



Chartered
Institute of
Fundraising



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LEARNINGS FROM 2021: SUPPORTER EXPERIENCE RESEARCH AND INSIGHTS



INTRODUCTION

The value of supporter research and insight has never been plainer than during the current global health crisis. Keeping supporters close, charities increased the emphasis on communication and relationship building. Mutual understanding has grown, and relationships strengthened as charities have strived to meet supporters' needs and ignite their passion for the cause. But none of this would have been possible without research and insight.

The Fundraising Convention Online 2021 Supporter Insight and Research Track, sponsored by Salesforce.org, focused on the value of both, exploring where to start, different approaches and their merits, and how to get it right across nine expert-led sessions.

ENHANCING THE SUPPORTER EXPERIENCE WITH INSIGHT



Research and insight are integral to delivering great fundraising, and completely integral to delivering great supporter experiences.”

Lesley Pindar
Head of Supporter Experience
British Red Cross

Today’s supporters want more. Time poor before the pandemic, during this particularly tough period in everyone’s lives, demands on their time, attention, and finances have only multiplied. It means their relationships with charities have to count and that, when charities’ succeed in engaging and inspiring supporters, those relationships take on a new depth. The supporter experience is paramount.

But great experiences and relationships are reliant on having a clear understanding of supporters, their interests, and preferences. In this, research and insight play a fundamental role, enabling charities to test, to listen, to learn, adapt and thrive.



Becoming part of one team, and making insights central to that team has been fundamental to our success. We have seen results improve significantly with better targeting and less spend. Volumes have been coming down as we understand our audience better, and income has increased, as well as ROI.”

Haylie Pallister
Insight Manager
Blind Veterans UK

Blind Veterans UK improves results with an in-house insight team

Blind Veterans UK built a two-person in-house insight team so it could handle more data itself. It’s led to an organisational shift in how the charity plans and executes campaigns, with the pair becoming an integral part of the fundraising team, involved from the inception of every appeal and supporter outreach programme. As a result, the charity’s retention campaigns from 2020/21 were their most successful in five years. Even their acquisition campaigns achieved stronger results than the two preceding years.

DIFFERENT AIMS, DIFFERENT TECHNIQUES



Qualitative research is amazing for getting under the skin of an audience. Once you know what frustrates them, what they wake up thinking about, and what gets them excited, they really come to life.”

Lucia Watsom-Bartlam
Senior Insight Manager
Save the Children

In the sector’s drive to better understand supporters and get stewardship right, charities are taking many different approaches, from quantitative and qualitative research, to mystery shopping, and applying behavioural science and neuroscience techniques. The first steps, before conducting any research of your own, are to clarify and prioritise goals, and explore which route will provide the insight you need.

The bedrock of much consumer insight, quantitative data provides the numbers and statistics, while qualitative research delivers the detail through the likes of interviews and focus groups. If the first tells you that 80% of people like your charity, the second can tell you why. It’s a key route for getting to know supporters, and the world they live in, even better.

Qualitative insight doesn’t have to come at great cost, so it can be accessible to any charity, regardless of budget or team size, although those factors will inevitably impact how you go about it. Supporter surveys, for example, can be conducted via email, focus groups via video call, and wider insights gained using readily accessible tools such as YouGov Direct and Google Trends. Free statistical calculators can also be found online to pull it all together. Third-party specialists can also help to provide an extra level of insight and guidance.

Such research can be as targeted as you want it to be. And, with many supporters keen to feel they’re making a difference beyond simply donating, involving them in research can be mutually beneficial, as Crisis discovered when developing a high-level giving club.





We wanted to offer something that would provide more insight into Crisis, build a stronger relationship and help them experience our work in a different way. The last thing we wanted was to put time and effort into what we thought they'd like, only for it to miss the mark. Involving supporters provided a massive learning curve, helping us make the proposition super-specific."

