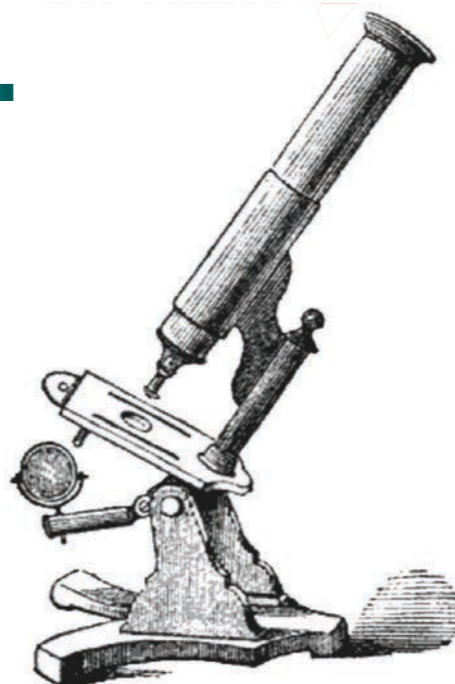Visceral
BUSINESS

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What the world thinks

THE 2013 SOCIAL CHARITY INDEX

THE TOP 100 MOST SOCIAL UK CHARITIES

October 2013

ABOUT THIS SOCIAL CHARITY 2013 STUDY

Welcome to the 2013 Social Charity Study, our third annual review of social and digital activity amongst the UK charity sector, and this year there have been some startling findings.

Whilst overall giving has gone down, for example, the average increase in social sharing among Just Giving's 'top 100 social sharing charities' is up 152%. Smaller charities are gaining an advantage here by having supporter communities with a stronger purpose and propensity to share. They have a greater level of follower authenticity* and a higher level of networked power (that's the relationship between revenue and their number of followers on social networks.)

Is this a tipping point for the charity industrial complex? It could well be. While follower levels have increased substantially, this is not being matched by how well charities are evolving to meet user-led needs in quite the same way, with only slight progress made over the last twelve months in terms of use of internal tools, HR and impact reporting.

Supporters want to know the impact their money is making, yet charities are not currently considering open data strategies in number, or providing details on how the money spent links specifically to the difference being made. Executive pay and transparency is one part of the picture here, the other is how large organisations connect with supporters, create the human touch, tell their story, make a difference.

Stories are being carried by more platforms using infographics, video, imagery and via hashtags.

They are shared, as in PompeyLive at The British Museum, by involving users in the experience, as something of a new approach in philanthropy, built around connected moments and communities.

The challenge for charities is how to tell the story about their ambition to make the world or people's lives better in a compelling way and to develop a whole social brand perspective as the nature of organisation becomes more diffuse. There is, more than ever, a good argument to break away from the norm. Cultural challenges exist, including internal support so strategic use of social media can help turn likes into donations, for example. Data will be a key asset.

Coalitions, like IF and Time to Change, are coming together to pool resources and to unify ideas and causes, and these growing connections developing between charities and commercial partners are the new ways of achieving capability and reach. The landscape is changing, and in the face of these pressures it is upending business models and opportunities are beckoning.

We hope you enjoy reading this report. We're delighted to have been able to collaborate with JustGiving again this year and to have sponsorship too from Blackbaud.

We see this as a very interesting time for charities, with efficiencies and impact that can be created alongside social capital as well as costs saved. We can help charities make the most of this and combine data, people and communications skill to make a crucial difference.

Anne McCrossan, Managing Partner, Visceral Business.

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25 THINGS ABOUT SOCIAL CHARITIES IN 2013

1 According to our YouGov poll, 61% of people are either very or highly likely to give to charity over the next 6 months

2 But in 2013, the Social Charity Top100 income was 26% lower than in 2011 (down from £12.4bn to £9.1bn)

3 Over 11 million people now 'Like' the top 100 Social Charities on Facebook

4 The Tate has the highest number of Followers on Twitter on a single account with over 930,000

5 The charity with the highest Follower growth on LinkedIn in 2013 was Medecins Sans Frontieres

6 Size doesn't mean being shared. Only 11 of the Social Charity 100 are also in the top 100 for sharing on Facebook on JustGiving

7 This year's highest rising Social Charity in the Social 100 Index is VInspired, up 107 places from 2012

8 The Top 100 Social Charities now have over 19million Likes and Follows between them across Facebook, Twitter, LinkedIn & YouTube

9 Comic Relief is the No 1 charity on YouTube

10 The White Ribbon Alliance and Animal Aid lead the field for networked power in 2013

11 This year's No 1 in the Social Charity 100 Index is Save the Children (woo - congrats!)

12 With an increase of 482% in followers, the platform that's shown the most supporter growth since 2011 is LinkedIn.

13 The average number of Followers a Top 100 social charity has on Twitter is 75,000, up from 37,000 in 2012

14 The average number of likes a Top 100 social charity has on Facebook is 110,000, up from 71,000 in 2012

15 Google+ now accounts for 2.7m likes across the Social Charity 100

16 70% of charities we spoke to rated Facebook as the most effective social media platform (but 30% didn't)

17 The amount of people connected to Social Charity 100 charities on Twitter has increased by 298% since 2011

18 Charities believe giving platforms are more effective than their own websites (27% vs 24% rated most successful for giving)

19 As a percentage, more people on LinkedIn are likely to give to charity than people on any other platform

20 The social media manager only looks after social media activity in 22% of charities

21 Only 16% of charities are currently optimised for mobile

22 82% of charities now build user generated content and live feed activity into campaigns

23 Animal health and cancer charities are most successful on Facebook, for Environmental and Humanitarian charities it's LinkedIn

24 Only 4% of charities are currently pursuing an open data strategy

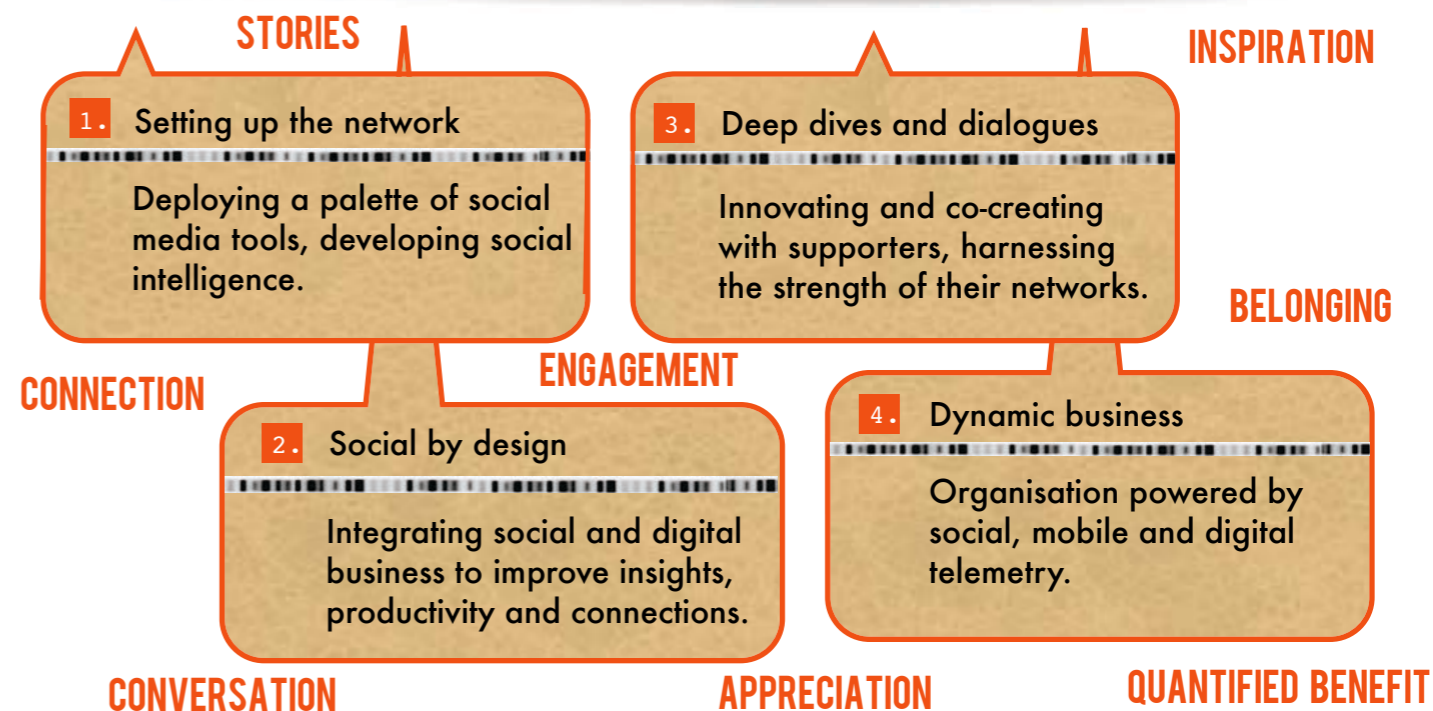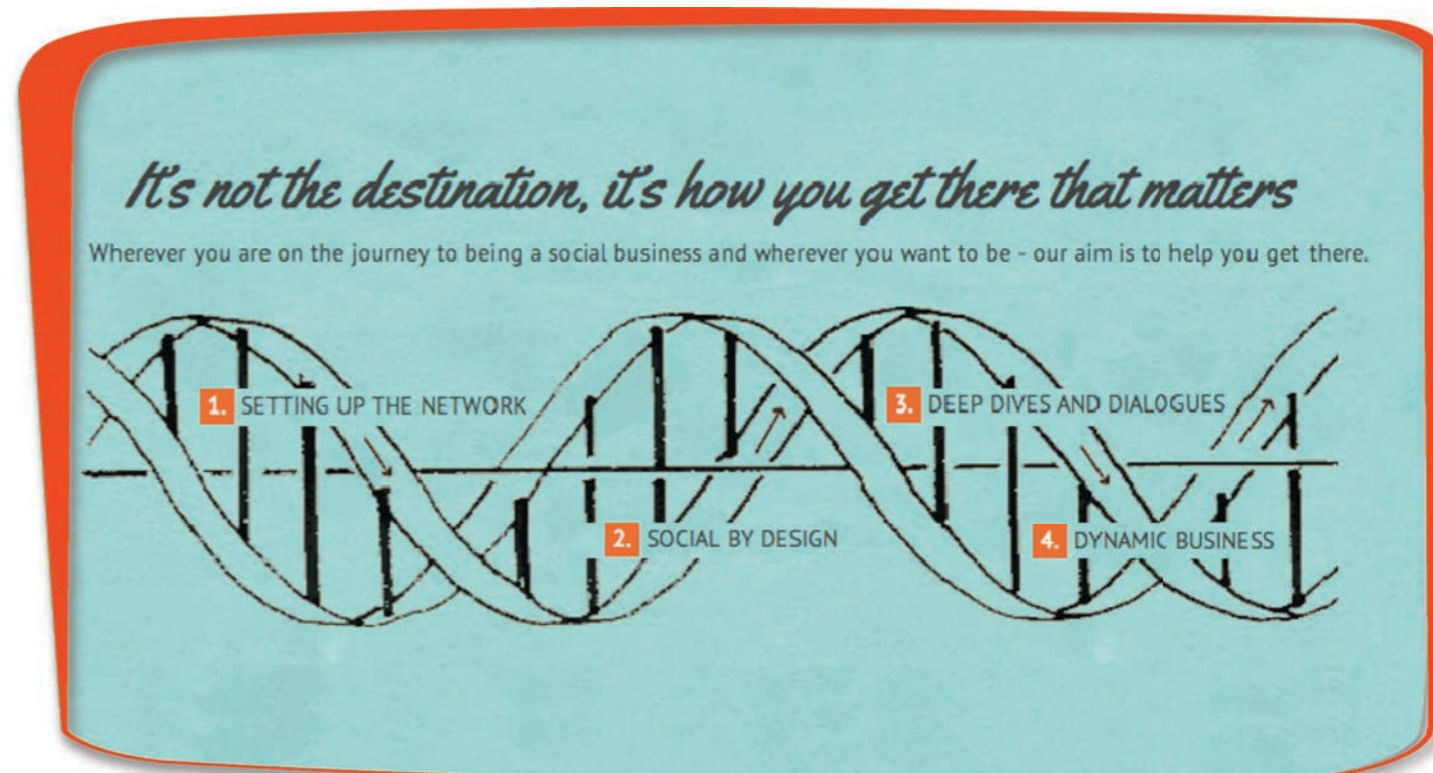**25** Only 27% of charities are using social media to reduce costs

THE JOURNEY TOWARDS NETWORKED ORGANISATION

Every charity's on a journey. Donations are being squeezed by economic pressures and data and digital technology open up insights about how people connect; the nature of content marketing and communications is changing beyond recognition.
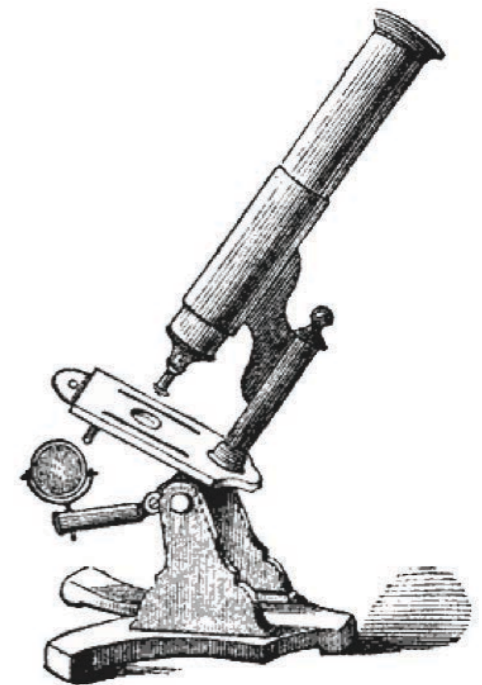
How charities do depends on how they adapt to these challenges. Over the course of the last year, we've seen online activity become more dispersed and causes become more about shared experiences. There's no map, but there is a direction of travel and room for innovation.

This is how we think digital and social media can make a difference.

It's not the destination, it's how you get there that matters

Wherever you are on the journey to being a social business and wherever you want to be – our aim is to help you get there.

1. SETTING UP THE NETWORK
2. SOCIAL BY DESIGN
3. DEEP DIVES AND DIALOGUES
4. DYNAMIC BUSINESS

A GENETIC CODE

1 NETWORKED Connected by digital

2 SEAMLESS Blurred boundaries, the web is us

3 OPEN Attention as a currency

4 COMPELLING Target moments and memorable experiences

5 PURPOSE BEYOND PROFIT Motivation based on mutual benefit

STORIES

INSPIRATION

1. Setting up the network
Deploying a palette of social media tools, developing social intelligence.

3. Deep dives and dialogues
Innovating and co-creating with supporters, harnessing the strength of their networks.

BELONGING

CONNECTION

ENGAGEMENT

2. Social by design
Integrating social and digital business to improve insights, productivity and connections.

4. Dynamic business
Organisation powered by social, mobile and digital telemetry.

CONVERSATION

APPRECIATION

QUANTIFIED BENEFIT

AN OVERVIEW OF THE SOCIAL CHARITY LANDSCAPE

THE DEVELOPING DIGITAL LANDSCAPE FOR CHARITIES

Two years ago, when we did our first study, we took our initial look at the charity sector from a social and digital perspective and the results were fascinating. Even then, when many charities had not fully embraced social media, it was clear that there was a great deal of activity already going on and insights that show how people connect to challenge many of the assumptions held within conventional marketing.

Today, looking at that picture two years on, we can see exactly how phenomenal and substantial the growth of social and digital media has become.

Levels of engagement far outstrip any to have been had by other communications medium over the last 30 or 40 years. The average rate of growth in terms of user take-up across the four main platforms averages at around 350%. That is staggering.

Within the charity sector as a whole, different subsets have developed aptitudes in different ways. This is not just about everyone being on Facebook and Twitter. For each charity sub-sector, some platforms work better than others. Cultural charities do exceptionally well on YouTube for channel subscriptions, perhaps not surprisingly.

Equally important is the activity that goes on behind the scenes of the media presence itself. Social network analysis can be a way of deepening engagement with fewer supporters, for example. For smaller charities, being able to demonstrate end to end value without the cumbersome apparatus of large process-driven organisation can make being nimble a decidedly 2.0 advantage.

Financial pressure has driven some charities to be cautious.

Looking at the inter-relationship between revenue, brand profile and social leadership we are seeing this year fewer charities able to gain an advantage via brand awareness alone.

This is perhaps because raising above-the-line awareness is expensive to do, or because now what matters is the strength of content, and who in one's address book is sharing it, rather than the brand itself.
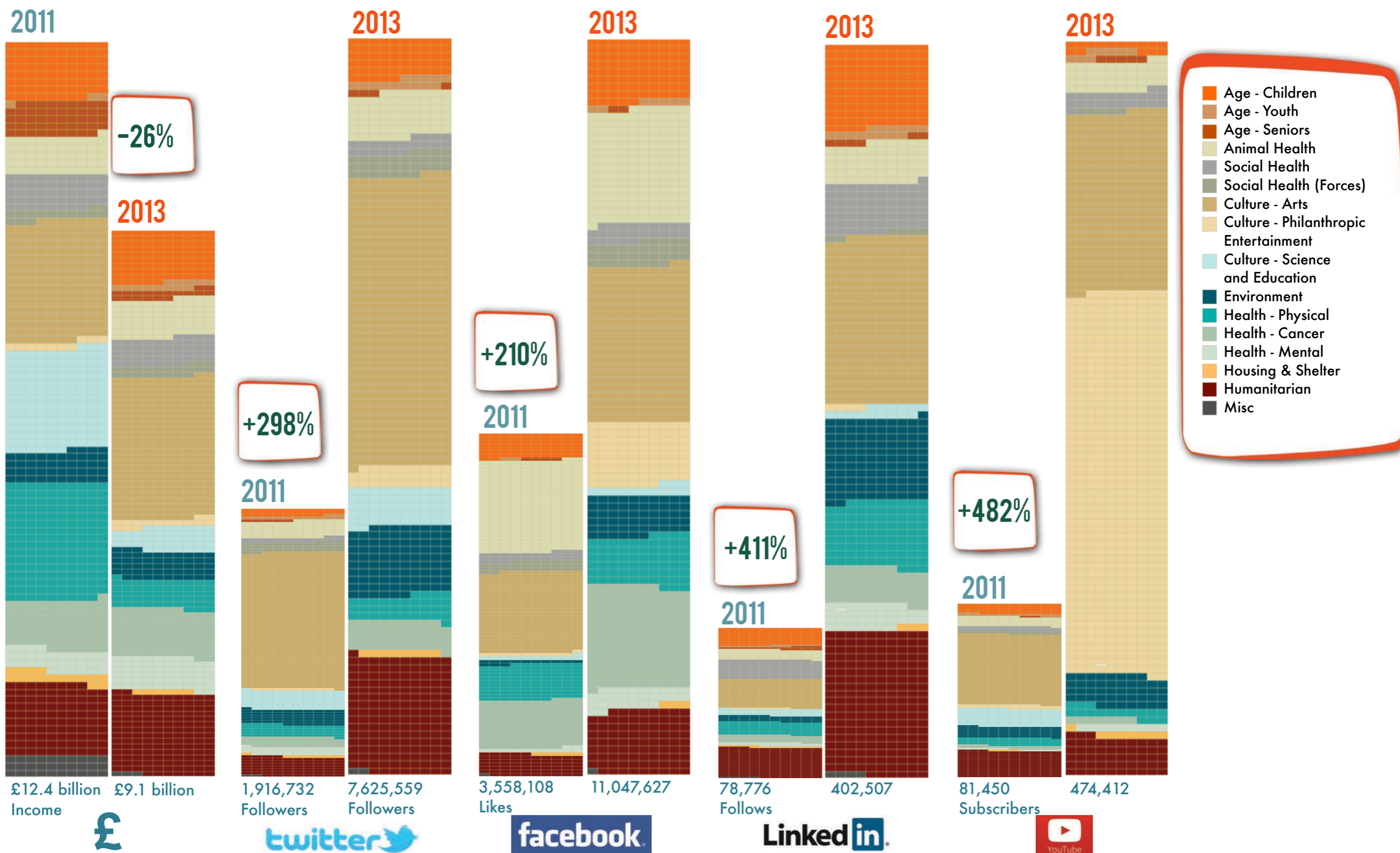
That said, there are a plethora of charities out there, and there are big advantages that can come from creative communication. A signature style is still a great advantage, and looking at the websites of over 300 charities, as we have over the last few months, they are places that need to convey the identity and the background of an organisation to make a memorable impression.

Small or large, charities will develop this networked power by building points of cultural difference online - graphic palettes, testimonials, behaviours, stories and user interactivity, in original ways.

This is particularly important as the relationship between revenue and social support becomes more developed and established.

We've seen the emergence of some strong digital cultures and communities across social networks and platforms over the last two years. Beyond social media, social business is now the focus that will enable charities to make the most of that opportunity, and convert it.

THE CHANGING RELATIONSHIP BETWEEN ATTENTION AND INCOME FOR CHARITIES

Legend:
- Age - Children
- Age - Youth
- Age - Seniors
- Animal Health
- Social Health
- Social Health (Forces)
- Culture - Arts
- Culture - Philanthropic Entertainment
- Culture - Science and Education
- Environment
- Health - Physical
- Health - Cancer
- Health - Mental
- Housing & Shelter
- Humanitarian
- Misc

£ Income
- 2011: £12.4 billion Income
- 2013: £9.1 billion
- −26%

twitter
- 2011: 1,916,732 Followers
- 2013: 7,625,559 Followers
- +298%

facebook
- 2011: 3,558,108 Likes
- 2013: 11,047,627
- +210%

LinkedIn
- 2011: 78,776 Follows
- 2013: 402,507
- +411%

YouTube
- 2011: 81,450 Subscribers
- 2013: 474,412
- +482%

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MAPPING MONEY, BRAND STRENGTH AND SOCIAL LEADERSHIP

In our 2011 report, we took a snapshot to map out the relationship between revenue, strength of brand profile and what was then the emergence of the social following, in order to see if we could identify different behavioural and cultural characteristics across charities.

