 'purpose first' approach can alienate Millennials. The report's authors say:

“Where Millennials feel their organisations put financial performance before everything else, only 20% intend to stay for more than five years (compared to the average of 27%). Significant differences are also seen with overall levels of employee satisfaction.”

The rise of 'brand me' is a challenge to all charities – to be much better at understanding why people engage with them, and to make no assumptions.

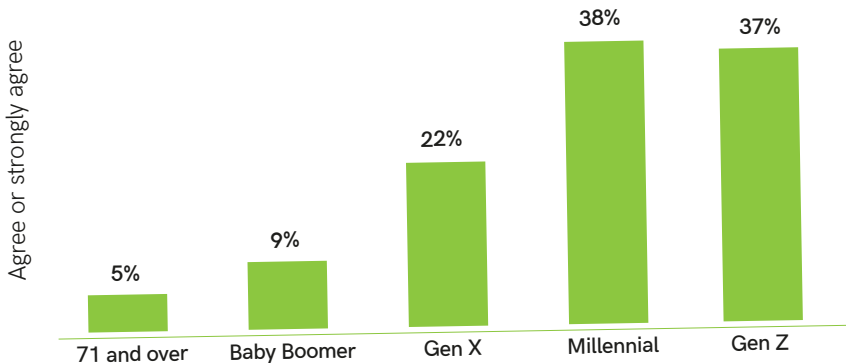
In one example, an engagement manager for a charity that runs heritage sites around the UK, told how the launch of Pokémon Go had driven an influx of 'non-characteristic' new visitors. Some at the charity have been concerned that **these potential new supporters aren't being attracted for the 'right reasons' – but does that matter?** Arguably not.

Another communications director commented:

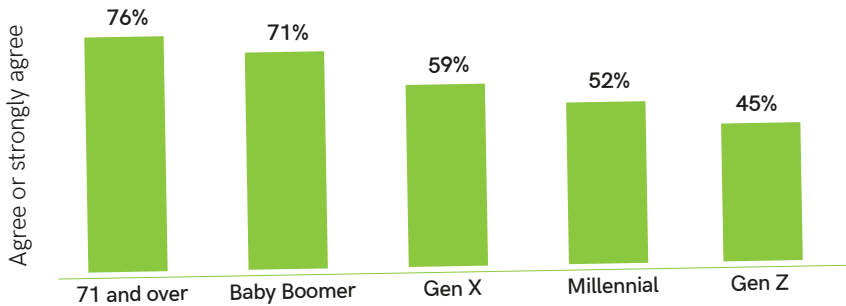
“Younger generations have a keener sense of 'self brand'. No other generations before have thought actively about how they curate that, on social media and elsewhere.”



I tend to share my views about good causes through social media



My support for charity is a private matter, and not something I tend to discuss with friends or family



Source: Eden Stanley



“This shifts things radically. How do we engage with this generation? We can’t expect them to set up a direct debit and keep it going. It’s going to be a lot more fluid.”

Millennials and politics

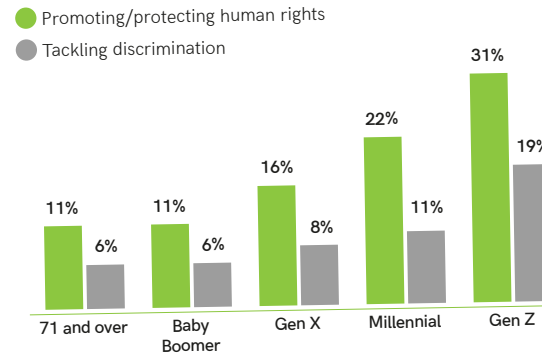
Millennials and their younger siblings are more likely than older groups to support causes when they're framed in terms of social justice and human rights, and are as likely to be motivated by high principles such as equality and tolerance, as by empathy alone. And they are more likely to be internationalists, **far more likely to see a role for the UK in helping developing countries, most believing this is just as important as addressing problems in the UK.**

But they're less interested in mainstream politics than their older counterparts, and less likely to vote. Those who did participate in the 2016 EU referendum were more likely to have voted 'remain' – 77% of Generation Z who voted, and 62% of Millennials, voted to stay in the EU, compared with only 37% of people over 70²¹.

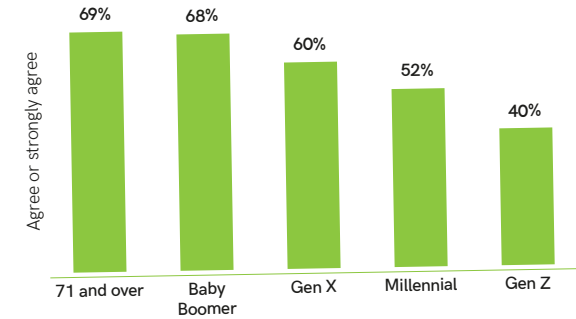
Younger supporters are much happier than older groups about charities campaigning to influence policy, and less likely to believe charities are 'too political'.

Baby Boomers and over-70s consider 'running programmes to help people directly in a practical way' to be far more effective than 'running campaigns to change policies and attitudes'. Millennials on the other hand believe campaigns to be at least as effective – even if their own low turnout at elections ultimately limits their political power.

