



# Charity Advertising Report 2024



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# Be on the lookout for data and insight on the following Charity brands and more



# 1 Charity Industry Trends

## 2 Charity Audience

## 3 Charity TV Strategy

- Charities Spending over £10m in advertising
- Charities Spending £5m - £10m in advertising
- Charities Spending £1m -£5m in advertising

## 4 Multimedia

## 5 UNICEF

## 6 Wateraid

## 7 Crisis vs Centerpoint

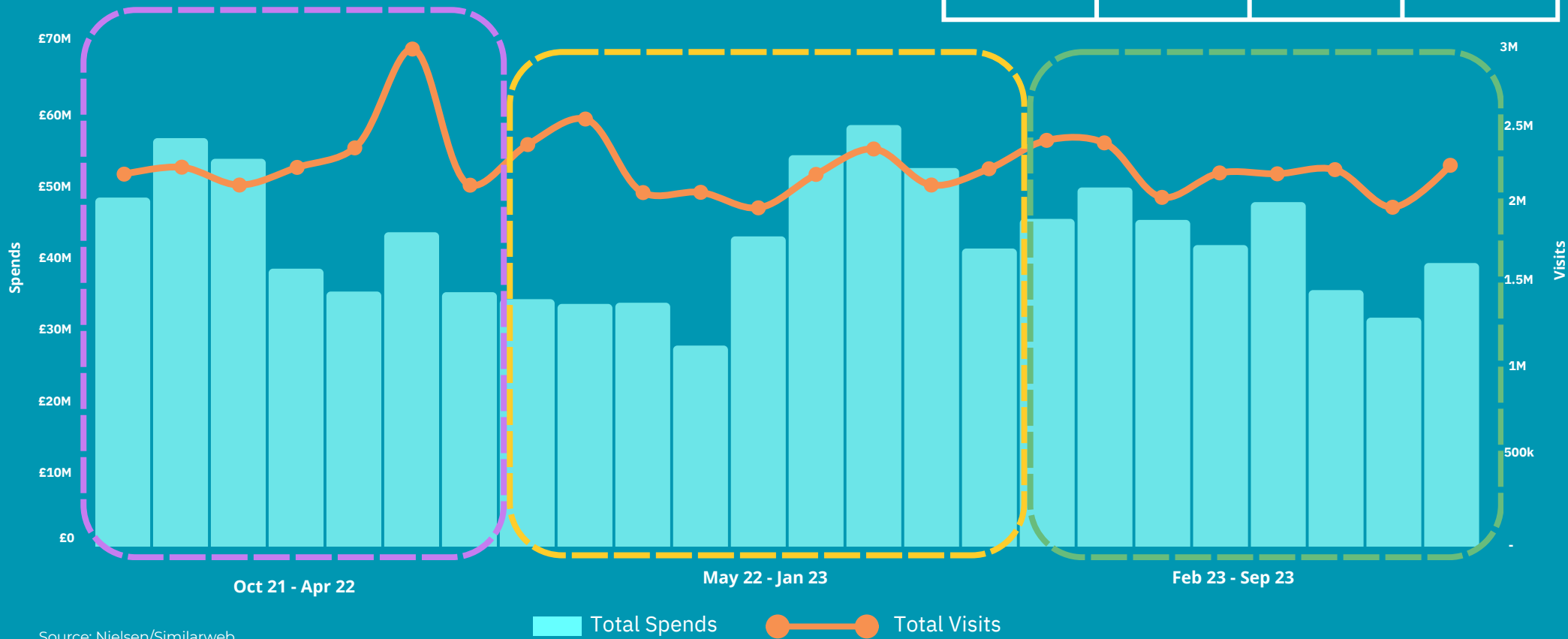
## 8 Royal British Legion

## 9 Charity TV Strategy Recommendations

# Visits decline for the Charity sector despite an increase in media investment

In comparison to Oct 2021-22 & 22-23, there's been a **3% decline in visits** for the charity sector despite a **12% increase in investment**. The cause is the **combination of high inflation and the energy crisis**, which is forcing families to re-evaluate their monthly spending and allocate fewer funds to non-compulsory activities.

	Oct 21 - Sep 22	Oct 22 - Sep 23	% Differential
Spends	£481,152,691	£539,891,245	12%
Visits	£25,061,822	£24,376,144	-3%



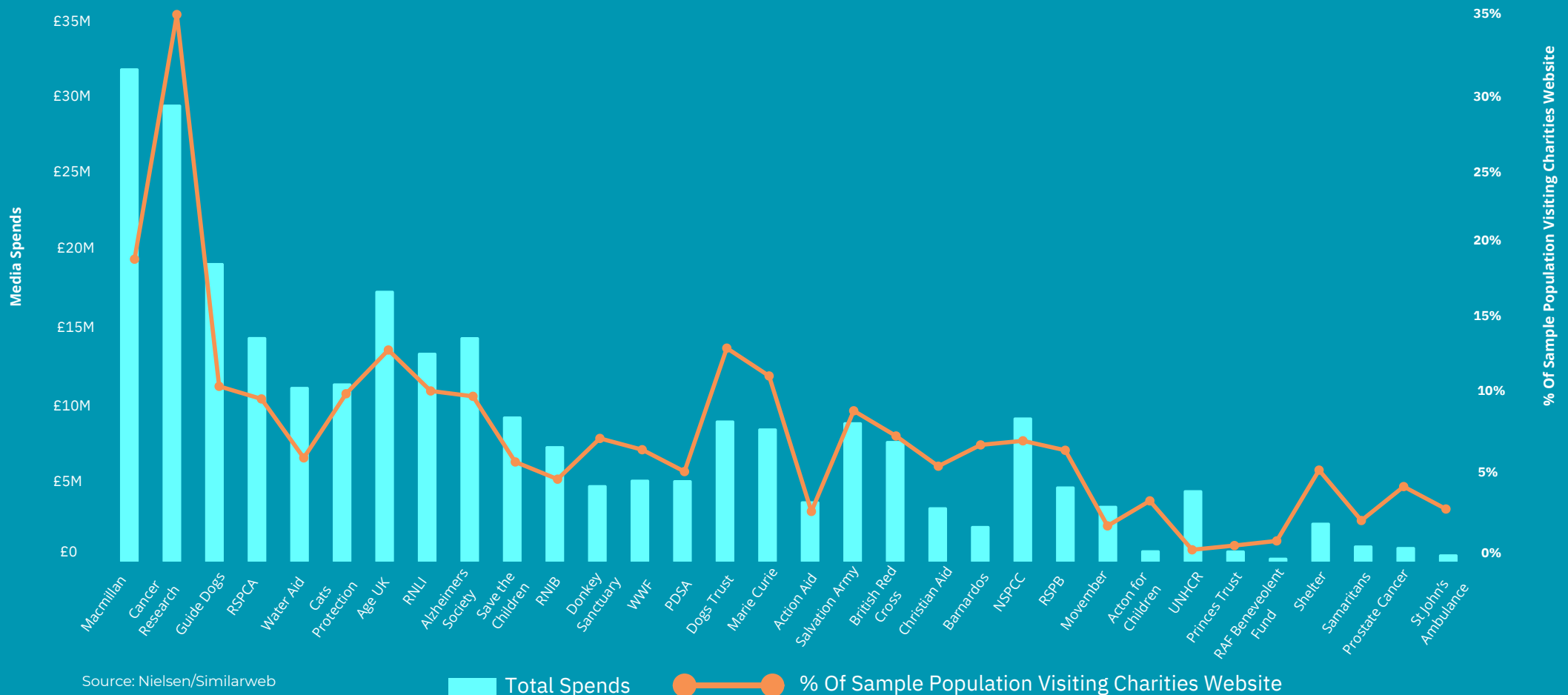
Source: Nielsen/Similarweb

# Strong link between media expenditure and visits



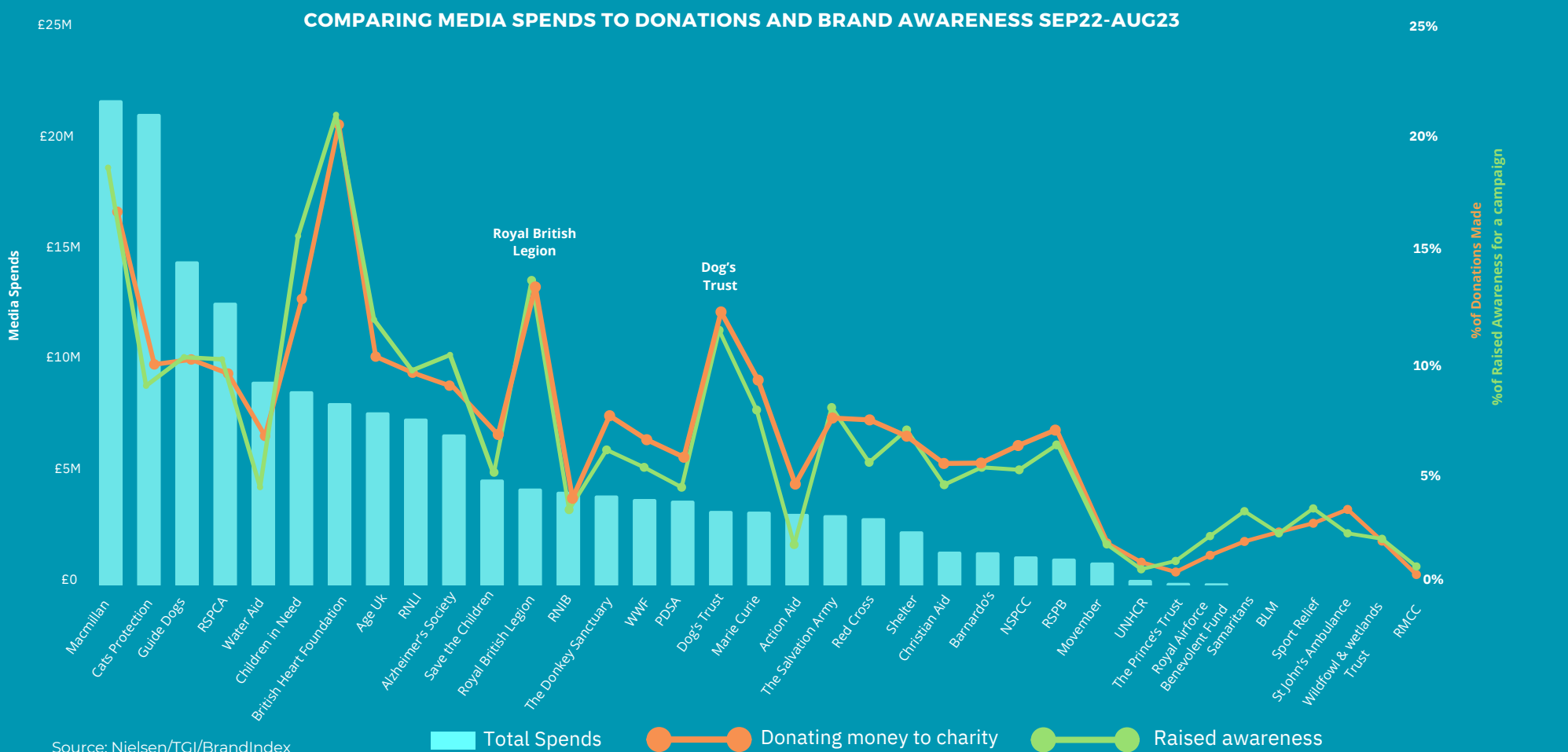
Advertising can have a significant impact on certain demographics. The positive correlation suggests that as an organisation **increases its media expenditure**, website visits **increase**. This connection highlights the effectiveness of advertising in directing attention and driving online traffic. Intercepting digital contributions and guiding individuals down a clear path can boost donations, raise brand awareness, attract new volunteers, and strengthen relationships with people.

CORRELATION BETWEEN MEDIA SPENDS & VISITS



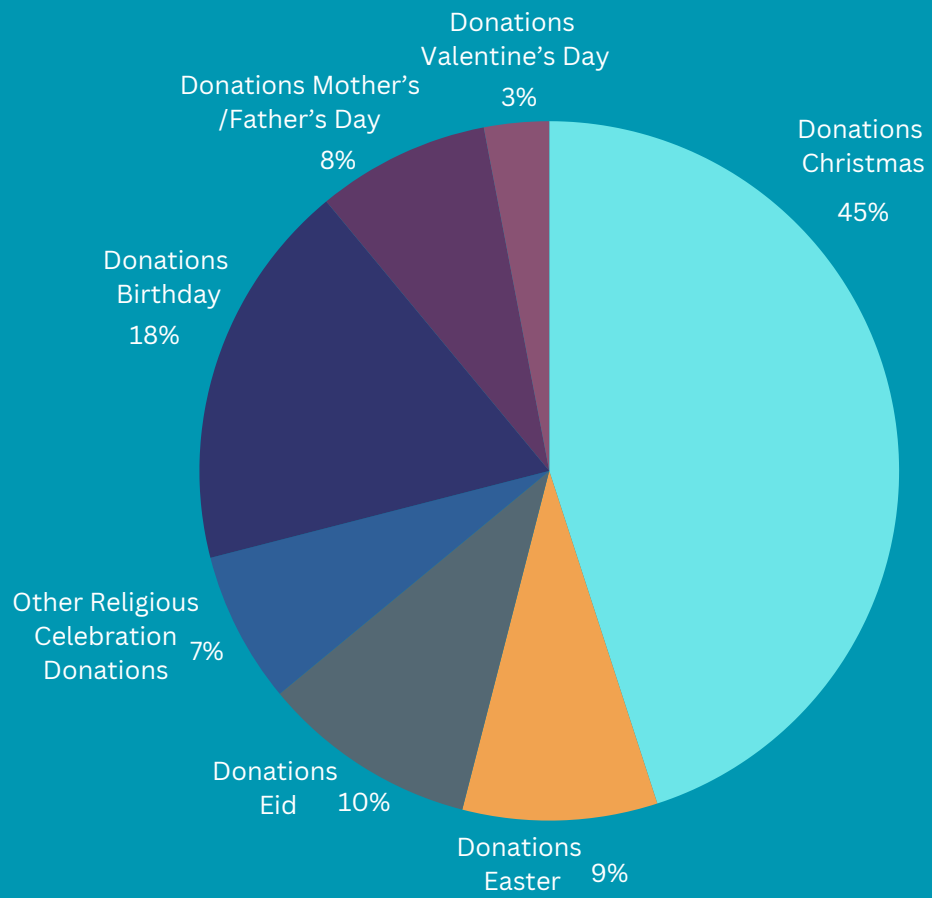
# The correlation between media campaigns, raised awareness and donations

Spending more can relate to better outcomes, but even brands with a limited budget may see great results with a 'smart' advertising strategy, such as the Royal British Legion and Dogs Trust. A carefully planned and executed campaign that outsmarts rather than outspends can yield impressive results, even with limited financial resources.