As a result of the study, we found social leaders and social followers. We could see that some charities were able to blend brand profile with healthy levels of revenue and have the edge in terms of network connections, whilst others were well known but less well funded, or well funded but existing with lower social profiles.

Since then, there has been some interesting consolidation. Fewer charities are out on a limb when it comes to having a distinctive brand in terms of networked behaviour, which is not necessarily a good thing.

Other charities have learned and gained in identity, stature and profile, Dogs Trust is a good example. As the pack gets crowded, how can charities break away and make themselves able to develop supporter loyalty and commitment?

It's an important question, because this is what will ultimately drive the networked value of the supporter network, help generate revenue and build advocacy and word of mouth.

As charities try out various strategies, we can see it shifting their position. An increasingly real-time understanding of how cultural and networked behaviour can and will impact upon performance is perhaps the next frontier in how social digital activity and data can unlock new levels of organisational insight and effectiveness.
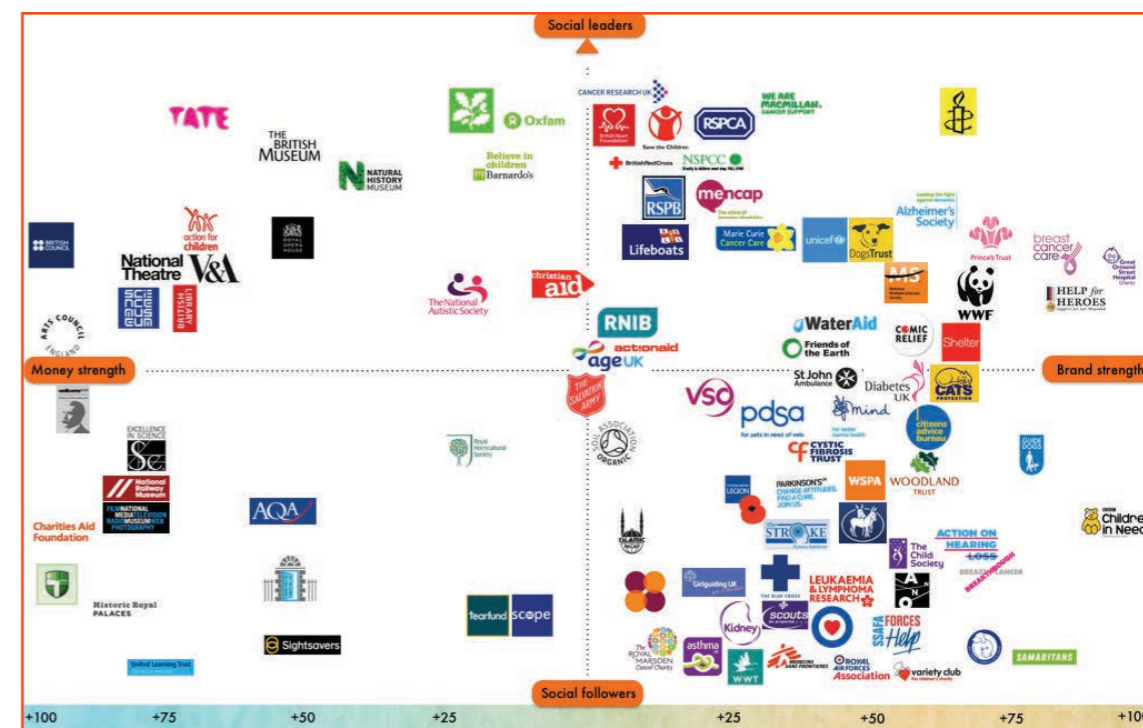
2013
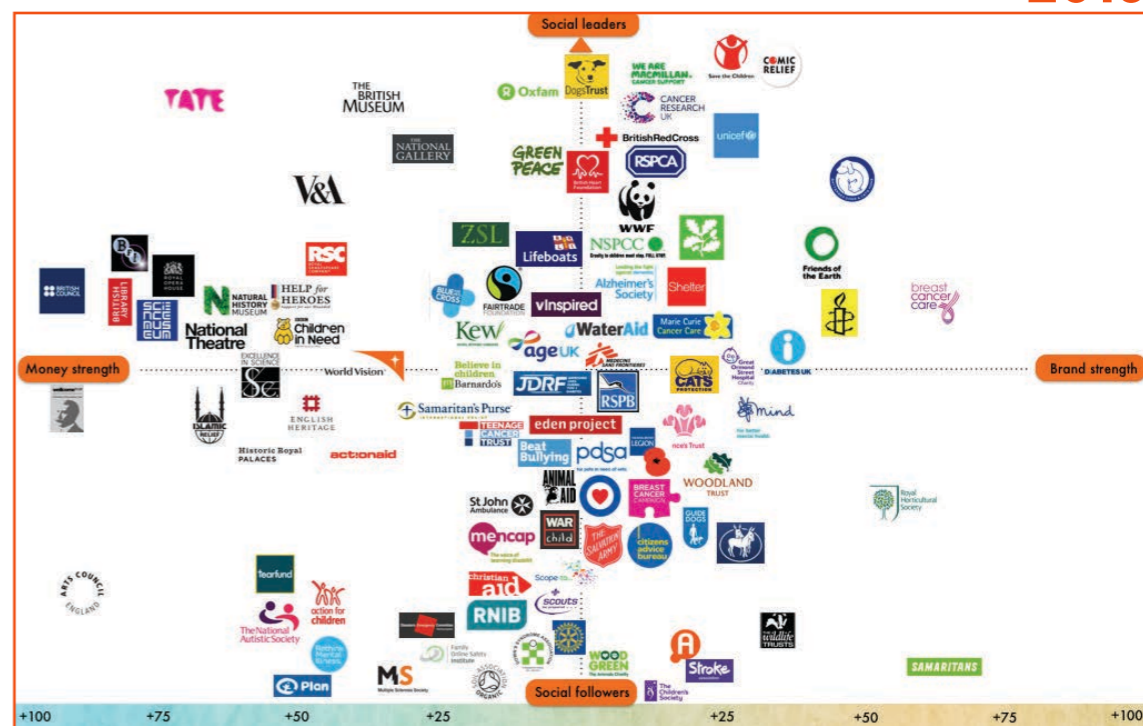
MAPPING NETWORKED POWER

For the last two years we've been looking at the developing relationship between the amount of income a charity has and its social support via Likes and Follows on social networks, what we are calling 'networked power'.

In times of austerity and reduced availability via grant funding, there's a benefit in being able to develop direct relationships with supporters using social media. Not only does this reduce the cost of promotional marketing, it also allows for a more dynamic relationship, so when extraordinary events happen, the chances are that relationship can be better relied upon to make a difference.

Not all supporters are the same in how well social media support translates into income. But all supporters can share and help spread the word, with the network effect increasing the odds of financial support and commitment.

In the last twelve months overall income has declined, whilst the amount of people following and supporting charities has gone up dramatically. In 2012, for every £2,707 of income, on average, charities had one supporter. In 2013 that's now one supporter for every £714 of income. Supporter traction has increased by more than 200%, spreading the load in terms of the ask.

The spectrum is broad and smaller charities tend to do well here. Two charities in this study now have a level of networked support of one supporter for every £1 of income they receive. Obviously the tighter this relationship, the more the power of the network is easier to activate. At the other end of the scale there are charities with one supporter for every £50,000 to £70,000 or more, but these are not necessarily better off in terms of total income.

Overleaf is a list of our Top 20 in our Networked Power index.

1 supporter for every

£2,707

On average the charities in our Top 100 have 1 social follower on Facebook/Twitter for every £2,707 of revenue.

1 supporter for every

£714

On average the charities in our Top 100 have 1 social follower on Facebook/Twitter for every £714 of revenue.
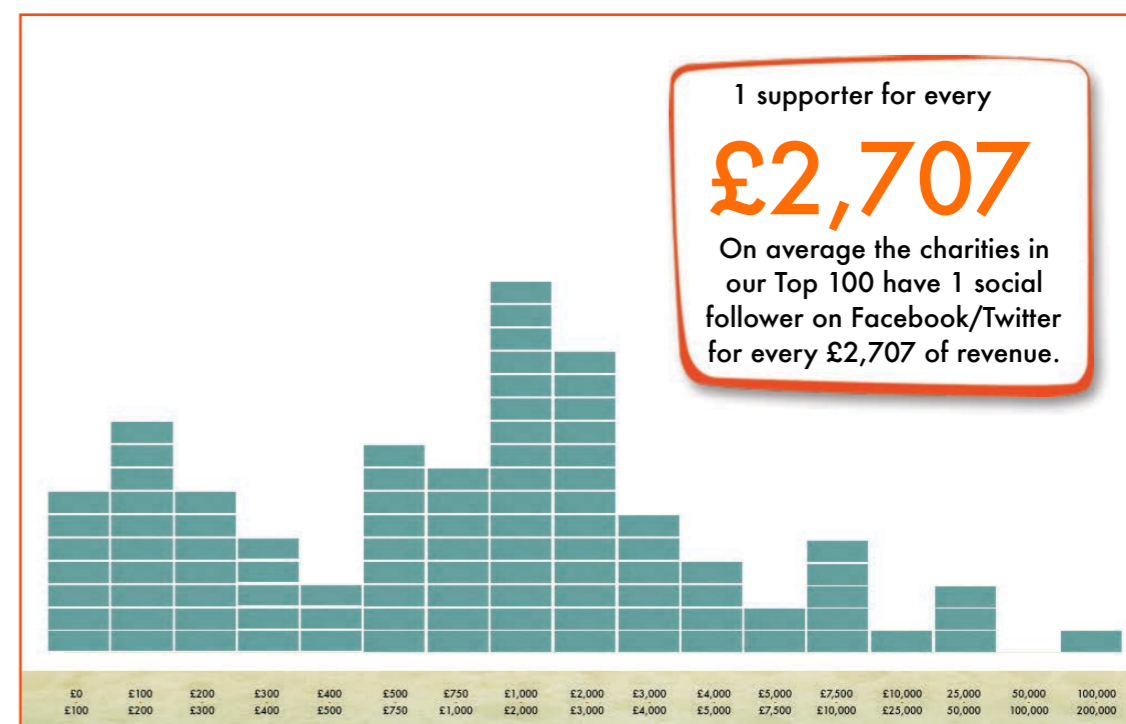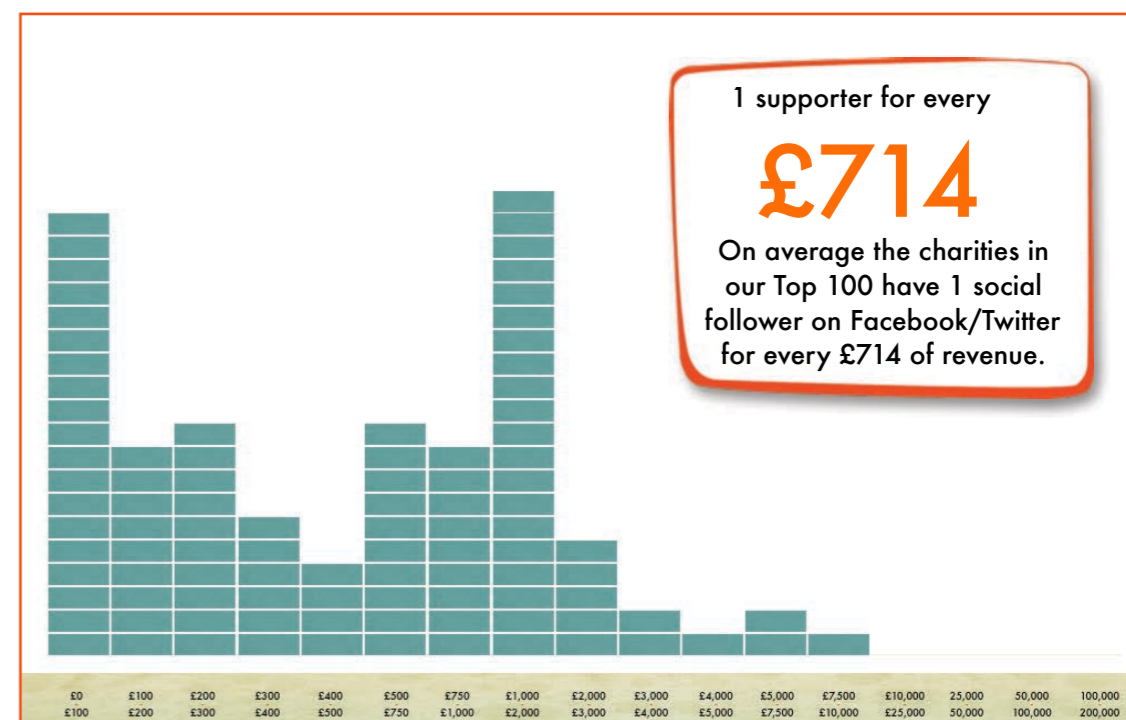
MAPPING NETWORKED POWER

These are the charities in our networked power Top 20.

It should be noted that we've only looked at supporters on Facebook and Twitter for the purposes of this ranking. Though many charities use a multitude of social network platforms and in some cases will have total level of supporter numbers that is far higher than calculated here, by restricting our networked power index study to these two platforms levels out the playing field and enables us to draw reliable comparisons.

In each case there's a relatively strong community of interest supporting these charities, pound for pound. These figures can be taken as an indication of a more fervent level of support than the average, in which supporters might be more likely to donate or get involved.

In a digitally powered and connection-based economy, we'd encourage charities to think about developing strategies that go beyond communications towards developing the kind of organisational culture that makes supporters want to respond and make a difference.

In adverse economic times, which according to our research has seen the levels of income amongst our Top 100 fall by 26% over the last two years, has at the same time seen social media supporter rates rise by between 200%-400% and more, networked power is an asset. Networked and inclusive cultures encourage people to feel involved so that content can be shared and each message can become as effective as possible.

The relationship between brand, culture and income is now more immediate as a result of digital networks. As data and digital media generated insights increase, networked power muscles will continue to become useful.

No	Charity	1 Supporter for every
1	White Ribbon Alliance	£1
2	Animal Aid	£1
3	Greenpeace	£4
4	Partnership for Youth Empowerment	£10
5	Rotary Foundation	£15
6	Arthritis Care	£17
7	Breast Cancer Care	£22
8	UKSA	£26
9	BeatBullying	£27
10	Family Online Safety Institute	£34
11	British Hen Welfare Trust	£40
12	BBC Children in Need	£42
13	Child's i Foundation	£49
14	Beating Bowel Cancer	£51
15	Downs Syndrome Association	£51
16	Battersea Cats & Dogs Home	£52
17	Save the Children	£53
18	Unique	£53
19	Fairtrade	£63
20	Action for ME	£64

HOW ARE CHARITIES CONNECTING TO SUPPORTERS?

60 charities collaborated in our survey this year. Our thanks go to all of them for responding to our invitation to participate. Between them they have helped produce insights that will help the whole of the sector.
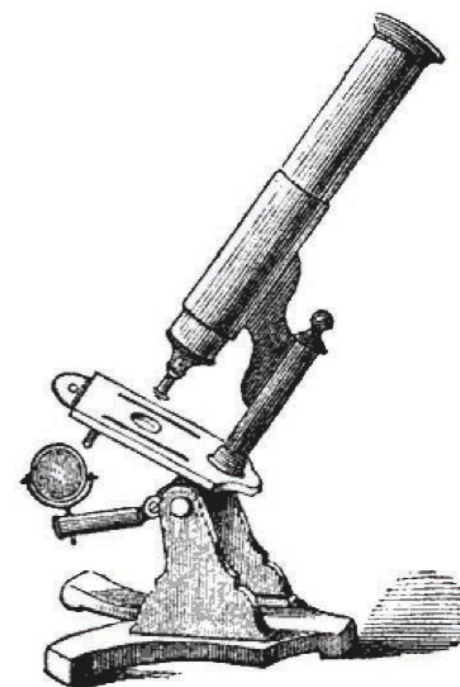
RECOGNISING CHARITIES WHO TOOK PART

2

HOW ARE CHARITIES CONNECTING TO SUPPORTERS?

Along with the external dimension of social and digital business is the question of how organisations are adjusting operationally to make the most of it.

Great communication articulates a compelling message and also evokes a culture. One of the reasons we do this study is to help charities understand how this landscape is changing so that they have the confidence to embrace it fully and supporters will want to respond and act accordingly.

This year we've seen Twitter continuing to snap at the heels of Facebook's dominance, although, for many charities, Facebook's critical mass analytics and engagement is still hard to beat.

New network platforms have become mainstream focused on imagery, video and content curation such as Instagram, Vine and Storify. Storytelling and the importance of delivering experiences is taking over from managing campaigns. Owned and earned media is definitely preferred when it comes to effectiveness and, in pursuit of that effectiveness, giving platforms have also become established as a must-have.

In some areas there has been little movement since last year however. This seems to be at the point where the deeper implications of digital networking technology impact upon existing corporate processes and ways of doing things. In HR and internal networking tools, for example, we have seen marginal change.

The value of user-generated content has been rapidly understood and embraced, and more content showing and evidencing supporter engagement is making its way into corporate and campaign communications, but only 17% of participants in our survey said they were engaged in co-creation with supporters and less than 10% in gathering collective intelligence with them.

Similarly, while significant change has occurred, for example, in tracking and measuring social media, there is less development that's taken place in terms of how that measuring and monitoring is playing out on policy and by encouraging innovation.

Only 27% of charities are apparently using social business to reduce costs, attract talent or reducing the time and resources it takes to get things done. The question then is whether social media is an activity being overlaid onto how things have always been handled, as innovation in small doses, and perhaps unsubstantially.

In terms of adjusting to mobile technology, scores on using data, optimising for mobile and evidencing impact are relatively low here also, and 61% of the charities that took part in our survey have no real capability to personalize content, for example.

We see an impending challenge ahead for larger charities to show that size does indeed matter and that legacy and scale are not impediments, particularly when it comes to competing with smaller, tighter, and more highly networked charities, that can demonstrate high levels of authenticity.

WHAT SOCIAL MEDIA NETWORKS ARE CHARITIES USING TO COMMUNICATE SOCIALLY?

This is last year's snapshot. In 2013, Twitter edged past Facebook as being the most widely mentioned main platform. More networks came into play. In particular Storify, Vine and Tumblr have emerged as strong new entrants. The emotive power of rich content and moving imagery has been making itself known. Other platforms used now include Ning, Ipadio, Thinglink and Ustream.
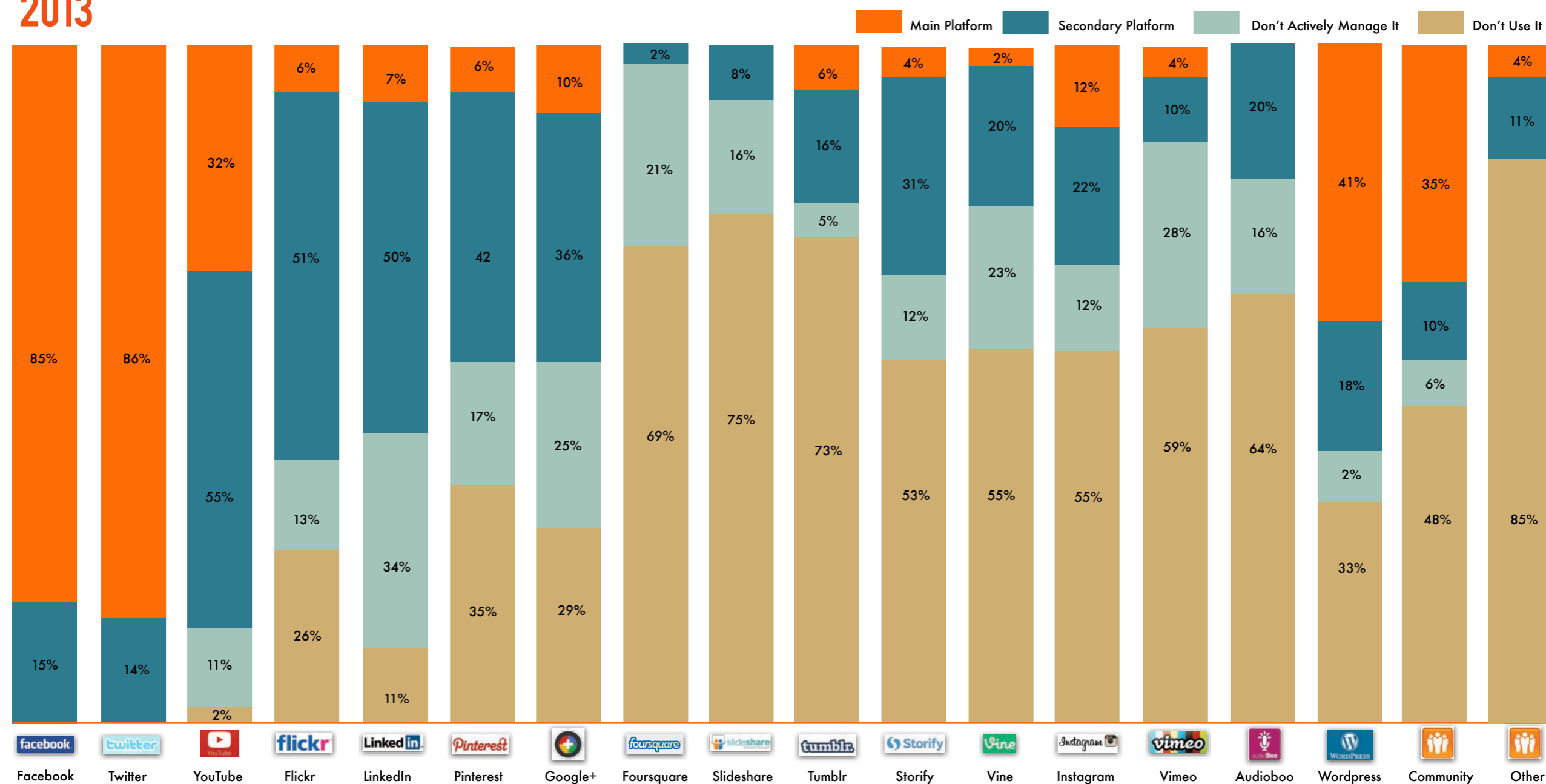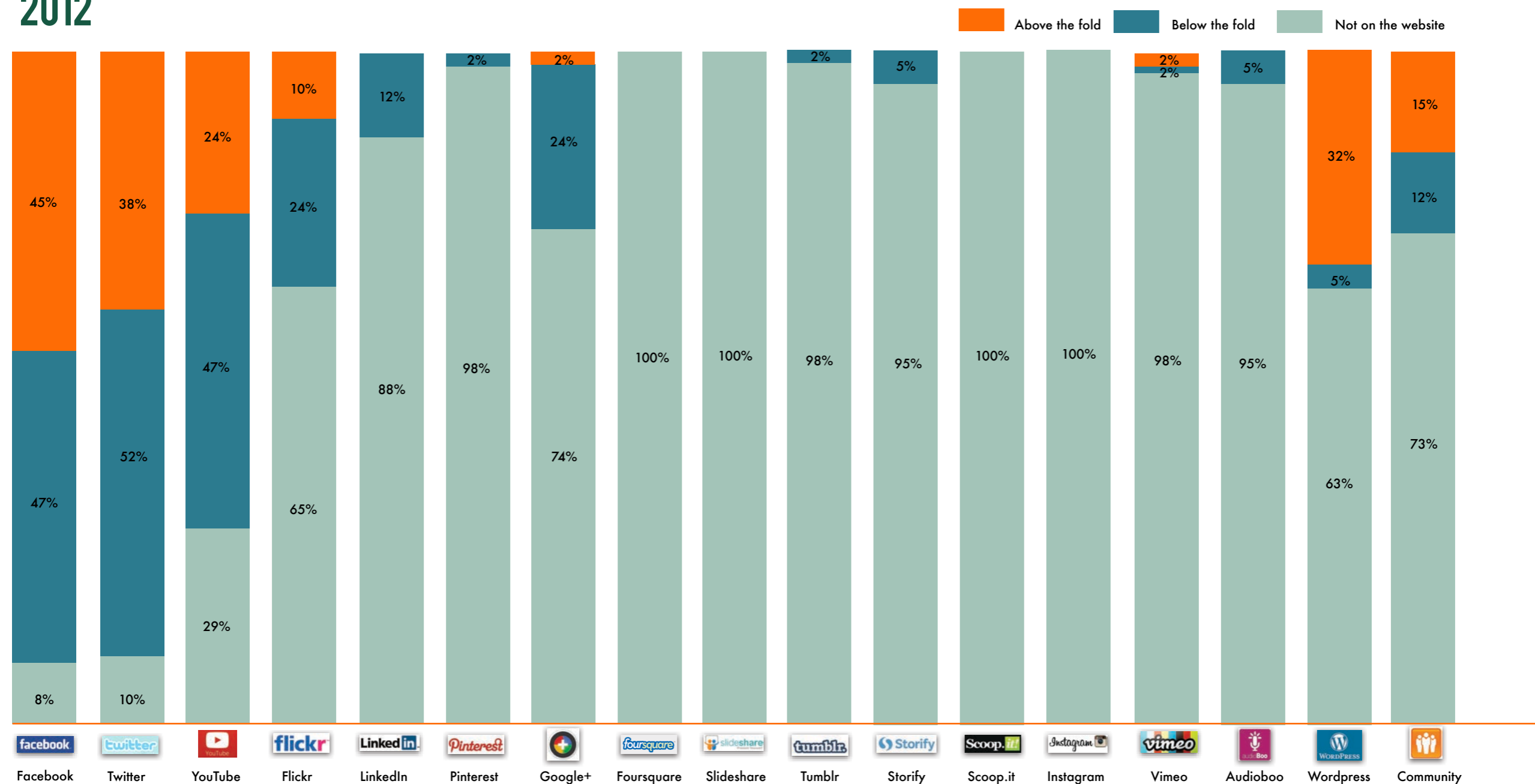
2012