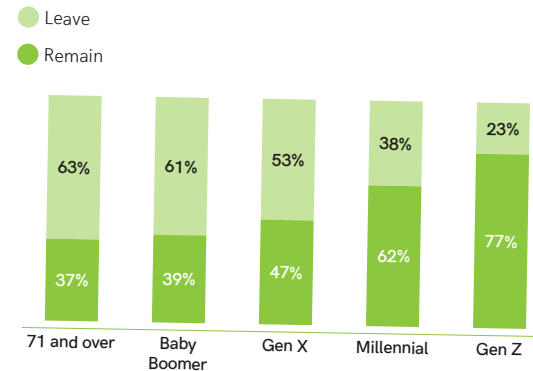
Preference for causes



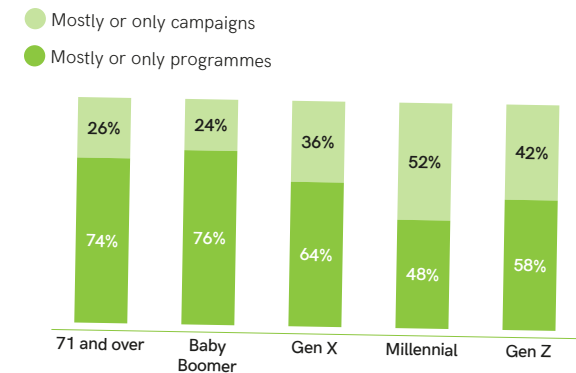
We should address problems in the UK before addressing problems overseas



How did you vote in the UK European Referendum?



What's the best way to make a difference?



Source: Eden Stanley

Source: Eden Stanley

Customer culture and loyalty

Millennials' expectations as customers have been shaped by their immersion in the world of globalised online shopping, social media and recommendation engines. They're digital natives who have seldom waited for a letter to arrive in the post or queued at a bank.

As a result, **this generation has very high expectations about choice, service and responsiveness.** According to the Boston Consultancy Group: "They put a premium on speed, ease, efficiency and experience in all their transactions."²² This desire for instant gratification on their own terms applies to other parts of life too, from university education to healthcare, and - yes - charities.

Millennials are both driving, and becoming accustomed to, a different kind of relationship with brands, whether transacting with you or just being exposed to your content. They expect **responsive, personalised and authentic interactions - and may not stick around if their expectations are not met.**

As one communications director said:

“The reality is people want different relationships than they used to have with charity brands - they're used to it in everything. It's much more 'pick and mix' than a long-standing relationship. They don't feel obliged to stay loyal.”

Another communications head added:

“This shifts things radically. How do we engage with this generation? We can't expect them to set up a direct debit and keep it going. It's going to be a lot more fluid.”

Predictable modes of support, like regular giving, will likely become less prevalent, as supporters reject brands that take their loyalty for granted.

The next generation(s)

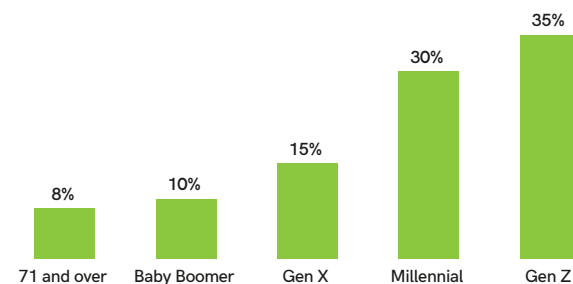
Millennials' younger brothers and sisters - Generation Z (or the 'iGeneration', if you prefer) - will be entering adulthood by 2022.

They'll be coming of age at a time of **insecurity and austerity**, will face continuing difficulties entering the job market, and are **likely to scale back personal ambitions** as a result. A UK national study of 16,000 people born in 1989-90 found that, by age 18, 16% were unemployed, compared with just 7% of 18-year-olds born two decades earlier²³.

They're not the first digital natives, but they use social media more than any other group for news, information and entertainment. According to Deloitte, younger audiences 'perceive news consumption as what they absorb on their social media newsfeeds throughout the day'²⁴.

They're not particularly active as donors yet, but many are willing to take action in support of a cause. More than one third (35%) have attended at least one public rally in the past five years, compared with just 17% of the overall population.

Attended at least one public demonstration or rally in the last five years



Source: Eden Stanley

Getting to know you

Your charity will appeal to people for reasons that go beyond generational values and attitudes. A constellation of other factors is at play, including personal experiences and links with your particular cause.

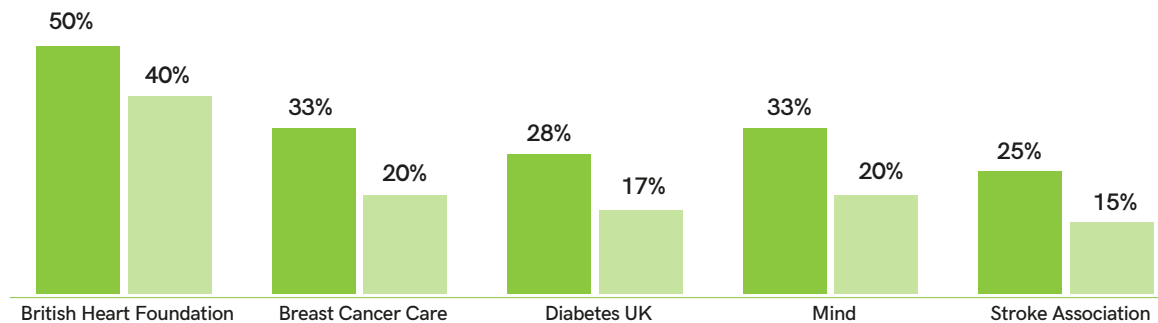
For example, we know that people with experience of any given health condition or disability – whether personally or through a loved one – are much more likely to support a charity associated with it. However, even where this ‘proximity to cause’ offers a clear reason to engage, its effect on likelihood to support differs significantly, depending on the condition or disability. This is because health and disability charities have used this insight differently – some working to deepen support among their natural supporter base, and others reaching beyond into a more general audience.

The chart on this page demonstrates this effect. It shows propensity to support each charity among all UK adults, compared with those with a high proximity to the charity’s related cause. ‘High proximity’ in this chart means the respondent has experience of the condition, either themselves or via a loved one. For example, 33% of people with personal or close-to-home experience of mental health issues have either supported Mind or would be very likely to do so, compared with a 20% propensity in the general population²⁵.

