

Third Sector Video Content 2018 Benchmark report



Executive Summary

Online content has enjoyed a meteoric rise in popularity over the past decade, thanks in part to platforms encouraging and enabling the uploading and sharing of videos, images and audio files.

Brands have been quick to realise the necessity of harnessing the power of content to drive user engagement and, ultimately, sales, through engaging target audiences on social media.

However, the increase in competing material from rivals, and individuals, has made the environment a very noisy and oversaturated space for publishers. Obtaining a view, click or share has become increasingly difficult - much more so for those with no budget to promote their content.

So how do brands achieve sustainable, measured success? With a content strategy. Whether it be at individual campaign level, or at a higher organisational level, a robust and well thought-out content strategy is essential in maximising investment and budget.

Consumer brands have been quick to implement, test and optimise their content strategies - even if you scratch the surface of any mainstream online advertising campaign, you'll quickly see how a number of assets are deployed across stages of their target user's journey and the platforms they frequent. From the user's point of view, the experience is often seamless and subliminal.

In our experience, UK charities both big and small are behind the curve with their content strategy design and implementation. Just 34% of respondents in our survey said that they had a formal strategy in place - this must improve if charities are to effectively and efficiently compete across digital channels.

We've observed that many organisations don't know where or how to start. It can appear an insurmountable challenge; a pursuit reserved for the big players. But, as with most endeavours in digital, it's about stripping back then starting small, testing, tracking, improving and then constantly repeating as the strategy grows in scope, confidence and effectiveness. (Raw can help - speak to us for more information on content strategy)

Even without a strategy in place, some charities are seeing the benefit of video content - nearly 74% of our survey respondents said they're seeing return on investment when choosing video content. And a whopping 95% said that they see video content playing more of a role in their organisations in the coming year.

So, there's definitely an increasing appetite for video content across charities in the UK, which is in line with consumer trends and behaviours, as well as technological advancements (faster broadband, increasing mobile capabilities, etc.). However, currently working against this trend is the overall understanding and integration of video across organisations. Just 9% of respondents here said that 'video is well integrated' across their charities. It appears that a more formal commissioning process and universal understanding of production is required across the board in order for organisations to be using and fully benefiting from the medium.

But the future for content in the third sector is bright. We're seeing an increasing number of bold and brave creative films score huge gains for their commissioning charities. As a sector, charities are frequently challenging the brands that have long had a monopoly over viewers' attention. And the resulting campaigns are winning awards and gaining recognition along the way.

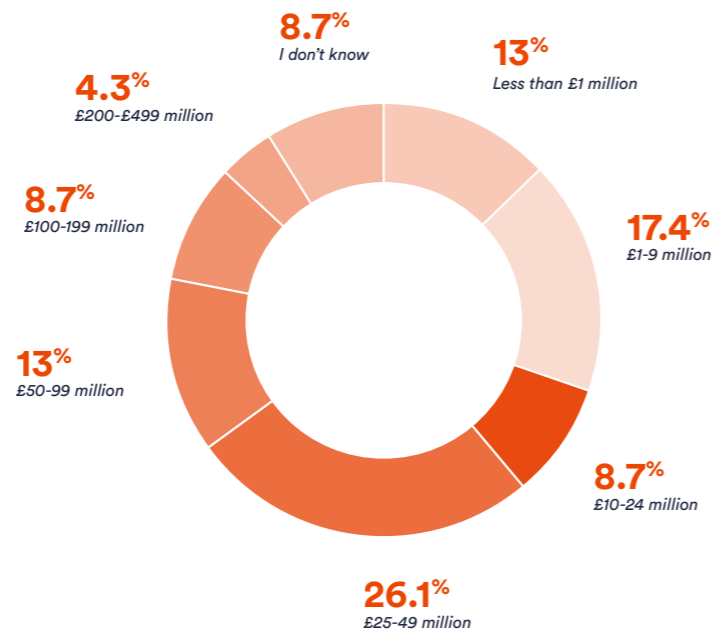
As a sector that has always achieved more with less, this could - with a bit more of a strategic approach - be a golden age for content production and marketing in the third sector. Long may it continue!