Legend: Main Platform | Secondary Platform | Don't Actively Manage It | Don't Use It | No response

Platform	Main Platform	Secondary Platform	Don't Actively Manage It	Don't Use It	No response
Facebook	84%	7%	2%		7%
Twitter	87%	4%	2%		7%
YouTube	44.5%	42.5%	2%	4%	7%
Flickr	18%	51%	13%	9%	9%
LinkedIn	11%	44%	34%	4%	7%
Pinterest	2%	29%	16%	44%	9%
Google+	7%	11%	24%	34%	9%
Foursquare		13%	11%	69%	7%
Slideshare		11%	11%	69%	9%
Tumblr		13%	13%	67%	7%
Storify	11%	20%	11%	49%	9%
Scoop.it		4%	2%	84%	9%
Instagram	4%	13%	7%	67%	9%
Vimeo	7%	13%	15%	55%	9%
Audioboo		20%	7%	62%	11%
Wordpress	38%	22%	2%	31%	7%
Community	38%	7%	4%	44%	7%

WHAT SOCIAL MEDIA NETWORKS ARE CHARITIES USING TO COMMUNICATE SOCIALLY?

In 2013, Twitter edged past Facebook as being most widely mentioned main platform. More networks came into play. In particular Storify, Vine and Tumblr have emerged as strong new entrants. The emotive power of rich content and moving imagery has been making itself known. Other platforms used now include Ning, Ipadio, Thinglink and Ustream.

2013

Legend: Main Platform · Secondary Platform · Don't Actively Manage It · Don't Use It

Platform	Main Platform	Secondary Platform	Don't Actively Manage It	Don't Use It
Facebook	85%	15%		
Twitter	86%	14%		
YouTube	32%	55%	11%	2%
Flickr	6%	51%	13%	26%
LinkedIn	7%	50%	34%	11%
Pinterest	6%	42%	17%	35%
Google+	10%	36%	25%	29%
Foursquare		2%	21%	69%
Slideshare		8%	16%	75%
Tumblr	6%	16%	5%	73%
Storify	4%	31%	12%	53%
Vine	2%	20%	23%	55%
Instagram	12%	22%	12%	55%
Vimeo	4%	10%	28%	59%
Audioboo		20%	16%	64%
Wordpress	41%	18%	2%	33%
Community	35%	10%	6%	48%
Other	4%	11%		85%

WHAT SOCIAL MEDIA NETWORKS ARE CHARITIES USING TO COMMUNICATE SOCIALLY?

The social presence charities have is extending across more platforms than last year and becoming more integrated into digital activity overall. Mobile perhaps signals a shift from social as a 'nice to have' to it being more embedded, part of an intention towards continuous engagement.

2012

Legend: Above the fold | Below the fold | Not on the website

Platform	Above the fold	Below the fold	Not on the website
Facebook	45%	47%	8%
Twitter	38%	52%	10%
YouTube	24%	47%	29%
Flickr	10%	24%	65%
LinkedIn		12%	88%
Pinterest		2%	98%
Google+	2%	24%	74%
Foursquare			100%
Slideshare			100%
Tumblr		2%	98%
Storify		5%	95%
Scoop.it			100%
Instagram			100%
Vimeo	2%	2%	98%
Audioboo		5%	95%
Wordpress	32%	5%	63%
Community	15%	12%	73%

WHAT SOCIAL MEDIA NETWORKS ARE CHARITIES USING TO COMMUNICATE SOCIALLY?

The social presence charities have is extending across more platforms than last year and becoming more integrated into digital activity overall. Mobile perhaps signals a shift from social as a 'nice to have' to it being more embedded, part of an intention towards continuous engagement.

2013

■ Above the fold   ■ Below the fold   ■ Not on the website

Network	Above the fold	Below the fold	Not on the website
Facebook	54%	41%	5%
Twitter	55%	39%	5%
YouTube	30%	43%	27%
Flickr	8%	22%	70%
LinkedIn	8%	12%	80%
Pinterest	2%	6%	92%
Google+	10%	12%	78%
Foursquare			100%
Slideshare		2%	98%
Tumblr	2%	2%	96%
Storify		4%	96%
Vine			100%
Instagram	2%		98%
Vimeo			98%
Audioboo		4%	96%
Wordpress	22%	14%	64%
Community	13%	8%	80%
Other		3%	97%

WHICH WORKS BEST IN TERMS OF MEDIA EFFECTIVENESS?

How much do charities spend on paid media? Last year's survey results showed an overwhelming preference for owned and earned media, and this year that has only become more pronounced.

Yet at the same time, research has suggested that organisations often spend less than 10% of their overall marketing communications budget on digital and social media marketing. So why the difference?

Shallower pockets and the desire for supporters to see real impacts being made as a result of their contributions are perhaps making a stronger case than ever for charities to put user-centric marketing more at the heart of their communications.

While having a mix of communication touchpoints can only be of benefit, existing operational structures within charities are often organised to maintain a conventional marketing mix. Our study suggests charities may be wrestling with a skills gap in many cases.

In addition, few media and marketing specialists are geared to help charities look at communications strategies in the round or reduce their spends overall. There are a range of scenarios that are combining to keep communications expenditure higher than it needs to be perhaps, given the feedback on media effectiveness here.

Is it time to descale and build indigenous communications? This is another area this year where we've seen smaller charities are gaining an advantage. Not having to maintain critical mass means also not spending marketing and media budgets to do it, in turn promoting more authenticity.
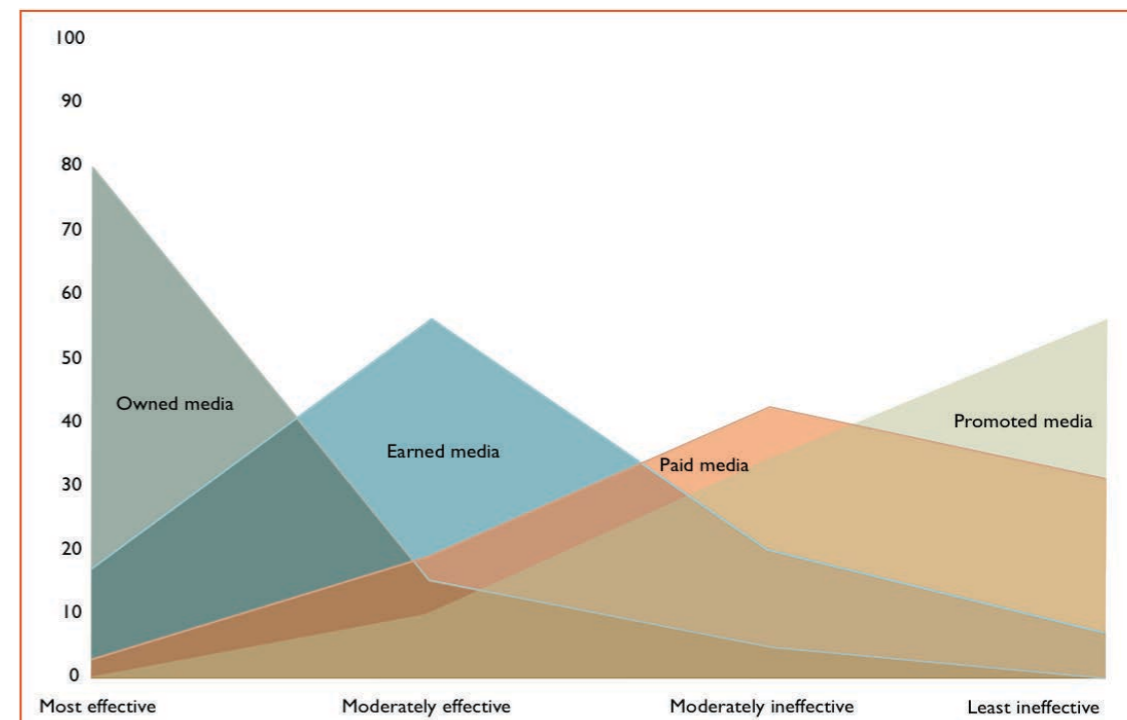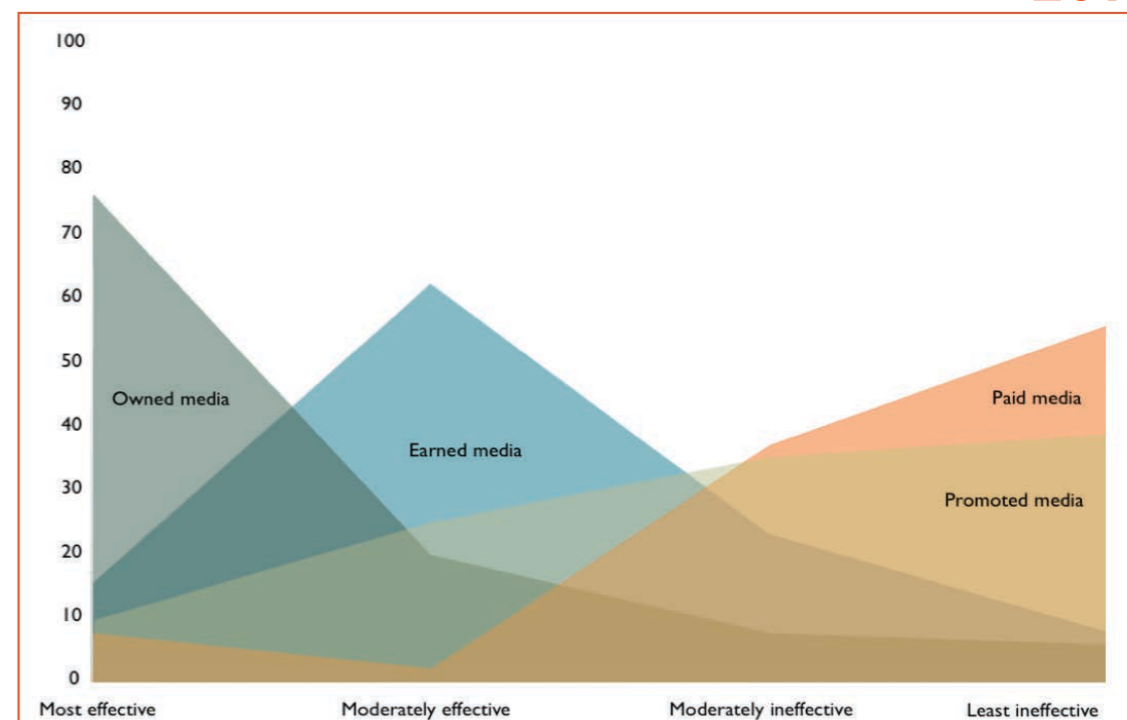
WHICH WORKS BEST IN TERMS OF MEDIA EFFECTIVENESS?

Facebook has marginally consolidated its dominance here in the last year, largely due to the convenience of the platform, its analytics capability and sheer scale.

People who took part in the survey mentioned that 'it drives most traffic to our site', and 'it can be targeted, promoted cheaply and gets great levels of engagement'. Reach, in the conventional broadcast sense, still holds a great deal of appeal.

Of value, too, is the shelf life of content on Facebook compared to other networking platforms. There is also the opportunity for deeper levels of conversation and engagement than on e.g. Twitter.

Twitter was preferred by those charities which are more focused on developing networks, and where supporters may be more actively engaged in sharing information. Other platforms have a way to go here, and were mentioned as being less understood by staff internally.

2012

twitter
26%

BLOG
2%

facebook
64%

OWN COMMUNITY
2%

You Tube
Broadcast Yourself ™
1%

2013

twitter
25%

OWN COMMUNITY
3%

facebook
70%

OTHER
2%
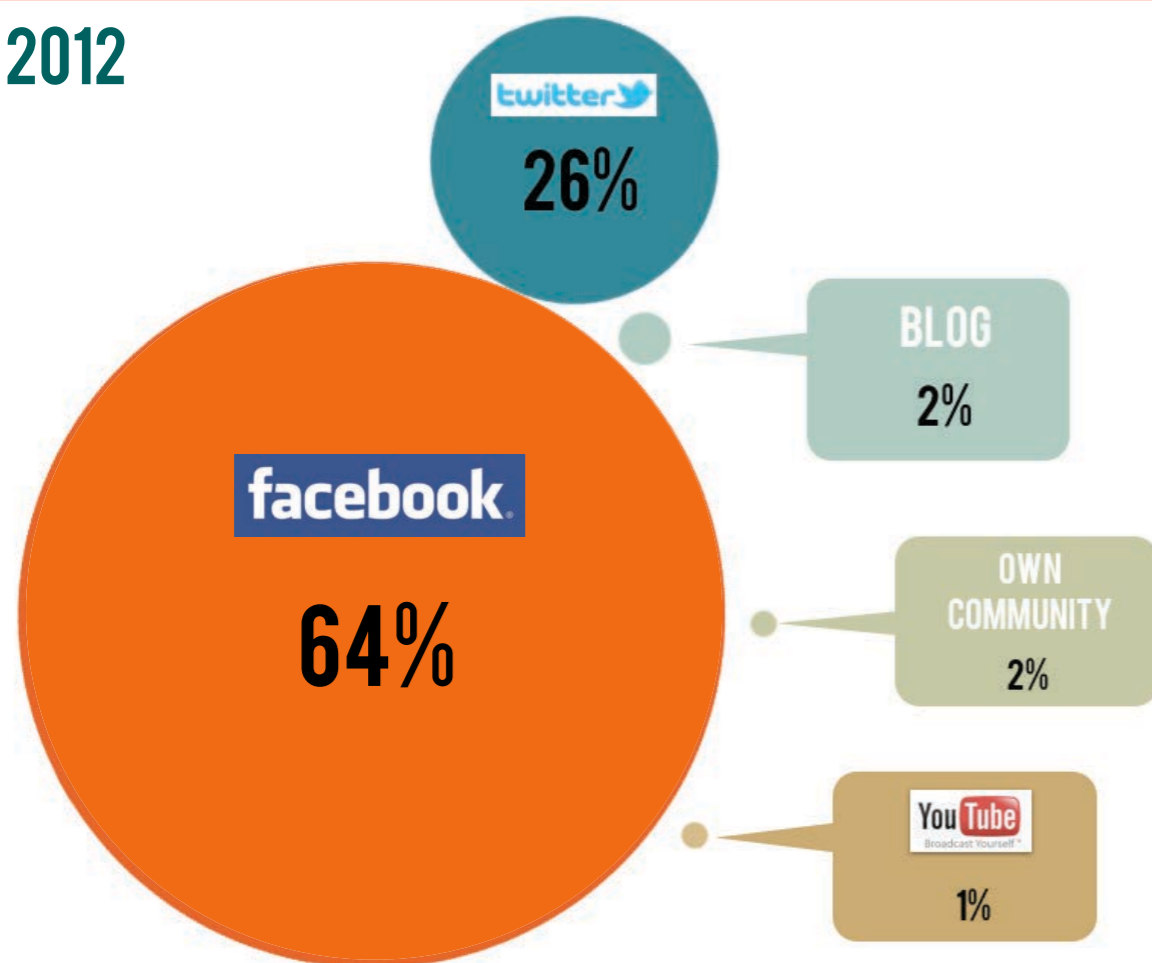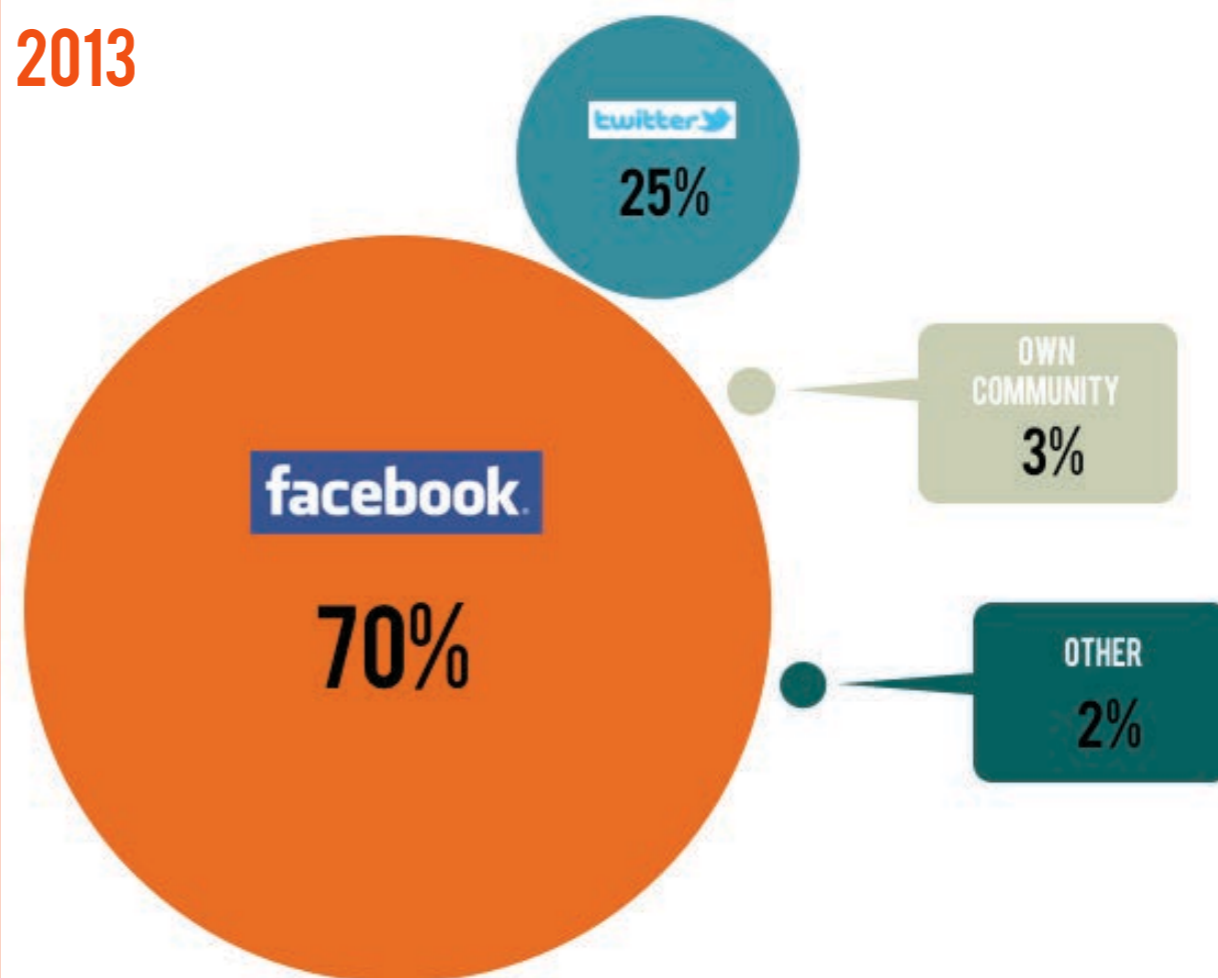
WHICH CHANNEL WORKS BEST FOR FUNDRAISING?