Equally, not all your supporters will engage in the same way – and so understanding what they want from you will be fundamental to attracting new generations of supporters and keeping them engaged.

Have supported or ‘very likely’ to support

- Close proximity to cause
- UK adults



This means being smart in your use of data to identify and get to know your audiences, **looking beyond straight-forward demographic segmentation, and considering the attitudes and behaviours that characterise those most likely to engage.**

Senior communicators told us that while charities recognise the need for more sophisticated insights, there are still too few examples of segmentations based on attitudes and values, or strategies that truly place supporters at the centre of things.

A fundraising director told us:

“We need to clarify who currently supports us and who we want to support us. The big drive is for a personalised relationship – and it’s not just about income.”

Inspiring and retaining support means no longer treating supporters as one-way value generators, but as partners in solving problems.

The Information Commissioner’s Office ruling in late 2016 against two leading UK charities drove home for all charities the need to be crystal clear when communicating with supporters about what you plan to do with their data²⁶. This goes beyond opt-in and opt-out, to a more nuanced way of communicating and building trust with supporters about this area of your work.

How will you respond?

It's too soon to say if this generational shift will prove as radical as it looks. Will 'brand me' survive into later life, or will middle age inevitably usher a return to the traditional values, interests and causes of previous generations? And how can charities prepare now to cope with a diverse and shifting supporter market of the future?

Our charity communicators talked about the need to grow and change with your audiences, staying relevant to people throughout their lives. **This means ensuring your asks reflect people's own concerns and interests at different life stages** – as students, parents, professionals, or empty-nesters – with tailored propositions for each segment.

One insight manager asked:

“How do you stay relevant to people at different life stages? We have to take them on a life journey, talking about different things at different times. To build loyalty, it has to be a long-term, lifetime value approach.”

It also means recognising it's not just people who change over time – your issues change too. For example, the current UK housing crisis includes issues of affordability and supply of homes for a broad socioeconomic group – and looks quite different to the issues facing the country a generation ago, when the middle classes were relatively insulated from the crises of the day – whether poor quality of social housing, an unscrupulous private renting sector, or a failing benefits system.

For a charity like Shelter, which campaigns in this area, this was an important insight. It has learned that its new supporters think about housing quite differently from long-standing stalwarts and has had to adapt.

Prevailing narratives and public perceptions of almost every issue we work on – whether overseas development, health, childhood, disability, the environment or human rights – are changing at pace. These changes are very easy to miss if you're not regularly talking to current and potential supporters, and renewing your insight.

As a director of fundraising pointed out:

“Younger supporters tend to ask 'Why do you need me? How do you fit into my reality? What do you do that's different from other charities?'”

In the past, we may have been guilty of taking Dorothy Donor for granted.

Our supporters in 2022 won't let us get away with that.

Choice and control

The media environment in 2022

Who's paying attention?

In 2022, digital technology will still be evolving and transforming the way our audiences engage with us and with each other. It's not just about online. Traditional channels like print media and direct mail will be adapting too.

“I'm not drafting press releases any more. I take content and distribute it. Our engagement is online first and foremost. The media coverage follows. For me, that shift is where the future will go.”



As the sheer volume of content and channels proliferates, so too will the ways we control our exposure, and attempt to exercise choice in a world of noise, whether through withdrawing marketing permission, buying out of advertising, or relying on a narrowing group of trusted sources.

This sense of control may at times be illusory, as much of the filtering and targeting is done for us by unseen algorithms second-guessing our preferences - 'you liked this, so you'll like this'. What is certain is that **as consumers' horizons are narrowed by the 'echo chambers' they become locked into, they will become ever more sheltered from alternative viewpoints that might disrupt their own.**

By 2022, this will have become a major challenge for charities wishing to engage people beyond their core supporter base.



In the past, charities have relied on the authority that comes with being a specialist and trustworthy source of information and comment. But since 2016, when Oxford Dictionaries picked 'post-truth' as word of the year²⁷, things look different.

The democratising power of the World Wide Web has brought with it some unintended consequences. Where anyone can broadcast or retweet an opinion, and where bravado trumps fact, **trust in experts and expert institutions has become compromised.** And owing now to 'fake news' (in the headlines at the time of writing), it has become increasingly hard to identify the provenance of news and information - or even if it contains a shred of truth.

As the Economist reported:

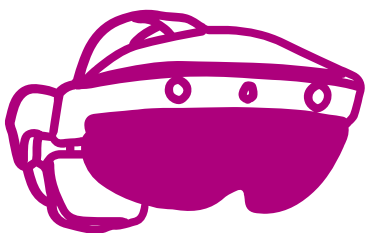
“Content no longer comes in fixed formats and in bundles, such as articles in a newspaper, that help establish provenance and set expectations; it can take any shape - a video, a chart, an animation. A single idea, or 'meme', can replicate shorn of all context, like DNA in a test tube. Data about the spread of a meme has become more important than whether it is based on facts.”²⁸

Suddenly it's no longer enough just to be right. You also must offer content that's more compelling, demonstrably more trustworthy, and more verifiable than the noise that surrounds it.



More tech

In 2022, video will still be leading the way in content growth. It's estimated that by 2020, nearly a million minutes of video content will cross the internet every single second – enough to keep one person watching continually for five years²⁹.



\$120bn+

predicted global market in augmented and virtual reality by 2020.

Pokémon Go has provided a glimpse of what augmented reality (AR) can deliver. Forecasters expect a **\$120 billion (and rising) global market in augmented and virtual reality by 2020**, driven predominantly by AR³⁰.

Charities are already exploring VR's potential to connect supporters with the lives of their beneficiaries. This works well when the charity's work is far removed from the supporters' usual environments. For example, WaterAid's 2016 VR documentary Aftershock transports the viewer to post-earthquake Nepal³¹.