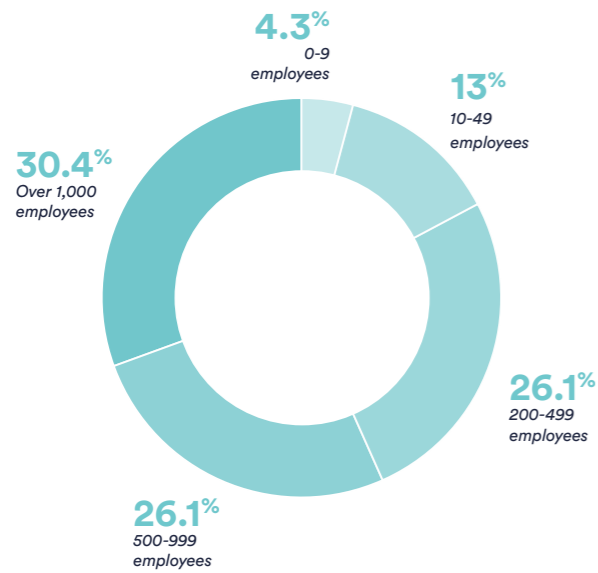
Ryan Wilkins
CEO, Raw London

Respondent demographics

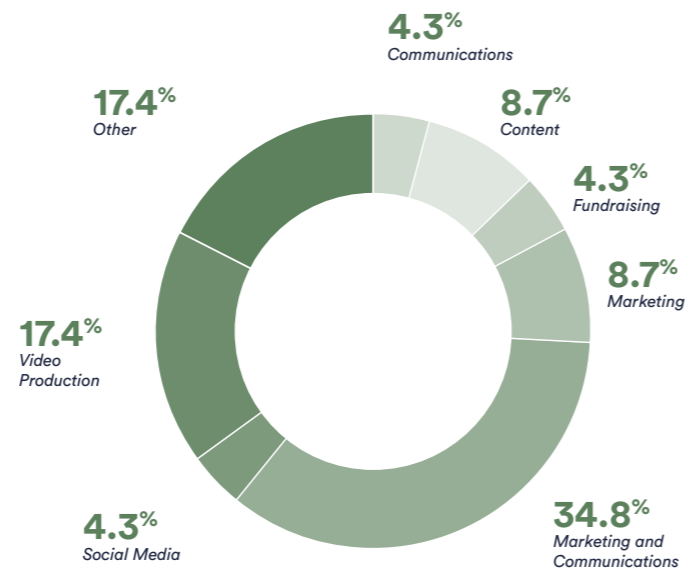
Charity income



Charity size



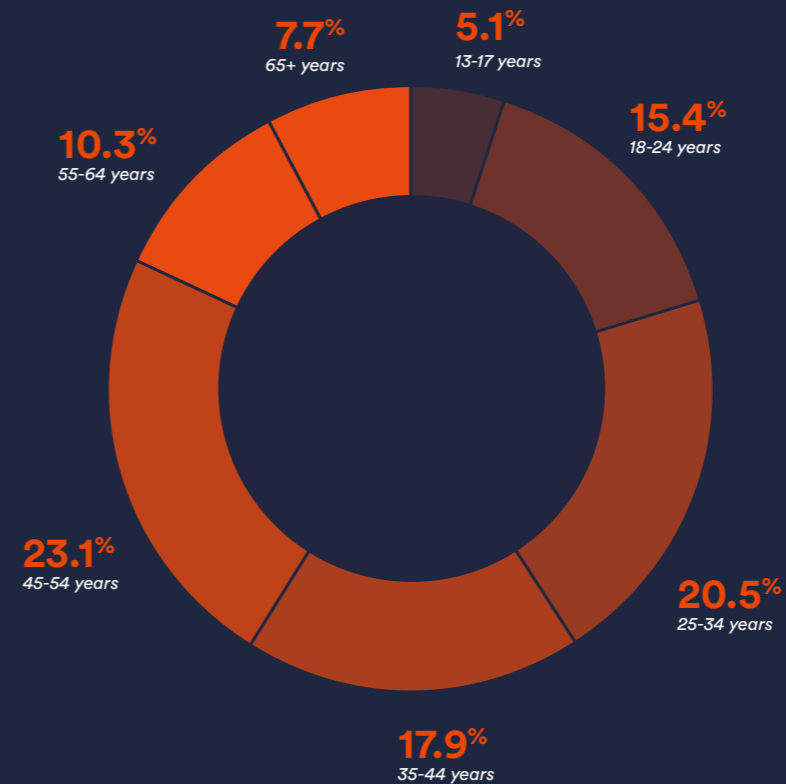
Respondent department



Respondent level of seniority



Target audience: Age





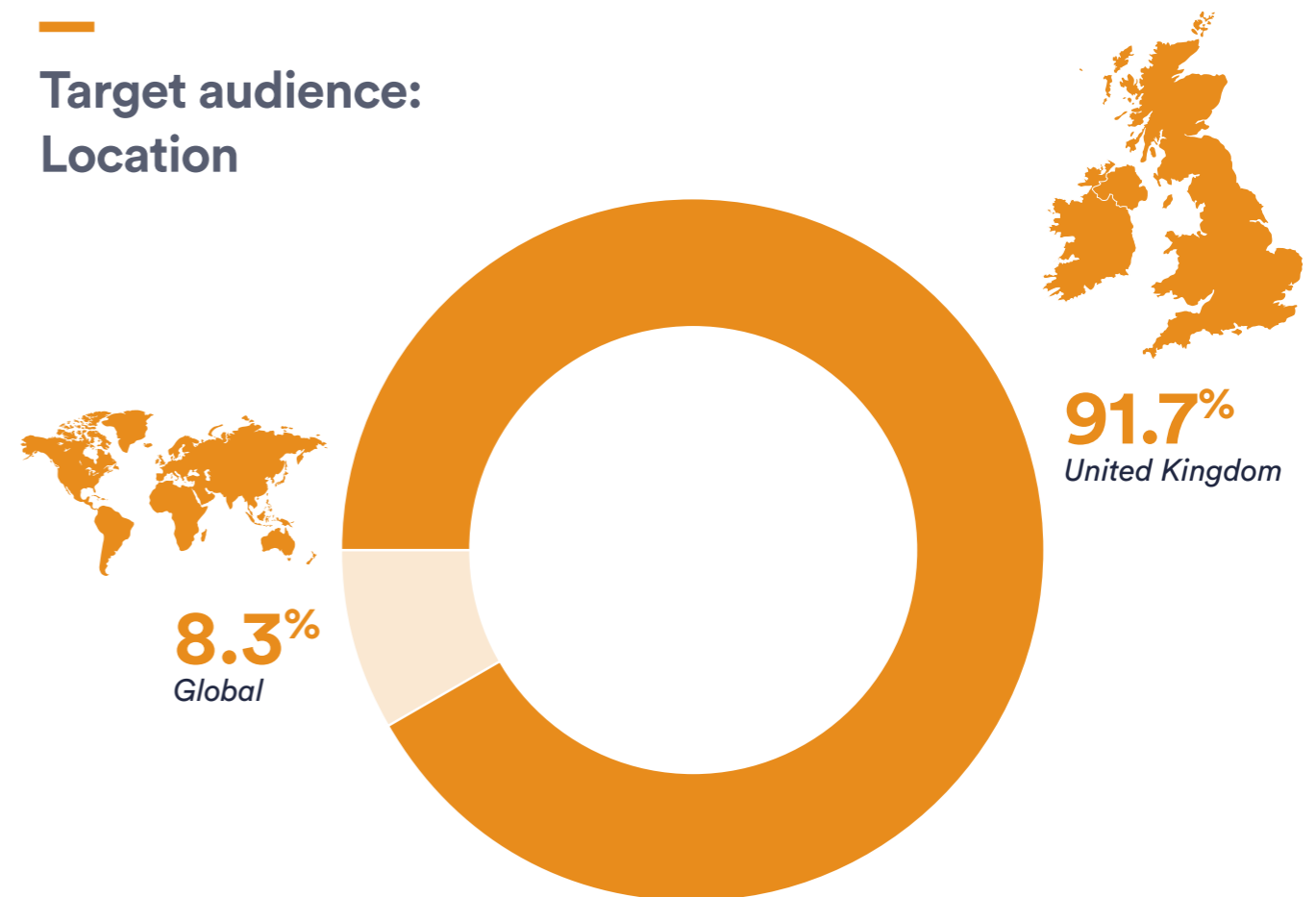
We see similar audience demographics for many charities. Millennials are a popular group, as they tend to be very active in the digital space.

The 45+ female profile is the most frequently targeted by charities, due to high rates of engagement among this group, especially when it comes to donations. This creates a lot of noise and competition in the sector, making it all the more crucial for charities to invest in bold content that will help them stand out from the crowd.

Target audience: Gender balance



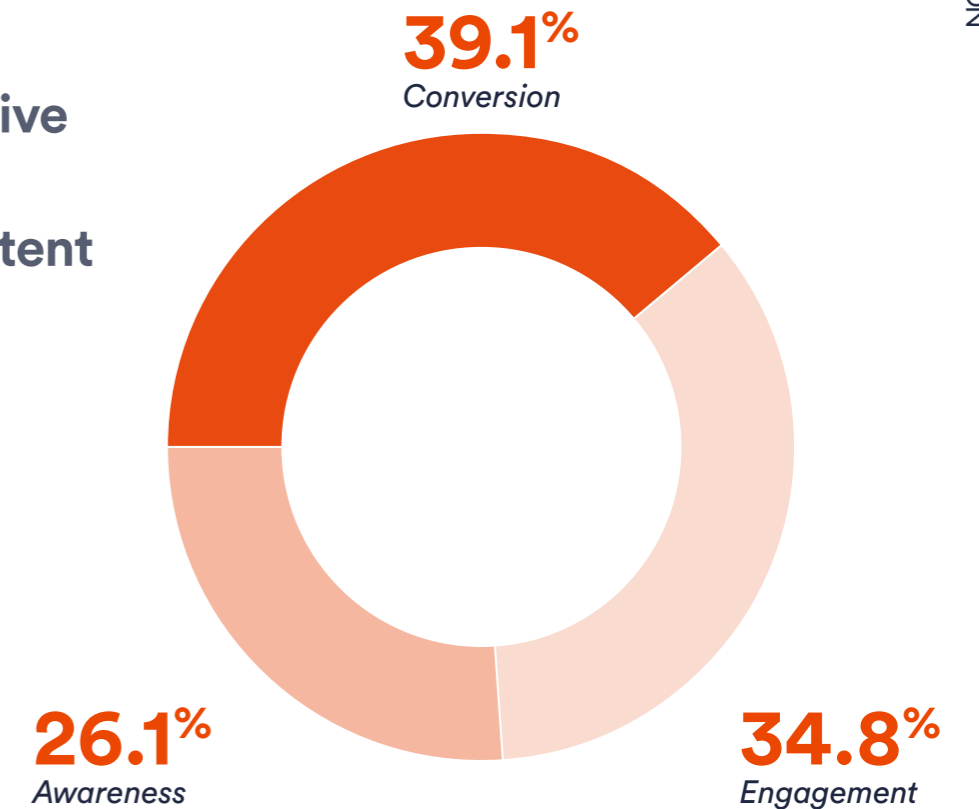
Target audience: Location



ASSESS

How are charities setting objectives for video?

What is the most important objective you are trying to achieve with content right now?



It's interesting to see that conversion is the most desired objective for video content.

This outcome often requires a multi-step audience journey, and as a result, a higher investment in planning and designing an integrated campaign. We would suggest that awareness and engagement are equally important overall measures of success, as they help to prime audiences for a longer-term relationship with the charity's overall message.



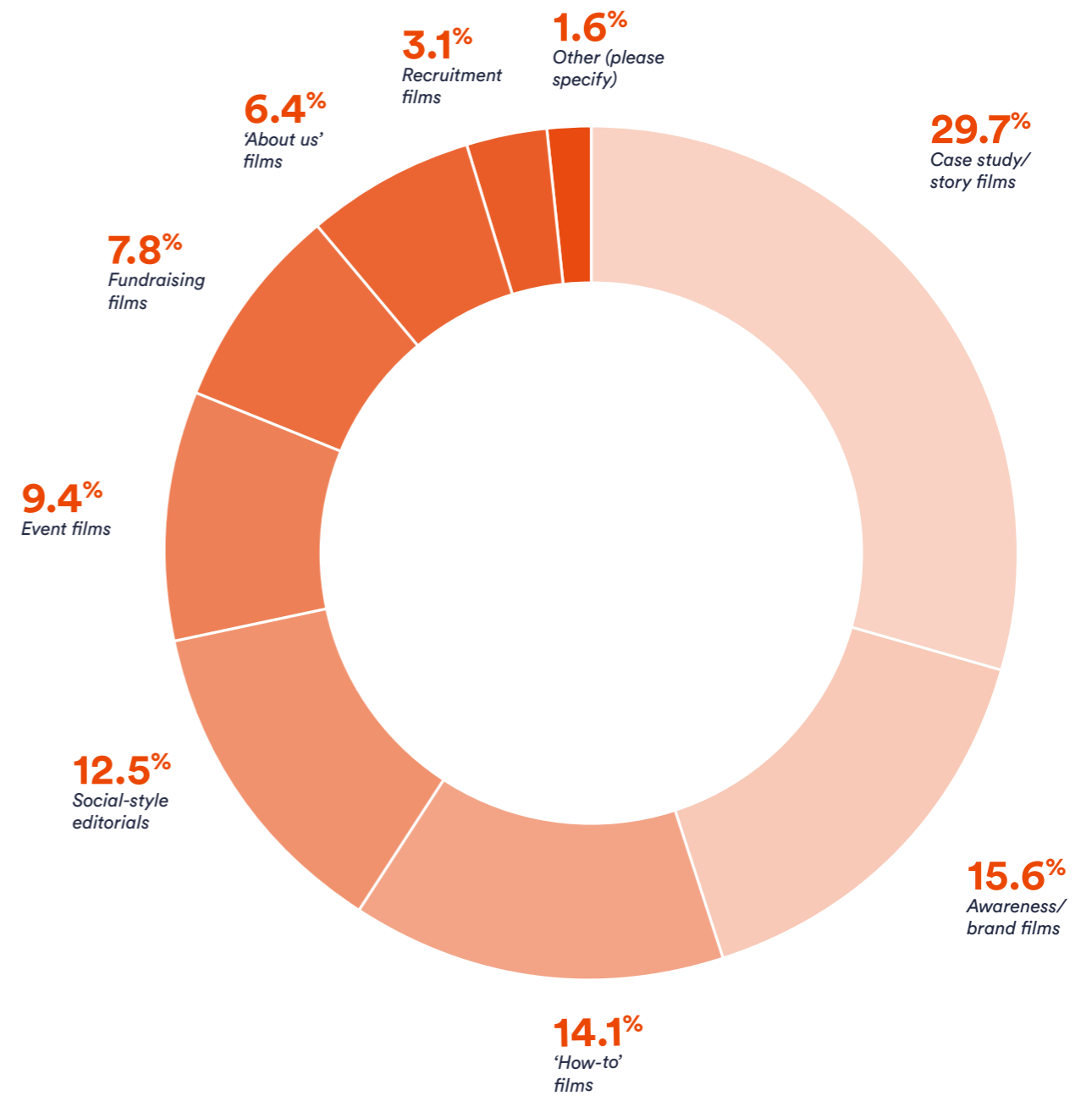
How engaged do you feel your audience are with your content?