Our study has found that it is not a charity's own website that is considered most effective when it comes to digital fundraising. We've seen this from both charities' own perspective and via the views of participants in our survey and our YouGov poll.

Giving platforms have become something of a 'de facto' part of the digital fundraising presence. Having a web presence which integrates a fundraising capability is also key. Several charity representatives who participated in the survey commented on how all fundraising touchpoints complement one another, while a couple of others said that none of them do!

Charities have to consider all this as part of the user experience. The key is perhaps cultural, so loyal supporters enjoy the experience, and for new supporters getting involved is made easy. Our YouGov poll results suggest that for supporters themselves, the people connection matters a great deal. For them, face to face giving and the support they can show for friends as part of making a donation is a crucial element.

All of this goes to suggest that the more charities can use digital media to enhance the human element of online fundraising, the more the technical ability will be likely to pay greater dividends.

Website	Social Media	Text/SMS	Email	Newsletter	Face to Face	Giving Platform	Payroll Giving	Other
24%	2%	2%	10%	9%	15%	27%	0%	12%
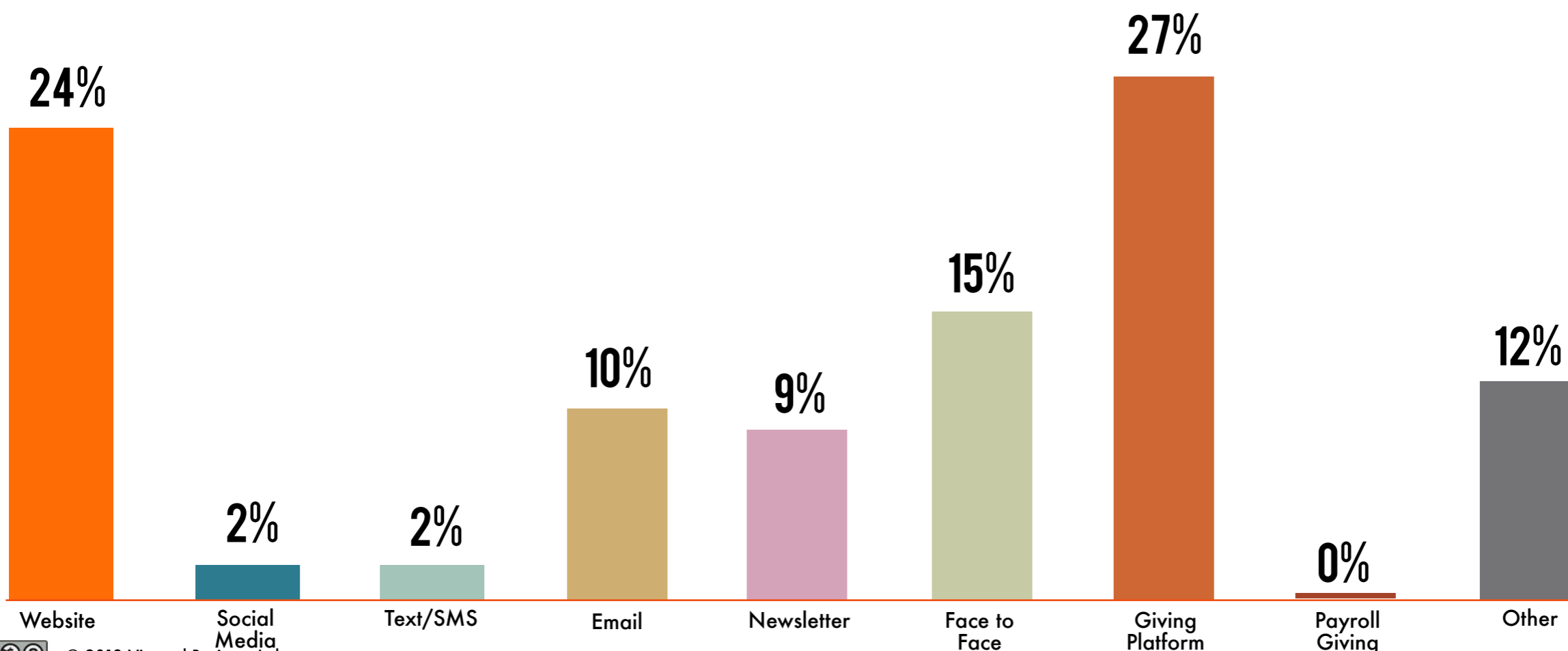
WHICH CHANNEL WORKS BEST FOR FUNDRAISING?
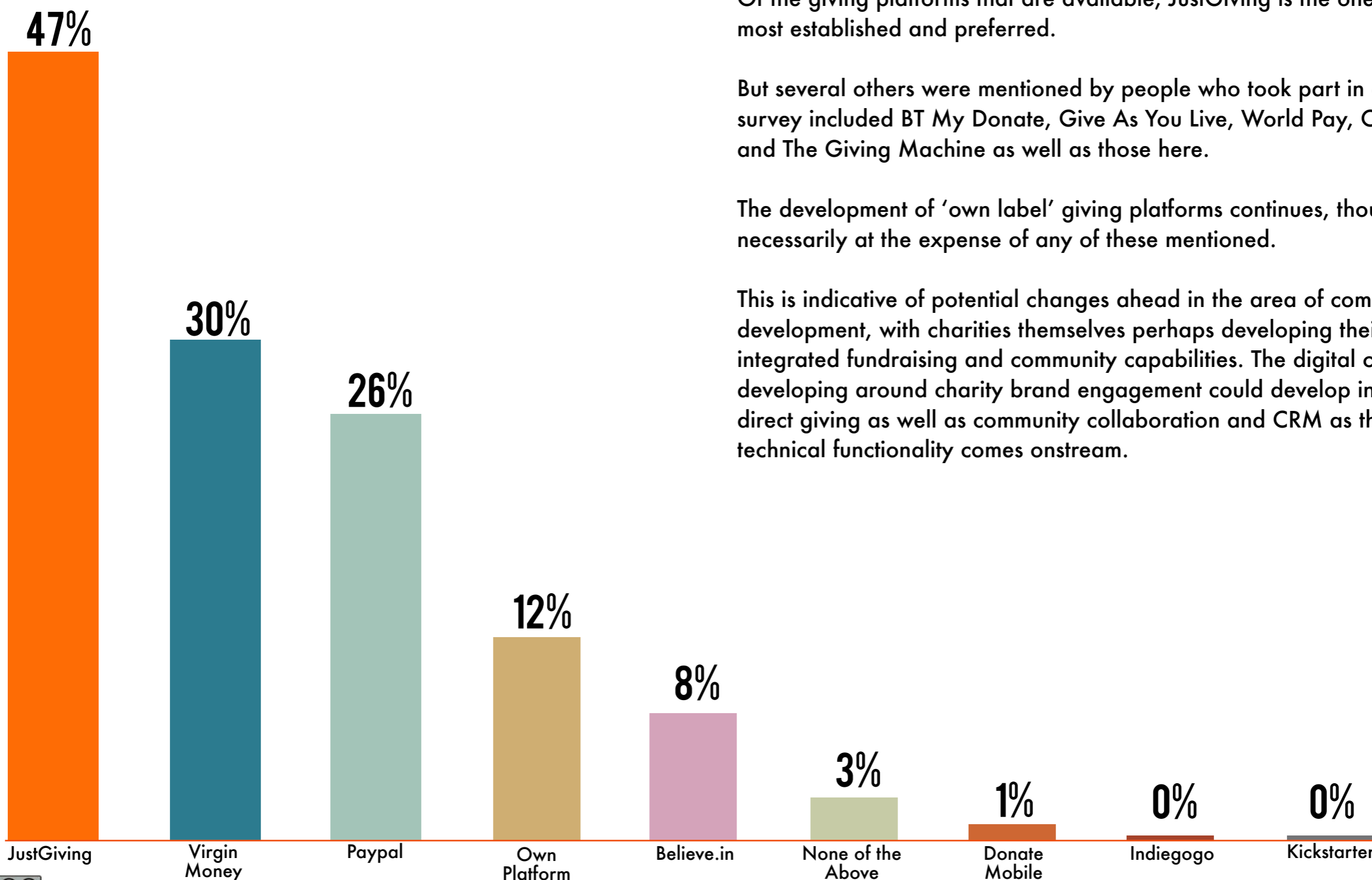
Of the giving platforms that are available, JustGiving is the one that is most established and preferred.

But several others were mentioned by people who took part in our survey included BT My Donate, Give As You Live, World Pay, CAF and The Giving Machine as well as those here.

The development of 'own label' giving platforms continues, though not necessarily at the expense of any of these mentioned.

This is indicative of potential changes ahead in the area of community development, with charities themselves perhaps developing their own integrated fundraising and community capabilities. The digital culture developing around charity brand engagement could develop into direct giving as well as community collaboration and CRM as the technical functionality comes onstream.

47% JustGiving

30% Virgin Money

26% Paypal

12% Own Platform

8% Believe.in

3% None of the Above

1% Donate Mobile

0% Indiegogo

0% Kickstarter

DOES YOUR CHARITY HAVE ITS OWN ONLINE COMMUNITY?

We're considering it

Yes

No

We use existing platforms

11%

32%

34%

36%
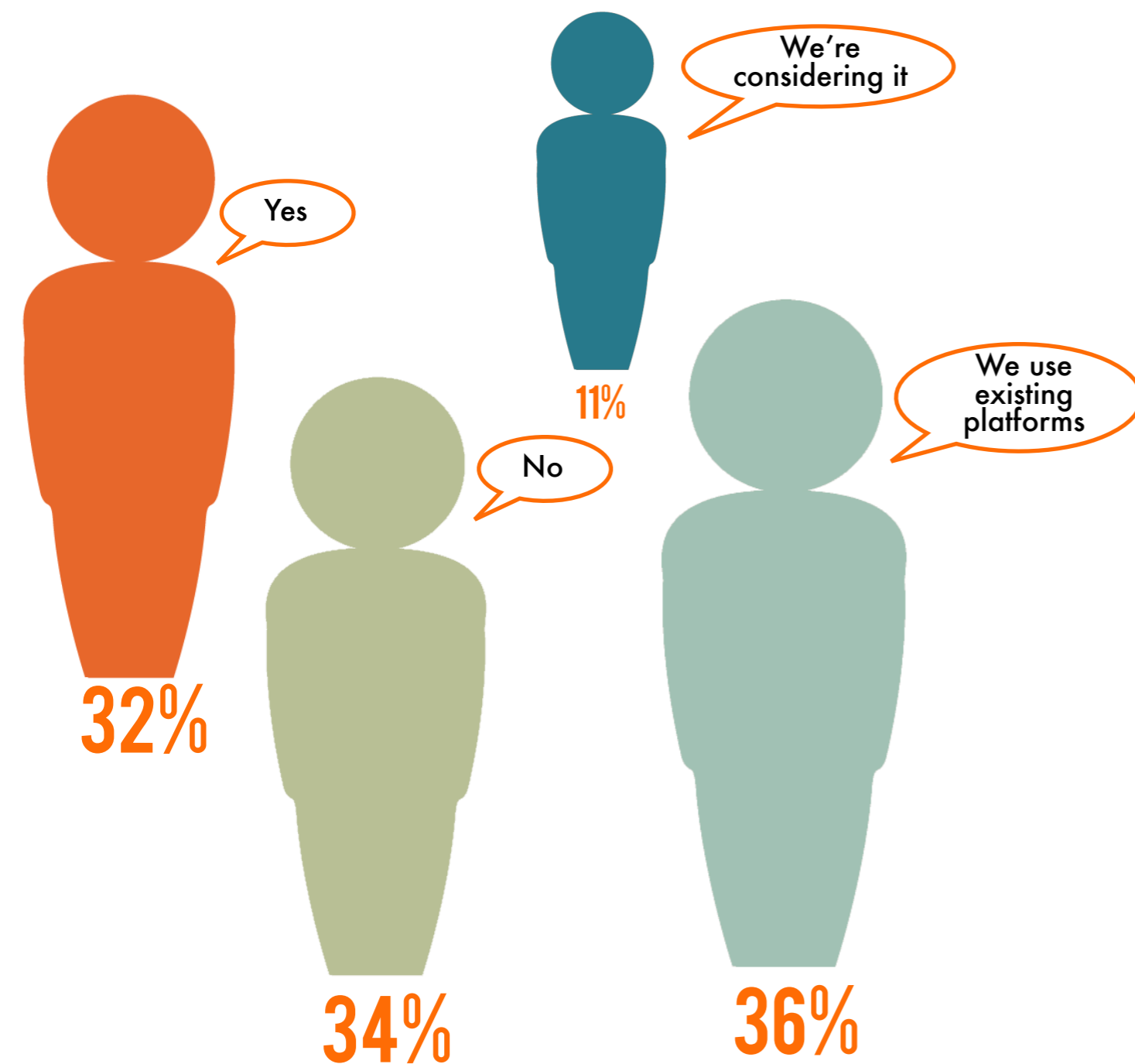
We've seen a slight retraction back from the idea of online communities since last year's survey. Different charities have taken part in the survey this year which accounts for some of this, but also technological advances in other areas have to some degree made communities that are purely for dialogue and connection less relevant.

Fundraising platforms and social networks have both created the scope to do some of the job themselves. That said, charities should not lose sight of the opportunity to create value as social leaders able to foster a sense of belonging.

2012

We're considering it

Yes

No

We use existing platforms

14%

39%

11%

36%
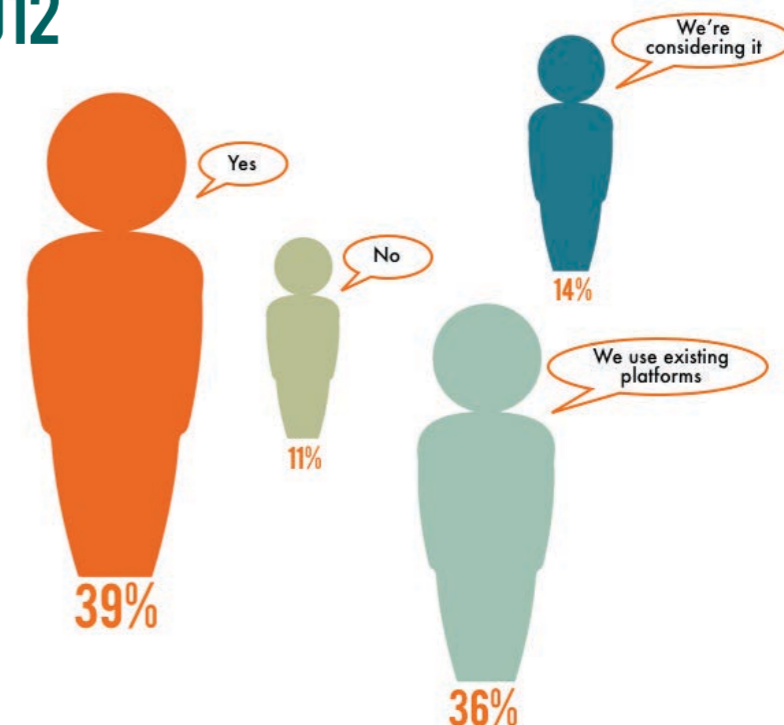
DO YOU KNOW WHO THE TOP 10% OF YOUR SUPPORTERS ARE?

Responses to this aspect of social engagement show there has been little movement in the last 12 months and, overall, what we've seen from the results of this year's survey is that social media has in some ways stalled at the level of shifting into social business design.

This may be for a number of reasons, including cultural challenges, austerity constraints or because the business case of new methodologies is unproven. Several responses to the survey, however, suggest that much charitable giving is opportunistic and derived from one-off donations or legacies rather than regular giving.

The 'top 10%' was classified by several charities as celebrity endorsement rather than sustainable standing order donations. This begs a question around finding alternatives and replacements to much of the grant funding being cut currently - how will charities be able to develop a bedrock of contributors for the future?

2012

55%
39%
13%

YES   NO   DON'T KNOW

2013

47%
43%
9%

YES   NO   DON'T KNOW
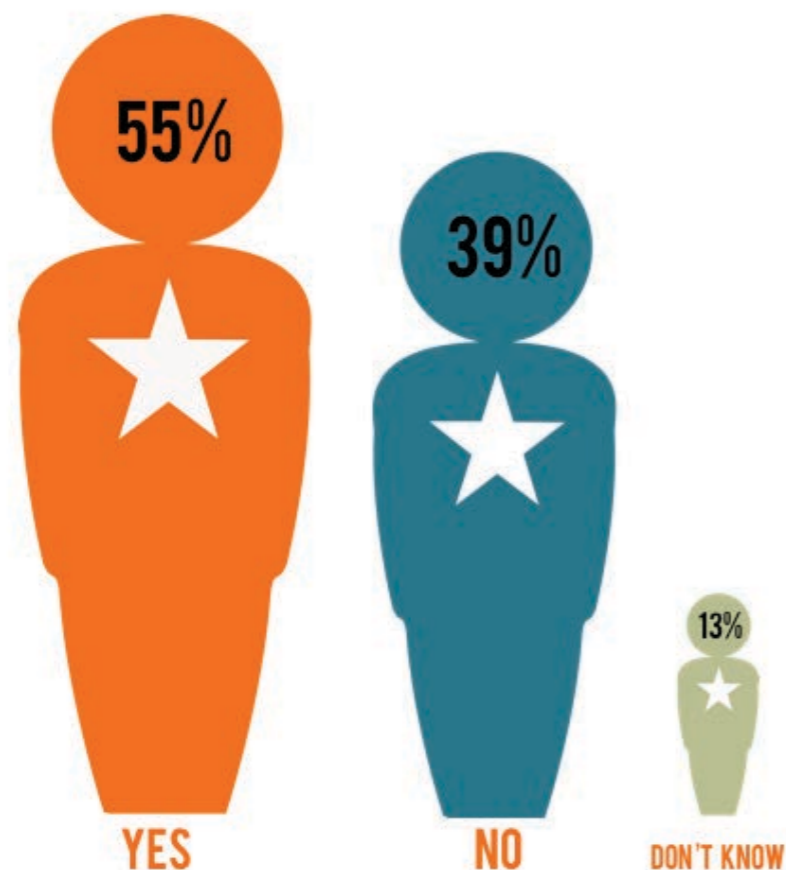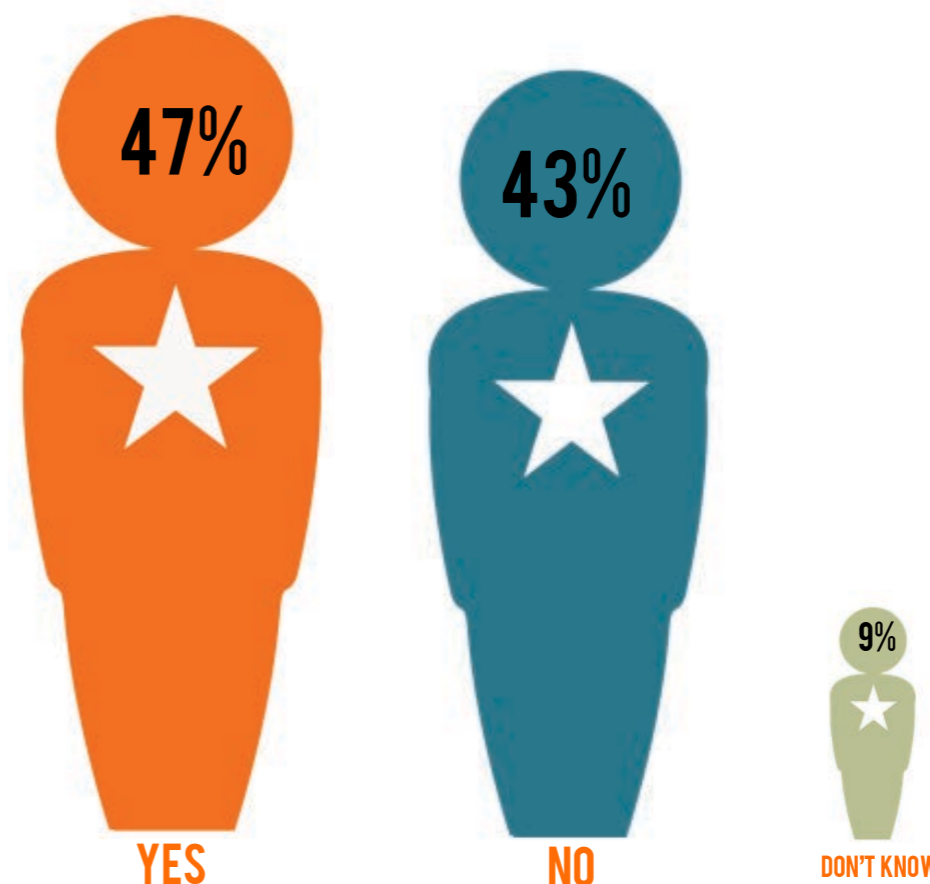
DOES YOUR CHARITY HAVE AN INTEGRATED APPROACH TO CRM?

Differences in the demographics of our survey participants this year have also highlighted how far there is to go in terms of social crm.

Smaller charities may be less sophisticated, but tighter ties with supporters and the more intimate nature of their social brands in some ways pays a dividend, one more reason why the tipping point may have arrived for large charities.

What we see from these results is that people simply don't know a lot about the whole user experience on an end to end basis.

There is an argument for charity staff to have more detailed understanding of what a supporter relationship looks like from that perspective, so that the various job functions people have within the organisation stay relevant and connect with real needs.