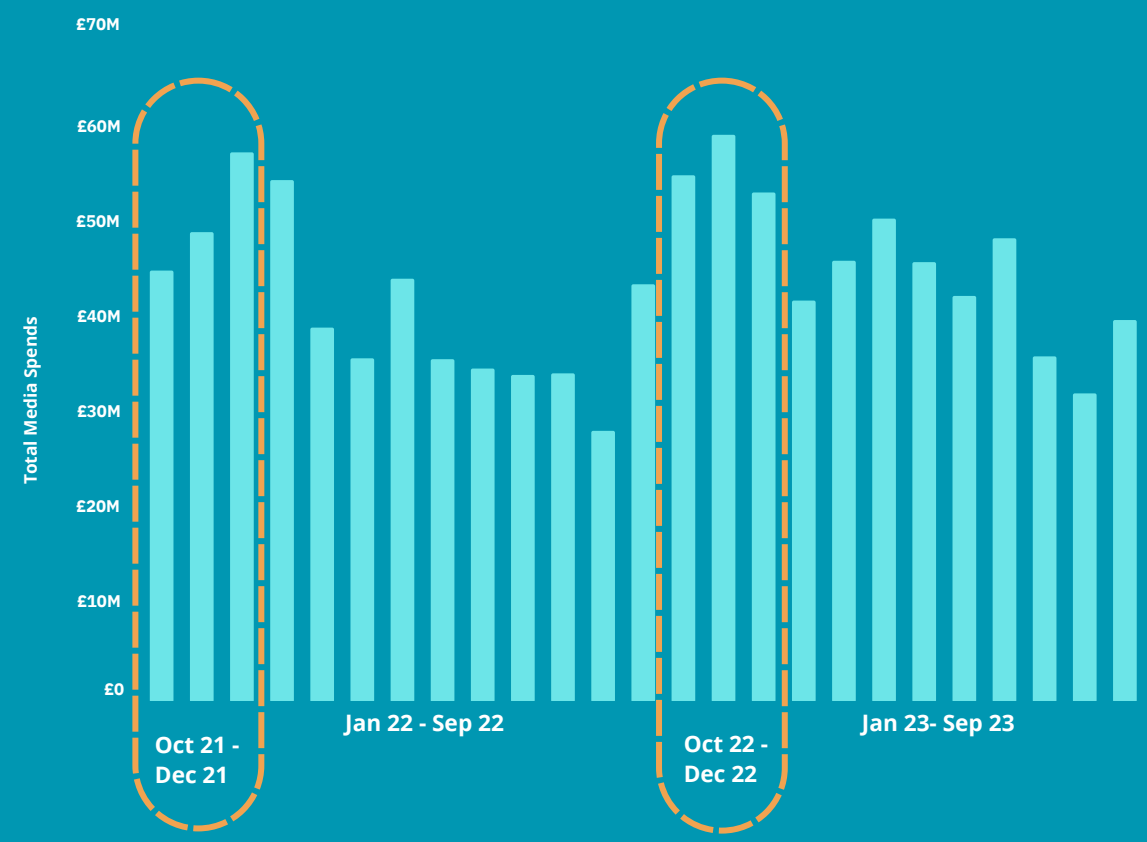


# Charitable contributions during Christmas show its importance, as seen in Q4 advertising

In the months leading up to Christmas, charity brands invest **heavily into advertising to promote charitable intentions, encourage donations and volunteering.**



CHARITY MEDIA SPENDS OCT 21 - SEP 23



Source: Nielsen/TGI

# 2 Charity Audiences

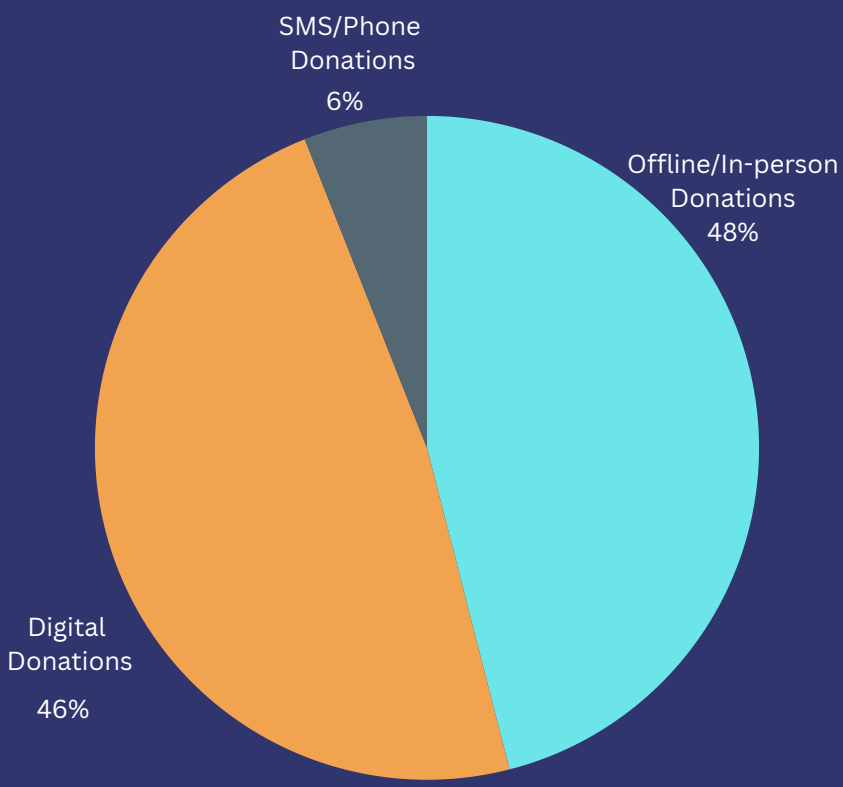
- The evolution of charity donations
- TV and donations
- The influence of ad campaigns
- Age-driven disparities in engagement
- Recruiting volunteers amid economic challenges



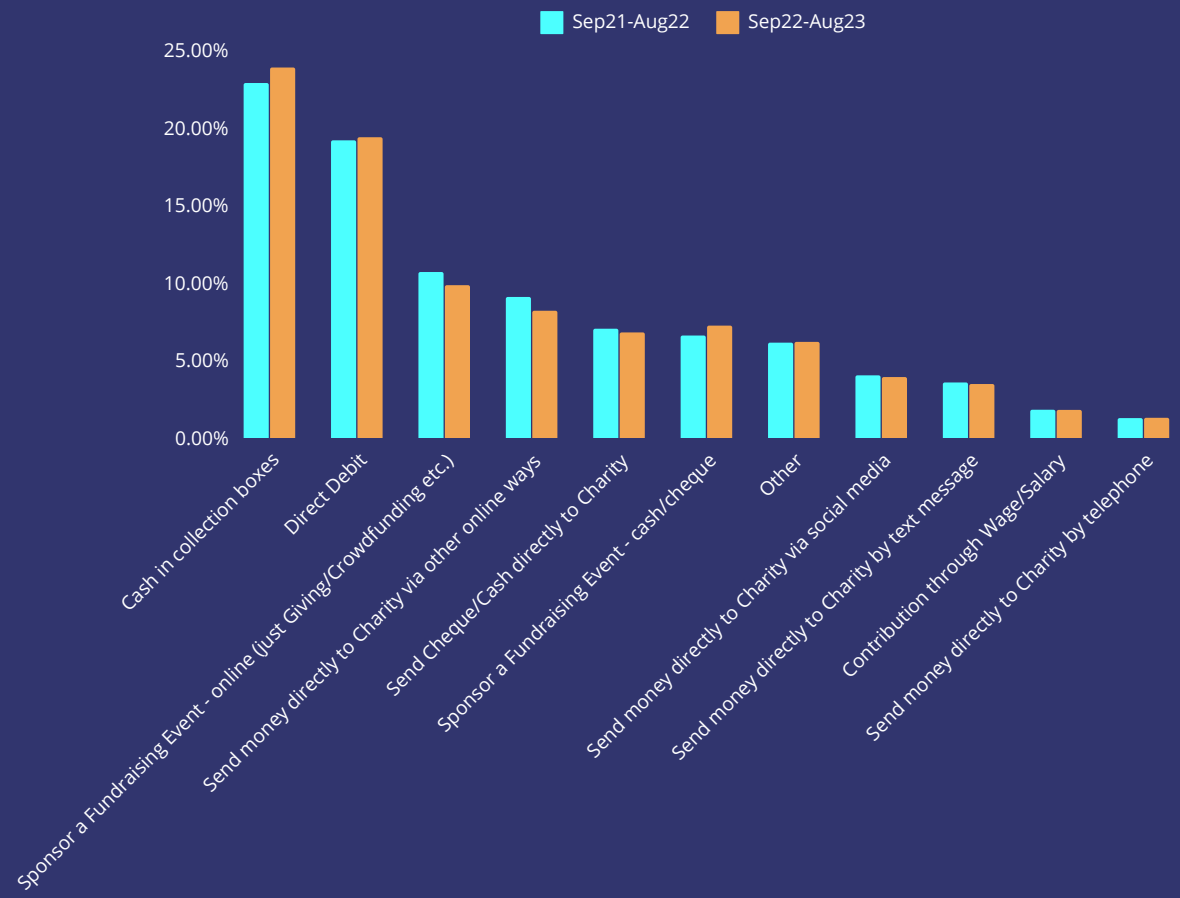
# Traditional vs. Modern

## The Evolution of Charity Donations

In addition to donating money via collection boxes, online alternatives account for **three of the top four positions in charity donations**. Of the total funds donated to charities, **48% come from digital sources**, and **46% come from offline or in-person sources**. **6% come from donations made via phone and text message**.



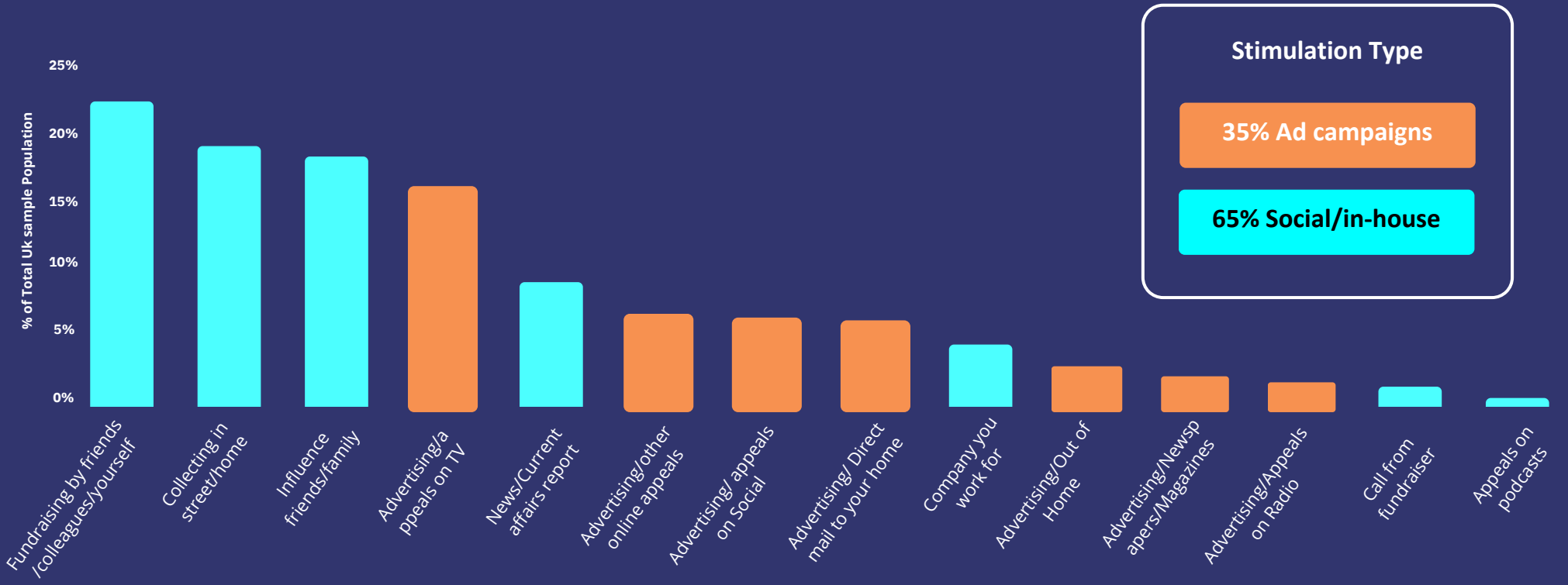
Source: Nielsen/TGI



# TV plays an essential role in encouraging charitable donations

Although advertising constitutes **35% of all stimulation**, its influence extends far beyond the digital realm, permeating into real-world interactions and even charitable events. The media that has the biggest impact on donations is **TV**, **followed by Online**. When these two channels are used together, they can provide a path that leads users through the online experience, promoting donations and giving brands the ability to monitor website traffic. As well as raising awareness, **they will have a direct impact on the offline and in-person social activities.**

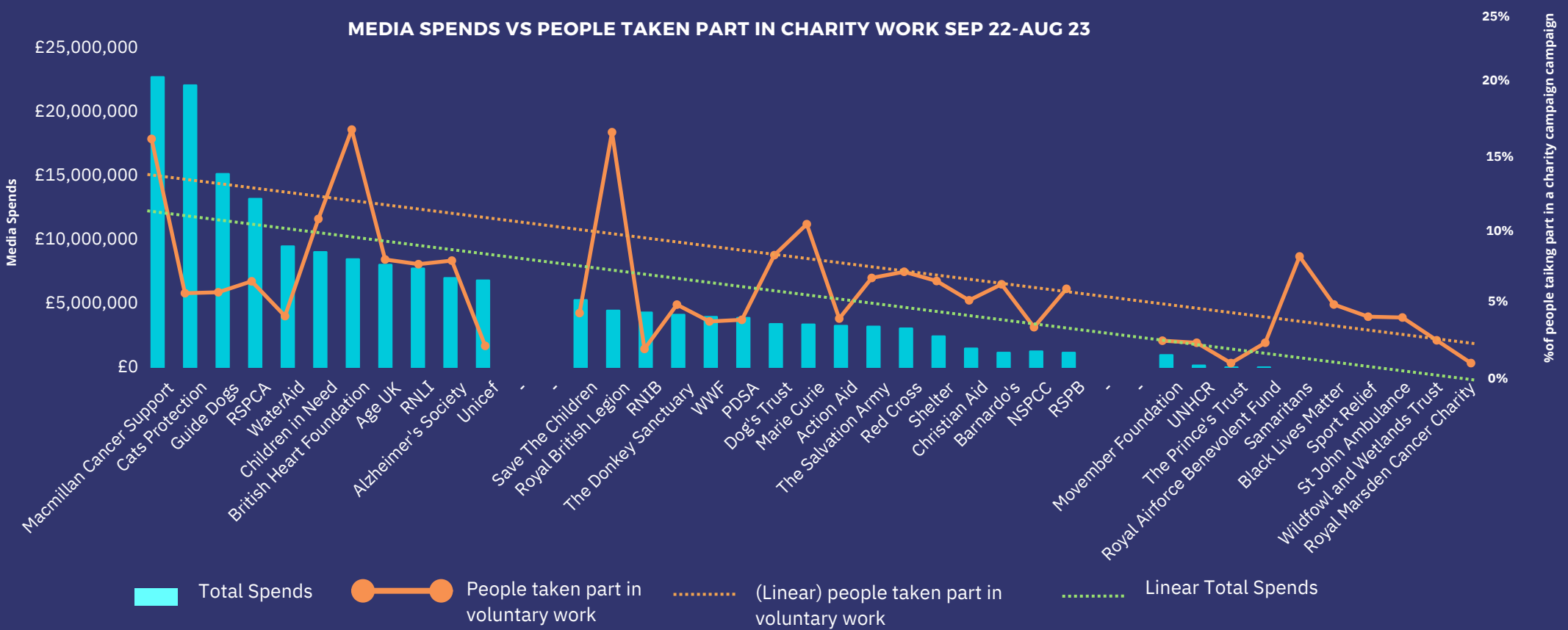
WHY DO PEOPLE DONATE TO CHARITIES?