Bea Theakston
Head of Partnerships and
Philanthropy
Crisis

Supporter involvement helps Crisis build a high-level giving club

In developing its high-level giving club, Crisis brought in supporters to learn more about them, what they were looking for and how being part of a club might change the relationship. The first research phase saw Crisis talk to them about key priority areas to see what resonated most as a potential focus. The second further shaped the club by uncovering what supporters felt was important and how they wanted to engage, which included a desire for meaningful involvement beyond just donating.



INVALUABLE INSIGHTS INTO STEWARDSHIP PROGRAMMES



As much as we try to channel our empathetic selves and think about a meeting or communication from the donor's perspective, there's often a mismatch between our expectations and theirs. You can use role play to step into their shoes."

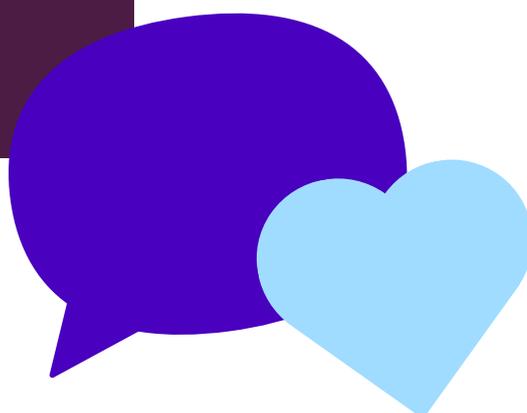
Ilana Jackman

Coach & Consultant

Ilana Jackman Fundraising
Consultancy

Roleplay too can provide a highly accessible route to gaining insight. In one immersive conference session, fundraisers adopted the role of a major donor and listened to an experienced fundraiser's pitch. Participants said it brought to life how donors felt and the experience and knowledge they can bring to conversations.

Mystery shopper programmes take this approach a step further, providing invaluable data on stewardship programmes from a donor's perspective. Non-profits like MSF UK use such programmes to gather insight on everything from how easy supporters find it to make a donation or an enquiry, through to what they think of communications, and their overall satisfaction.





Our tracker report gives us regular feedback, highlighting areas to improve but also providing positive feedback confirming that our communications approach to supporters works; that we're on that right track with the voice of MSF, our letters, and the stories from our field staff. It's really given us an objective look at our fundraising programme."

Louise Greysmith
Fundraising Operations Manager
Medecins Sans Frontieres UK

MSF UK & mystery shopping

MSF UK uses THINK Consulting Solution's Stewardship Tracker mystery shopping programme to drive meaningful change in their stewardship operations. The feedback gained has enabled MSF UK to improve various areas of the supporter journey, from revamping its Direct Debit cancellation letter and legacy enquiry response to improve engagement to ensuring a more consistent experience for supporters, regardless of their donation route.

SEEKING OUT BEHAVIOURAL INSIGHTS



Then there's behavioural science. This approach offers a different kind of lens to view supporters through. Moving away from those traditional demographics of age, gender, job role, and location, it helps charities focus on the individual by looking instead at how people act and react. Armed with this insight, communication and stewardship programmes can be adapted to suit different supporters' values and preferences, helping to build more fulfilling and longer-term relationships.



Once you've identified the primary energy colour someone is using, you can adapt communications to be more in tune. It reduces unconscious bias because you're not just treating them in a certain way because of the details you're given on them, but waiting until you can see what sort of personality profile they might have."

Oliver Hiscoe
Associate Director of Income
Generation
Willen Hospice

Improving supporter journeys with behavioural science

Sharpstone Skinner helps fundraisers improve their organisation's supporter journeys with its four-colour Insights Discovery Model. This enables them to recognise and respond to supporters based on their energy and decision-making traits rather than traditional demographic profiling.

Under the model, people with Fiery Red as their dominant colour energy for example tend to be rational, fast decision makers meaning succinct results-focused communications are most effective.