2012

YES
68%

DON'T KNOW
8%

NO
23%

2013

YES
21%

DON'T KNOW
8%

NO
76%
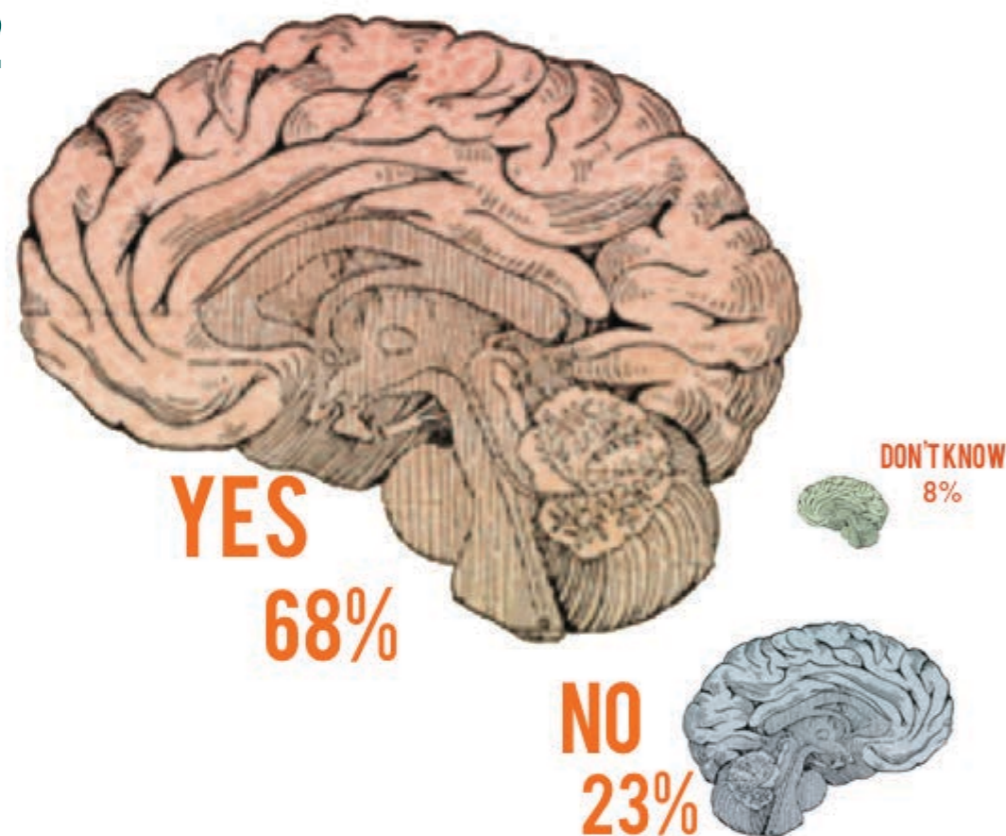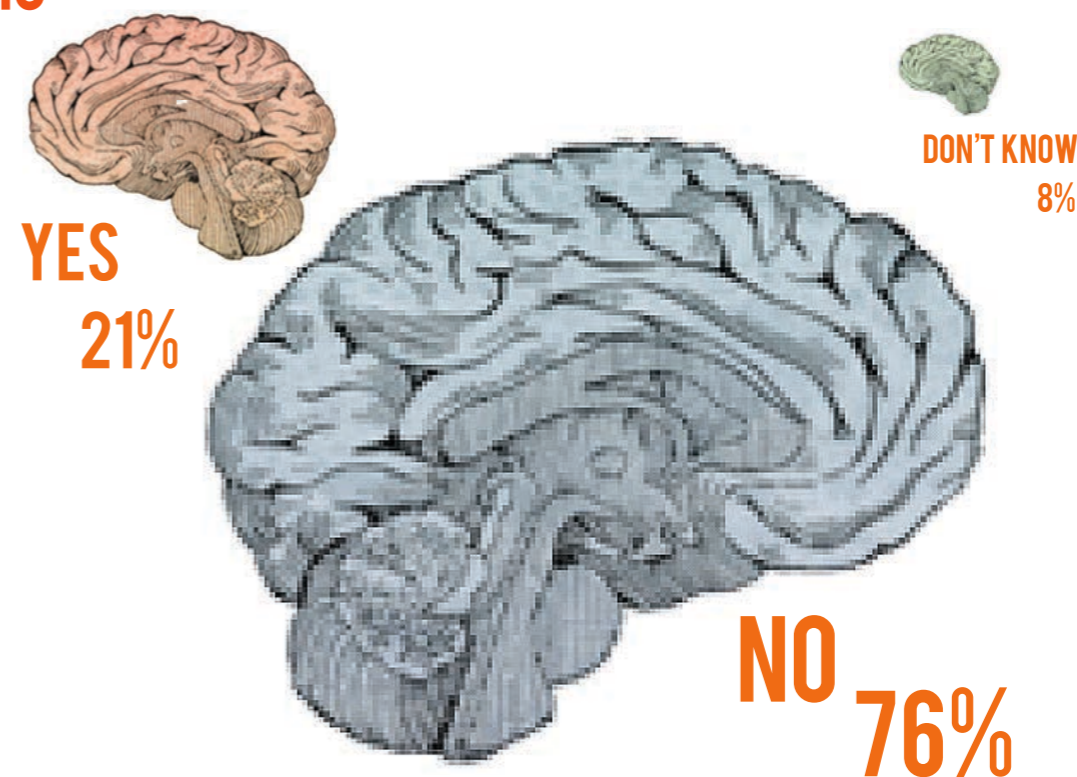
DO YOU PERSONALISE CONTENT?

We know from our research that supporters value highly the opportunity to be able to customise the nature of the relationship they have with charities. Yet, what may be an incentive to give more for one person may be quite the opposite for another, particularly in hard times where greater scrutiny exists around what works and what doesn't. In that context, an inability to tailor communication to individual needs may be a dealbreaker.

This is perhaps one of the most significant challenges for charities today. Scale has for a long time been king and mass market media has placed reach rather than quality of engagement ahead in the pecking order of priorities.

From 3D printing to footwear, personalisation is the next big thing. Are charities equipped to make the most of it?

YES 30%
ME

NO 61%
ME

DON'T KNOW 8%
ME
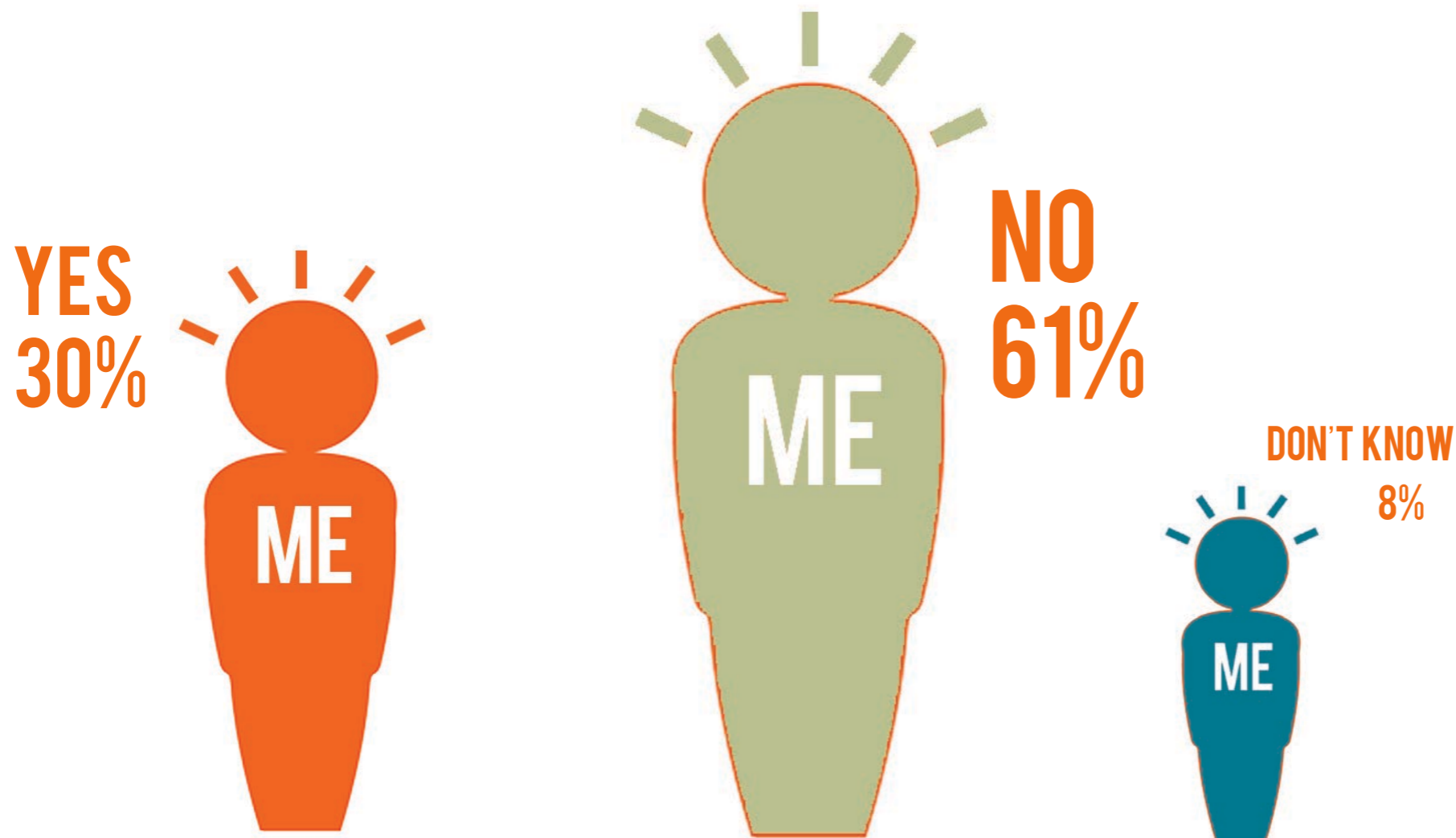
WHAT SOCIAL COMMUNICATION NETWORKING TOOLS DOES YOUR CHARITY USE INTERNALLY?

There has been a negligible amount of development in the overall level of adoption of internal networking tools as an average, though there has been some diversity recorded which suggests a level of experimentation.

Participants mentioned use of Skype, Huddle, Google Apps and iChat as platforms being used, Dropbox and also smartphones.

This suggests charities have hit something of a wall when it comes to working in new ways and adapting culturally to social business. Is the 'trough of disillusionment' as described by Gartner in their Hype cycle in play here?

What will be the impetus for charities to get out of it?

2012

Yammer
12%

Sharepoint
25%

Other
5%

Salesforce Chatter
3%

We don't use any of these
55%

2013

Sharepoint
18%

Yammer
12%

Other
4%

Chatter
4%

We don't use any of these
62%
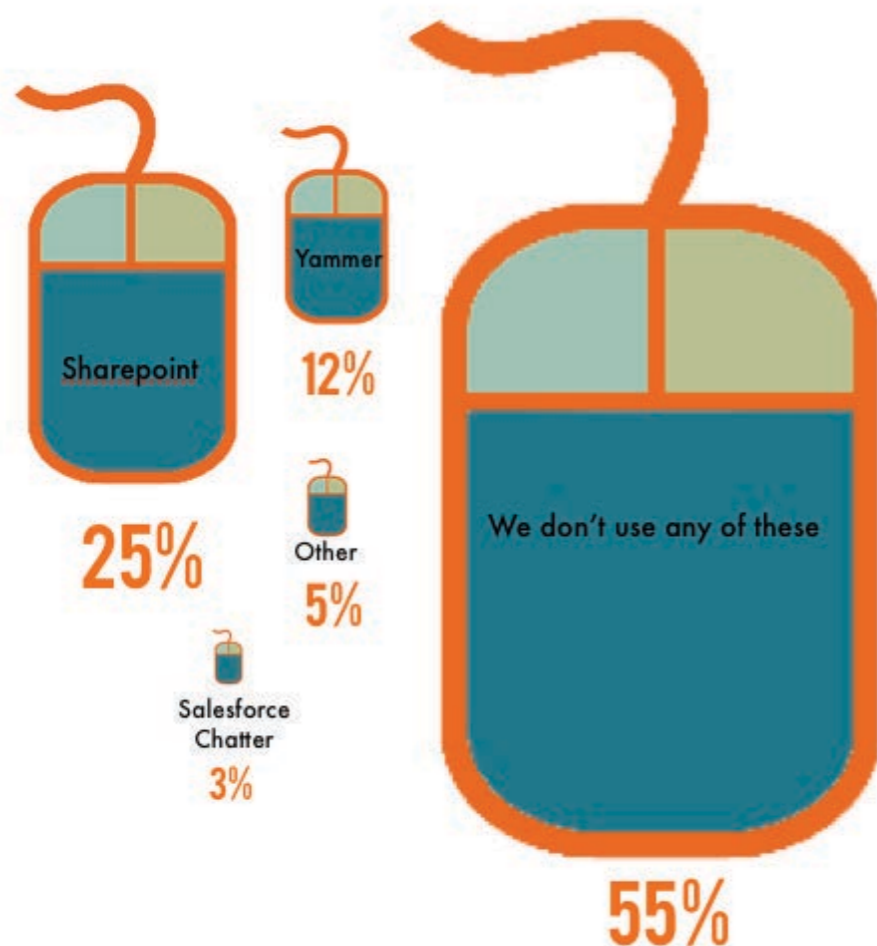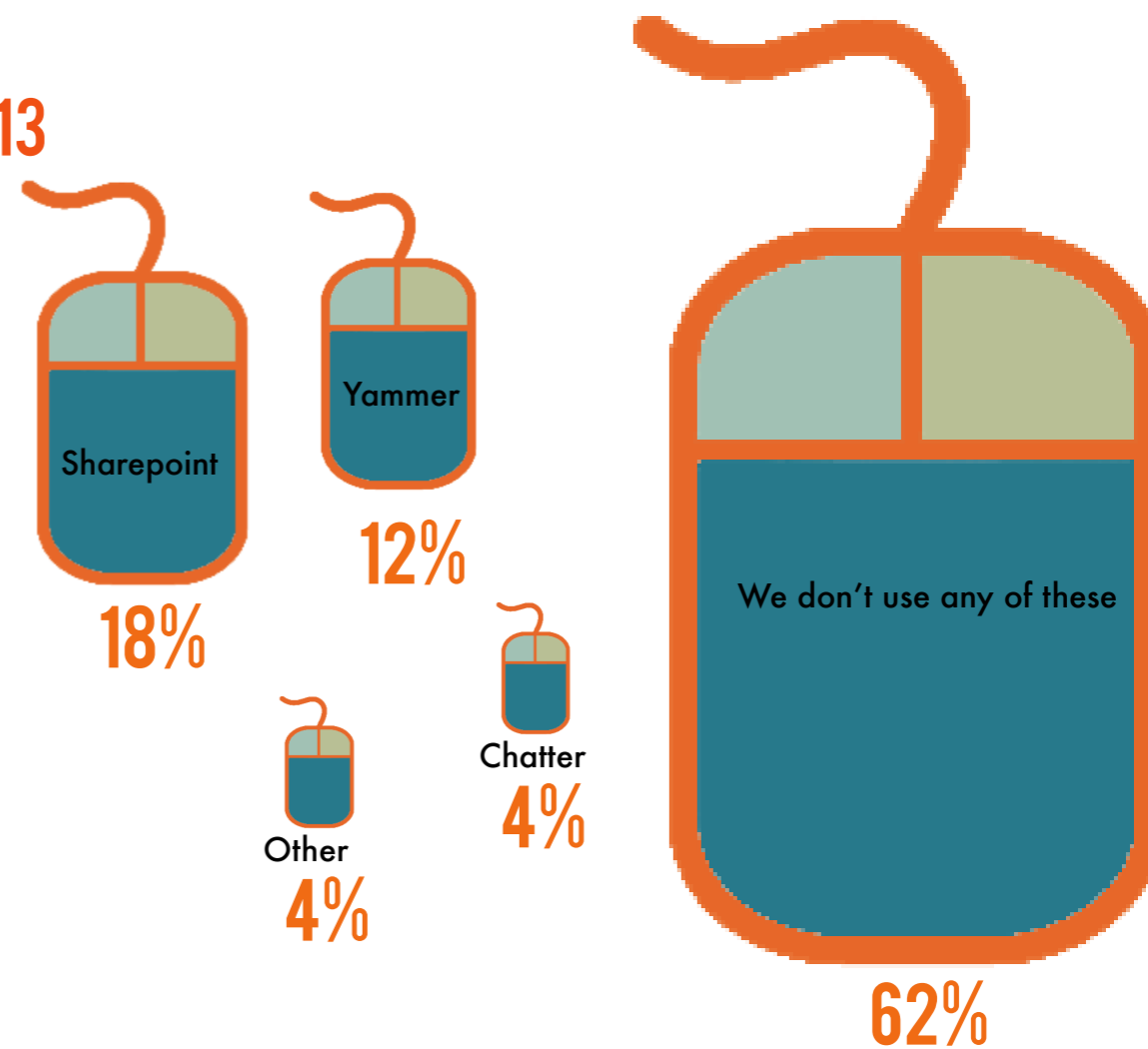
WHAT IS YOUR CHARITY'S APPROACH TO SOCIAL BRAND ARCHITECTURE?

As familiarity with social media has developed and some of the perceived threats of social media have receded as it becomes more of a norm, we've seen some diffusion in terms of who uses it. Most charities now have social media guidelines in place making it it easier to manage, too, across the organisation.

Approaches vary widely, however. Some charities are partway between a centralised and a hub and spoke approach, mobilising the charity as a whole around key campaigns when needed. For others, profiles are managed by volunteers, supported by training.

2012

We have a main social brand
29%

We have a few accounts
8%

We're developing a networked presence
35%

Our networked presence isn't defined
11%

We have a networked social brand architecture
17%

2013

We have a main social brand managed by a central hub
27%

We have a decentralized approach across the charity
6%

We have a hub and spoke strategy reporting into a central team
18%

Don't know
4%

We do not have a clearly defined brand architecture
31%

We have a decentralized hub and spoke strategy
14%

HOW MANY PEOPLE IN YOUR CHARITY USE SOCIAL MEDIA PROFESSIONALLY?

2013 results are very similar to 2012. Less than a quarter of charities have adopted social networking widely across their organisation. Being networked seems to remain the preserve of the digital and marketing functions within charities. Professional adoption of social media is clearly lagging some way behind its adoption for personal use.

LinkedIn is an interesting case in point. When platforms like Facebook and Twitter have so grown dramatically, is it wise to not leverage B2B networks in the same way? These results indicate we are still some way off organisations fully developing an ability to act dynamically, powered by social networking technology.

2013

Like

2012

50%-75%
Like
6%

75-100%
Like
9%

Like
5%-10%
44%

25%-50%
Like
19%

10%-25%
Like
22%

Like
5%-10%
39%

Like
50%-75% **10%**

Like
75-100% **8%**

Like
Don't know
4%

25%-50%
Like
14%

10%-25%
Like
25%

WWW.VISCERALBUSINESS.COM
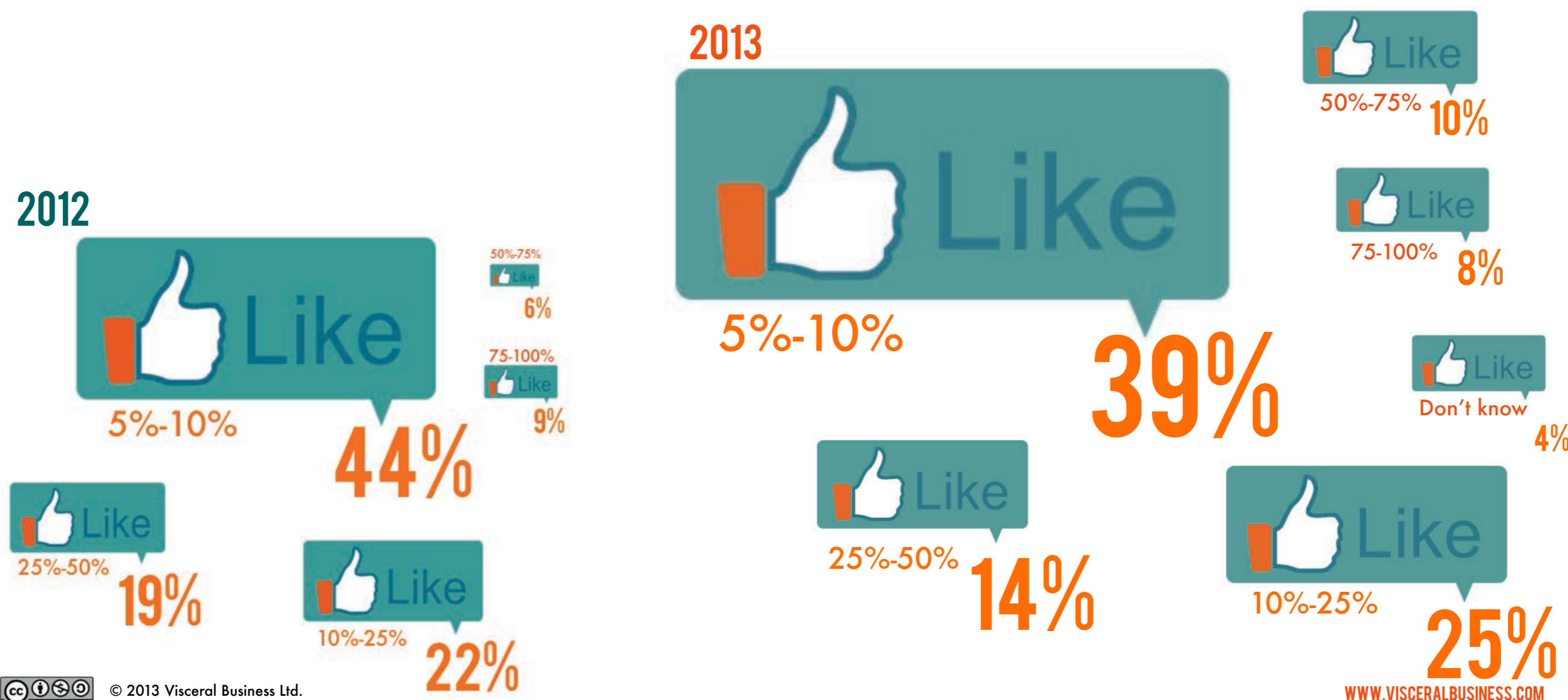
WHO LOOKS AFTER SOCIAL MEDIA IN CHARITIES?

Responsibility for social media in charities is comparable to last year, showing a level of stability, with some of the uncertainty surrounding management approaches of previous years having been stripped away.

Slightly more charities are encouraging an inclusive approach. In addition to the social media and digital teams, PR managers, fundraising teams and volunteers are all involved in playing a part.