Meanwhile, we're seeing rapid development in the 'internet of things' – 'smart' objects and buildings that monitor and relay data and take autonomous action, like a car booking itself in for a service, or a carpet that knows you're having a heart attack and calls an ambulance. While some applications will inevitably find themselves in the dustbin (or perhaps the BinCam³²), **these technologies will be profoundly changing our interactions with the world by 2022**³³.

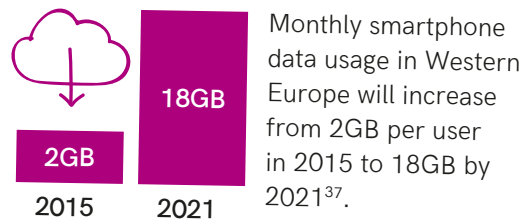
Meanwhile, some humanitarian organisations are getting to grips with the ethical and practical issues that come from unmanned media drones gathering footage at scenes of disasters³⁴.

TrendWatching characterises these trends as part of a move in digital interactions with brands from *information to experience*³⁵.

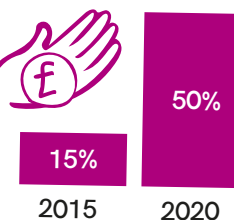
Mobile traffic is expected to increase 10 times between 2015 and 2021³⁶, thanks to streaming services, improved broadband coverage and the proliferation of smartphones.



x10 increase in mobile traffic between 2015 and 2021.



JustGiving expects 50% of all UK donations to be made online by 2020, up from 15% in 2015³⁸



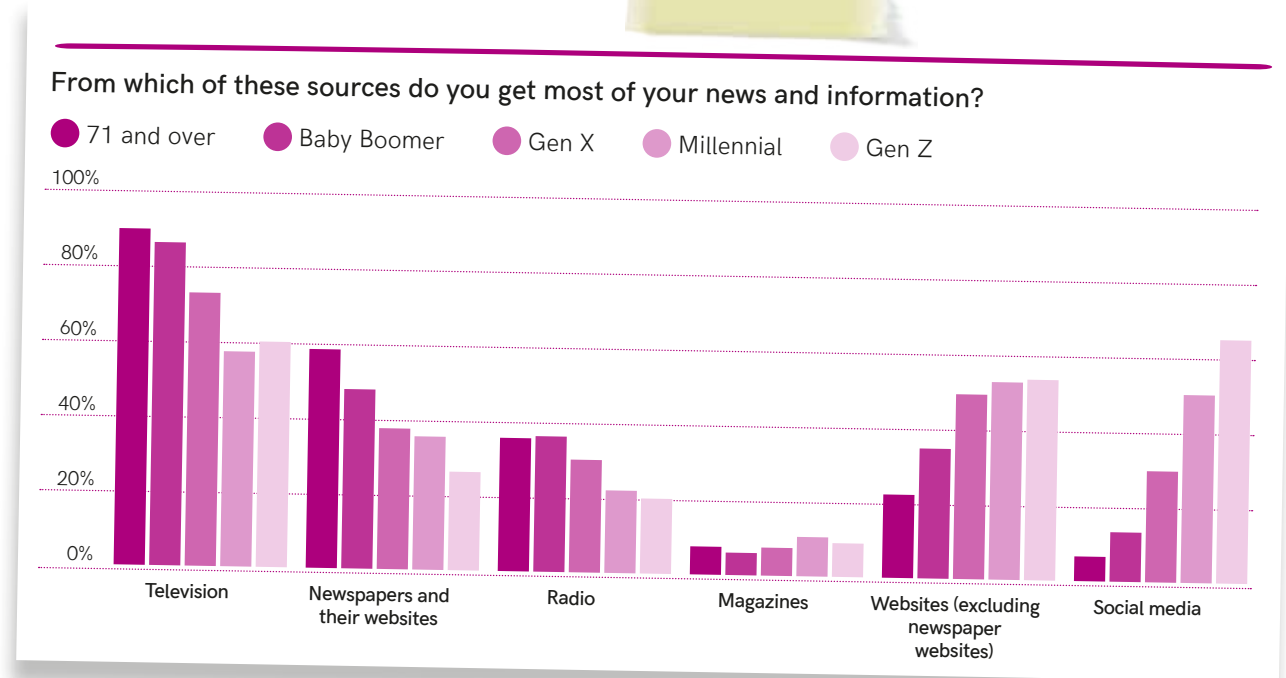
The end of news media?

The rise of free and paid online content across a fragmented media landscape will continue to ramp up pressure on traditional news and consumer press, like newspapers and magazines.

The current decline in newspaper sales will continue - the Sun could be selling just a million copies a day by 2019, compared with 2 million now³⁹. Traditional media owners are still scrambling to find new business models to achieve financial sustainability, through online offerings, partnerships, selling premium content, advertising revenues, or subscription models, like the Guardian's membership programme⁴⁰. **By 2022, some media brands may even be making it pay - while others will have disappeared entirely.**

Even online news providers are losing their USP: only 14% of people who read online newspapers believe these sites offer content you can't find anywhere else, compared with 28% of those who use Twitter for news, and 42% of those who use other social networks⁴¹.

There is a generational aspect to this change in news media consumption - while TV is still the most popular source of news and information overall, younger generations favour online sources⁴².



Source: Eden Stanley

'I get news content here I can't get elsewhere'

 **14%**
of people who read online newspapers

 **28%**
of people who use Twitter for news.

 **42%**
of people who use other social networks.



It's not just alternative free sources of news that threaten traditional media. It's also the blurred boundaries between news, opinion, newsfeeds and entertainment – devaluing pure news offerings, while favouring content delivery via social media and platforms like BuzzFeed.