Source: TGI

# The influence of ad campaigns on behaviour

The impact extends beyond the traditional realms of commerce, reaching into the broader sphere of social responsibility. The acknowledgment that advertising impacts real-world interactions implies that the effects of advertising extend beyond our devices. Consumers carry the influence of advertisements into their daily lives, affecting **how they perceive brands, products, and societal issues**, and ultimately influencing their interactions and decisions. Adverts serve not only commercial interests, but also social causes and philanthropic efforts. In addition to generating support, evoke emotions, and drive engagement, advertising contributes to positive societal outcomes.

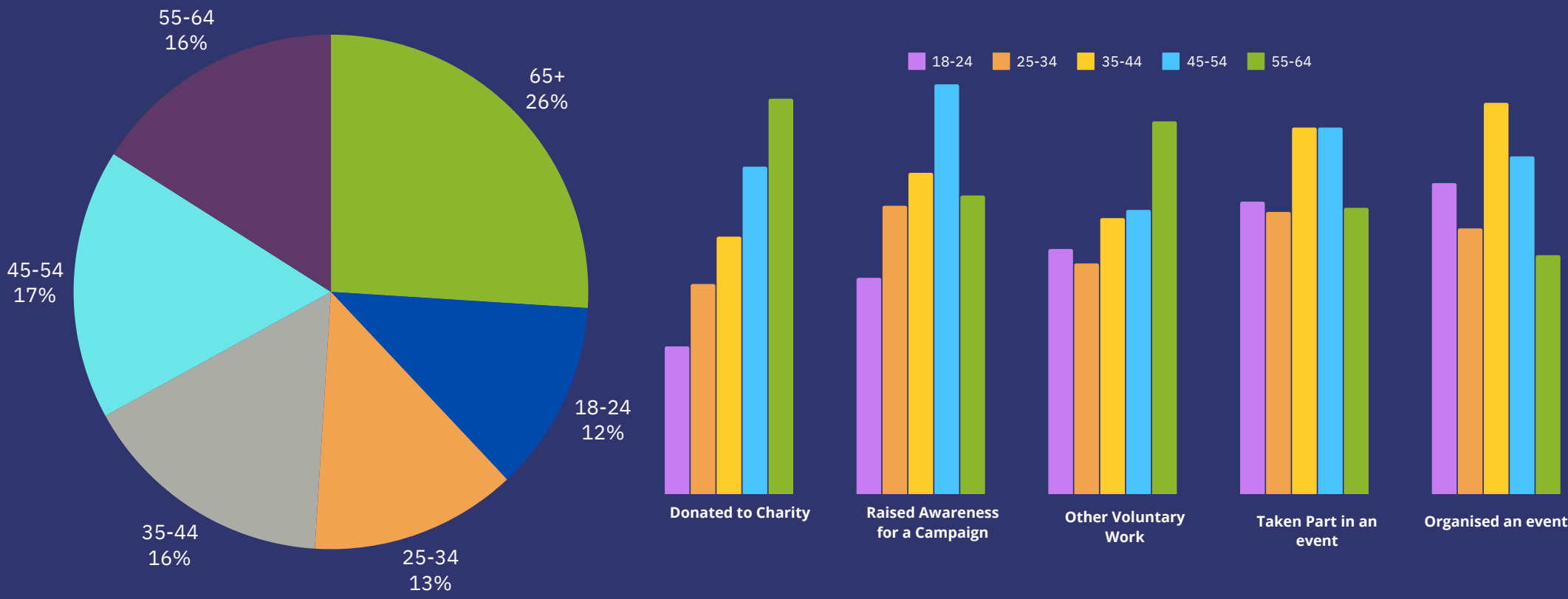


Source: Nielsen/TGI

# Tailoring Charitable Engagement: Age-Driven Disparities in Participation

Although the group 65+ exhibits the highest level of interest in all charitable activities, the percentage of participation **varies by age for each activity group, and this should be taken into account when developing a targeted approach.** A charitable organisation is not limited to giving donations priority over other business objectives. Raising awareness for a cause, encouraging new volunteers to join the company mission, or participating in a charitable event can all work to achieve objectives.

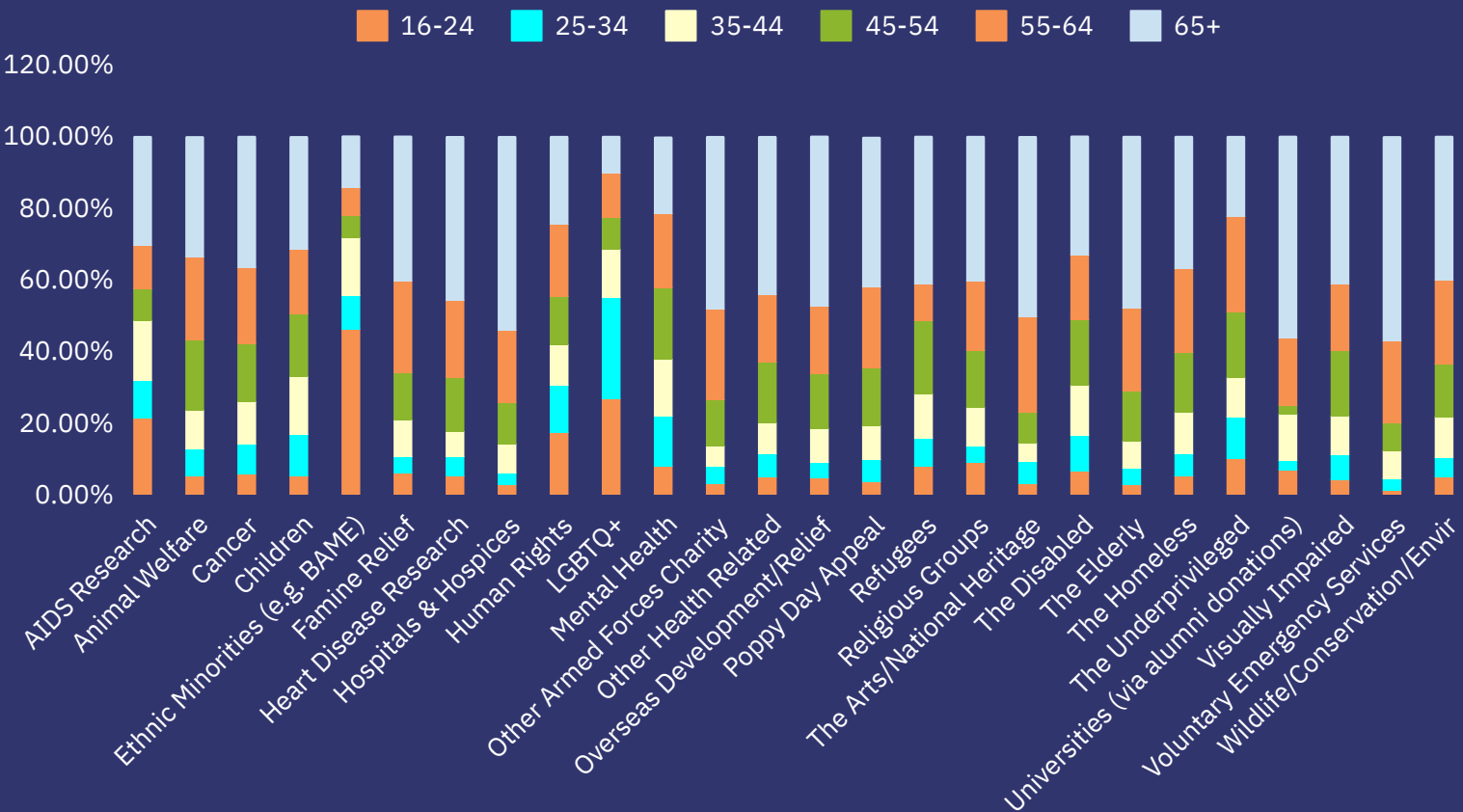
AGE DEMOGRAPHICS AS A PERCENTAGE OF ALL CHARITABLE ACTIVITIES



Source: Nielsen/TGI

# Strengthening Support: Recruiting New Volunteers Amid Economic Challenges

Recruiting new volunteers helps ensure that charitable organisations continue to provide assistance and services at the current level **without placing undue pressure on donations**. The media plan must be adapted based on target groups that have **different areas of interest**. Some organisations, such as those that support LGBTQ+, AIDS Research, Ethnic Minorities, and Human Rights, are more appealing to younger audiences.



The majority of charity organisations should focus on targeting the over-55 age group. This demographic is the most likely to be prepared to volunteer for charitable causes.

Source: TGI

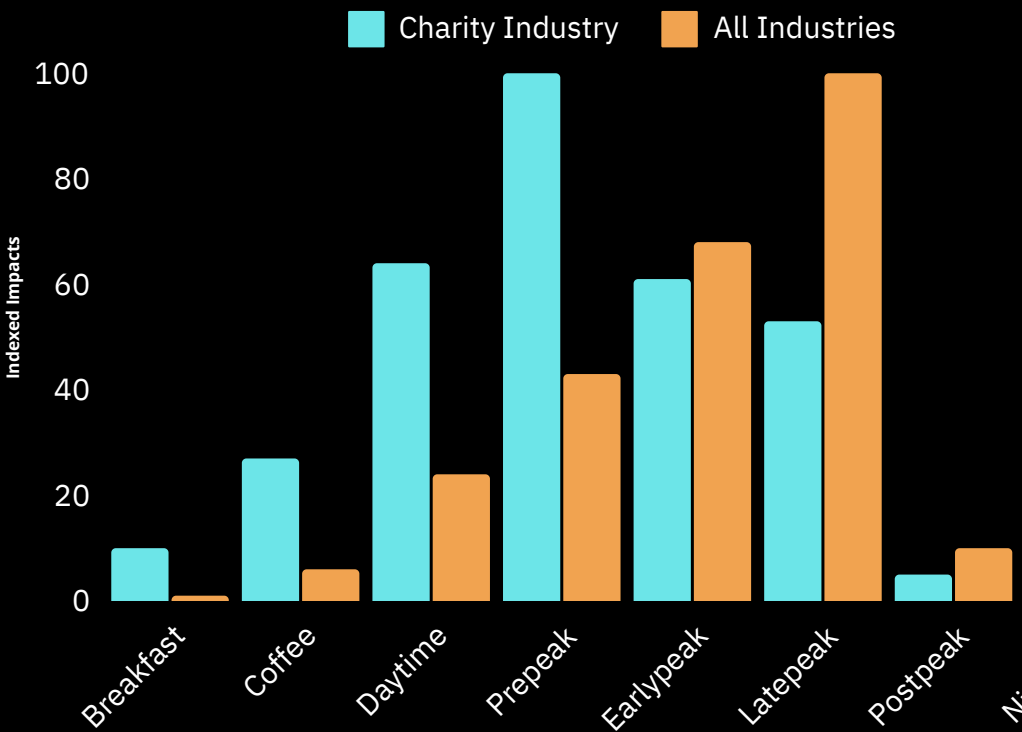
# 3 Sector Media Trends

- Sector approach to Dayparts
- Spot lengths
- Saleshouse Impacts
- Strategies from charities spending £10m+ on advertising
- Strategies from charities spending £5m-£10m on advertising
- Strategies from charities spending £1m-£5m on advertising
- Unlocking online engagement

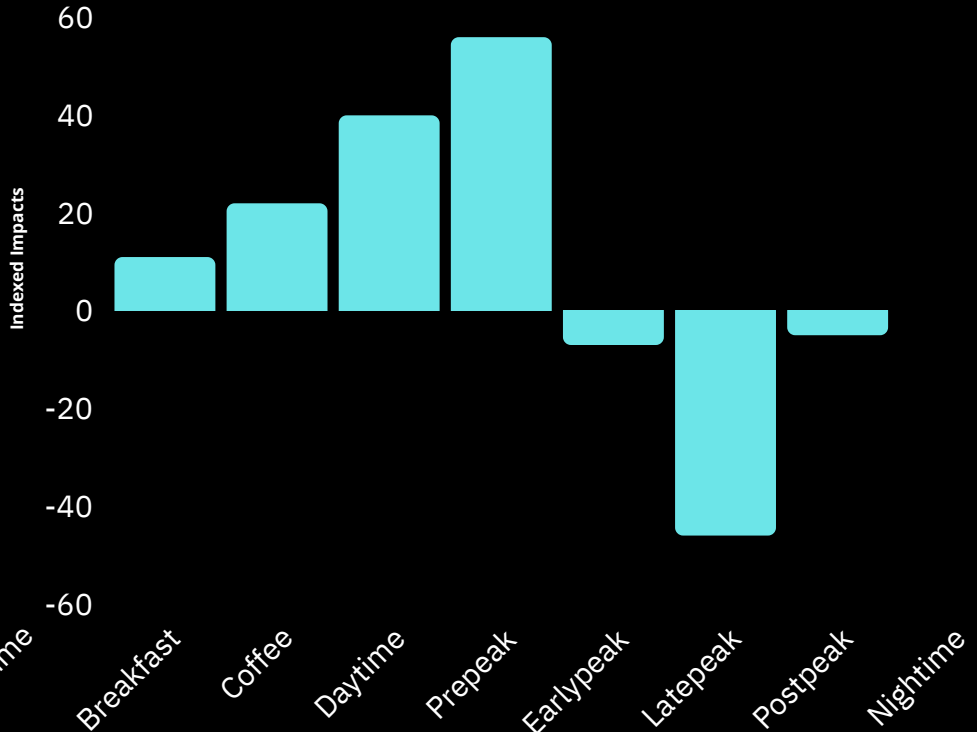
# The Charity Sector's Approach to Daypart Commercial Allocation

The industry prefers to invest in Daytime advertising rather than Peak-Time. Cheaper TV spots and the ability to Reach over 65s demographics are some of the reasons behind this.