2013

Certain people have permission and are trained to use it

28%

The digital team

14%

The social media manager

22%

Different departments are responsible for their own activity

4%

Everyone is encouraged to use social media

16%

The marketing and communications team

18%

2012

Certain people have permission and are trained to use it

22%

The digital team

14%

The social media manager

25%

Different departments are responsible for their own activity

11%

Everyone is encouraged to use social media

11%

The marketing and communications team

17%

DO YOU HAVE A MOBILE STRATEGY? WHAT HAVE YOU OPTIMIZED FOR MOBILE?

Although mobile has been capturing a great deal of attention over the last year, this has not yet translated into a fully developed strategy for the majority of charities that have taken part in our survey.

It's early days of course, but eMarketer projects that by 2014, two out of three mobile phone users and 53.7% of the UK population will use smartphones.

Mobile optimisation, like social networking represents something of a challenge when it comes to integration into core business processes.

Website design and social media have been addressed for more than half of the charities, but deeper engagement via events and donation lag behind even though they represent, arguably, the bigger opportunity.

16%
We're 'mobile by default'

33%
We're starting to have one

29%
Not really

22%
No

71%
Website content/landing pages

19%
Event registration

57%
Social media/sharing

48%
Donation processes

17%
Don't know
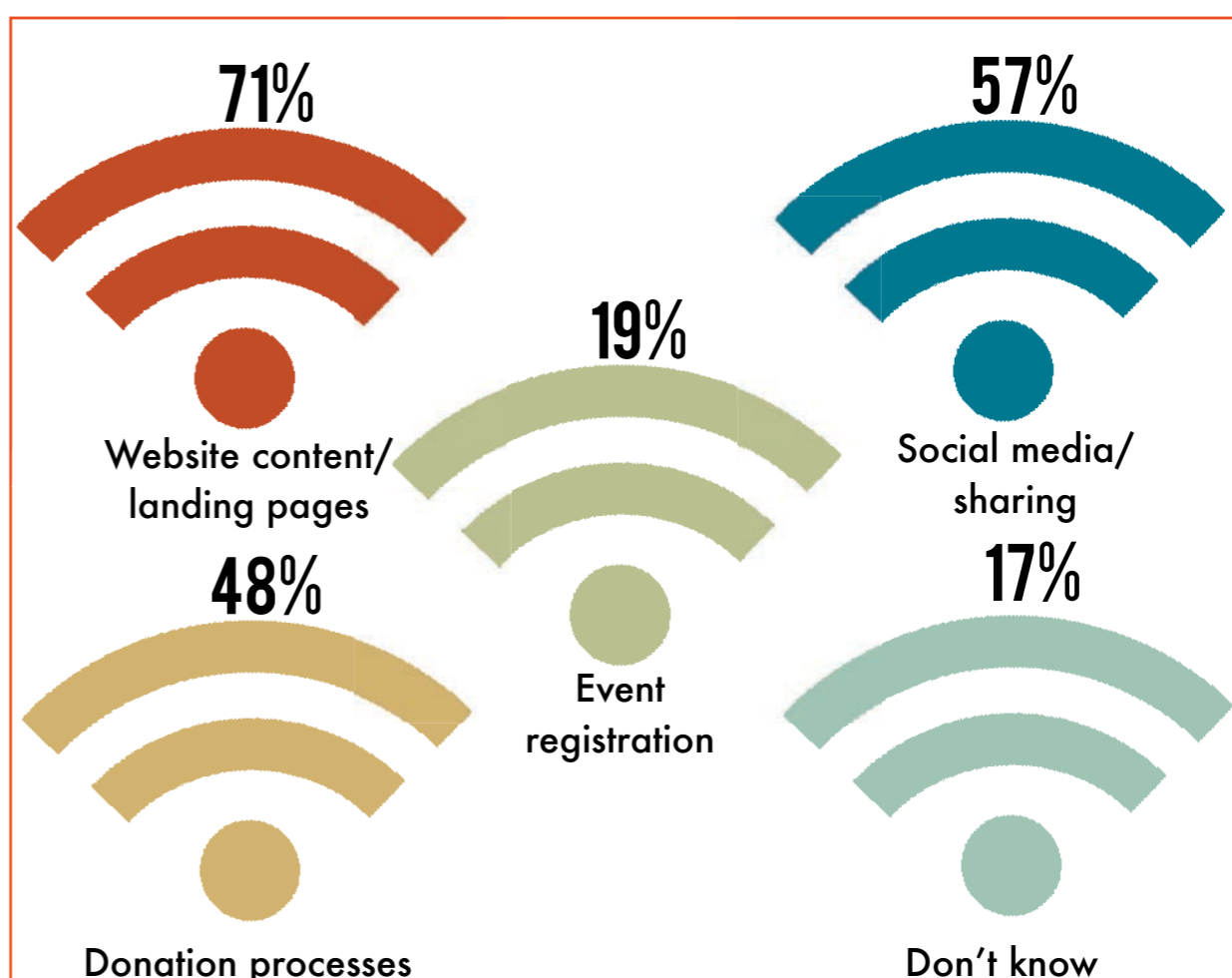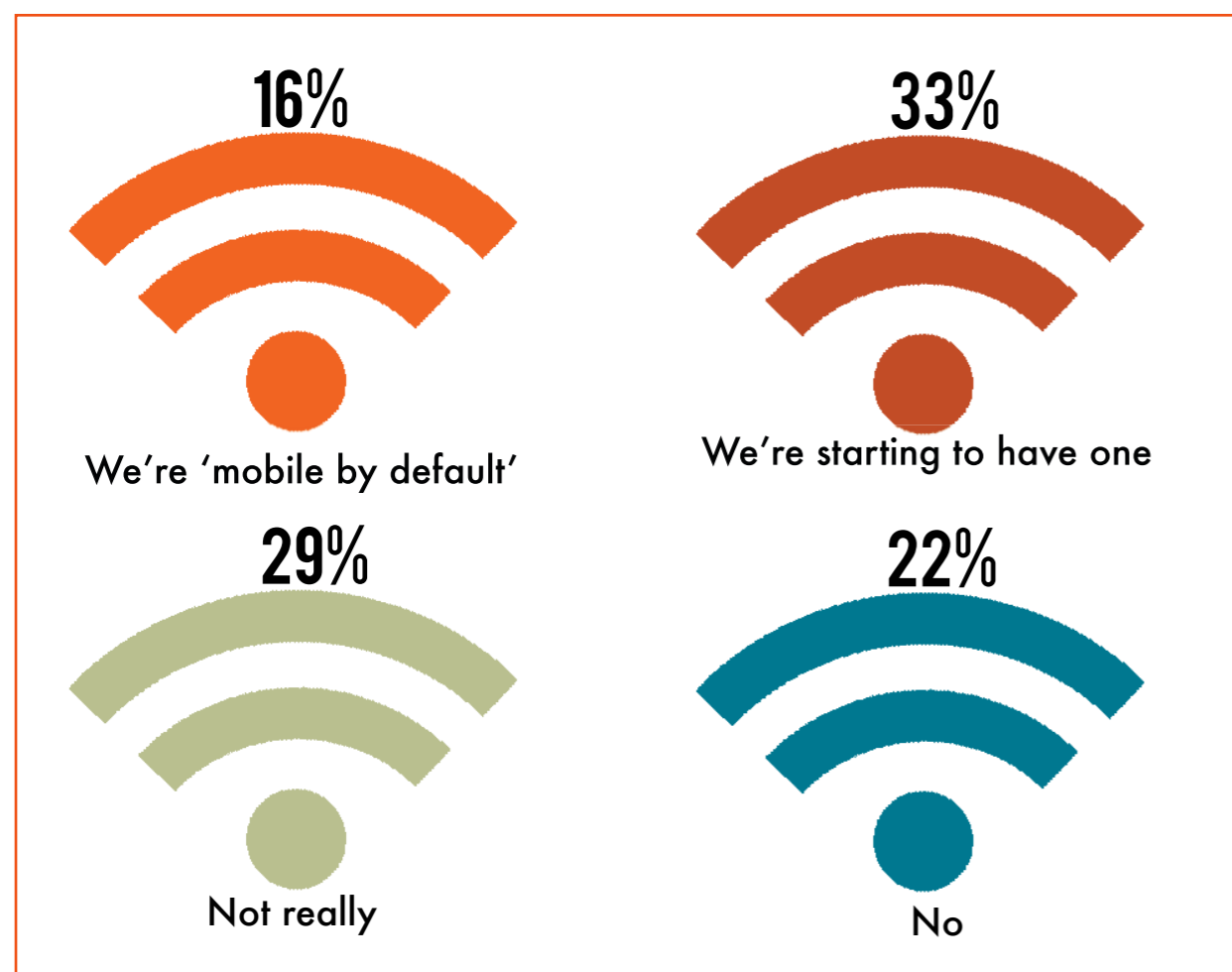
WHAT BEST DESCRIBES YOUR APPROACH TO OPEN DATA?

Open data strategy is an area still in its infancy and, for the majority of charities, it's not yet become factored into the networked relationships and communications they have with supporters and stakeholders.

At a time when open data is being increasingly recognised as a key area of future value generation, only 4% of the charities that took part in this study expressed a commitment to developing it.

This reflects perhaps a lack of knowledge and understanding about what open data is and how it can be managed internally.

Connecting and linking data across departments is a crucial challenge for charities, one that 2014 may put under the spotlight as supporters look for evidence to show how charities use donations to make a difference and provide value, in real time, on the ground.

We report regularly but don't have an open data strategy **18%**

We produce a quarterly impact report **2%**

We're developing an open data strategy and an impact dashboard **4%**

We produce an annual impact report **35%**

Not sure **41%**

HOW ARE YOU MEASURING THE IMPACT SOCIAL MEDIA IS MAKING TO YOUR CHARITY?

The degree to which supporter engagement is now seen as a promotional asset, and measured as such, has been enabled by the fact that analytics capabilities themselves have improved and social media impact measurement has developed significantly over the last twelve months.

In line with how the value of social media itself has become more accepted, 96% of charities now count Follower and Like levels, compared to just over a third of that in 2012.

Beyond the social media dimension, the impact of digital and social media on revenue has become more developed as part of management metrics as well, with 42% of charities tracking the amount of donations made via social media.

While this is less than half of all charities, it is perhaps a precursor perhaps to data management in general taking more of a place centre stage next year.

We count Followers and Likes	2012	36%
	2013	96%
We measure our influence using tools like Peer Index, Klout, Kred or Social Mention.	2012	18%
	2013	31%
We measure sentiment.	2012	7%
	2013	18%
We measure the amount of content we produce that's spread by others.	2012	25%
	2013	55%
We measure the impact of social media operationally	2012	14%
	2013	38%
We track website views via social media	2013	76%
We track website donations via social media	2013	42%

HOW DO YOU COMMUNICATE THE IMPACT YOU'RE MAKING AS A CHARITY?

Given the urgency of campaign appeals, impact reporting lags behind and the annual report remains the prime method for impact reporting.

This is in part because our survey suggests the majority of charities have not yet come to grips with data management as a core operational competency.

Most charities use a combination of ways to communicate impact, and 22% of them are quantifying impact against donations made, but only a quarter are producing any form of dedicated impact report with half regarding impact as primarily explaining how money is spent, as opposed to how well the charity is achieving its aims.

Delivery of achievement will undoubtedly only receive increasing scrutiny. Charities have an opportunity here to think about how they align as organisations to deal with both the challenges and the opportunities of connecting to supporters compellingly in real time to make a difference.

77% Through our Annual Report

25% We produce an Impact Report

67% On our website

49% We provide a breakdown of how money is being spent

22% We quantify impact against donations to show value for money

4% We have a data strategy for benchmarking this in real time

6% Don't know
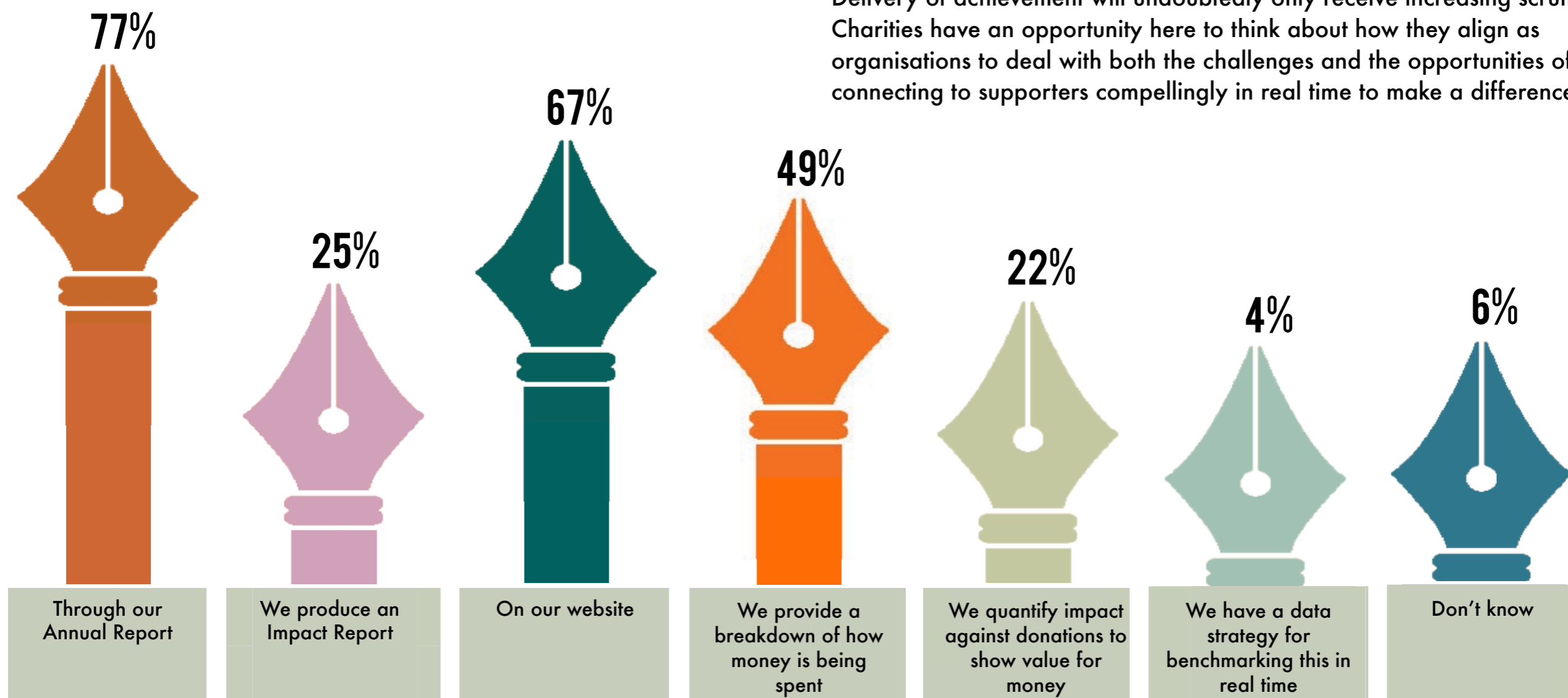
SOCIAL BUSINESS AS A NARRATIVE
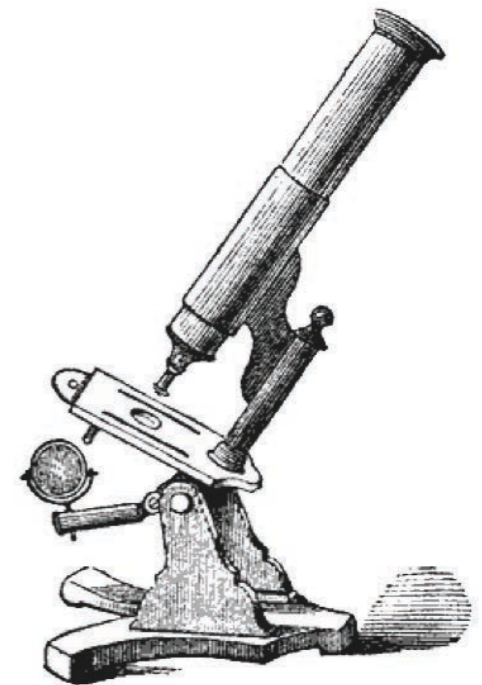
SOCIAL BUSINESS AS A NARRATIVE

The information, stories and conversations that people are telling and sharing about charitable causes are powering change. We've seen that from the numbers - even whilst income has gone down, the levels of potential traction via social networks has rocketed.

What's also changed is the way those stories can be told. No longer is the written the word the only, or indeed the dominant, means of this storytelling and sharing. As information volumes rise, for example with the arrival of the six-second-video from Vine this year, the use of imagery, graphics, infographics and rich media are all emerging as forms of content now holding people's attention.

The look and feel of content is a crucial component of making effective, powerful connections. It's increasingly important that supporters are able to navigate through digital media using semiotics as easily as they might do a supermarket, understanding colour codes and web layouts as part of a distinctive digital experience.

Are we entering another age of code in terms of hashtags and hieroglyphics? One thing is certain, and that is how content is conceived, served and circulated is changing rapidly, and are great ways of co-ordinating and condensing information.

On the following pages are snapshots of the stories charities themselves have told us about how this is affecting them. There have been some memorable developments over the last twelve months and marketing efforts have focused on making shared experiences a means of getting supporters involved.

That said, clearly challenges remain. Survey respondents have mentioned how social business effectiveness depends on dealing with silos within the organisation and being able to live and breathe core values.

There is still the question of whether the CEO or Board of Directors think social media is worthwhile.

In a '7 second memory' kind of world, it is challenging to cultivate long term, sustainable relationships with supporters and donors, and to keep up with innovation and technology.

One particular challenge is how the supporter journey has been changed by social media. People feel they can support a charity with a like or a follow rather than a financial donation. This upends operating models, and charities are wrestling with how to adjust to it, as well as how to measure impact.

That said, there is a consensus that there are huge benefits. 'Not being afraid to be creative on the cheap' is perhaps something that stands out. It is an indication of how social networking can foster indigenous skill, something smaller charities have more of as a necessity. It is also, of course, the true mark of an effective networked culture, connected with both supporters and end users.

Making this shift, away from line management, is perhaps the next chapter of social networking evolution on the horizon.

HASHTAG CULTURE AND CHARITY CONVERSATIONS #FTW

In the last twelve months, the hashtag has become adopted across social networks.

As a prime focus around which people gather, they are propelling a shift from 'target audiences' to 'target moments' and shared experiences.

Hashtags are becoming a crucial part of digital communication and charity language. We're not at the stage where the hashtag is recognised as a form of organisation in itself, although we think they can be. Hashtags denote streams of impact, in the moment organising to make a difference. Perhaps it's only a matter of time.

While these are by no means exhaustive, here are some of the most powerful hashtags charities in this study said they used in 2013.

"

#CPI2012
#DAMBUSTERS70
#DECEMBEARD2013
#DIABETESWEEK
#DIAMONDCHAMPS
#DISABILITY
#DONTCALLMECRAZY
#DONTWAIT
#DPC13
#DYINGISNTWORKING

#GRACEDARLING
#MINDMEDIAAWARDS
#MIRANDASMARCH
#MSFSCI
#NASONESIEWEDNESDAY
#NATIONALARTHRITISWEEK
#NLAWARDS
#NORTHEASTHOUR
#NUTRITION
#OLDERPEOPLE
#OPPORTUNITYPARTNERSHIP

#RND
#RNLIMAYDAY
#ROCKENROL
#RTSTARS
#SAKILI13-
#SAVEWAVE
#SAVINGYOUNGLIVES
#SEEYOUONTHESAND
#SHAPINGOURAGE
#SINGFORYOURLIFE
#SINGWITHUS

#12DAYSOFCHRISTMAS
#12MINUTES
#1D4RND
#4TEA
#70THBIRTHDAY
#ARTHRITIS
#ARTHRITISMYTHS
#AUTISMFACTS
#AUTISMMYTHS

#BAKECLUB
#BCAW
#BCAW2012
#BEHEARD
#BIGCHAT
#BIGGIG2012
#BIGGIG2013
#BIKE4BOBATH
#BOWELCANCERCHAT
#BRIBERY
#BUCKHAMFAIR

#PEACEOFMIND
#POSTCARDSFROMTHEEDGES
#PROMISEFORALL
#PROUDOFOURCROWD
#READTHESIGNS
#REALROLEMODELS
#RESPECTTHEWATER
#RETAILREADYPEOPLE
#REVERSERIOTS

#SOCENT
#WIMPSTV
#WIMPSLIVE

#SOCIALFINANCE
#SOCIALFINANCE
#SPORTABEARD
#STARWALK
#STEPHENFRY
#SUPPORTERS
#SYRIA
#TALKPANTS
#TALKTONSPCC
#TEAMBONES

#THICKE

Culturally, the hashtag has made it.

#WORLDORANGUTANDAY

#THE4TS
#TURNHARROWPINK
#TYPE1KIDS
#VINSPIREDLIVE
#VINSPIREING
#VOLUNTEERS
#WAAD
#WALKTEN
#WEEDTHESIGNS
#WELDMARWALK

#EASYNEWS
#ELEFRIENDS
#FATALNEGLECT
#FIBROMYALGIA
#FOOTBALLSSUICIDESECRETS
#GDA2013
#GIRLSATTITUDES
#GIVINGLOVE
#GIVINGTIME

#LUPUS
#MAGGIESCC
#MAGGIESMONSTER
#MAKECAREFAIR
#MARIECURIESTORIES
#MEDIAAWARDS
#MEETOUREXPERTS
#MENINGITIS
#MENINGITISMATTERS
#MINDAWARDS

#GLOBALDEVLIVE
#GOODNIGHTWALK
#GREATNORTHDONATE
#GYMDNA
#IFCAMPAIGN
#IGNITER
#IMABEARDY
#JESSIEJDARES
#LETTERFROMSANTA
#LONDONMARATHON
#LONELINESS

#CARDIOMYOPATHY
#CAREBILL
#CAREFORACUPPA
#CHALLENGE30
#CHARITIES
#CHARITYSHAKEOFF
#CHARITYTUESDAY
#CHILDRENOFSYRIA
#CLARASSTORY
#CPAM

"

CURRENT BENEFITS OF SOCIAL MEDIA?