“Our best performing content is always that which directly educates the public.”

Survey Respondent

What type of content generally performs well for you?

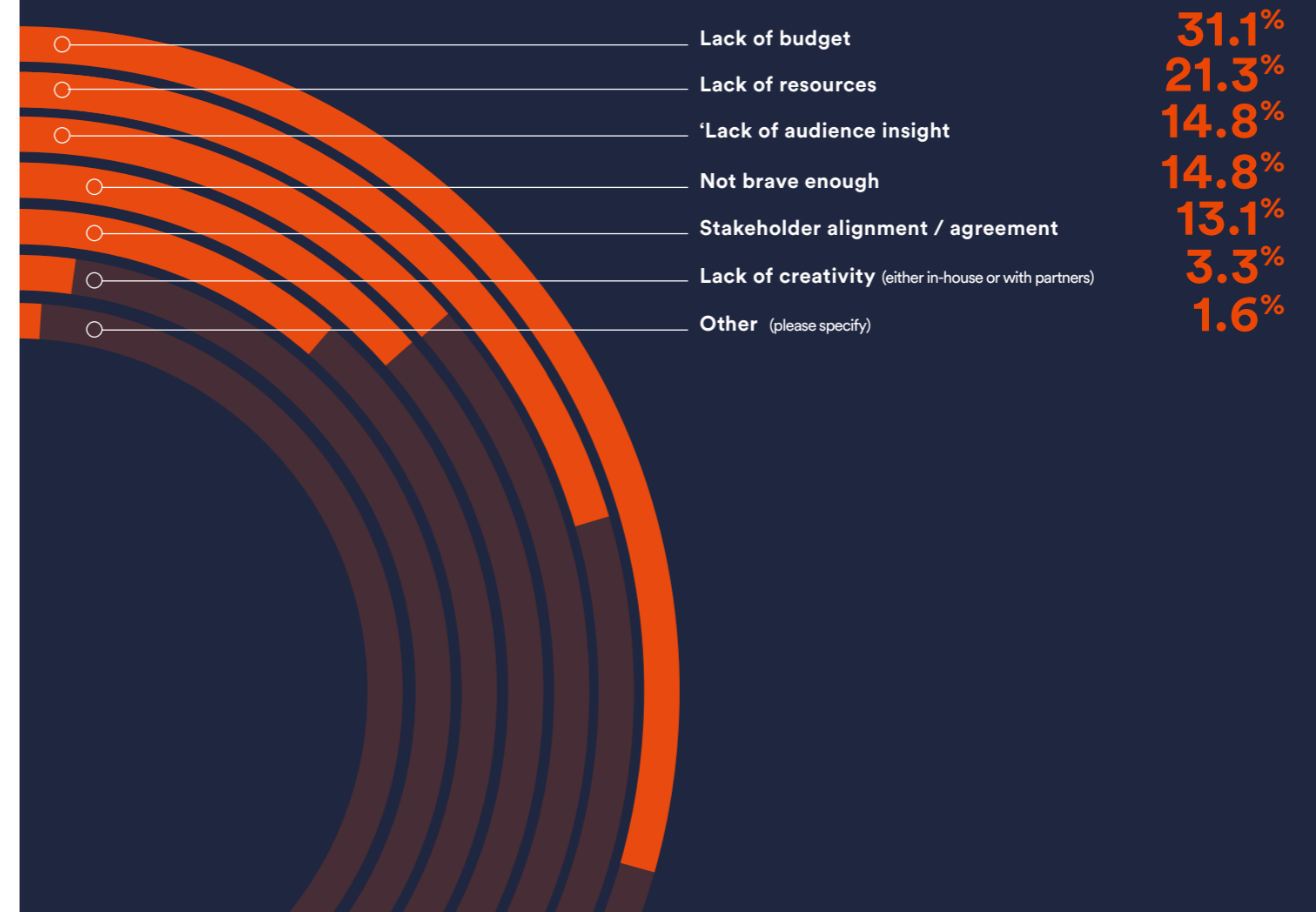




Case study films continue to be one of the most powerful forms of content for charities.

Highlighting beneficiary stories and capturing first-hand accounts can have a long lasting impact across the organisation, and help bring audiences closer to the people you support.

What factor(s) have restricted you from achieving your ambitions with content?



“When finding patient case study stories, we need to be sensitive to the patient and family and it can be hard to find them.”

Survey Respondent

Do you feel video content provides a good return on investment (ROI)?

73.9% Yes

4.3% No

21.7% I don't know

“Video marketing can be used to warm up audiences before acquisition, and aid with supporter retention. It's also the mainstay form of content that people engage with across the biggest social platforms.”

Survey Respondent



“With social media and web content as it is, video is extremely popular. If done correctly, it can be extremely effective.”

Survey Respondent

—

“ Video provides a lasting legacy and sustainability which our funders want to see when they fund our projects. ”

Survey Respondent



—

“ Video is key to telling a story. With the changes in technology and consumers increasingly being short on time, you can tell an engaging story in 30 seconds. Visual content is key to engaging the audience. ”

Survey Respondent

—

“ The value of video can't be underestimated, however, measuring ROI is a challenge. Video is excellent for brand / product awareness and engagement. We also get a wealth of cookie data to retarget, and that's where a lot of the value can be quantified. ”

Survey Respondent

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“ Video engages people a lot more and encourages awareness, excites people. ”

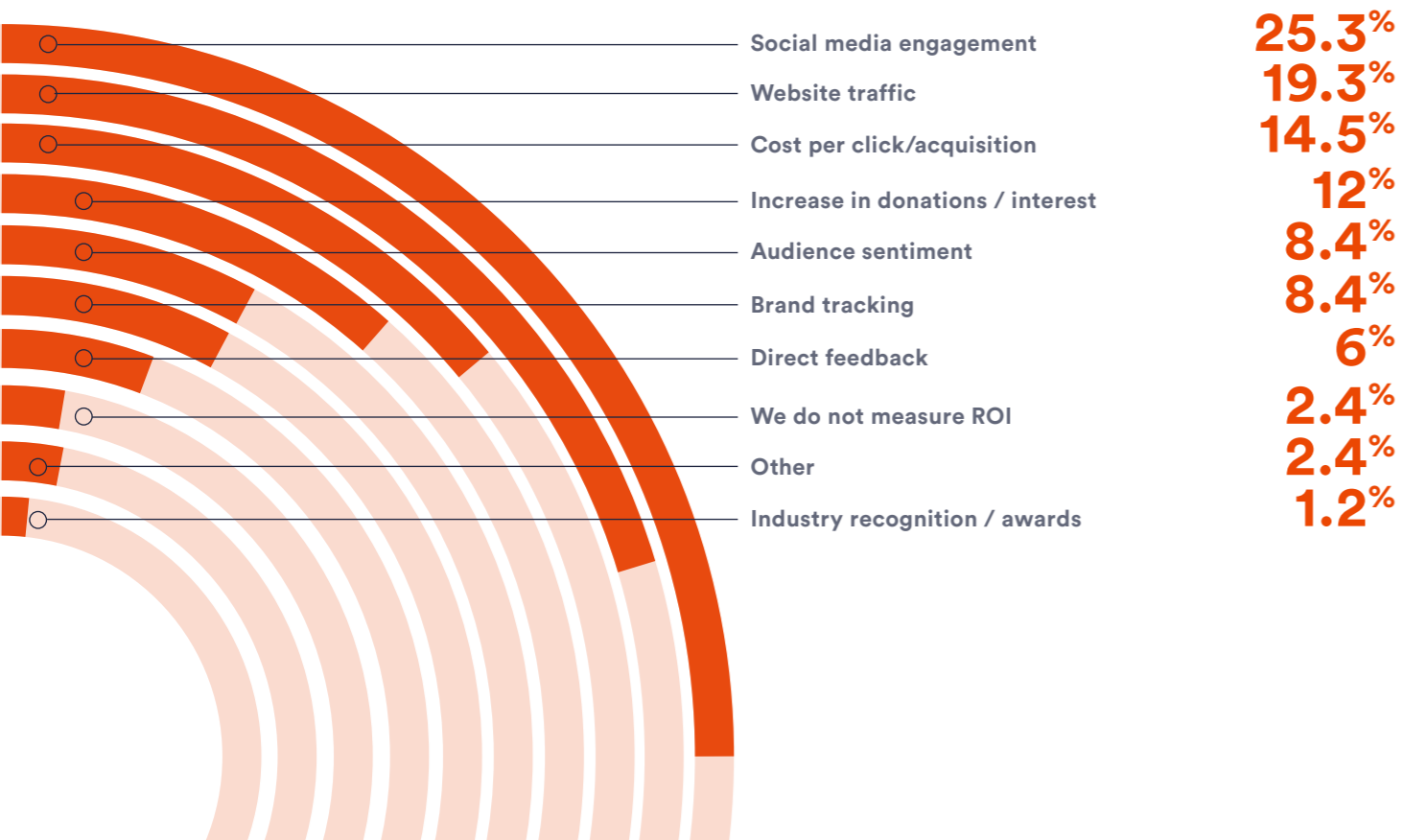
Survey Respondent





It's great that there's a positive perception of ROI for video content, but for the longer-term sustainability within organisations, it's important that there's a focus on tracking key KPIs in order to make solid business cases to budget stakeholders in future.

How have you measured your ROI in the past?