**TOTAL TV IMPACTS ALLOCATED BY DAYPART**  
 CHARITY INDUSTRY VS ALL INDUSTRIES COMBINED  
 OCT22-SEP23



**VARIATIONS IN IMPACT ALLOCATION BETWEEN**  
 CHARITY INDUSTRY VS ALL INDUSTRIES COMBINED  
 OCT22-SEP23

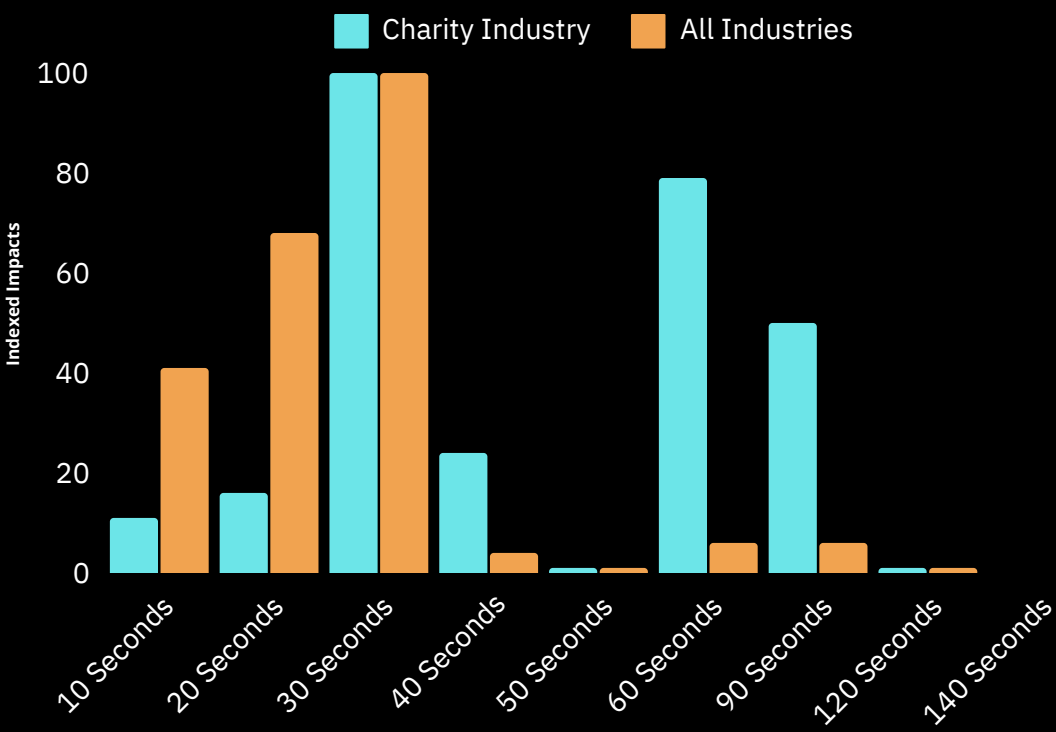


Source: DEN

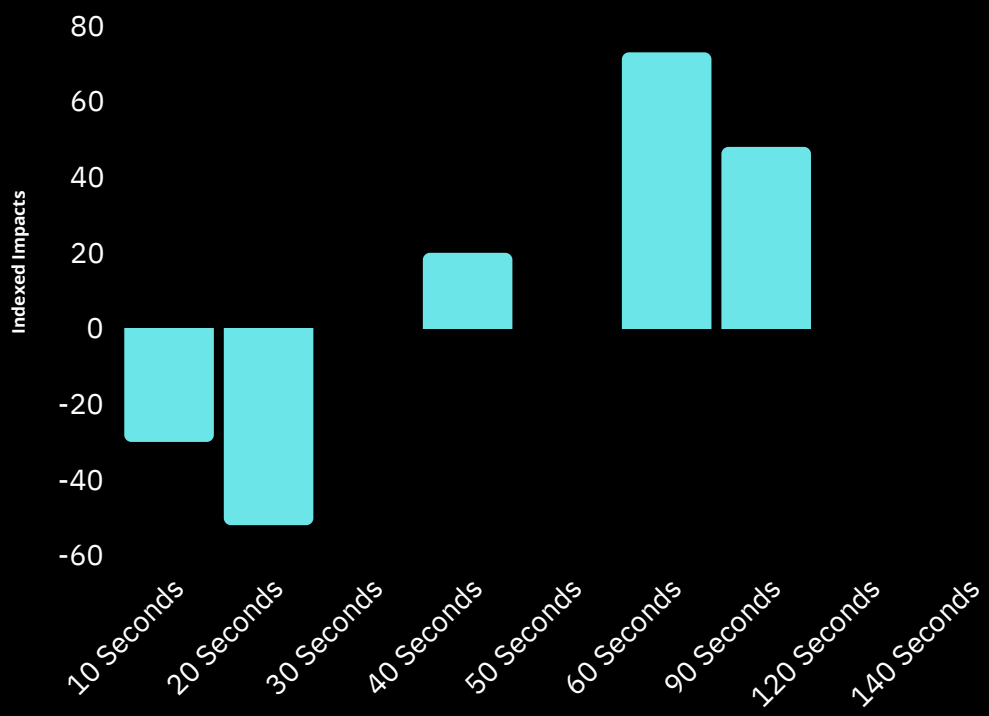
# The Sector's Approach to TV Spot Length

For 60 seconds, they invest **73 points more than the other sectors combined**, and for 90 seconds, they invest **48 points**. The Industry doesn't seem to be drawn to the **10 and 20 second spots**. Charity brands have to convey an emotive message that takes time. Longer ads effectively "*anchor*" advertising in memory and can improve image recall.

**TOTAL TV IMPACTS ALLOCATED BY SPOT LENGTH**  
 CHARITY INDUSTRY VS ALL INDUSTRIES COMBINED  
 OCT22-SEP23



**VARIATIONS IN IMPACT ALLOCATION**  
 CHARITY INDUSTRY VS ALL INDUSTRIES COMBINED  
 OCT22-SEP23



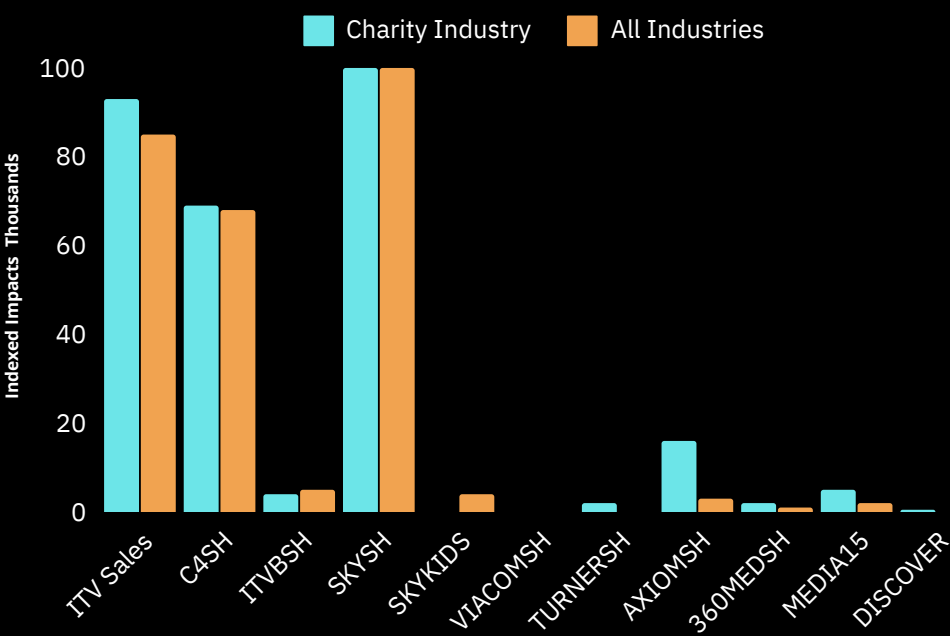
Source: DEN



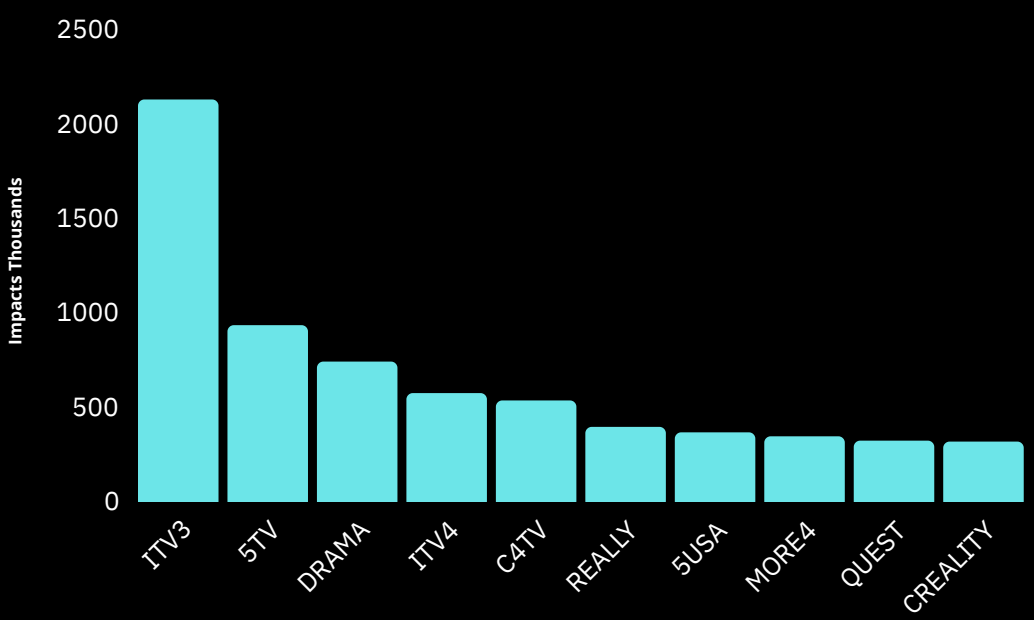
# Alignment with TV Sales House Impacts: Following Industry Trends

The channel with the most "impacts" allotted is **ITV3**, followed by **Drama** and **5TV**.

**TOTAL TV IMPACTS ALLOCATED BY SALES HOUSE**  
CHARITY INDUSTRY VS ALL INDUSTRIES COMBINED  
OCT22-SEP23



**VARIATIONS IN IMPACT ALLOCATION**  
CHARITY INDUSTRY VS ALL INDUSTRIES COMBINED  
OCT22-SEP23



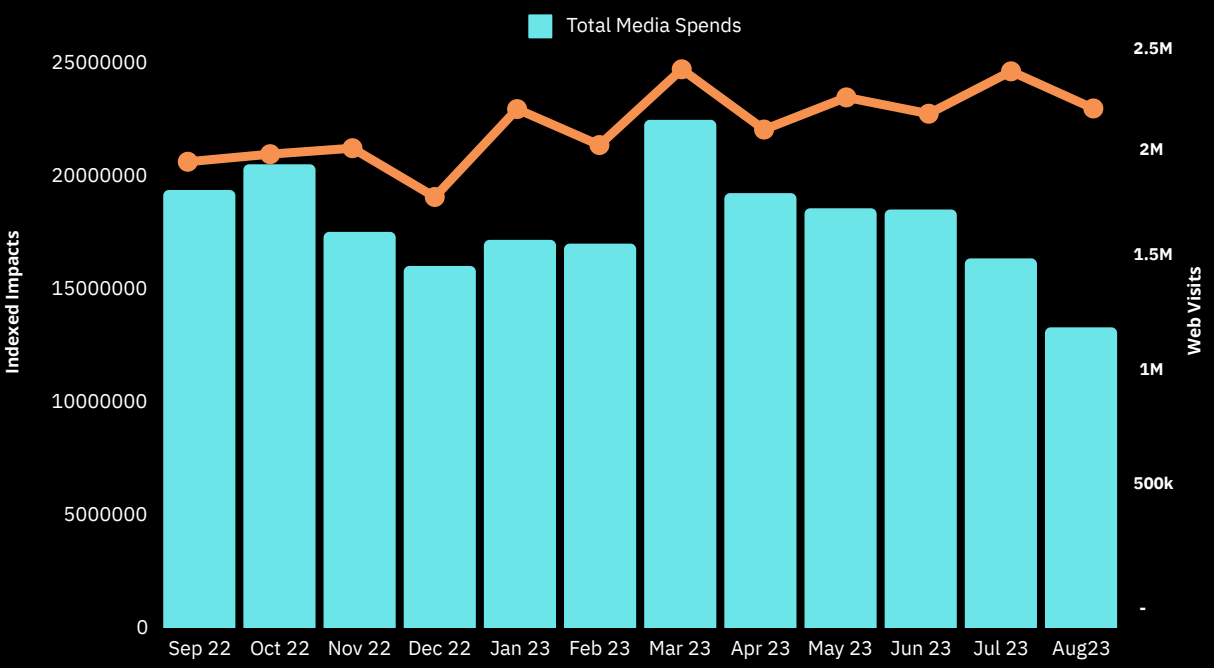
Source: DEN

£10M+ AD SPEND

# Trends in Advertising Budgets of Charities Spending Over £10m

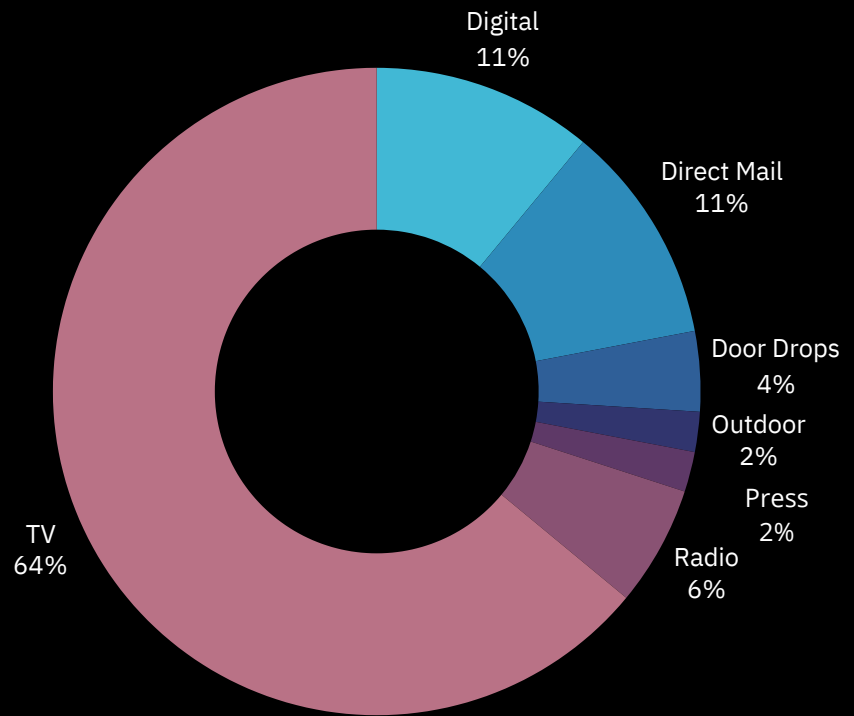
Charities spending over £10m tend to be advertising year-round, with **more than 60% of ad spend allocated to television**. In contrast from the rest of the sector, this group **invests less during Q4** which is typically the industry's favoured quarter to advertise in.