" **BREAKING DOWN SILOS, INTERNALLY AND EXTERNALLY**

Helping build a momentum for social change – there's real, everyday support for what we do

A more personal approach to communicating

Our online community allows people to share their frustrations and successes safely and without judgement

Customer service and building life time value with followers

SUPPORTER CARE

Engaging with our supporters and those we help on a daily basis

Being able to respond to people directly who have questions about our operations, and giving them a quick, public answer

Building brand awareness

It's a great soft stewardship tool – gently reminding our supporters why we're here

Generally being very transparent about what we're doing, what our priorities are and involving others in the journey.

For us, a large organisation spread across the UK and Northern Ireland, and with sister organisations in 145 countries around the world, we have found that social media has been a great way to connect with amazing people and share brilliant stories

We are starting to think more **innovatively**

IMMEDIACY OF CONNECTION

MAINTAINING AND FURTHERING THE HUMAN IDEAL THROUGHOUT VARIOUS TEAMS AND DEPARTMENTS

A place for charities to engage with users in their "personal space", to create a connection with individuals and rally them around a cause

Ability to share events and news with a wider audience

We don't offer a 'support' function as a charity (eg support helpline), so social media is a vital way of engagement with people to help inform our campaigns and media activity and to raise awareness of the work we do.

Social media enables us to live our core values

Increase dialogue with supporters and grow our supporter network

Increasing awareness with the public of who we are and what we do

Keeping supporters updated in real time about the work we do and the difference their support is making

Connecting with, understanding better and mobilising our audiences and community to action

COMMUNITY BUILDING

"

BIGGEST CHALLENGES?

" Sense of losing control to chaos but still needing to be answerable to many authorities

Encouraging the CEO to believe that spending time on social media is worthwhile

Being quicker to respond, adapt and change. No more 3 day sign-off periods on messages!

TO MAINTAIN INTEREST AND LONG TERM SUPPORT

RESOURCES

Turning a retweet, like or share into a donation

The millions of opportunities social media has and mission creep

Competing against other very 'social media friendly' charities

Getting standout in a crowded marketplace

MEASURING IMPACT

Working our way through the noise and the signal dilemma

The resource, tech and data skills required to handle, analyse and deal with volumes of information, non-linear customer journeys and trans-media communication touch points.

Demonstrating the true value of social media

Not overloading or turning off our audiences

Resource and cost, as well as giving it the backing it needs to be done properly

Damage control when social media goes wrong — its instant nature is amazing and terrifying all at once!

KEEPING UP WITH INNOVATION AND TECHNOLOGY

"

FUTURE OPPORTUNITIES OF SOCIAL AND DIGITAL MEDIA?

"

Increasing the ways people can support more easily, in a way and at a time that best suits them

Micro-payments through social media

STORYTELLING

More people using it as a way to communicate with charities

More understanding of what supporters say they want and need

INVOLVING PEOPLE ON A GRASSROOTS LEVEL

Delivering services in a collaborative fashion

An amazing way to get honest feedback quickly

A way to share ideas

Gaining a large number of supporters for a charity mission extremely quickly

Becoming a more customer-centered organisation

Blurring boundaries with supporters

INTERACTION WITH BENEFICIARIES

NOT BEING SCARED TO BE CREATIVE ON THE CHEAP

The potential to constantly evolve and co-create services and communications

Being able to show impact in realtime to donors

CRM and user support exclusively through social media

Charities that are able to measure, assess and use data will be able to act quickly in response to needs

"

DEVELOPING AS DISTRIBUTED NETWORKS

One of the main developments this year has been the degree to which commercial partnerships have become more prominent. Some charities such as Girlguiding and VInspired now have very good pages that map out these commercial partnerships. This is a sample of just some of the commercial partnerships charities have and how the 'not for profit' and the 'for profit' lines are blurring.

What's key here is how much charities really are becoming distributed networks. As operations become diffused like this, a consequence is the essence of what a charity stands for, and its purpose, really needs to be communicated and articulated with clarity, perhaps more than ever before.

A2 DOMINION
BARCLAYS
BHS
BIG YELLOW SELF STORAGE
BISHOP'S MOVE
BLUE SKY FOSTERING
BOOTS
BOSCH
BRITISH AIRWAYS
BT
BUPA
CAPITAL ONE
CLARINS
COTSWOLD OUTDOOR
CURRYS
DELOITTES
DIGBY BROWN LLP
DISCOVER ADVENTURE
DISNEY
DIXONS

DRAYTON MANOR PARK
EASYJET
ENDEMOL UK
EON
EVERYTHING EVERYWHERE
FIRST DIRECT
G4S
GLAMOUR
HILL'S PET NUTRITION
HILTON
HOGAN & LOVELLS
HOMESERVE UK
JELLY BELLY
LBM
LEGO
LINK ATM
LONDON LUTON AIRPORT
LUSH
MARKS AND SPENCERS
MATALAN

MERLIN
METRO
MONEYSUPERMARKET.COM
NORTHERN POWER GRID
O'MELVENY & MYERS LLP
ODEON
OPENREACH
ORANGE INFORMATION SYSTEMS
PAMPERS
PANTHEON VENTURES
PC WORLD
PETPLAN
PETS AT HOME
PFIZER
PG TIPS
PREMIER LEAGUE
RBS
ROCKSTAR YOUTH
ROLLS ROYCE
ROUGH GUIDES

RYMAN
SAFESTORE
SAINSBURY'S
SAMSUNG
SHEFFIELD MUTUAL SOCIETY
ST ERMIN'S HOTEL
SUPERDRUG
TALK TALK
TESCO
THE CO-OPERATIVE FOUNDATION
THE LEWIS PARTNERSHIP
TK MAXX
TRUVIA
VALOUR FINANCE
VERNON BUILDING SOCIETY
VERSO CREATIVE
VODAFONE
WASPS
WELLA
YAKULT

HOW ARE SUPPORTERS CONNECTING TO CHARITIES?
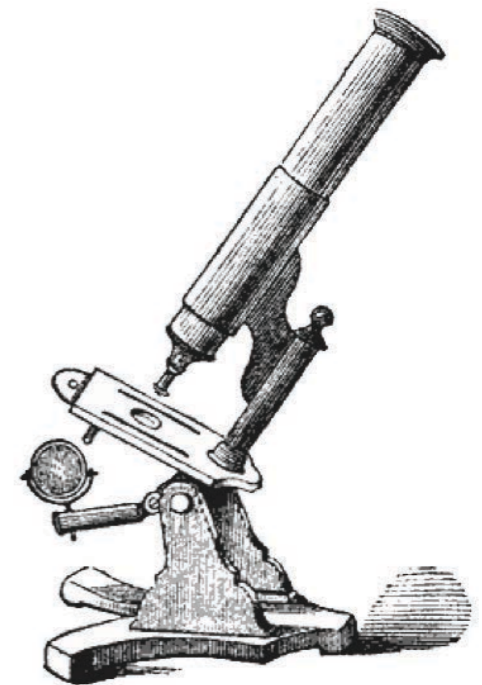
HOW ARE SUPPORTERS CONNECTING TO CHARITIES?

We have partnered with JustGiving again this year and also welcome Blackbaud as a sponsor in 2013.

With this support we've been able to pull together the broadest dataset looking at digital and social perspectives for charities in the UK to produce a truly broad-spectrum piece of research.

JustGiving have an invaluable sightline on the dynamics of social sharing, and with Blackbaud we have been able to work with their apprenticeship programme and create a YouGov survey to get under the skin of the supporter perspective.

As a result, we now have a parallel as to what charities themselves have been saying by including the view from supporters, and a holistic picture. What we see as a result is while donations overall may have declined, the loyalty and willingness of people to share charitable activities with friends remains high, as is people's own willingness to give directly to charity, but that digital could do better.

As you will see from this information, the personal touch remains crucial. According to the YouGov data, for example, it is the relationship and the connections with people that play at least as big a part as the digital element of a joined up strategy. It's all humans connecting with other humans, all social, powered increasingly by mobile technology.

Despite the high increase in the number of people connecting to charities using social media, our YouGov research suggests

that a reasonably high number of people believe they could be more effective with it. Of the charities that showed the most increase in social sharing via JustGiving during 2012/13, only 12 are also in our Top 100 for volume of voice. There are below.

JustGiving top charities for social donor over 2012/13 within our Social Charity 100

	Disasters Emergency Committee
2	BeatBullying
3	ZSL
4	Blue Cross
5	Cats Protection
6	Rotary Foundation
7	Barnardos
8	Age UK
9	Actionaid
10	Rethink Mental Illness
11	Downs Syndrome Association
12	RSPCA

HOW LIKELY ARE YOU TO DONATE MONEY TO ANY CHARITY IN THE NEXT 6 MONTHS?
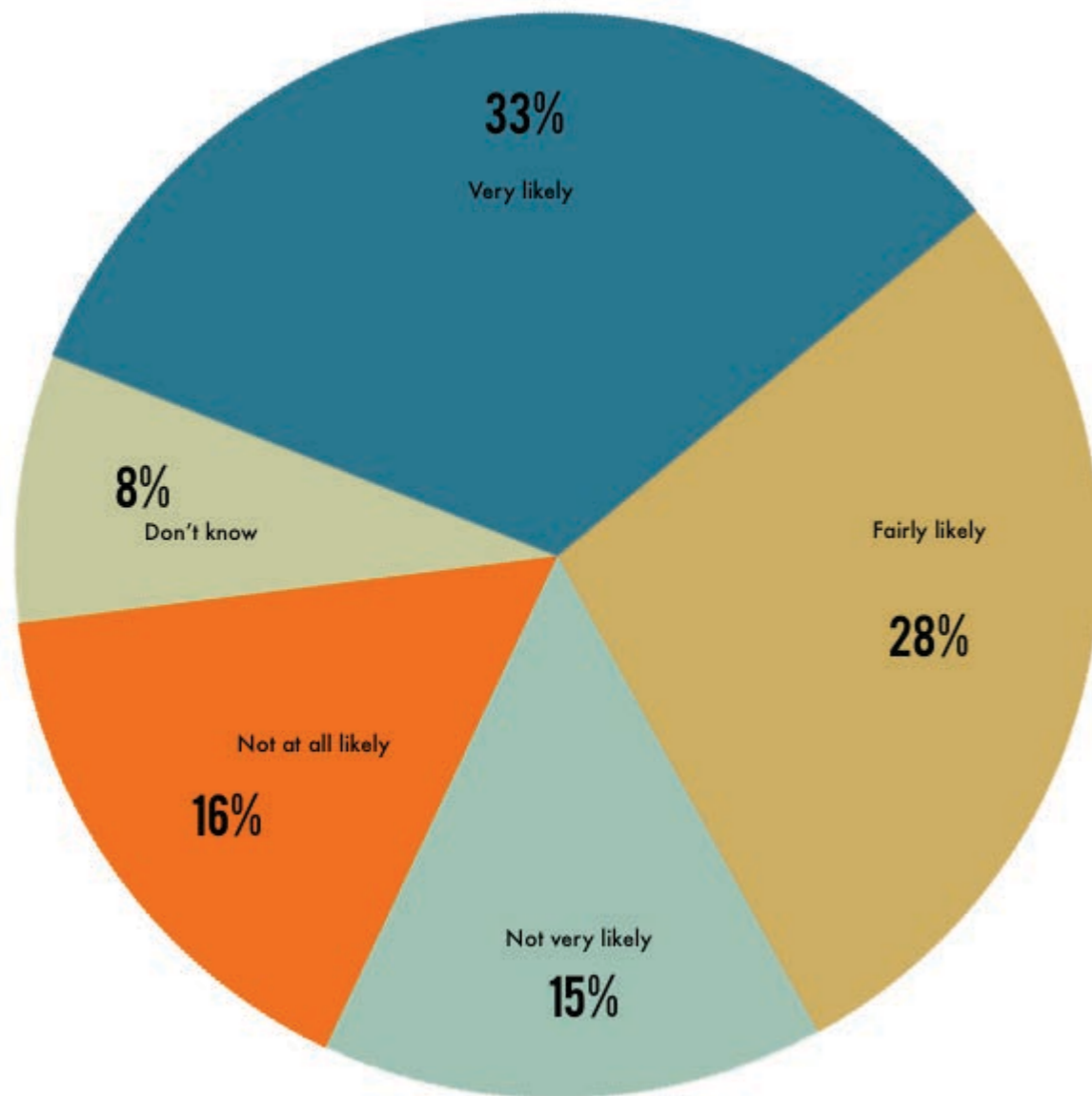
HOW EFFECTIVE ARE CHARITIES IN USING SOCIAL MEDIA TO ATTRACT SUPPORT FOR THEIR CAUSES?

33%
Very likely

8%
Don't know

Fairly likely
28%

Not at all likely
16%

Not very likely
15%

Very effective

6%

Fairly effective
28%

40%
Don't know

20%
Not very effective

5%
Not at all effective
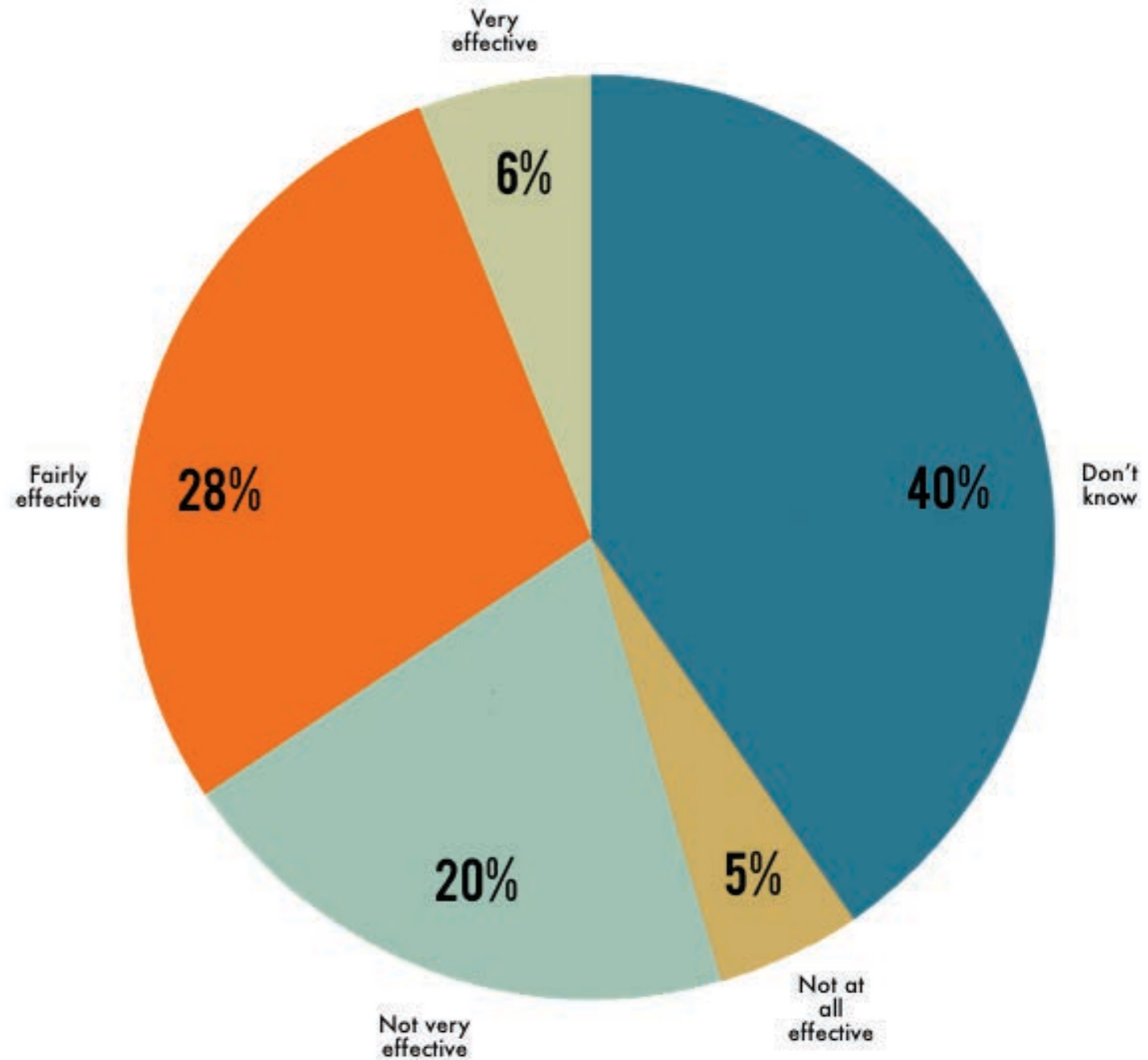
IN WHICH OF THESE WAYS HAVE YOU RAISED OR DONATED MONEY FOR CHARITY?
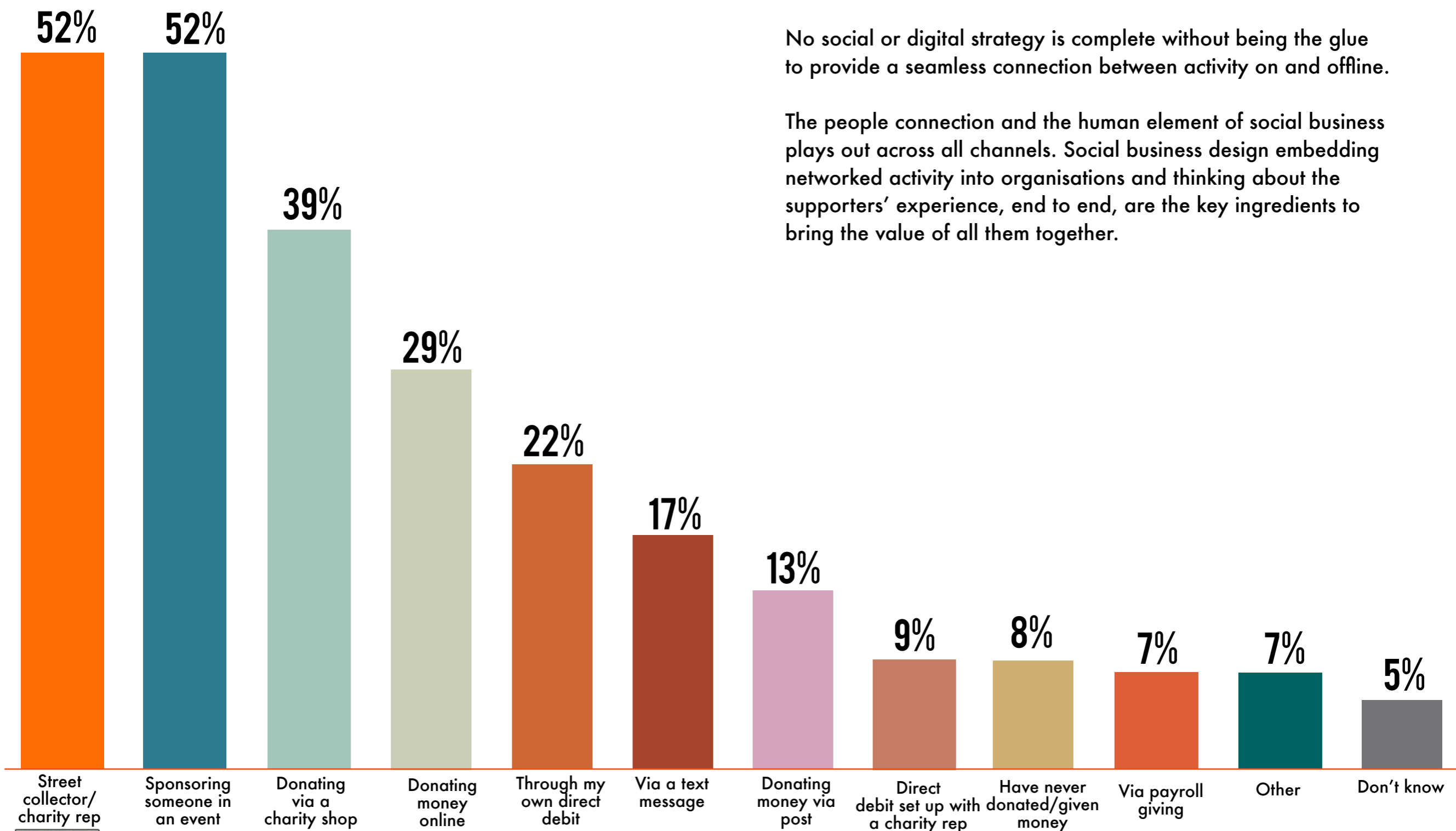
No social or digital strategy is complete without being the glue to provide a seamless connection between activity on and offline.

The people connection and the human element of social business plays out across all channels. Social business design embedding networked activity into organisations and thinking about the supporters' experience, end to end, are the key ingredients to bring the value of all them together.

Street collector/ charity rep	Sponsoring someone in an event	Donating via a charity shop	Donating money online	Through my own direct debit	Via a text message	Donating money via post	Direct debit set up with a charity rep	Have never donated/given money	Via payroll giving	Other	Don't know
52%	52%	39%	29%	22%	17%	13%	9%	8%	7%	7%	5%

SOCIAL CHARITIES – 3 SNAPSHOTS

One of the aims of this study is to give charities the confidence to develop their own digital, social and cultural footprint in their own way. Here are three examples that show how social business success and innovation are being embraced in the not-for-profit space, as well as a spotlight on our No1 charity this year.
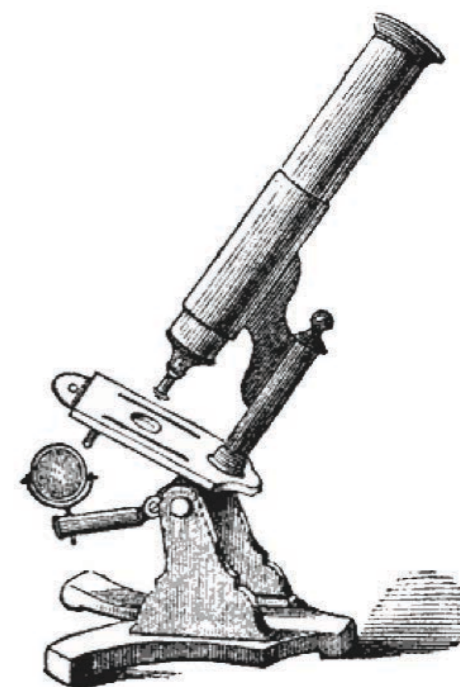
'DIGITAL HAS BECOME ENGRAINED INTO WHAT WE'RE DOING'

Like many charities, in the last year Save the Children has focused on social and digital opportunities across the supporter journey.