Meanwhile, the rapid rise of 'clickbait' – a distributed publishing model where writers are paid by the click – has created **an online arms race of overinflated headlines** ('You Won't Believe What Happened Next!') that bear little resemblance to the content they link to.

A more extreme version of this trend is (again) the rise of fake news – output from content producers who deliberately seed untrue stories through social media to advance their own commercial or political agendas⁴³. Social networks – especially Facebook – have been criticised for failing to distinguish between fake news and genuine content. **By 2022, this may have been contained – but restoring trust in credible sources will take time.**

For the people we spoke to, the falling value of trustworthy content is a worrying trend, but we think it likely that many charities will also spot the opportunities here. **For some of you, the best response will start with behaving more like the media – even *becoming media***, as one person described it to us. A former charity communicator, now working for a global consumer brand, told us:

“I'm not drafting press releases any more. I take content and distribute it. Our engagement is online first and foremost. The media coverage follows. For me, that shift is where the future will go.”



And then, looking ahead, building trust in content will be your prime concern. **Expect to see more charities providing peer review, video 'explainers', or quality marks.** Could a service like

PolitiFact⁴⁴, that fact-checks statements from American politicians, or UK mythbusting charity fullfact.org⁴⁵ be replicated for your particular sector?

Remember, in our 'self-actualisation marketplace', the desire to be informed is often an important motivator, particularly for younger audiences. They may have given you their contact details simply because they are interested in the topics you talk about. Support may come later

Bursting the filter bubble

The ability to choose which content to pay attention to is natural. But there is a lively debate about the consequences of life in a 'filter bubble'.

We populate our social networks with people who think like us, while advertising algorithms predict our interests, and Google offers search results according to what it 'thinks' we want to know.

Our Facebook posts may only be seen by a small proportion of our friends and followers, with gaps in their newsfeeds filled in by promoted content.

The result can be a narrower, self-reinforcing view of the world, where commercial interests have a growing stake. Recently, Brexit and the Trump victory have been attributed in part to the filter bubble phenomenon. Two opposing world views had become insulated from each other, and the liberal/left consensus didn't see it coming.

New York Times columnist Frank Bruni points out:

“By bookmarking given blogs and personalising social media feeds, we customise the news we consume and the political beliefs we're exposed to as never before. And this colours our days, or rather bleeds them of colour, reducing them to a single hue. We construct precisely contoured echo chambers of affirmation that turn conviction into zeal, passion into fury, disagreements with the other side into the demonization of it.”⁴⁶

One communicator told us:

“It often feels like we are only talking to ourselves. How do we cut through to people who aren't in the algorithm to get our stuff?”

The obvious consequence of the filter bubble is that it's harder to connect with audiences beyond your traditional supporter base, because you are filtered out before you reach them. **Even if you do reach them, you may not understand them or the world they occupy well enough to engage them**, because you too are exposed to a limited view of the world.

Breaking out of the filter bubble will be an ever more important challenge for charities in the coming years. After all, communicating to 'people like us' is easy. But being a professional communicator, by definition, means engaging people that are different from us. That is going to matter more.

As one digital transformation expert reminded us: “We always like to communicate with people who are like us. We will have to understand who we're talking to much more than we do now.”



“It often feels like we are only talking to ourselves. How do we cut through to people who aren't in the algorithm to get our stuff?”

An 'opt in' world



Five years ago there was no Fundraising Preference Service. Right now, plans are being finalised to allow the public to use the FPS to specify charities they don't want to hear from. As we saw earlier (page 16), recent Information Commissioner's Office fines have reinforced the need to be clear with supporters about what you're going to do with their data, as an important step to obtaining consent⁴⁷.

By 2022, the current debates on regulation and changes in practice will be all but over, new rules for charities will have been established, and we'll be seeing their effects in hard numbers. And by then, there may be other regulatory controls affecting our marketing and communications, such as broader changes to UK legislation on data protection⁴⁸.

Whatever the regulatory and legislative environment, by 2022 charities will no longer be able to rely on the old 'opt out' marketing model, where we presume consent unless it is expressly withdrawn. Neither can you continue to assume that your approaches are welcome, or even tolerated, in the way they once were.

Do we have to choose choice?

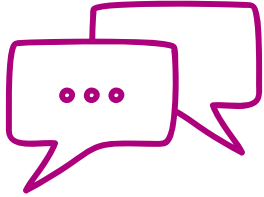
As we've already seen (page 15), new generations of supporters have enhanced expectations of service levels and how organisations should meet their needs. Offering a variety of ways for people to access services or get involved will lead to a greater impact or higher returns, or so the theory goes. Malcolm Gladwell's now-famous 'spaghetti sauce' TED Talk eloquently shows how we like being able to select a product that's 'just right' for us⁴⁹, and how this, in turn, makes us buy more stuff.

By 2022, people will have more choice than ever when it comes accessing on-demand content of all kinds, including content relating to the causes we care about. So that's a good thing, right?

If you've ever given up trying to choose your next TV box set, you'll recognise an alternative school of thought - one that suggests too much choice doesn't make us any happier. Another TED Talk, this one from Barry Schwartz⁵⁰, explains this paradox of choice. Choice raises expectations ("Look at all these challenge events - there must be one that's perfect for me!"), followed by dissatisfaction or even guilt, as people wonder why the experience isn't 'perfect' after all ("It must be my fault for choosing badly"). **Too much choice also results in paralysis, because it's easier to make no decision than a difficult one.** As every direct marketer knows, one strong call to action usually delivers a better return than three or four options.

Be aware of this contradiction when promoting content or designing asks and options for keeping in touch. Make up your own mind how to play it. You want your supporters to feel good about the choices they make, but as choices proliferate, will consumers cling to brands that simply tell them what to do?

How will you respond?



We are looking ahead to a bewildering and tough media environment.

On the one hand, there'll be more channels and content providers than ever. Technology will offer extraordinary creative opportunities to bring supporters even closer to the causes they care about.