**TOTAL TV IMPACTS ALLOCATED BY SALES HOUSE**  
CHARITY INDUSTRY VS ALL INDUSTRIES COMBINED  
OCT22-SEP23



Source: Nielsen/Similarweb

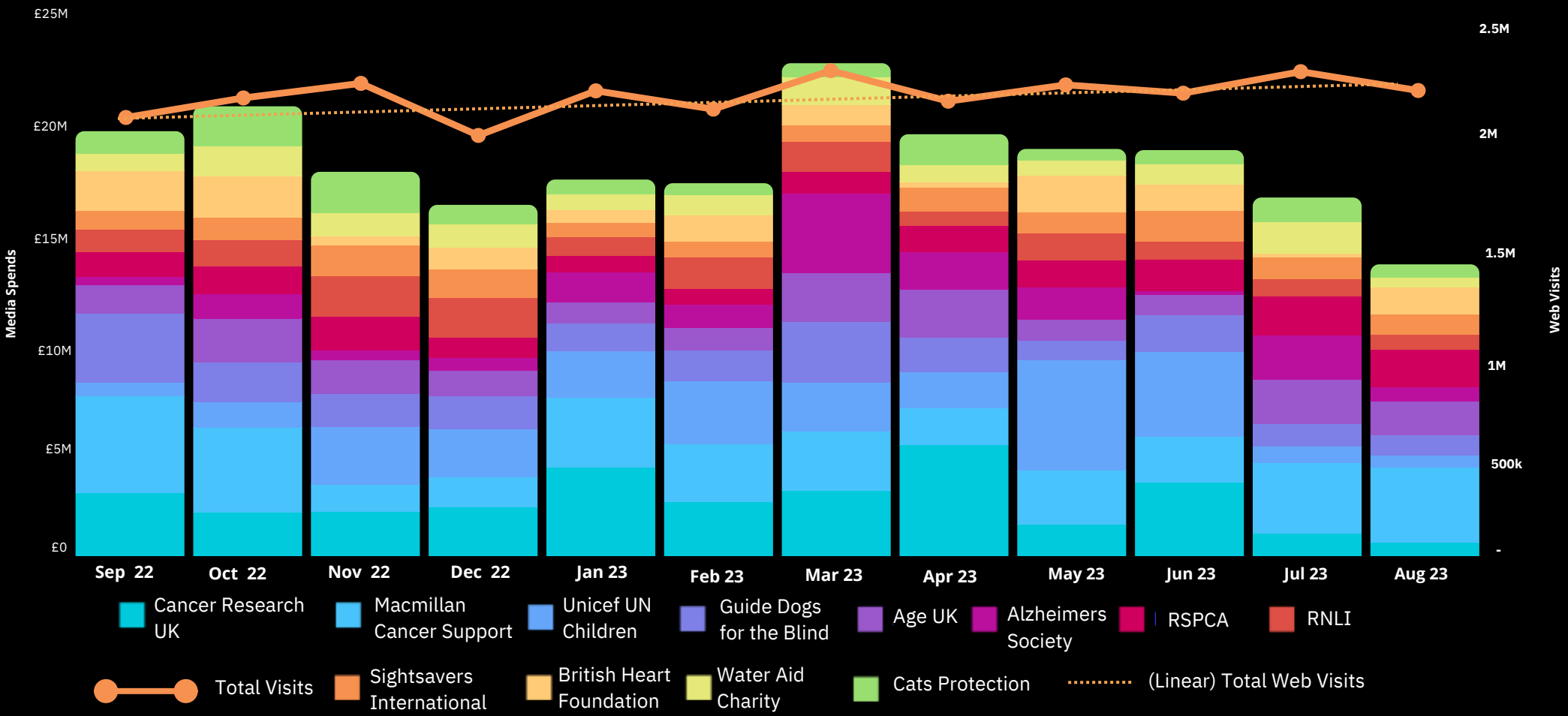
**VARIATIONS IN IMPACT ALLOCATION**  
CHARITY INDUSTRY VS ALL INDUSTRIES COMBINED  
OCT22-SEP23



£10M+ AD SPEND

# The major funders of this spend group are UNICEF, Macmillan, and Cancer Research

The month with the **highest investment amount** also tends to have the **highest value of online visitors**. We see that several large investors do not dedicate large budgets throughout the summer months.



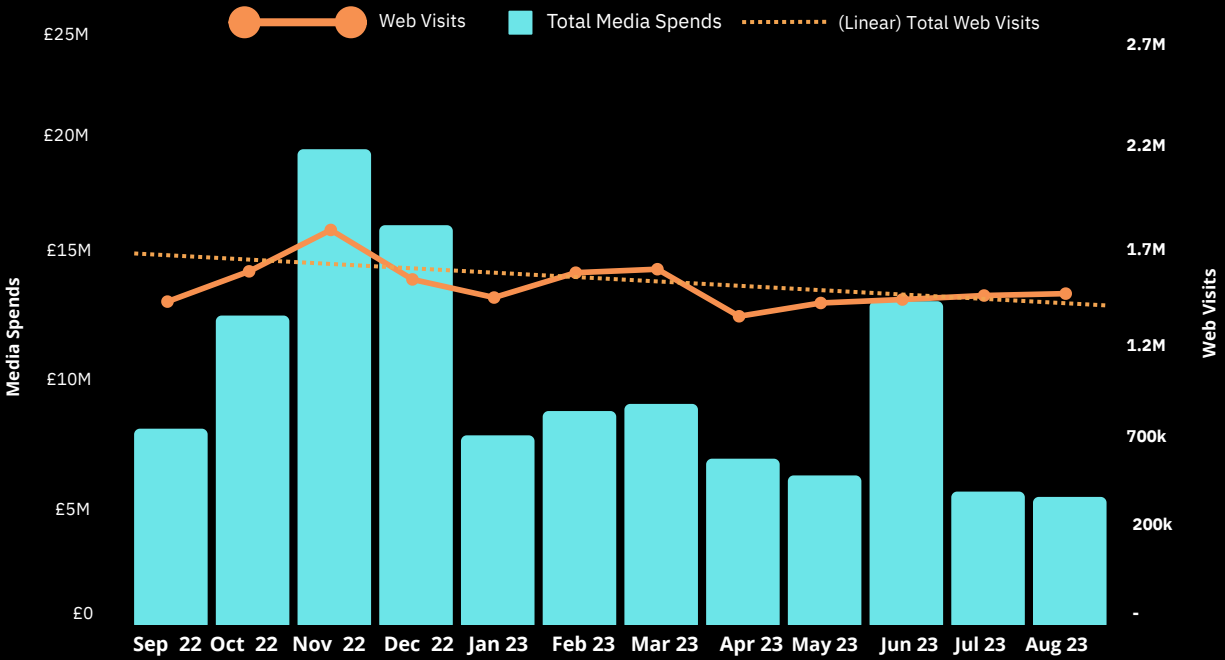
Source: Nielsen/Similarweb

£5M-10M AD SPEND

# Charities Spending Between £5m-£10m Favour Q4 Spend Allocation

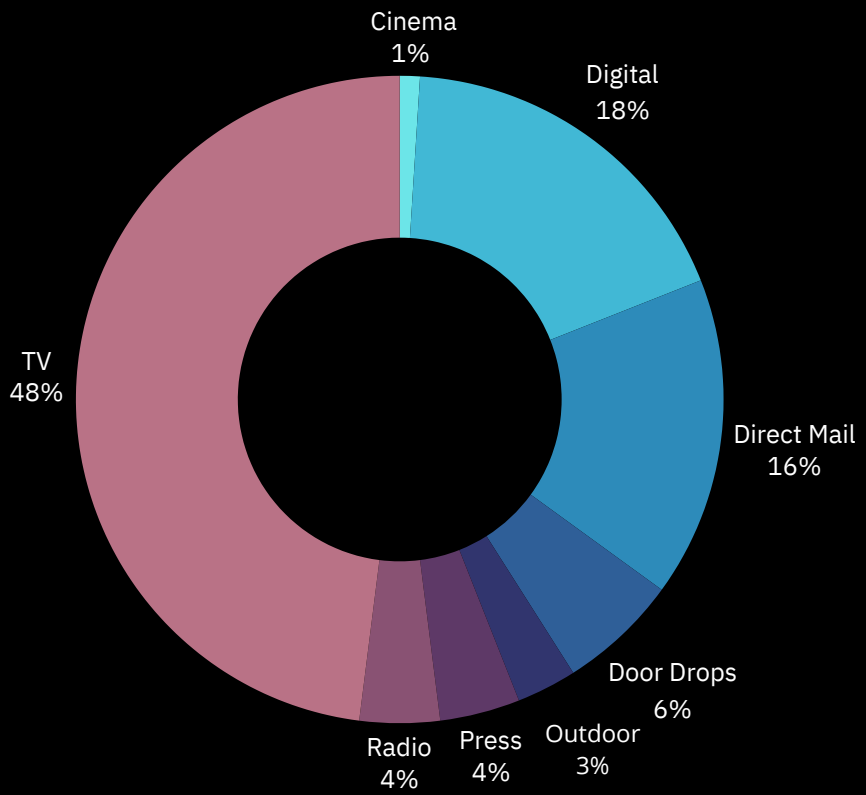
A decline in online traffic is likely caused by lower TV budgets (*less than 50%*) and less investment for the remainder of the year. Compared to the £10m+ ad spend group, digital and direct mail account for a **larger portion of the overall media spend**.

5M-10M CHARITIES SPENDING VS WEB VISITS  
SEPTEMBER 2022 - AUGUST 2023



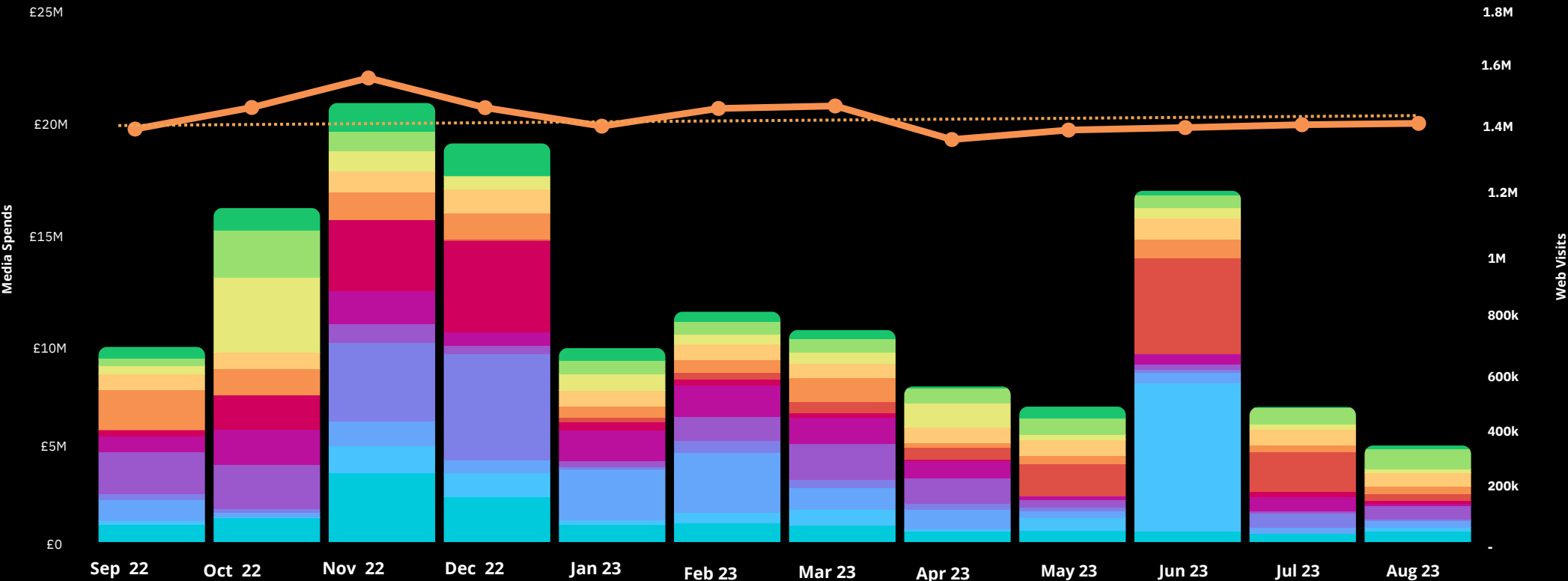
Source: Nielsen/Similarweb

VARIATIONS IN IMPACT ALLOCATION  
CHARITY INDUSTRY SEP22-AUG23



# Salvation Army, Crisis, Save the Children, and RNIB Drive Online Visits with Q4 Investments

The majority of the investment was bulked around Q4 22, with a large investment peak in June 23 mainly driven by the NSPCC and the Oddballs Foundation.