An already highly recognised charity, Save the Children has translated brand awareness into an effective social brand network. With a healthy relationship between fundraising and supporter engagement, they now have one supporter on Facebook and Twitter for every £50 of income as well as support across other platforms.

Save the Children have shown a 130% increase in supporter growth on Facebook in the last year and an 89% increase on Twitter, just on the UK account. They also have a page for every country. They are consistently demonstrating high levels of support across YouTube, LinkedIn and through blogger outreach, too, over the last twelve months, with approximately four followers for every employee on LinkedIn. With all this activity, and even after discounting fake followers levels as we reported on a month ago, Save the Children are No 1 in our Index.

Mark Weber, Head of Digital, says social and digital technology now underscores all aspects of fundraising and corporate behaviour at the charity, with more digital skills being developed throughout the organisation, mentored and coordinated by the core digital team. This has resulted in success with campaigns on Syria, healthcare in Liberia, and joint initiatives such as the IF campaign.

A network of social apps allow Save the Children to reach out to their more committed supporters, with Christmas Jumper Day providing a major force in social mobilisation. Every department at the charity is now involved in working digitally and in a more connected way – the aim is to put social at the heart of the organisation.

'Culturally, we're taking an agile approach to digital', says Mark, 'It helps that we're being adventurous in taking risks, and able to test out ideas underpinned by new systems.'

It helps, too, that what Save the Children articulates as a brand is a universal call to action, more than just a description of what they do. Save the Children is a rallying cry of our times, and people are connecting to it through social and digital media.

'SOCIAL IS SUCH A GIFT TO US'– BEING ON TOUR WITH THE CAUSE

As people become more networked, shared memes and experiences are emerging and these are having an impact on organisational performance. Hashtags are acting as 'digital maypoles' beyond campaign management; successful social media creates a buzz and sense of being on the same journey in a way that enables supporters to be 'on tour' with the cause.

Comic Relief demonstrates this well. As an entertainment and activity-based charity using compelling storytelling and heroic tales of achievement to connect with supporters, Comic Relief has made a big impact and risen 50 places to no 2 in our Index.

With Red Nose Day and Sport Relief the prime focus, as a charity it has a different kind of temporal quality compared to others, and is now extending contact with supporters into all year round communication through social media.

The Comic Relief App Hack for 2014 is co-creating digital innovation with its supporter base. Comic Relief demonstrates social leadership using the platform it has to change attitudes, e.g. in mental health, as part of a tuned-in national conversation, and with its strong links to entertainment, it provides a 'halo effect' for the other charities it connects with, illustrating the increasingly dispersed and networked influence of charities. It's giving people content as and when they want it. The One Direction support is an illustration of that, acting as a community within a community. It is a great example of an enabling charity.

COMIC RELIEF

People understand there's a rhythm and tempo to Comic Relief communication. As Mark Woods, Head of Journalism and Social Media says, 'If we think something's interesting, informing or entertaining the people good enough to follow us on social we'll post it. If not we'll try and keep schtum until we've got something worth saying. We don't need to be in people's faces all the time. Who wants that?' Comic Relief is developing a cultural philanthrophic language. It is one click away from the action, playing an everyday part in people's lives.

EMBEDDING CHARITABLE BUSINESS INTO LIFE AS USUAL

It's become clear this year that charitable activity is becoming more networked and dispersed, both across platforms and via commercial partners. DePaul Box is one innovation that reflects the amount of opportunity beyond the 'for profit' and 'not for profit' divide by thinking about fundraising in a way that embeds charitable business into life as usual.

Though outside our Top 100, DePaul Box is worth a mention in this study as an indication of what 'charity' might come to mean and look like in the future.

Moving house is just something that happens every so often for some people but for others it's a pipe dream, way beyond reach as a possibility because they're homeless. The DePaul Box Company acts as a bridgehead between the two, making it easy for people moving house to embed good work into an everyday activity, by taking a user-centric social business approach to deliver practical benefit in a commercially astute way.

It represents a means of connecting a cause relevantly for donors and delivering easy ways to 'give while you live'.

The initiative has been a result of learning coming originally from 'iHobo', an app that notched up over 750,000 downloads and several awards. Learning from ihobo and how users engaged with it, the goals are to raise awareness and promote education, to gather data and deliver fundraising by involving the end user.
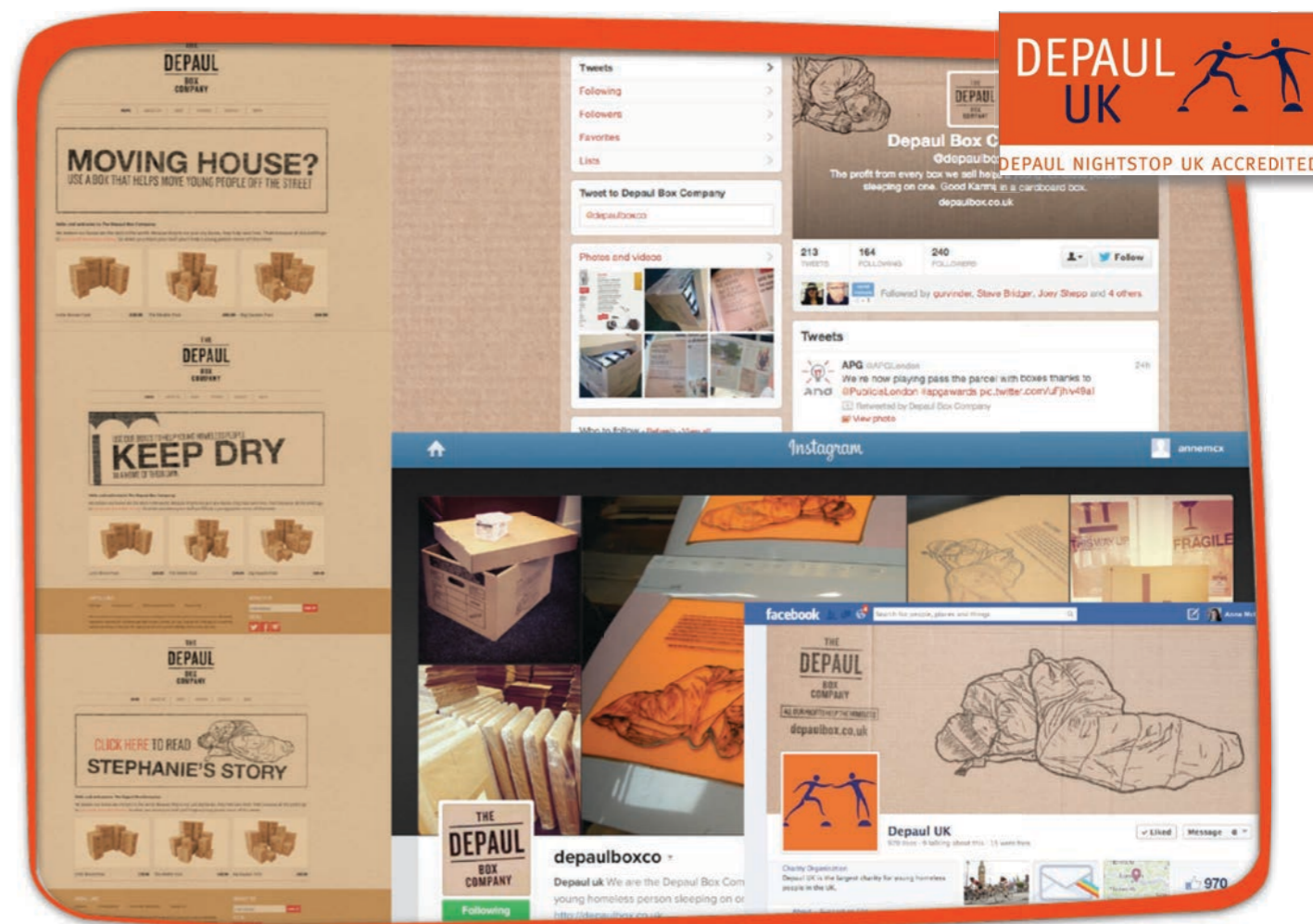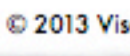
DePaul Box shows how smart social business design by charities can create a situation where philanthropy can provide added value as competitive edge. It can compete with existing pure play commercial providers, potentially changing the whole game.

The idea is beautifully liveried throughout, and by revolving around user needs, fundraising can become an embedded element of a brand that is preferred by offering utility with a bigger purpose.

THE RANKINGS
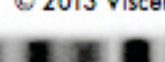
THE 2013 SOCIAL CHARITY 100 RANKINGS

2013 Rank		Organisation	Networked Power Rank	Networked Power Change	Twitter Followers Rank	Twitter Growth Rank	Facebook Likes Rank	Facebook Growth Rank	LinkedIn Follows Rank	LinkedIn Ratio Rank	LinkedIn Growth Rank	YouTube Subscribers Rank	YouTube Views Rank	Google+ No Rank	Google+ Change	JustGiving Top 100?	Survey Responsive?	Total Score
1	▲	Save the Children	18	+57	42	52	5	16	3	55	22	21	23	7	-2			813
2	▲	COMIC RELIEF	-	-	16	2	45	81	61	42	78	1	1	13	+73		●	784
3	▲	Oxfam	-	-	22	31	21	72	4	38	16	13	7	3	-2			765
4	▲	Dogs Trust	36	-22	20	59	14	-	62	14	18	18	25	16	-5		●	757
5	▲	THE BRITISH MUSEUM	23	+6	9	78	10	34	11	9	14	22	34	12	-2			751
6	▲	TATE	13	-2	1	-	2	79	7	4	6	4	10	1	+2			748
7	▼	WE ARE MACMILLAN. CANCER SUPPORT	97	-32	15	12	15	36	24	-	54	67	20	9	-1		●	745
8	▼	CANCER RESEARCH UK	-	-	19	35	6	39	14	-	57	28	18	5	-1			736
9	▲	British Red Cross	-	-	31	28	26	4	16	-	50	14	9	19	-7			732
10	▲	THE NATIONAL GALLERY	35	-24	13	9	16	21	41	11	49	27	77	33	+50			706
11	▼	unicef	92	-22	21	27	38	86	68	34	4	33	22	2	=		●	694
12	▼	RSPCA	60	-34	14	25	9	-	49	-	58	39	40	27	+2	●		667
13	▲		17	-6	44	5	12	7	-	50	23	60	57	66	-19			659
14	▬	WWF	-	-	77	61	50	37	9	5	35	5	31	40	-1			658
15	▲	GREEN PEACE	3	-1	35	-	23	90	5	24	17	10	8	30	-10			656
16	▼		-	-	28	30	18	95	23	87	41	23	5	28	-10			647
17	▲	V&A	45	-22	6	51	14	62	12	8	3	17	32	-	-			643
18	▼	Friends of the Earth	27	-9	33	-	70	8	53	51	79	9	6	56	-7			638
19	▲	BFI	-	-	11	50	58	41	17	3	27	3	3	7	-			635
20	▲	RSC	81	-27	17	26	47	93	36	19	19	15	16	4	+46			632

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2013 Rank		Organisation	Networked Power		Twitter		Facebook		LinkedIn			YouTube		Google+		JustGiving	Survey	Total Score
			Rank	Change	Followers Rank	Growth Rank	Likes Rank	Growth Rank	Follows Rank	Ratio Rank	Growth Rank	Subscribers Rank	Views Rank	No Rank	Change	Top 100?	Responsive?	
21	▼	[logo]	-	-	10	44	25	46	10	-	43	47	56	14	-			615
22	▼	NSPCC	99	-40	26	10	17	-	35	-	63	54	19	72	+3		●	596
23	▲	ZSL	-	-	72	46	59	5	89	85	66	6	2	15	-	●		590
=24	▼	BRITISH COUNCIL	-	-	25	55	11	53	2	66	13	7	67	37	-3			=573
=24	▲	Lifeboats	-	-	53	82	35	68	51	-	24	20	21	35	-11		●	=573
26	▲	HELP for HEROES	25	-5	8	54	13	42	-	78	7	64	90	39	+11			571
27	▲	[logo]	-	-	29	94	24	58	47	59	20	2	4	8	-2			568
=28	▼	Amnesty	22	+3	24	-	27	92	-	-	12	8	12	25	+8			551
=28	▼	NATURAL HISTORY MUSEUM	49	-24	3	47	19	33	32	63	53	30	41	-	-			551
30	▼	Children in Need	13	-8	12	80	1	-	-	-	-	34	30	71	+3			550
31	▼	[breast cancer care]	34	-6	23	16	54	12	77	35	54	-	-	70	-6			544
32	New	[Fairtrade]	20	-	32	-	31	-	65	10	-	46	24	36	-			523
33	▼	Alzheimer's Society	-	-	56	35	44	47	40	-	40	38	44	52	+7			510
34	▼	Shelter	-	-	39	15	57	57	45	49	36	80	58	46	-4			508
35	▲	[logo]	63	+11	97	37	2	74	-	-	51	78	42	-	-	●	●	494
=36	▲	[logo]	62	-24	2	-	30	28	30	65	33	49	86	29	+29			493
=36	▼	Marie Curie Cancer Care	70	-39	63	38	8	-	52	-	62	-	96	20	-7		●	493
38	▼	Science Museum	57	-30	5	-	33	26	85	-	86	36	33	6	+1			490
39	▲	National Theatre	-	-	18	86	49	75	39	70	30	11	11	55	-			485
40	New	vInspired	32	-	80	17	61	3	-	17	8	96	-	74	-22		●	476
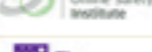
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=41	▼	WaterAid	-	-	62	-	89	69	27	37	34	50	28	10	-			474
=41	New	Kew	43	-21	64	67	46	11	-	33	90	52	60	51	-			474
=43	▼	DIABETES UK	96	-55	38	20	20	24	94	69	41	86	84	23	-		●	473
=43	▼		75	-27	41	-	11	53	2	66	13	7	67	37	-3			473
45	▼	CATS	67	-34	68	63	29	-	-	76	25	53	55	26	+4	●		468
46	▼	MEDECINS SANS FRONTIERES	12	-6	-	-	3	-	8	-	47	89	92	18	+11		●	458
47	New	World Vision	61	-	4	-	-	-	1	97	-	19	37	22	-			456
48	▲	SG	-	-	45	57	93	9	98	32	28	24	15	79	-			443
49	▼	RSPB	-	-	34	33	51	44	28	82	72	66	89	-	-			430
50	▼	mind	72	-29	37	39	52	52	-	-	1	34	30	71	+3		●	429
51	▲		-	-	54	81	-	23	34	36	36	37	39	68	-5			426
52	▲	Believe in children Barnardo's	-	-	43	13	65	-	43	-	88	56	74	99	-	●		420
53	▲	ENGLISH HERITAGE	90	-33	30	75	36	30	18	57	38	81	-	61	-			419
=54	▲		-	-	74	19	55	31	72	-	39	45	17	62	-8			415
=54	▼	Princes Trust	-	-	27	99	81	88	25	94	59	32	35	69	-9			415
56	▲	Samaritan's Purse	82	-	40	1	-	-	31	71	45	87	64	17	-			409
57	▼	age UK	-	-	67	49	72	-	38	-	48	100	61	35	-4	●		403
58	▼		-	-	66	32	85	55	87	-	64	40	47	-	-			386
59	▲	actionaid	-	-	-	24	91	-	13	77	60	65	27	-	-	●		373
60	▲	Historic Royal PALACES	-	-	91	23	83	20	81	-	64	12	26	94	-			369

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			Rank	Change	Followers Rank	Growth Rank	Likes Rank	Growth Rank	Follows Rank	Ratio Rank	Growth Rank	Subscribers Rank	Views Rank	No Rank	Change	Top 100?	Responsive?	
61 ▲		WOODLAND TRUST	-	-	60	65	75	19	74	48	15	68	76	-	-			367
62	New	JDRF	51	+47	78	3	-	-	20	-	89	57	73	44	-			362
63 ▲		eden project	78	-34	65	-	40	71	-	-	81	48	53	38	+3			349
=64 ▼		Royal Horticultural Society	-	-	51	41	69	48	46	25	21	72	-	-	-			345
=64 ▼		TEENAGE CANCER TRUST	33	-16	47	-	34	65	-	62	69	71	79	64	-19			345
66 ▼		Beat Bullying	9	-6	69	-	39	-	-	-	91	25	13	-	-	●		343
67 ▲		tearfund	-	-	-	72	-	14	56	-	74	59	68	41	-			341
68 ▼		pdsa	-	-	95	40	32	76	-	-	31	-	80	24	-8			330
69	New	ANIMAL AID	2	-	85	-	87	-	-	20	-	-	41	38	-			327
70 ▲		St John Ambulance	-	-	100	45	37	70	-	-	11	63	59	-	-			317
71 ▼			65	-20	-	76	41	25	100	6	2	-	-	-	-			316
72	New	BREAST CANCER	7	-3	-	58	7	-	-	64	52	-	-	53	-			310
73 ▲		THE SALVATION ARMY	-	-	-	87	-	-	6	-	85	35	49	-	-			307
74 ▲			-	-	92	-	64	18	78	-	73	62	63	-	-			306
75 ▼		action for children	-	-	50	7	-	-	33	-	70	32	35	32	-11			305
76 ▲			-	-	48	-	97	38	22	30	56	69	94	-	-			304
77 ▼		The National Autistic Society	-	-	71	21	48	99	64	-	80	55	-	-	-		●	300
78 ▼			-	-	70	56	-	43	50	-	32	95	-	63	-10			298
79 ▼		mencap	-	-	52	22	-	61	37	-	71	94	97	-	-			296
80 ▼		WAR Child	26	-18	76	-	60	-	-	-	67	29	14	-	-			293

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81	▲		-	-	60	4	73	54	-	83	43	84	72	-	-			290
82	▼	aid	-	-	58	18	-	84	20	-	75	61	50	-	-			277
83	▼	Scope to.	-	-	46	-	-	27	55	-	82	-	-	-	-		●	275
84	New		-	-	57	-	67	-	48	39	-	72	-	67	-	●		269
85	▼	scouts	-	-	73	97	86	73	67	-	46	16	46	-	-			267
86	▼	RNIB	-	-	-	88	-	74	58	-	84	90	62	31	-8			266
87	New		5	-	7	-	-	-	-	1	-	-	-	-	-			261
88	New		15	+19	-	-	66	1	-	-	5	-	80	24	-8	●		260
89	▲		-	-	-	14	-	10	-	-	83	75	-	-	-			255
90	▼	Arthritis Research UK	-	-	-	-	-	6	-	-	68	76	71	-	-		●	249
91	New	Disasters Emergency Committee	-	-	-	-	71	-	-	16	10	97	82	49	-	●		245
92	▼	MS Multiple Sclerosis Society	-	-	93	93	94	-	15	-	87	51	52	-	-			242
93	▼	Stroke association	-	-	61	11	95	67	90	-	28	-	78	-	-			240
94	▼	SAMARITANS	88	-39	-	6	90	97	83	-	77	-	-	82	-15			237
=95	New		-	-	55	-	22	-	-	-	-	44	45	-	-			233
=95	New	WOOD GREEN The Animals Charity	66	-24	-	48	76	59	-	-	-	98	91	47	-			233
97	New	Plan	-	-	-	-	79	49	75	-	9	93	29	45	-			231
98	New	Family Online Safety Institute	10	-	-	-	68	-	-	15	-	82	87	-	-			228
99	▼	The Children's Society	-	-	94	29	-	85	71	-	61	-	-	-	-		●	222
100	▼		52	-16	49	42	-	66	-	75	76	-	-	87	-			220

NOTES
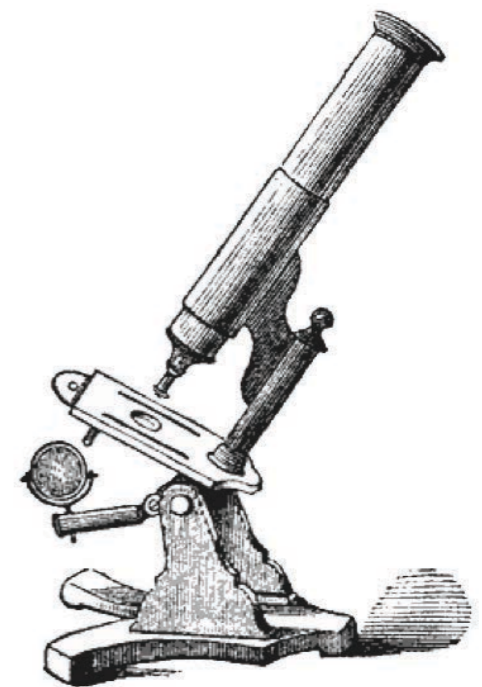
ABOUT OUR METHODOLOGY

Data was gathered during late July and early August. For the purposes of comparison, we used the UK accounts for each of the charities we looked at wherever possible across Facebook, Twitter, LinkedIn, YouTube and Google+. We also looked at user journeys, brand strength and income. Charities Commission data has been used to verify levels of income and Brand metrics are from the Third Sector Research Charity Brand Index 2012.

Social media data is live and open data, and we keep records of the data we source. This report is designed to study macro trends. Every attempt has been made to record all relevant statistics that are part of this study. We are human though, and may have possibly missed something, in which case please let us know and we'll do our best to take that into account too.

FOR MORE INFORMATION

For more information on this study and to find out how we can help you, please just get in touch
Anne McCrossan, Managing Partner
VISCERAL BUSINESS
www.visceralbusiness.com
(+44) 0203 355 0582
anne@visceralbusiness.com
@VisceralBiz
@Annemcx

ABOUT US

Visceral Business specialises in combining social business modeling, brand marketing and change management to help organisations succeed using networking technology.

We can help you save costs as well as increase performance from a whole brand perspective, by providing

- Social business diagnostics
- Digital and social business strategy planning
- Brand and user experience design
- Media reviews
- Change facilitation and management
- HR strategy and skills support

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A little LinkedIn endorsement of my skills would be great.
A follow on Twitter will go down well too @VisceralBiz @Annemcx

Or do just get in touch and let me know what you think at anne@visceralbusiness.com.

Thank you.