On the other, the person you want to reach may never be exposed to your content, because a combination of their own preferences and algorithmic alchemy keeps you trapped the wrong side of their filter bubble.

Digital channels are likely to remain a low-cost way to source, create, test and distribute the stories that inspire people to support your work. Paid advertising will continue to fuel the major content platforms, and by 2022 you will be able to target niche groups with even greater accuracy than now. Your challenge will be creating content that fits in their world.

People's desire to take control – a particularly Millennial mindset – is already driving new engagement approaches that feel innovative, but which may be much more prevalent by 2022.

One example is Oxfam's My Oxfam app⁵¹, which allows supporters to change the amount they donate in any given month, like a central heating controller, and to set out how the charity can get in touch, by telephone, email or post. The app provides access to video messages from staff in the field, live updates on emergencies, links to shop at the Oxfam online store and access to real-life stories.

Another is the 'effective altruism' movement⁵², a growing community of people who want to 'optimise' their giving of money and time by designing a portfolio of support tailored to their individual interests and values. A growing industry of websites and online tools help people match their values with causes.

One digital director told us:

“ The ability to generate content well, and to move in a way that enables genuine cross-platform engagement is an achievable goal. We're just not there yet. ”

Which reminds us, it's not all about digital. As we'll illustrate in the next section, real-world engagement will still be important, and may even make a comeback.

A new world order

What you can offer in 2022

Future proof

What kind of world will we live in by 2022?

Events big and small can change our lives, sometimes in ways that can only be guessed at in advance. But we can make a few reasonable predictions about some of the big drivers.

“It’s not the first time we have encountered a generational shift. We have always taken a step back and reinvented ourselves. Being clear about the problems you want to solve is the way into innovation.”



£ Shrinking funding

With no apparent plans for large-scale stimulus for recovery, **economic uncertainty** will continue to be a feature of our world⁵³. That means less public funding for charities and a smaller welfare state, coupled with low wages, rising housing costs and potentially high inflation.

Many people – often our service users – will still feel excluded from the prosperity they hear about, and worried for their children’s futures. As a sector, we may justifiably feel that the need for charities has never been greater, at least in modern times.

✓ Stronger regulation

New regulation has emerged from a less friendly media and policy environment for UK charities, along with lobbying laws⁵⁴, and debates around restrictions on using statutory funding for advocacy⁵⁵.

We’re seeing a more rigid regulatory approach from agencies like the Charity Commission, the Fundraising Regulator and the Information Commissioner’s Office (see page 16). We’ll see how far these changes bite by 2022.

👤 Demographic changes

The world’s population will continue to grow, and in the UK there will be **more older people**, as we all live longer⁵⁶.

More of us will be living alone too: **one-person households are the fastest rising household size in the UK.** In 2016, 28% of households comprised just one occupant⁵⁷.

Meanwhile, growing urbanisation and economic development is changing the face of overseas poverty, with implications for the proposition used by international development charities. **Most people who live in extreme poverty now live in middle-income countries**⁵⁸.

▶ Accelerated knowledge

According to futurist and inventor Ray Kurzweil, the history of technology shows change happens at an exponential rate:

“So we won’t experience 100 years of progress in the 21st century — it will be more like 20,000 years of progress, at today’s rate.”⁵⁹

This means that, while we’re becoming accustomed to advances in tech and medicine⁶⁰, along with greater global connectivity (see page 7), developments will continue coming along even faster. This is good news if you’re a medical research charity able to predict a cure in years rather than decades. **But overall it challenges charities to keep up with the pace of change, and with people’s new expectations.**

🌐 Globalisation

Since the Brexit vote and the election of Trump, much discussion has focused on the societal impacts of **shifts in economic power** from the global West to other parts of the world⁶¹.

There is growing political consensus from both the right and the left that **globalisation (at least in its current neoliberal form) has contributed to deepening inequality, a growth in nationalism, highly polarised political movements, and declining trust in old institutions – ultimately resulting in the political shocks now unfolding across the world.**

According to Bank of England governor Mark Carney:

“Many citizens in advanced economies are facing heightened uncertainty, lamenting a loss of control and losing trust in the system. Rather than a new golden era, globalisation is associated with low wages, insecure employment, stateless corporations and striking inequalities.”⁶²

Quality time

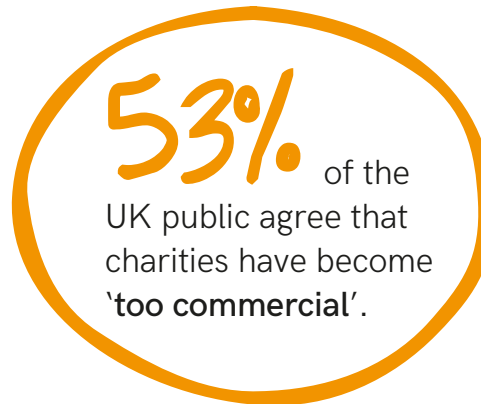
So there are major trends that will continue to shape our experience of the world, from globalisation to new technology. Much of this change is welcomed – on the whole we like next day delivery, on-demand video and iPhones. Meanwhile, there are other trends that reflect people’s reactions to these bigger forces – like the growth in nationalist political movements seen as a counter to global economic uncertainty and complexity. Where does this leave charities? How can you add value to your supporters’ lives?

Remember, **your charity won’t be the only well-run, professional organisation offering customers ways to solve their problems, while fulfilling a broader social purpose** (see page 6). Even so, with more than half of the UK public (53%) agreeing that charities have become ‘too commercial’⁶³, the answer probably doesn’t necessarily lie in communicating in ways that are more explicitly like purpose-driven brands. There must be a point of differentiation.