“ ROI is measured by the individual client teams and not by the video team. We're keen to be collecting this information but this isn't something we're achieving, yet. ”

Survey Respondent

How regularly do you look at what your competitors and leading charities are producing?

69.6%
Regularly
(once a month or more)

30.4%
Occasionally
(every six months or so)

Which charity video campaign stood out to you over the past 12 months?



Age UK
'Just another day'



Macmillan
'Life with cancer is still life'



Oxfam
'The heist no one is talking about'



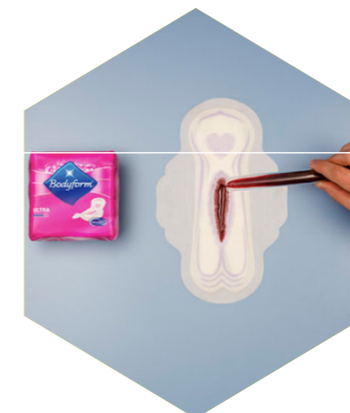
“Probably because I watch them carefully, but Marie Curie’s animated Christmas video with the present as a house stood out for me.”

Survey Respondent

Which non-charity video campaign stood out to you over the past 12 months?



Airbnb
'We accept'



Bodyform
'Blood normal'



IKEA
'#WonderfulEveryday'

PLAN

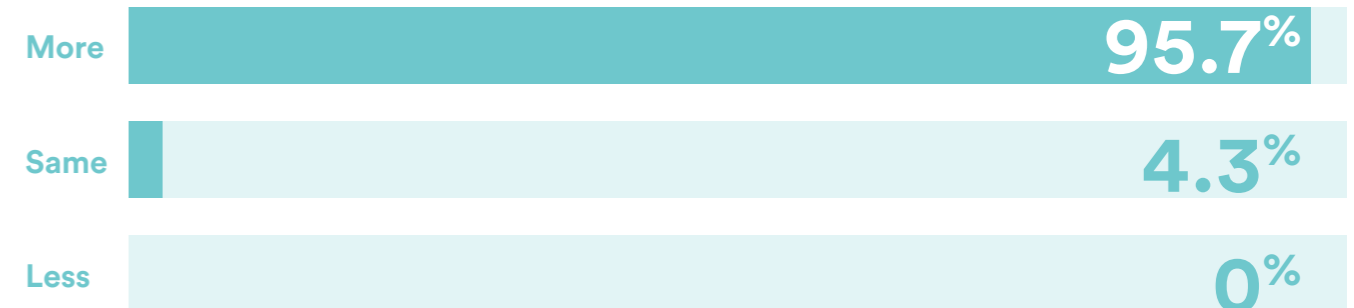
How are charities planning their content?

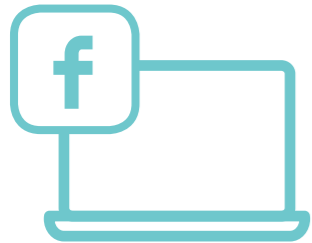


79%

Said that video content is 'important' or 'very important' to their charity.

Do you see video content playing more of a role in your content strategy in the next 12 months?





“ A lot of video content gets produced but there is a lack of strategy and coordination across product teams and marketing. Ideally, we’d brief in a suite of assets for use in-stream and for display, such as Facebook, rather than just for the website, or on YouTube. ”

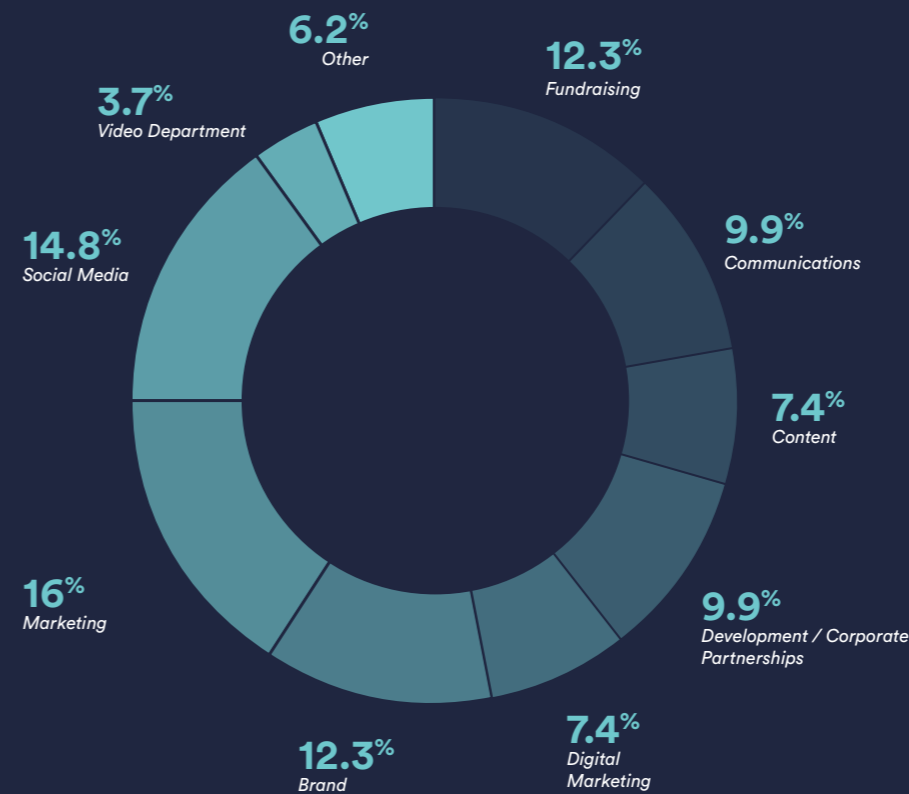
Survey Respondent

“ We’re only just getting a content strategy into play so hopefully, this will help increase video as it’s a key area for us. We’re up against it organisationally but we’re moving forwards! ”

Survey Respondent



The fact that 95.7% of respondents see video content playing more of a role represents the crescendo of an ongoing trend in the sector. Video is here to stay and is becoming an increasingly central pillar in campaigns across all departments.



Which departments commission video content in your charity?

Just 9% said that video content is ‘well integrated’ across the charity

50%
50% were neutral

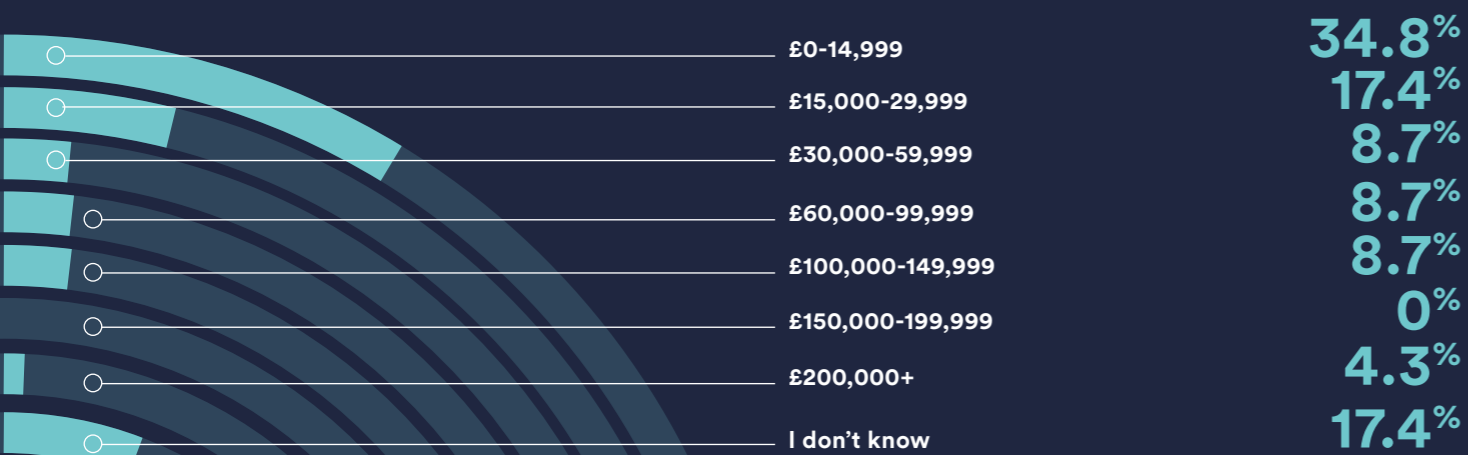
41%
said that video content was ‘not well integrated’



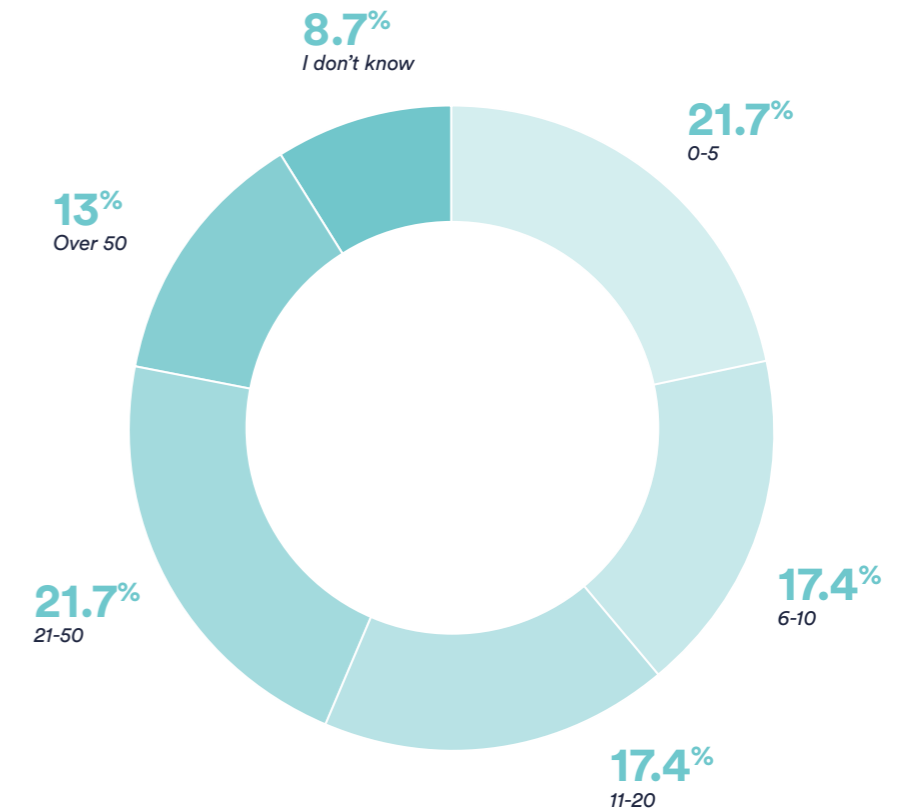
Given the huge increase in appetite for video content, content specialists within charities must improve the formal commissioning processes and understanding of video production across their organisations.