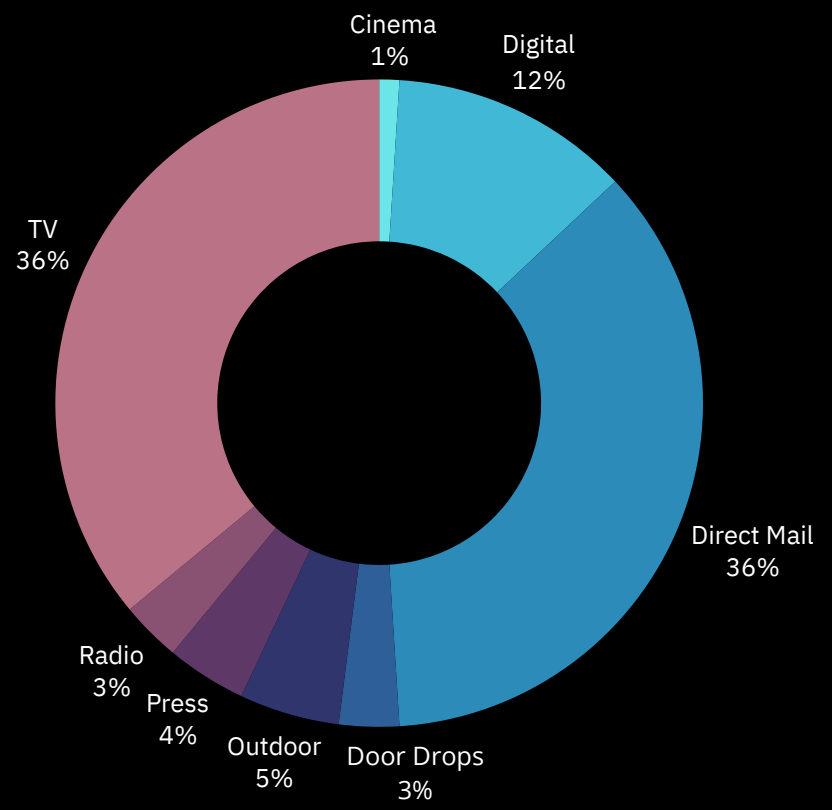
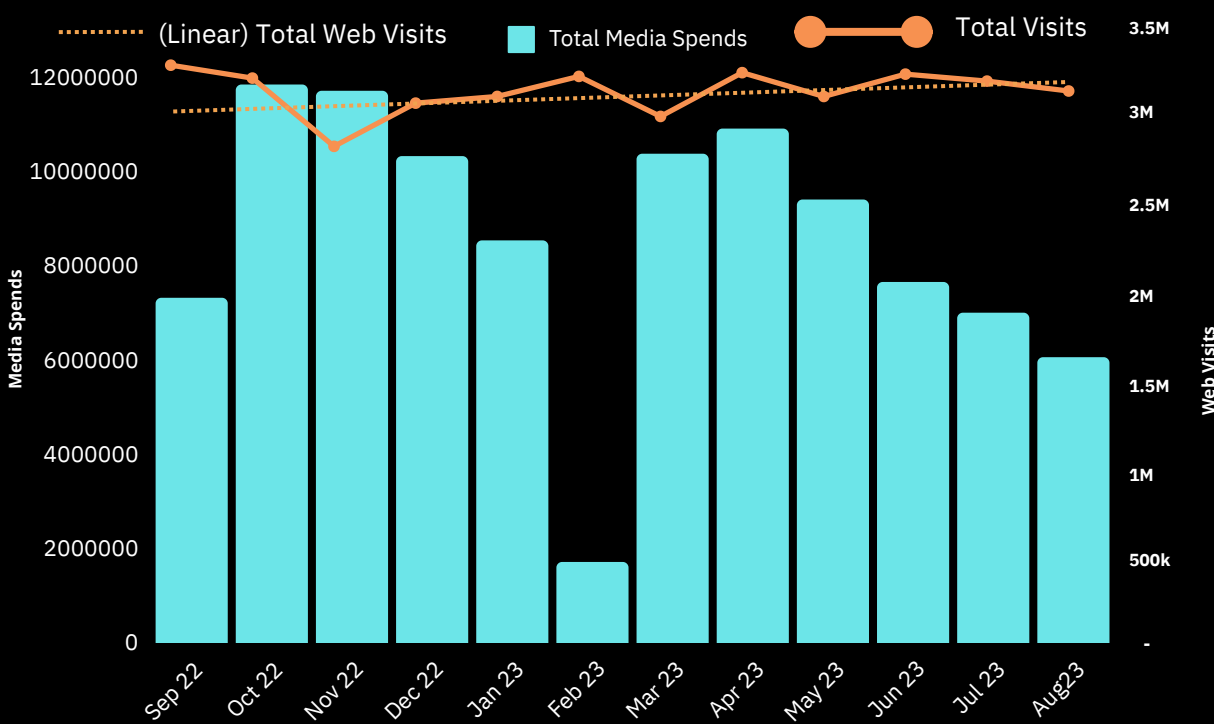
Source: Nielsen/Similarweb

£1M-5M+ AD SPEND

# Comparing Investment Stability: Spending Trends Among Groups with Different Budget Ranges

When we compare the investments made by this charity ad spend cohort with those of the preceding group, we find that the former is more constant throughout the year, with some fluctuations in the summer months.

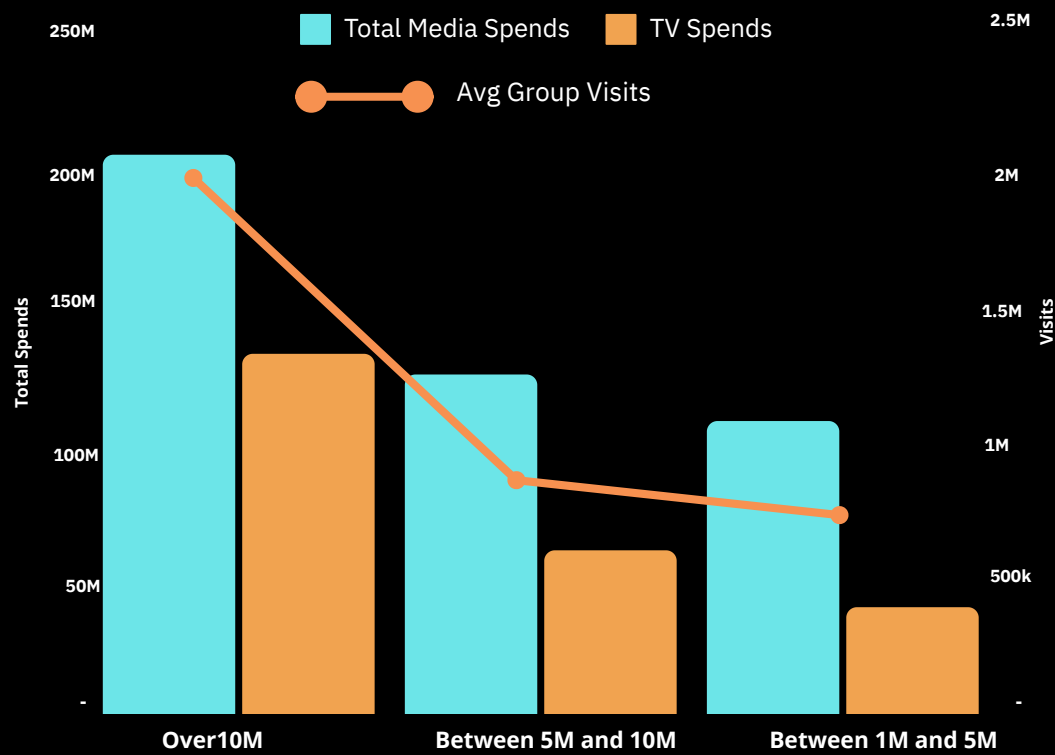
Web visits appear to be on a far more constant and rising trajectory, whilst TV investment declines slightly to less than 40%, direct mail now accounts for the same amount as TV in the total budget.



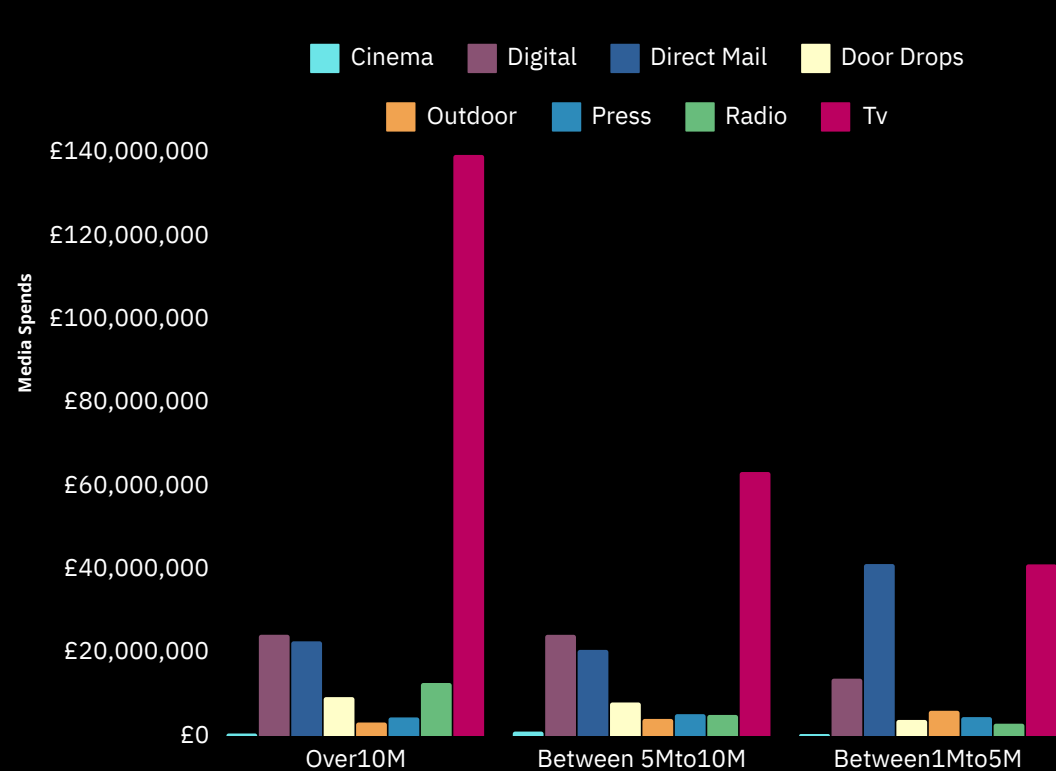
Source: Nielsen/Similarweb

# Unlocking Online Engagement: The Importance of Increased Investment in Media Campaigns

The top spenders concentrate their strategies on TV, while the medium spenders continue to concentrate on TV but begin to **rely on Direct Mail and digital for a significant portion of overall spending**. Direct Mail is just as important to small spenders as television.



Source: Nielsen/Similarweb



# 4 Missed Opportunities

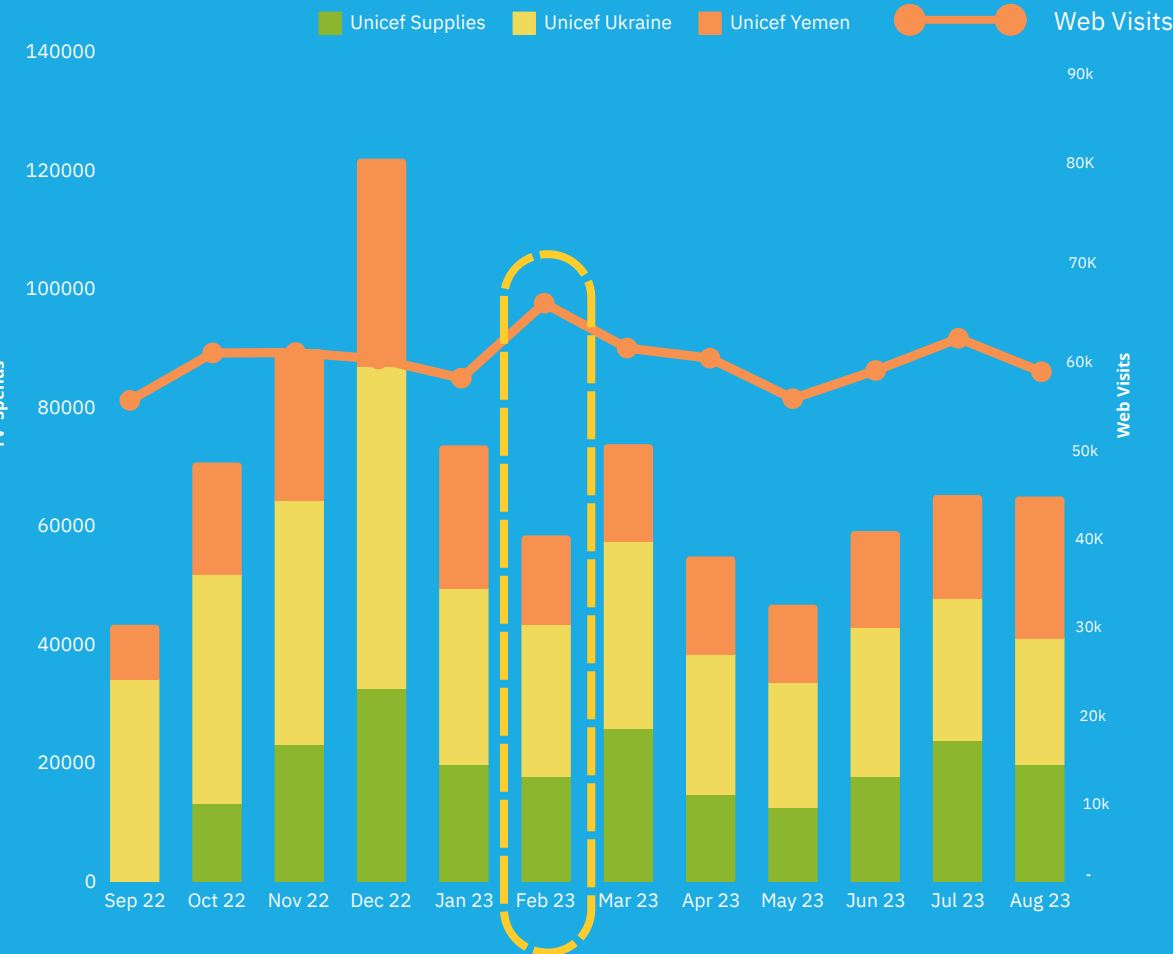
- Unicef: TV ads and online searches
- Wateraid: Missing out on donations from over 55s
- Crisis vs Centrepont: Post-Q4 vaccum
- Royal British Legion: Enhancing year-round impact



# Exploring Unicef's TV Investment

## A Deep Dive into Three Distinct Television Commercials

Being a nimble business and quickly reacting to global issues to raise awareness has seen UNICEF grow it's donation. We found that the peak in visits is **caused by the Syria earthquake**.



The search term *syria earthquake* or *earthquake* has a combined traffic share of 3.39 - a catastrophe that truly touched people's hearts, prompting them to make donations via UNICEF.