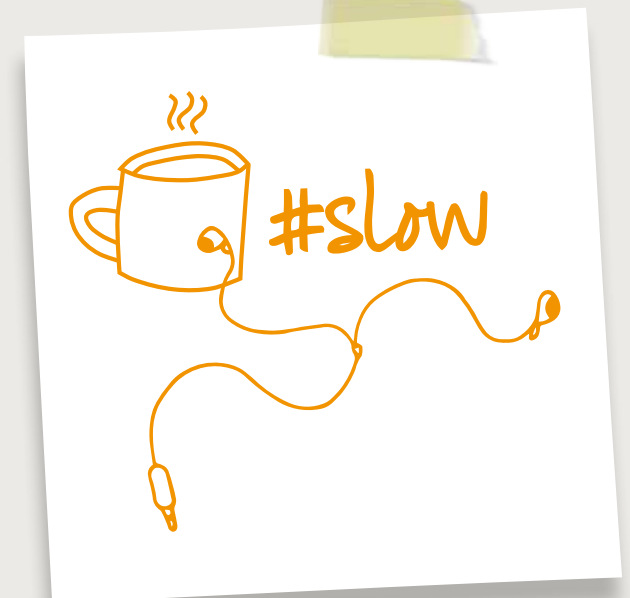
One area of fertile ground may be within the counter trend movements inspired by the big social and economic drivers mentioned above.

For example, one reaction to globalisation and accelerating technology is a greater tendency to value something simpler – something that feels local, analog, or human. **There’s increased interest in nostalgia and heritage** – the reaching back to a simpler, more authentic and safer past – and in the ‘slow’ trends around food, travel and making things.

So if charity is a vehicle for people to address society’s problems, perhaps you can offer quality time – moments and spaces where people remember and act on our shared humanity, close to home, and with their phones switched off.



“People don’t only want to exist in a digital space. People meet physically. You don’t make the most of connections without thinking in terms of both offline and online.”



Local roots and global reach

Our charity communicators saw potential in tapping into the need for a sense of local belonging. One said: “We are finding an increasing desire in our supporter base to be rooted in your community as well as an online space. When everything’s big and scary and you don’t know what to believe, you can believe what’s happening locally.”

This may mean putting more emphasis on your local roots and your presence in your supporters’ own communities, whether that’s their neighbourhood, town or country. **Finding creative ways to evoke your own heritage and community may be a fruitful starting point.** Other sectors are doing this – for example, alongside its US-made output, Netflix is now investing in domestic content in several of its 130 international markets⁶⁴.

Meanwhile, for charities looking to mobilise public support on global issues, there may be value in helping more people know where consumer goods are from and explaining how global supply chains work, tapping into a renewed interest in provenance. You may need to shine a light on your own global partnerships, for example in medical research.

For charities that work on international causes – where the rewards are felt by distant beneficiaries – the challenge is in appealing to people who place their own family or community above all else.



This has always been a challenge with right-leaning audiences, but it’s a self-directed mindset that we expect to increase in coming years, particularly among Millennials, regardless of political leanings.

This challenge is not unique to international charities. If your charity is looking to broaden from your traditional supporter base by targeting younger supporters with a ‘brand me’ mindset, you need to make clear what’s in it for them.

Keeping it real

Analysis from PwC suggests consumers will continue to place a premium on live experiences, from sports finals on TV to live events and trade shows⁶⁵.

Offering someone a real life experience – close to home and outside the digital realm – will be a valuable proposition in 2022. Marketers from all sectors are exploring technology that links the physical world of outdoor advertising, attractions, shops and mail delivery with the digital world of interactive content.

For our charity communicators, this is an area ripe with opportunity. One talked about how the rarity of offline communication gives it greater value:

“Whenever you get a handwritten letter now, it’s amazing – it has resonance.”

Another said:

“People don’t only want to exist in a digital space. People meet physically. You don’t make the most of connections without thinking in terms of both offline and online.”

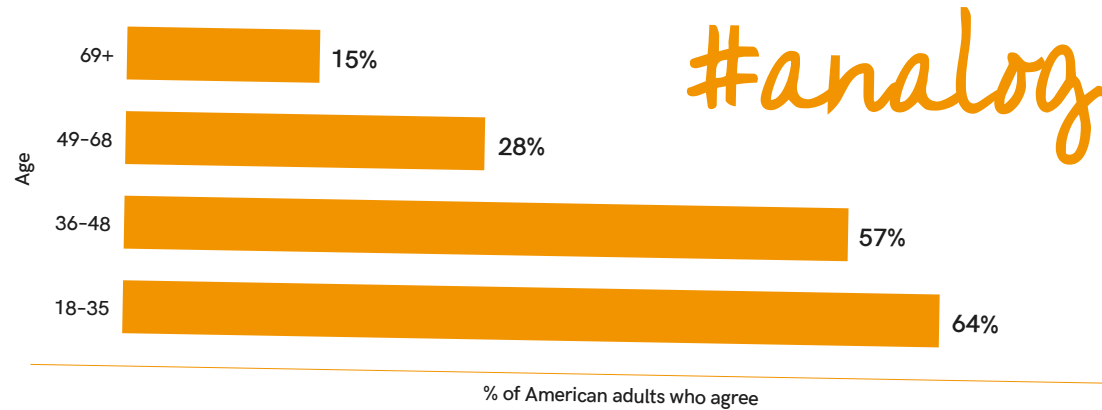
The past and the future

Analog is another digital-era counter trend that responds to people’s desire for real-life, imperfect encounters. As we buy more apps, e-books and downloads, and as digital screens become our default interface with the world, **we are increasingly seeking out physical objects and experiences** – from film cameras, fancy notebooks and vinyl records (see below) to acoustic guitars, crafts and bespoke one-off items⁶⁶. Check out the hashtag #analog for lots of examples of how people are embracing the physical, old-fashioned world – and then sharing their experiences in the digital one.