Earth Greens however are steady planners, so communications fare best when they're not pushed for quick decisions.

LEVERAGING PSYCHOLOGY AND NEUROSCIENCE



‘Traditional’ and more problematic fundraising imagery relies on creating a feeling of discomfort for donors, which they can alleviate by stepping in to help. If an organisation simply dilutes this emotion by using more neutral and rational imagery and language, it’s no wonder some are not seeing the same results. Finding the answer comes down to psychology and to building a programme built on other strong motivators to action, without relying on sadness or pity.”

Lizi Zipser
Director
Global Strategy & Insights
Blue State

Psychology and neuroscience can tell us a great deal about what might be going on in supporters’ minds and why they might react in a certain way.

Research conducted by Blue State, for example, showed anomalies in how people felt about images used by charities, versus what promoted them to give.

The study found that while people recognised stereotypical and ‘white saviour’ type images as undignified, disrespectful and unrealistic, 67% said these images would still prompt them to donate. This presents a challenge for charities seeking to decolonise their fundraising. Neuroscience helps to explain why these images are so powerful.



EXPLORING EXISTING MARKET RESEARCH



The key is to be clear on what you want to know, but open about how you find that out. Whether it's finding papers that have already been written up, or talking to existing donors, or people with no relationship to your organisation, you won't know what you need until you know your knowledge gaps."

Erika Hall
Designer, Researcher and Author
Mule Design

While bespoke research will deliver valuable insight into your own supporter base, it's important not to forget to explore what data might be available already, and what you can glean from this. Broad market insights into consumer and supporter behaviour can often be found through pre-existing and third-party research.

When it's easy to make assumptions about what people might think or feel, or how they might behave, external research can provide that much-needed wider perspective on public attitudes.



BECOMING CONSCIOUSLY AWARE FOR REPRESENTATIVE RESEARCH



The first step for any researcher is deprogramming: checking your biases and unlearning everything from your ableism to your stereotyping. Including a shared responsibility agreement with every project also means everyone involved becomes responsible for the diversity and inclusion within it, putting this at its foundation.”

Momo Amjad
Senior Strategic Researcher
The Future Laboratory

Of course, to really build an accurate, representative picture of how people feel, and ensure all communications and stewardship are inclusive, it's critical to ensure that research is not only inclusive, but anti-racist too.

Achieving this means looking again at how it's conducted as well as who is involved in delivering it. And this requires more conscious awareness from individuals, teams, and organisations, from looking at their own biases, to the impact of wording used, and how they engage with different groups of people and make participating in research accessible.

However research is conducted and whatever form it takes, there's no doubt that clarity on goals is critical for gaining usable insight. But if it's really to make a difference to fundraising and supporter engagement, research also has to challenge assumptions and actively seek to be truly representative. Not only will this approach bring greater insight and better results, but it will build relationships of greater value for charity and supporter alike.

Key track takeaways

- Research and insight are integral to great fundraising and great supporter experiences
- Getting research right requires being clear on what you want to know, but open about how you find that out
- Small teams can still achieve big results using free and low-cost tools and techniques
- For an anti-racist and inclusive approach, charities must first rethink how research and supporter insight is conducted
- Behavioural science and neuroscience can help challenge traditional assumptions and stereotypes to build a more accurate picture of supporters

About the Chartered Institute of Fundraising

The Chartered Institute of Fundraising is the professional membership body for UK fundraising.

We champion our members' excellence in fundraising. We support fundraisers through professional development and education. We connect fundraisers across all sectors and skill sets to share and learn with each other. So that together we can best serve our causes and communities both now and in the future.

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In a world where digital-first is no longer a choice, our Nonprofit, Education and Philanthropy Clouds enable organizations to increase digital engagement, create a single source of truth, and generate actionable insights. Technology helps build resilience, maximize societal impact, and build a better world. Together, we can close the gap between the impact created today, and the potential for impact in the future.

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