Search Terms	Traffic Share	Traffic
Unicef Uk	6%	2392
Unicef rights of the child	1.39%	553
Syria Earthquake donate	1.29%	514
Unicef uk careers	1.13%	448
Earthquake	1.12%	445
Children rights based approach	0.99%	392
Syria earthquake aid uk	0.97%	384

Related to Feb 2023

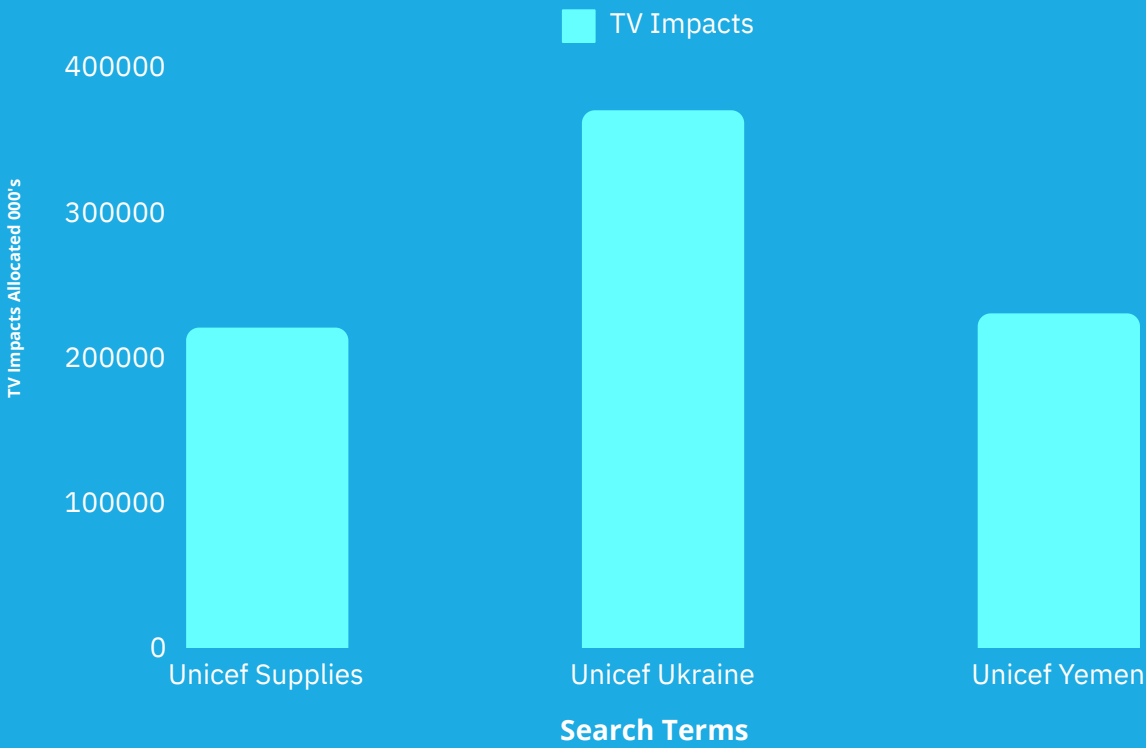
Source: Nielsen/Similarweb

# Optimising Advertising

## Utilising Suggested Search Terms and TV Impacts

The ad relating to the Yemen appeal appears to be working well. Despite not driving as many impacts as the Ukraine campaign, it ranks 9th in the search terms. The Ukraine appeal on the other hand, has the most TV Impacts, but just ranks 30th in the traffic share table. It is also crucial to note that, while providing the same number of impacts as the Yemen campaign, UNICEF Supplies does not even appear in the top 50 traffic share.

SEARCH TERMS SUGGEST BY UNICEF IN AD CAMPAIGNS  
SEP22-AUG23



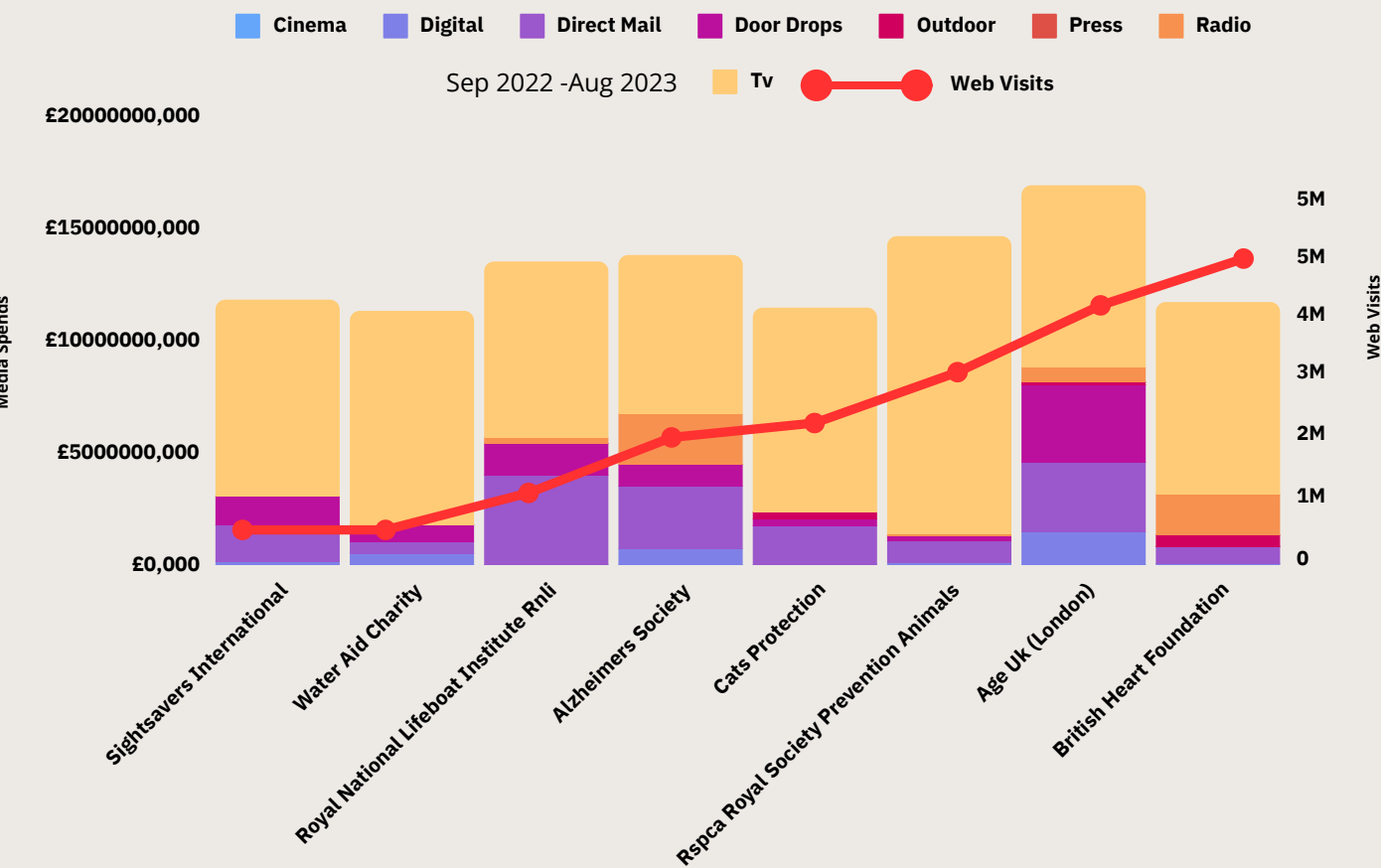
Source: DEN/Similarweb

Rank	Search Terms	Traffic Share	Traffic
1	Unicef	5.26%	20,723
2	Unicef UK	3.25%	12,783
6	Unicef rights of the child	0.84%	3,324
9	Unicef Yemen	0.49%	1,926
15	Soccer Aid	0.31%	1,207
17	Yemen Appeal	0.30%	1,182
22	Unicef Shop	0.28%	1,083
30	Unicef Ukraine Appeal	0.22%	867
33	Unicef Disability	0.20%	795
42	Unicef Ukraine Donation	0.19%	738
49	Earthquake	0.16%	633
50	Syria Earthquake Donate	0.16%	626

N.B Sourced via Keyword Traffic Share Similarweb  
Sep 2022 -Aug 2023

# WaterAid & Sightsavers perform poorly online despite spending the same as their competitors

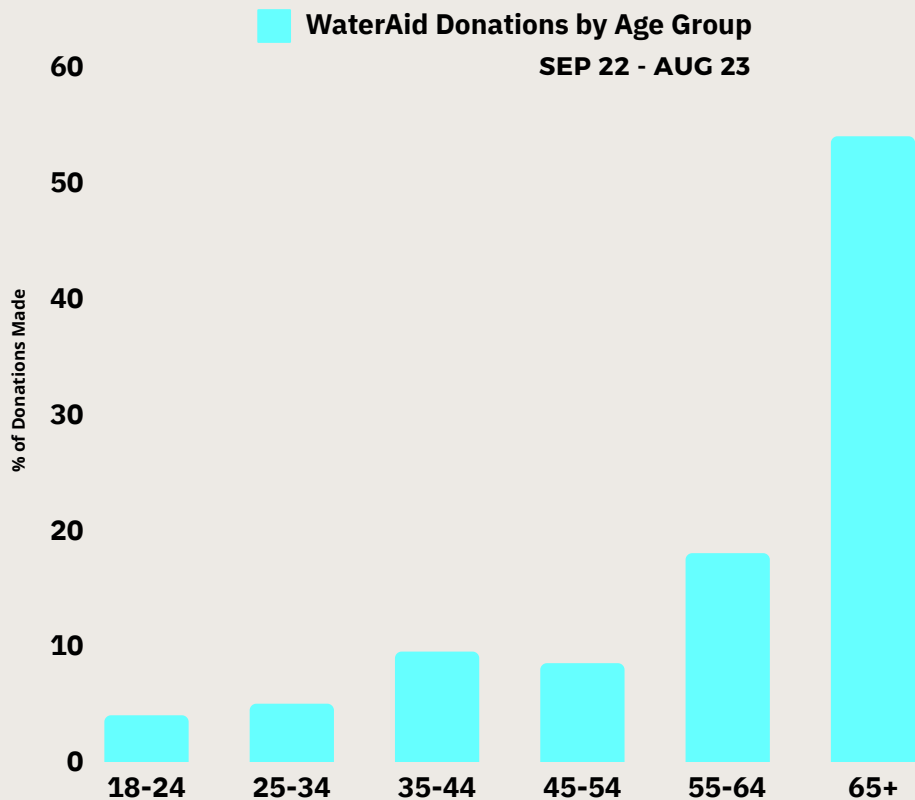
Despite the fact that these organisations also rely on phone numbers for donations, we believe website traffic should be considered equally important. The charity's website provides detailed information about its mission, programs, impact, and how individuals can get involved. Web visits allow potential supporters to access a wealth of information in their own time.



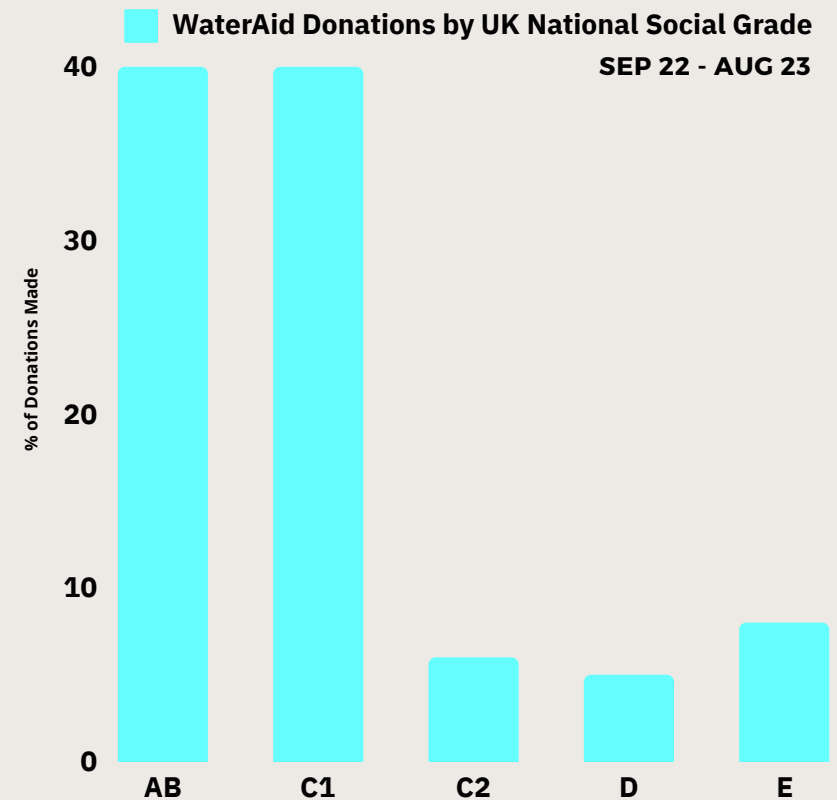
Charity organisations often run specific campaigns, events, or initiatives. The website serves as a hub for detailing these activities, including dates, locations, and ways for individuals to participate. Increased web visits enhance awareness of ongoing campaigns.

Source: Nielsen

# WaterAid's Target Audience comprises mostly of over 55s and AB-C1 adults

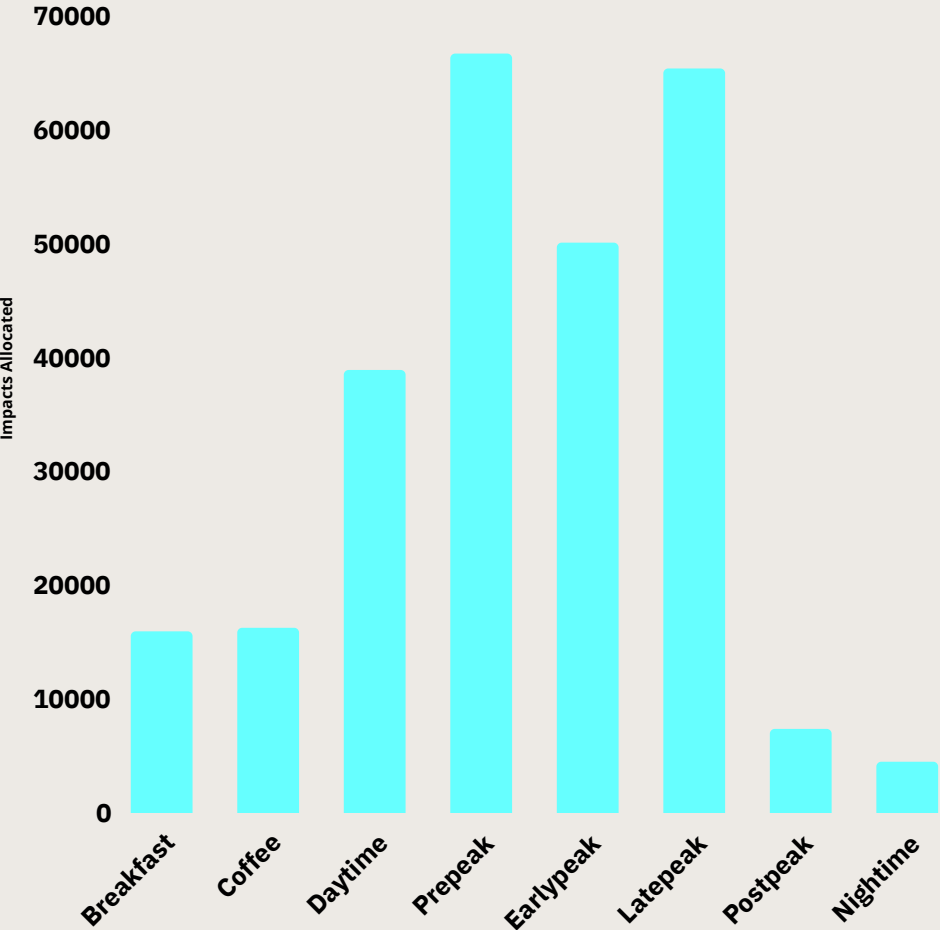


Source: Mediaplanner/TGI



# WaterAid is missing out daytime donations from the largest giving demographic

Around 70% of donations to wateraid are made by over 55s (TGI, 2024) - a segment that usually responds better to TV ads throughout the Daytime. **Yet, it appears that WaterAid allocates a higher ad budget during peak hours. Additionally, the AB segment, that contributes the most to donations (TGI, 2024), is not being reached effectively.**



Source: DEN/TGI

## Suggestions for increasing TV audience reach

**Daytime TV Advertising:** Since the 55+ demographic may be more active during daytime hours, consider advertising during these slots. Morning programming might be particularly effective in reaching this audience.