A top-level content strategy will help other departments appreciate the priorities and practicalities involved when submitting their briefs.

Annual investment in video content:



Approximate number of videos published annually:

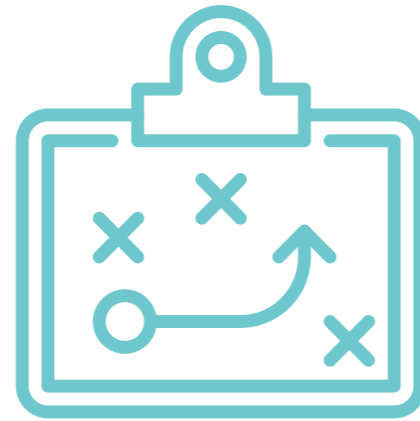


“ We’re currently writing a wider content strategy that will incorporate Stories and Film. ”

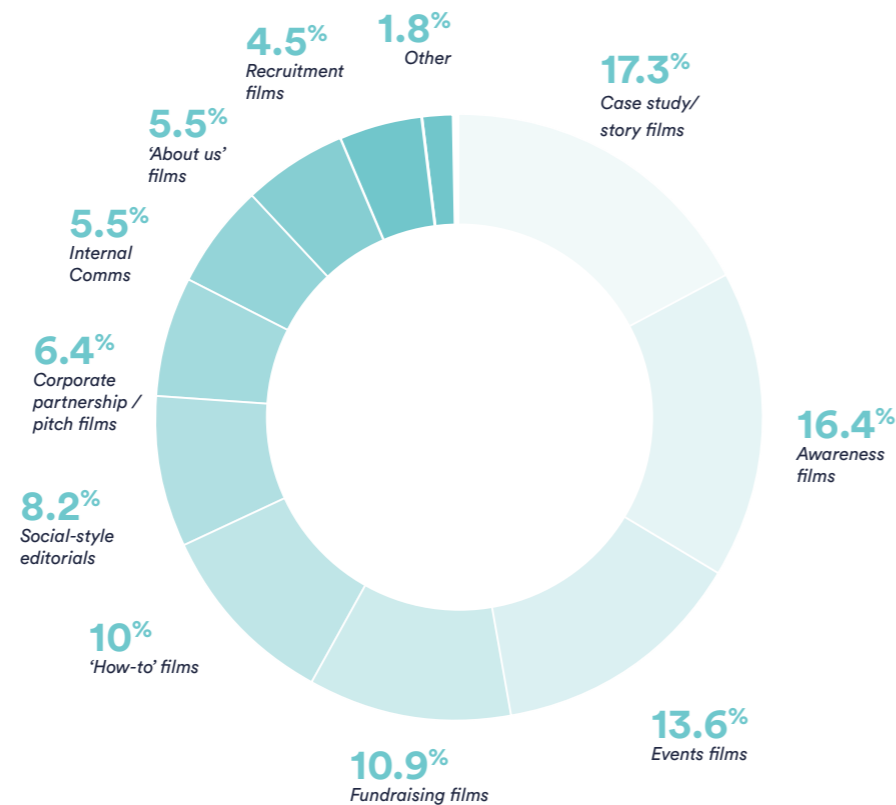
Survey Respondent

“ We have a content strategy but not one specific to video... we’re currently very reactive when it comes to producing video content for those who need it.”

Survey Respondent



What types of video made up your content mix in 2017?



As charities increase their investment and expectations for video, a formal content strategy really is essential if they’re to effectively compete and get the most out of their investments.

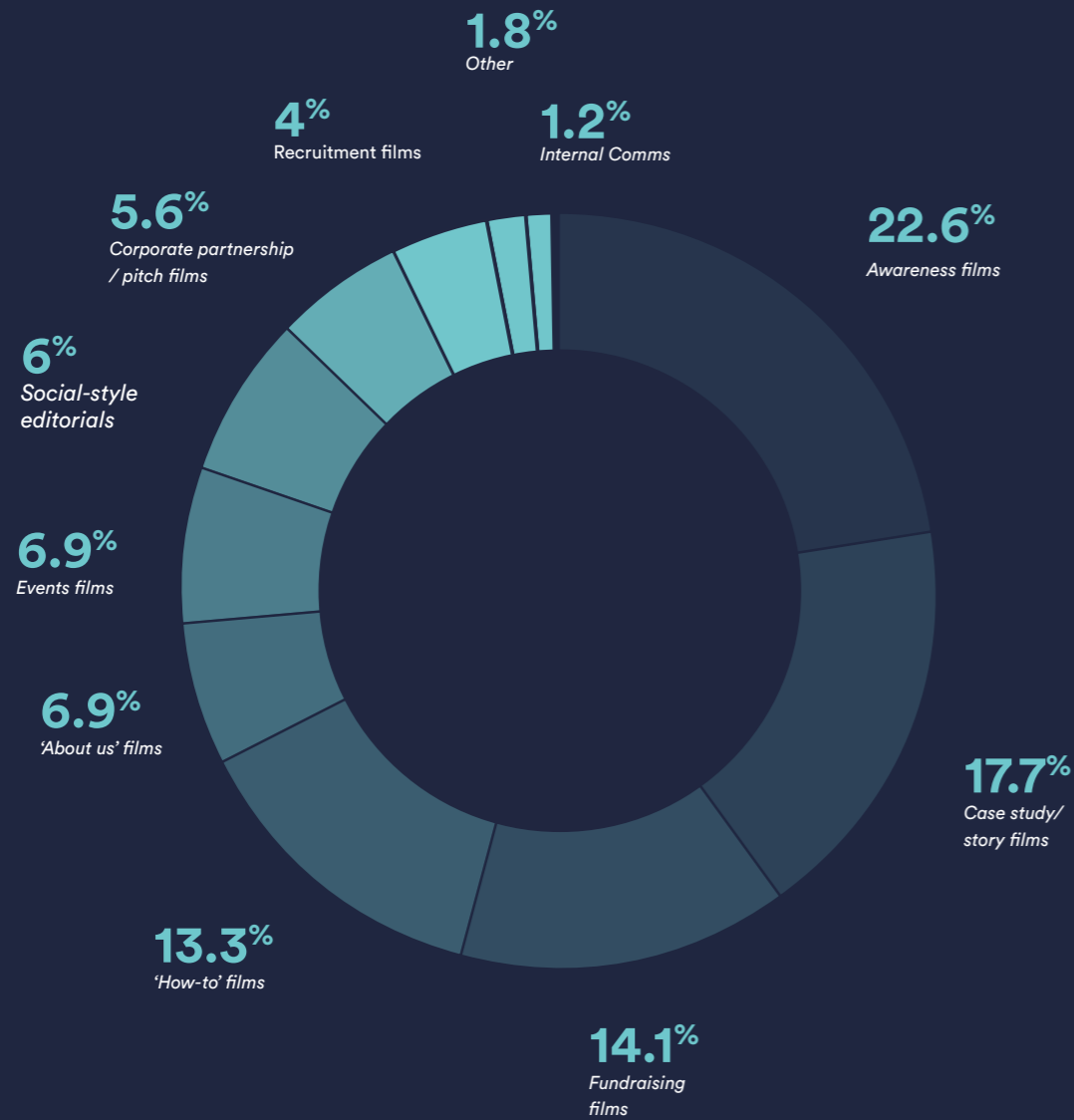


Raw London run free, regular seminars on the subject and we support charities on a more formal basis by facilitating a content audit and strategy workshop. We also monitor and report on the effectiveness of strategy implementation, along with recommendations for evolution.

Do you have a formal content strategy plan for video content?



How did you allocate your budget across your content mix in 2017?