It is among the next generation of supporters – the Millennials – that these notions of the past and present converge most easily. This is the generation that buys albums on vinyl, while listening to music via online streaming. According to the BPI, sales of vinyl increased 53% to 3.2 million records in 2016⁶⁷, and there were 45 billion audio streams. But 48% of vinyl buyers surveyed in a BBC/IBM poll in 2016 said they do not play the vinyl they buy – and 7% do not even own a turntable⁶⁸.

From hipster culture to steampunk, new and old forms of self-expression, communication and ways of living co-exist more easily for Millennials and Generation Z than for any other group.

I would be interested in buying now-obsolete items (vinyl records, a record player, cassette tapes and/or a typewriter) as a collector’s item



Source: JWT Intelligence

3.2m

vinyl records purchased in 2016.

48%

of buyers don't play their vinyl.

A new point of difference?

Responding to people's anxieties about global uncertainty and their desire for simplicity and meaning: is this your opportunity? When it comes to engaging supporters, your charity has a unique role to play in helping people access the good in themselves. You can help them get back in touch with those core human values that remain stable even as the world is running away from them.

Taking this opportunity means focusing further on building, and rebuilding, trust with your audiences, and showing you're accountable to them. **People's desire for simplicity and certainty reinforces the need for easy-to-understand, compelling narratives and straightforward messaging.**

As ever, the key issue is trust. In a rapidly changing and ambiguous world, where fake news jostles for digital space alongside #nofilter images, trust becomes a valued, questioned and scarce commodity.



By offering people ways to feel safe, informed and able to be their best selves, however they define that, your charity can successfully engage new generations of supporters.



From here to there...

Getting ready for 2022

How can you use these insights, and those you generate yourselves, to be ready for future challenges?

Here are our suggestions.



Be a facilitator, not a gatekeeper

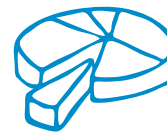
In a world of greater connectivity, consider ways to provide a **direct connection** between supporters and causes, bringing them closer together rather than standing between them.

Embrace alternative funding models

Explore **new ways for people to fund your work** - from creative corporate partnerships to crowdfunding and peer-to-peer lending, and participating in the effective altruism movement.



Get smarter at segmentation



It's no longer enough to identify target audiences based on demographics alone. Factors like where supporters live, their age and gender won't necessarily give you insights rich enough to show what's driving engagement. Nor will it help you broaden your appeal to new audiences. **Effective segmentation** takes into account your audiences' attitudes, behaviours and values, but still, far too few charities are doing this effectively.

Tap into the younger generation's enthusiasm for campaigning

If concerns about traditional supporters being turned off by anything that feels 'political' have previously put you off campaigning, it may be time to think again. **You may be able to increase your appeal to younger supporters through campaigns that mobilise their support.** But take care, of course, not to fall foul of lobbying laws.



Become a trusted source

Behave more like the media by producing and distributing **high quality, verifiable content that satisfies people's desire to be informed.** Build trust in your content by providing peer review, video 'explainers', or quality marks, and by taking interactions offline and into people's real-life worlds.

Foster innovation

There are many routes to innovation, from investing in digital transformation, to establishing innovation funds open to bids from staff looking to try something new. **Find your own way in.**



Track engagement

Gather data on how people are engaging with you, and then use it to help you do better. By building a fuller picture of each individual supporter, you can **personalise communications and develop a stronger two-way relationship.** If you're coming to this area new, remember collection, storage and use of personal data brings its own issues and responsibilities.



Keep telling stories

It may not sound new or futuristic, but **emotive and compelling human stories, told in simple and straightforward ways,** is still one of charities' most powerful ways of connecting. When supporters think about causes, they think about people.



Be strategic

Steal the insights here and combine them with your own, to decide if you need a new answer to the question: **why support us?** The answer will be different for every charity. Once you know what it is for you, put it at the centre of your integrated communications strategy.



Build trust by showing your roots or showing your reach

Emphasise your local heritage and/or your global connections. **Focus on building, and rebuilding, trust with your audiences,** and showing you're accountable to them.





Further Reading

Some websites we found useful for this report:

- Cisco Visual Networking Index Forecast (www.cisco.com)
- Deloitte Millennial Survey and Deloitte UK Media Consumer (www.deloitte.co.uk)
- Fullfact.org
- Nesta (www.nesta.org.uk)
- Pew Research Center (www.pewresearch.org)
- PwC Global (www.pwc.com)
- TrendWatching (www.trendwatching.com)

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- **Roger Harding**, director of communications, policy and campaigns, Shelter
- **Mark Hodson**, customer insight manager, British Heart Foundation
- **Sarah Jacobs**, director of communications, Global Witness
- **Joe Jenkins**, director of supporter impact and income, The Children's Society
- **James Kemp**, head of strategic communications planning team, Oxfam GB
- **Sarah Knapp**, group head of media, campaigns and engagement, Age UK
- **Greg Marshall**, head of insight, NSPCC
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- **Ciara Smyth**, director insight, planning and strategy, Stroke Association
- **Tina Trythall**, head of insight, Oxfam GB
- **Chris Wainwright**, director of communications and external affairs, RSPCA

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 - 7 Crowdfunding Good Causes, Nesta and NCVO, 2016
 - 8 Public Trust and Confidence in Charities, Charity Commission, 2016
 - 9 CharityComms, 2016 (www.charitycomms.org.uk/articles/developing-a-positive-response-to-the-publics-view-of-charities)
 - 10 Eden Stanley's market trackers, October – December 2016
 - 11 Constructive Voices – A Resource for Journalists, NCVO (www.ncvo.org.uk/about-us/media-centre/constructive-voices-for-journalists)
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We also offer a range of highly specialised, next-generation data tools that our subscribers use for audience segmentation, media planning, attitudinal research, and brand tracking.

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