**Choose Appropriate TV Channels and Time Slots:** Select TV channels that cater to the preferences of the AB 55+ audience. Consider channels focusing on news, documentaries, and lifestyle programming.

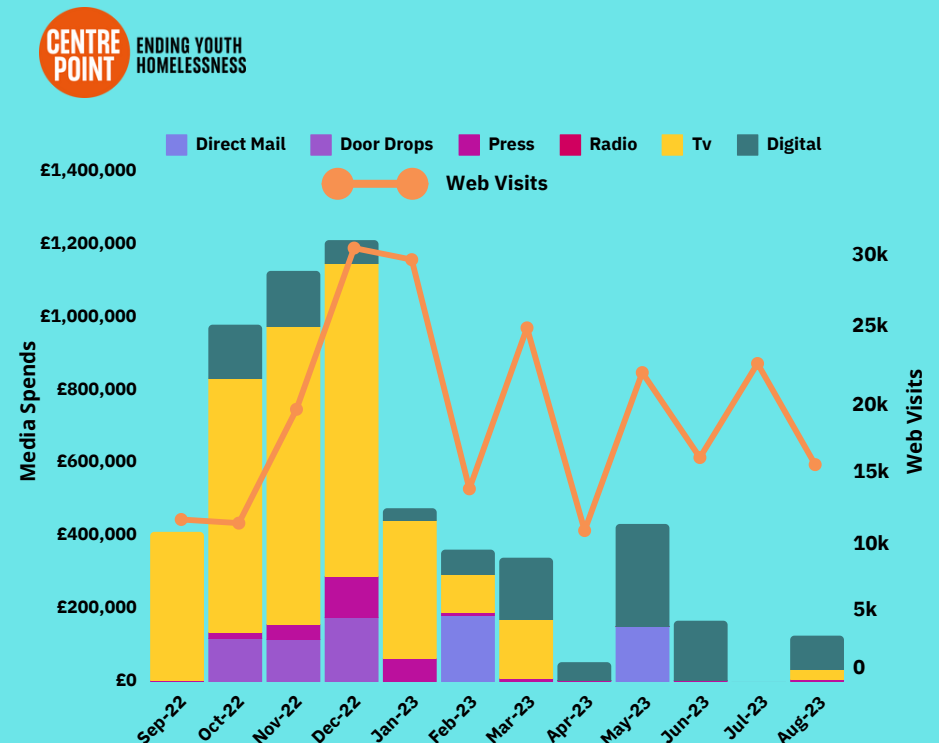
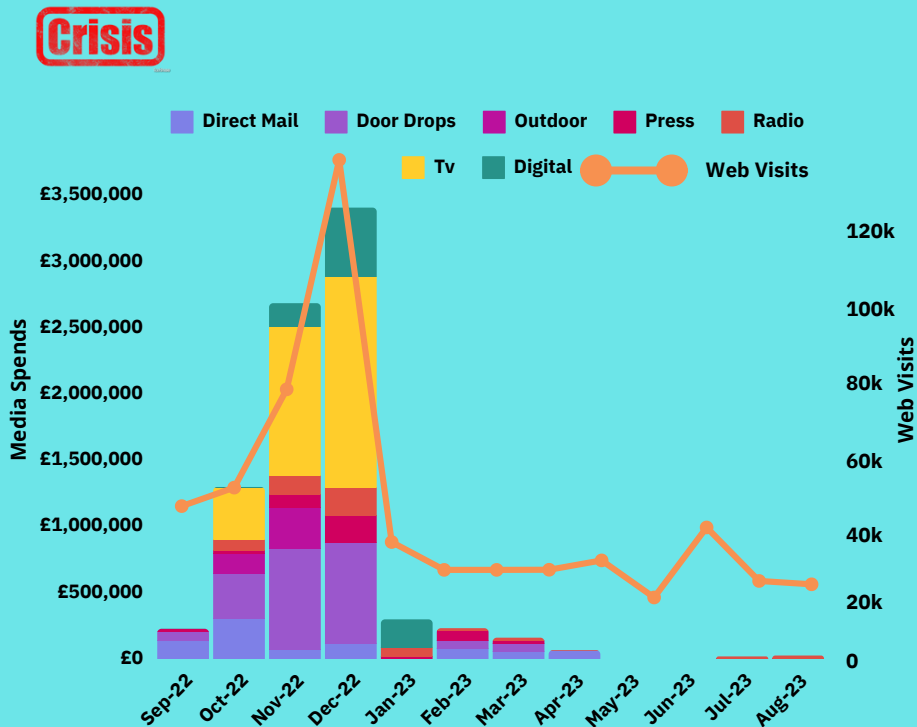
**Highlight Long-Term Impact:** Emphasise the long-term impact of charitable contributions. Assure the audience that their support will make a lasting difference and leave a positive legacy.

N.B everything under 120 indicates under reaching in BaseOne+Index column

Group	BaseOne+	BaseOne+ Profile	BaseOne+Index
AB	3.60	15.50	59.80
C1	6.60	28.50	91.60
C2	5.20	22.60	108.10
D	3.30	14.20	117.40
E	4.40	19.20	192.00

# Crisis and CenterPoint's multi-channel ad visits post-Christmas

With a cross-channel integration that combines TV, digital and direct mail, CenterPoint is able to provide a consistent level of website visits year-round. Crisis could also benefit from planning to increase its visibility to it's audience throughout the year to continue growing their donations.

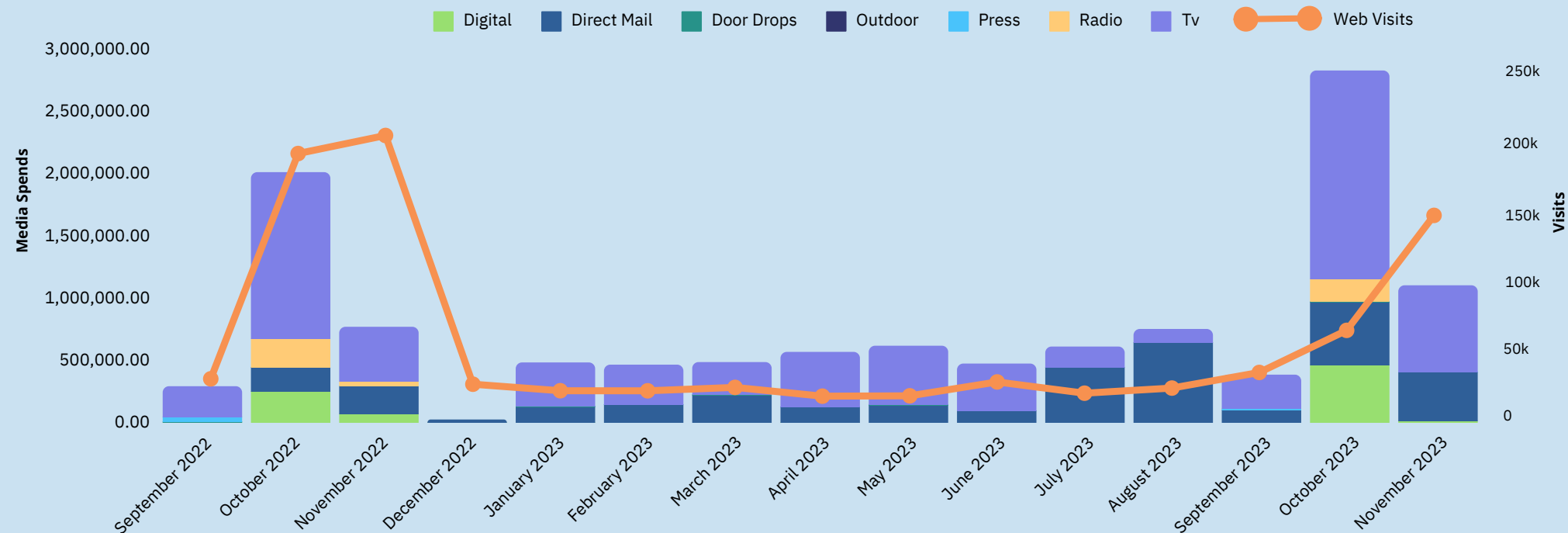


Source: Nielsen/Similarweb

# Extending Royal British Legion's Success During Remembrance Season

The challenge is to maintain interest and engagement beyond the Remembrance Day and Poppy Appeal months. To combat this, The Royal British Legion have launched two additional TV campaigns, one focusing on Legacy Donations and the other on the Poppy Lottery.

However, the brand does not appear to have a significant influence on increasing online traffic. **Presenting compelling stories to capture listeners—like the success stories of community projects, veterans, and current events—could greatly boost engagement all year long.**

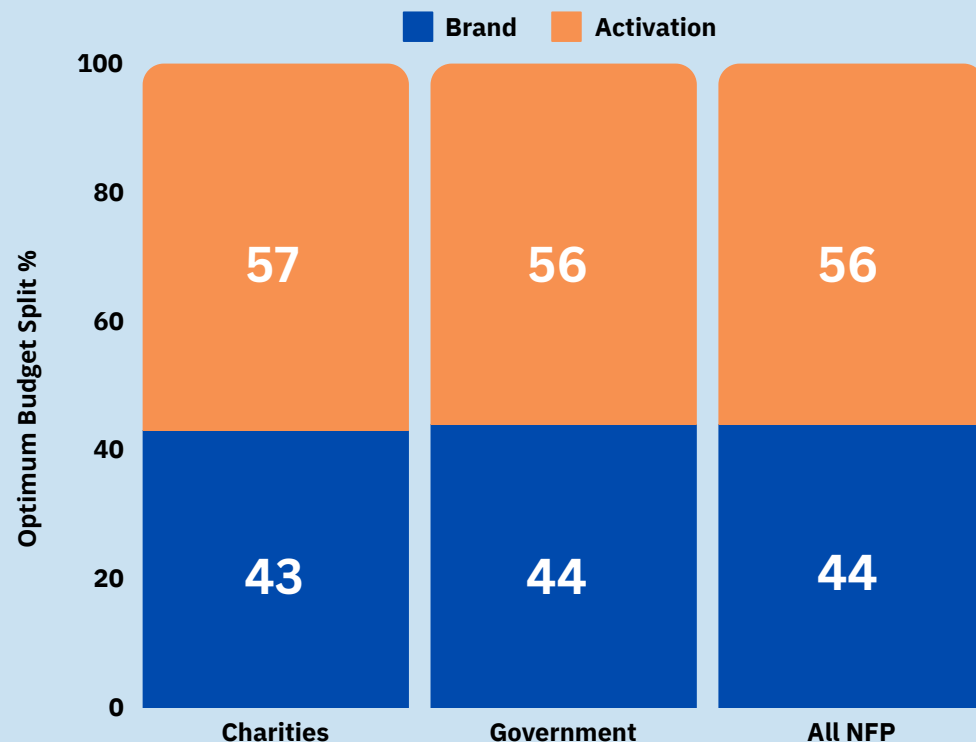


Source: Nielsen/Similarweb

# Striking a Balance

## Enhancing Royal British Legion's Year-Round Impact

Over the Remembrance Day period, Royal British Legion's activation strategy seems effective. To continue growing donations, finding the balance with a brand strategy might be advantageous to keep the focus up throughout the year.



The Royal British Legion can balance its TV advertising strategy by merging immediate action DRTV with long-term awareness campaigns.

This addresses short-term goals like web visits and donations alongside building enduring audience connections.

Continuous monitoring and analysis of performance data will be crucial for optimising overall impact.

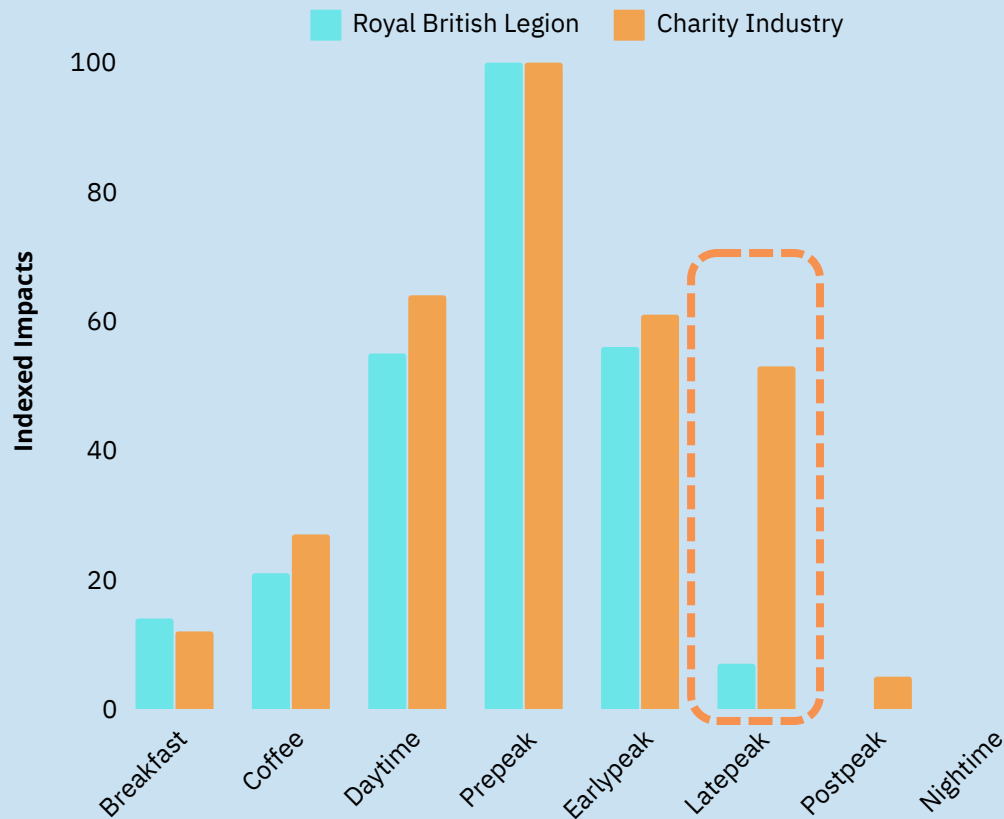
Source: IPA



# Seizing the Opportunity

## Optimising Poppy Lottery's TV Ad Placement

Poppy Lottery's TV ad is missing out on a high viewership opportunity by not airing during late peak hours.



Source: DEN

### Benefits of Investing on Late Peak slots

#### High Viewership

Peak time slots, typically in the evening, attract higher viewership. This can be advantageous for reaching a large audience and maximising exposure.

#### Engagement After Daily Activities

Older adults may engage more with TV during late peak hours after daily activities. They are more relaxed and receptive to messaging.

#### Prime Time Appeal

Peak time slots are associated with prime time programming, which may include popular shows and events. This can enhance the appeal and impact of the Poppy Lottery ad.