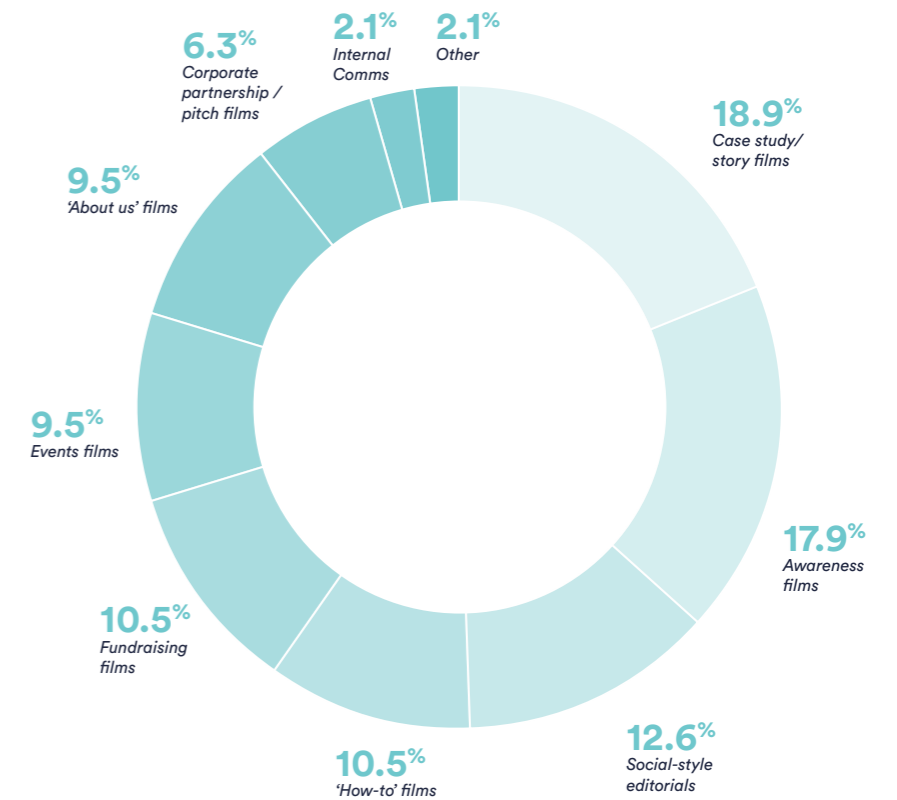


Case studies are the most popular format, which is not surprising, given that a well-crafted case study story can do a lot of heavy lifting in terms of driving awareness and engagement. Events films, fundraising films, and 'how-to' videos rank highly too.



Somewhat surprising to us is the fact that internal communications and recruitment films are consistently ranked among the lowest priority. Is there any opportunity to invest more in communicating with internal staff using video?

What types of content are you going to be focussing on in the next 12 months?



The rising trend of the social-style editorial format has left its mark in the third sector. This format saw the highest jump in projected investment for 2018.



Just **21.7%** of respondents said that they feel their charity is 'brave' or 'very brave' when developing content

56%
were neutral

21.7%
said they were 'not very brave'

The low levels of brave content could imply that there is still a lack of confidence amongst charities to push the boundaries and try new things when it comes to content.

This could be due to increased pressure to prove ROI, leading to less willingness for risks to be taken.



“Often too many opinions and lack of bravery makes for duller content.”

Survey Respondent

— CREATE

What creative challenges and considerations are affecting your content?

—
Does your internal sign-off process hinder the final outcome?



—
“ We don’t have a platform which allows people to feedback collaboratively or efficiently. Also - really strict levels of feedback which can bring back conflicting views, impacting on production time. ”

Survey Respondent



—
“ We have a convoluted and unclear sign off process. Content creation also sometimes doesn’t involve consultation with those who look after the intended channels for the content either. ”

Survey Respondent

How well do you know your audience?



Obtaining a deep understanding of target audiences, beyond top-line demographics is often overlooked. In order to effectively reach and influence our audience, we must better understand them.

Investment in proper research is highly recommended.

Do you tailor creative to specific channels?



It's great to see 69.6% of respondents mostly tailoring creative to specific channels. Doing so can increase success rates and provide a better experience for audiences.

Live action or animation?



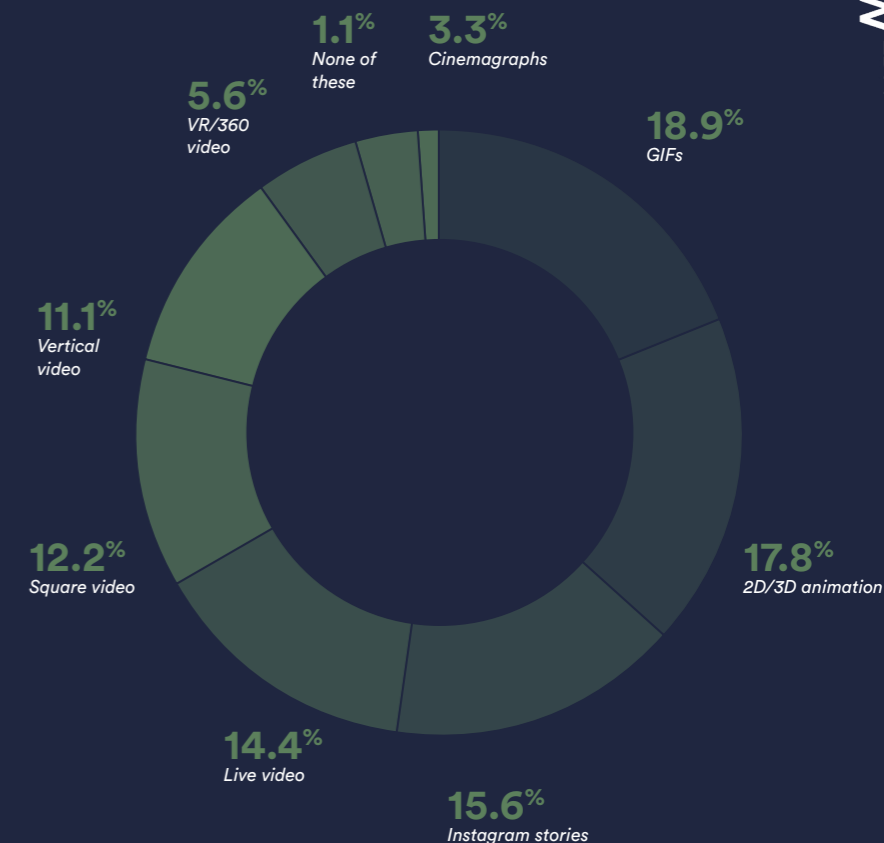
We've encountered an increasing enthusiasm for animation amongst third sector clients. It's an especially effective medium for communicating more complex and/or less interesting subject matter to colder audiences.



We've seen great examples of policy reports, legacy processes and even case studies come to life through animation. Just to note - the animation production process is markedly different to live action projects. We have a PDF on process best practice along with explanations on the different styles available and associated terminology.

Email hello@raw.london for a copy.

In the past 12 months, have you experimented with any of the following?



“ Square format has proven reliably better than 16:9 format. ”
Survey Respondent

“ Square videos have been really effective for us. GIFs work okay but we feel that people are becoming a little tired of them (they're also not hugely accessible). Our live videos never perform that well - we think this may be because they are overplanned and not very spontaneous. ”

Survey Respondent

“ VR was particularly successful, Instagram Stories not so much. ”

Survey Respondent



“ Square video (Social) most successful. Live video least successful. ”

Survey Respondent

“ Square video seems to work well across Facebook and Instagram. ”

Survey Respondent

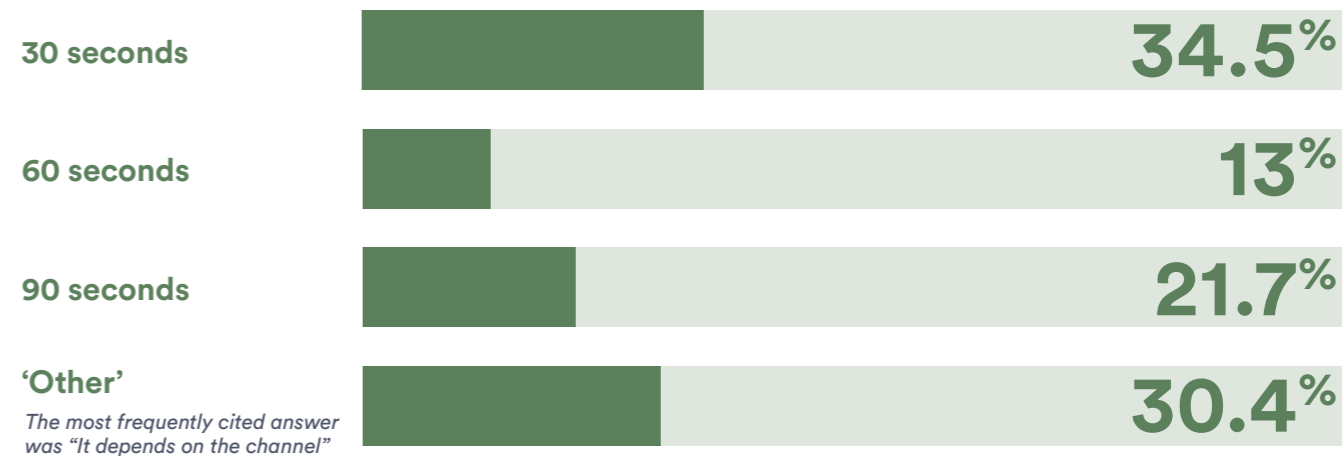


Despite VR/360 video being identified as one of the biggest trends in 2017, it's surprising to see that only 5.6% of charities have actually tried it.

This puts it at the bottom of the leaderboard of experimental formats, behind vertical video, live video and animation.



What do you feel is the ideal length for a video?



“ The ideal video length is however long it takes to tell the story really well. That could be 30s or it could be over 2min. As long as you are keeping your viewers attention...Pace and energy has to be right, no dull or empty seconds. ”

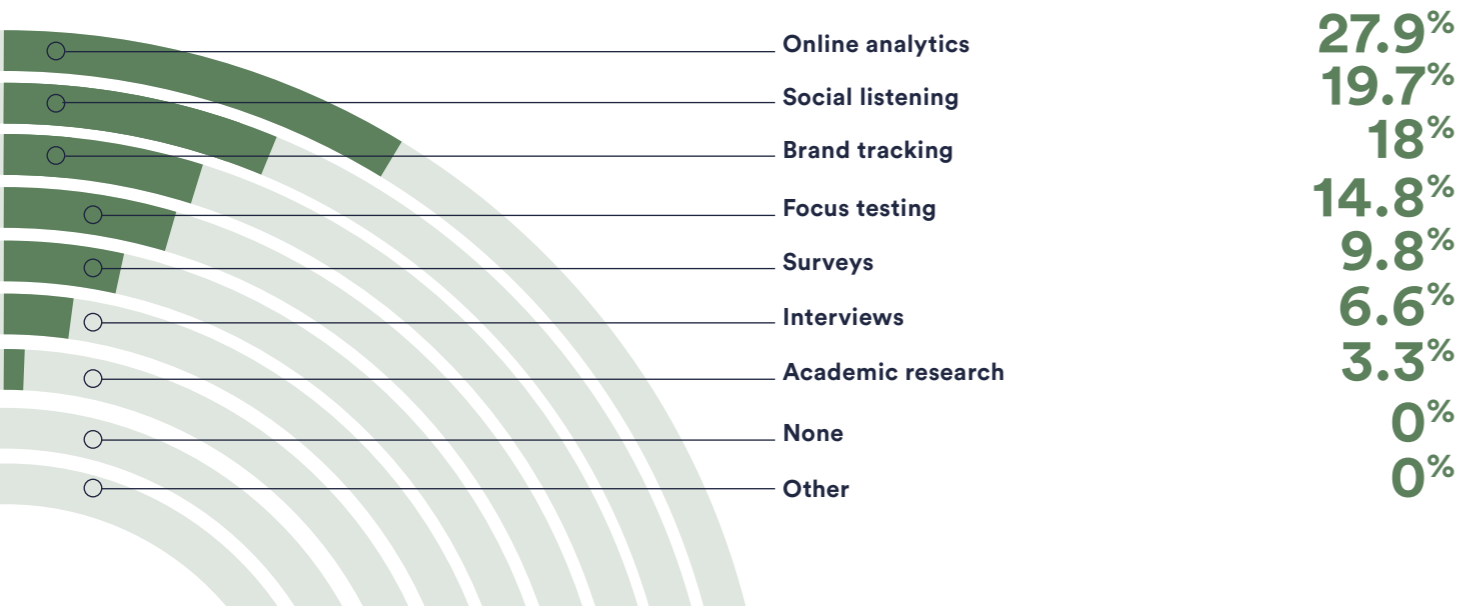
Survey Respondent

34.5% of respondents believe that 30 seconds is the ideal length for a video - but we would disagree.

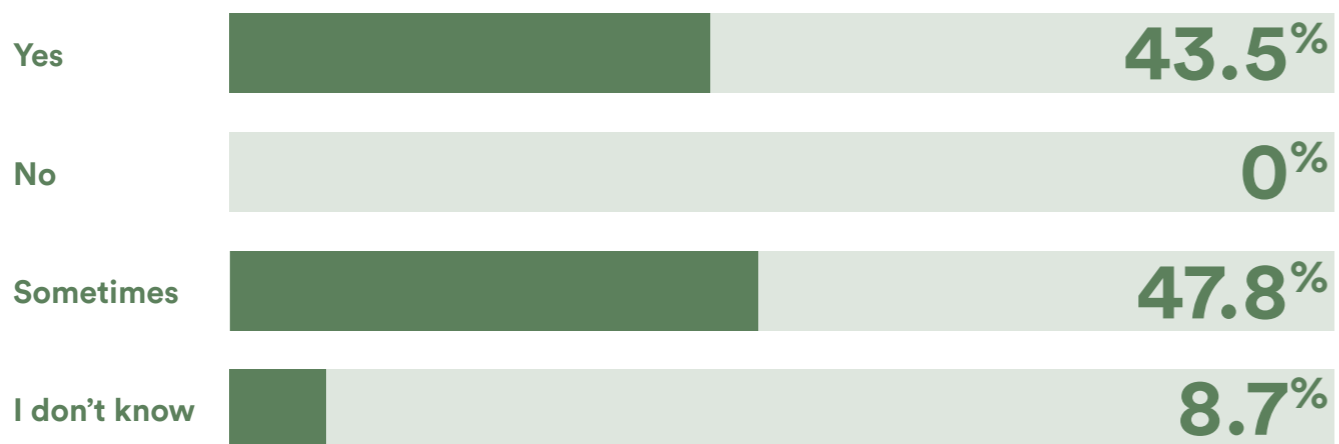
The ideal length for a video entirely depends on various aspects, and it's important to first consider the content, format, channel, audience and purpose before deciding on an 'ideal' length.



Do you use any research methods to qualify certain creative approaches?



Do you find that research returns valuable results?



“ We’ve gained some really good insight from focus groups, which has often been surprising and made us re-evaluate assumptions. ”

Survey Respondent

“ It’s not always easy to act upon the research when the production is already in progress. ”

Survey Respondent



It’s encouraging to see a majority of respondents seeing research usually returns valuable results. Investing time and resources into different research methods nearly always pays off and can save you time and money in the long-run.

Agree or disagree?

“We find video to be effective for converting/fundraising”

61% agree

“We always include a call to action in our videos”

74% agree

“We find video to be more effective as a primer for direct fundraising (rather than making the ask with the video)”

74% agree



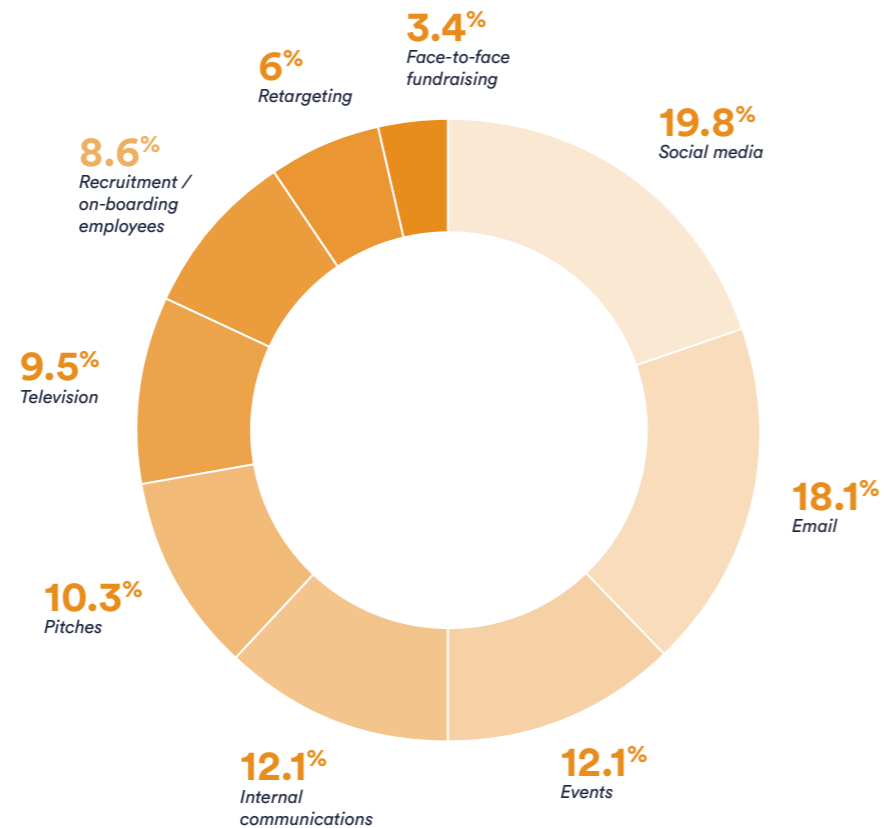
It's great to see a majority of respondents recognising the different kind of value video can bring - from raising awareness through to motivating action and conversion. What's most interesting though is that more respondents felt that video is more effective as a primer for fundraising than it is for actual conversion.

This shows that you should consider the long-term plan and impact of your video.

REACH

Which channels are producing the best results and how much should you be spending?

Do you use video for any of the following platforms / scenarios?



Agree or disagree?

- “Video is more effective than other types of content” **83%** agree
- “Video has a long-term impact on the way audiences perceive charities” **91%** agree
- “I find it difficult to measure the impact and effectiveness of video content” **48%** agree
- “Average reach and engagement is higher for video than other content” **78%** agree

72.2%

of respondents said that paid online video distribution is ‘effective’ or ‘very effective’ **21.8%** were neutral

68.7%

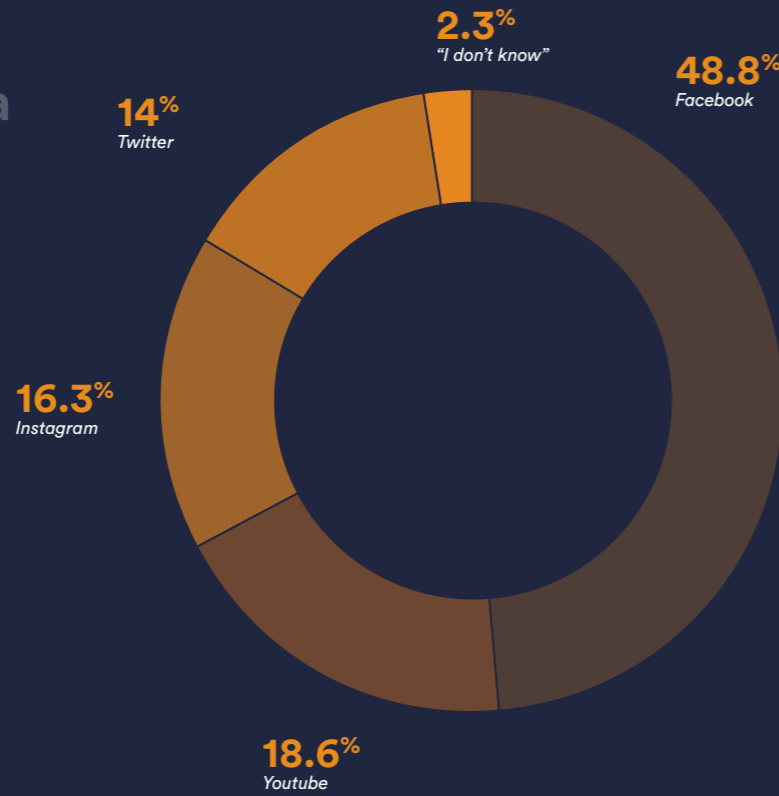
of respondents say they “don’t know” what their average cost-per-view is



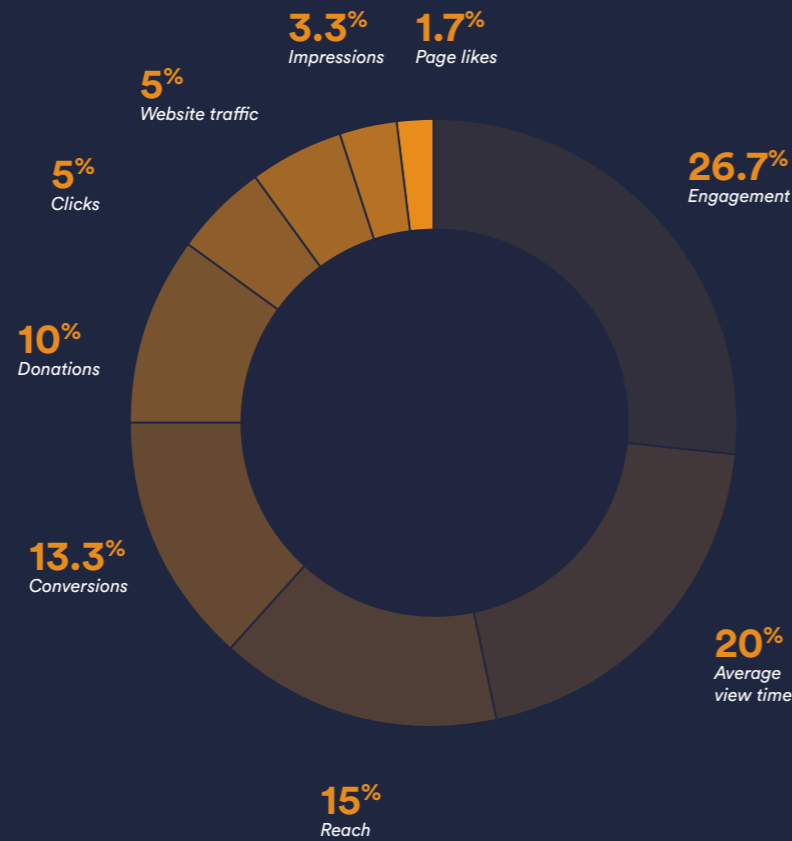
It’s interesting to see video being heavily leveraged in a number of more unexpected scenarios.

We’re seeing an increased appetite for video in corporate pitches, email communications and events and in our experience, it’s working. If you’re not currently using video in these areas, it’s likely that your competitors are.

On which social media channel do your videos see the best results?



Which metrics are most important to you when measuring these results?



It's notable to see that respondents cited 'engagement' at double the rate of 'conversions' as a metric of success. This is seemingly in contrast the stated 'desired outcomes' of charity content at the start of the survey.

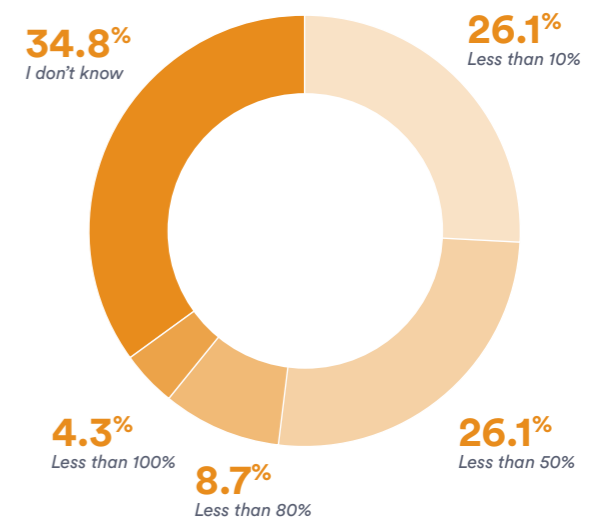


This trend is encouraging to see; the long-term benefit of audience engagement is that it creates a loyal supporter base, which has the trickle down effect of boosting conversions and donations in the long run.

Only 30%

of respondents are "satisfied" or "Very satisfied" with their videos' performance on social media

What completion rates should you expect?



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“ We’ve made our videos shorter and more engaging, putting attention-grabbing soundbites at the start to draw people in. We’ve also found that videos without heavy branding do really well. ”

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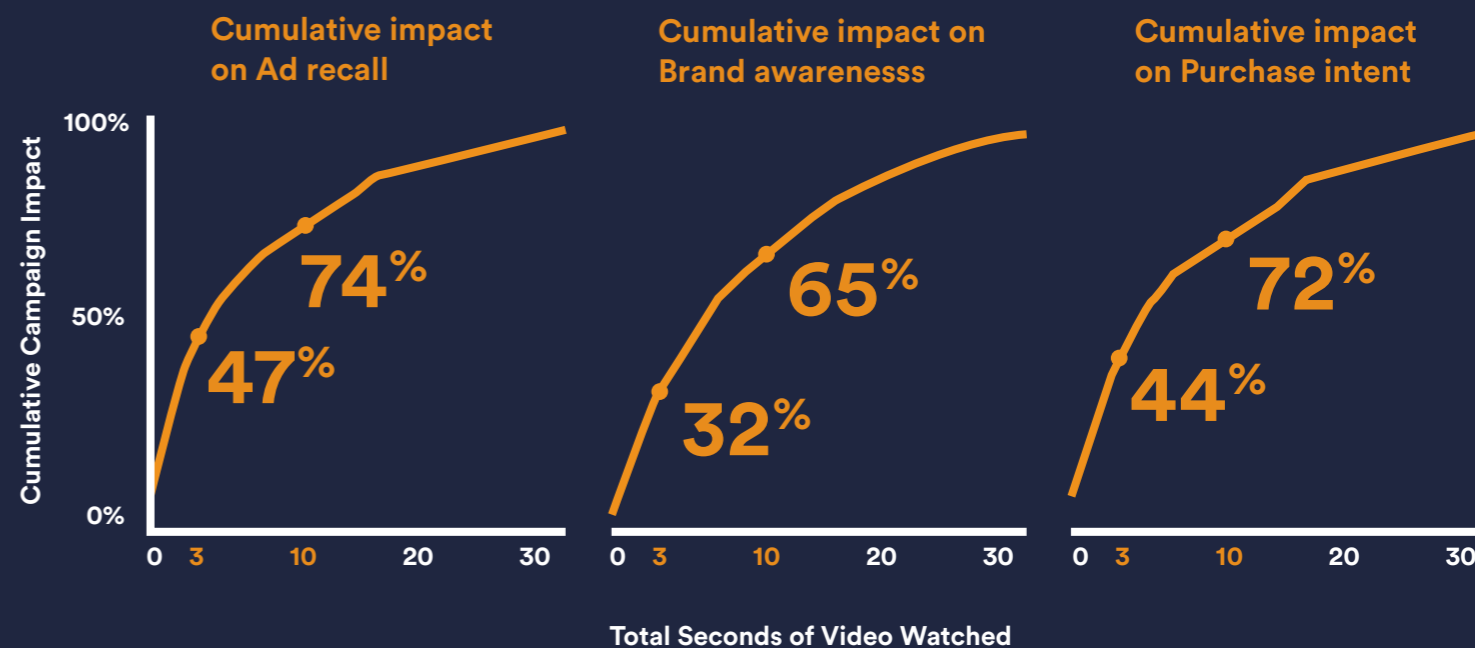
“ We find that because YouTube is a search engine, people actively seek the content so tend to watch more. Facebook/Twitter video completion rates are much lower for our channels. ”



—

Average viewing time is considered an important KPI when measuring the success of your video content, but how much does it actually tell you?

A study by Facebook Business showed that after just 3 seconds there was a significant uplift on ad recall, brand awareness and purchase intent - and after 10 seconds, each of these almost doubled.



This shows that “every part of a video view — from the initial impression to a complete video view and everything in between — drives value. Understanding this helps advertisers build content and evaluate success.”

The Value of Video for Brands, Facebook Business

About Raw London

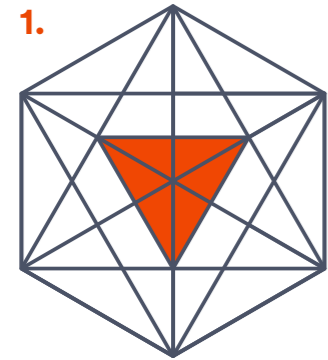
**We are a specialist branded content agency.
We create campaigns designed to change perceptions.**

We work mainly with charities to deliver long-term content strategies, individual campaigns and effective videos. We won 17 awards in 2017/18 for effective brand communication and innovative content marketing, including Gold at the Content Marketing Awards, Charity Times Awards and Charity Film Awards, as well as voted People's Choice at The Lovie Awards. We were also the biggest riser in Televisual's Corporate Top 50 Agencies in 2018.

So, if you want to change the way people see your cause or brand, or reach out to new followers and fans, we can help.

T 020 7831 6060
E hello@raw.london

We have developed a distinct methodology to ensure we deliver exceptional results.

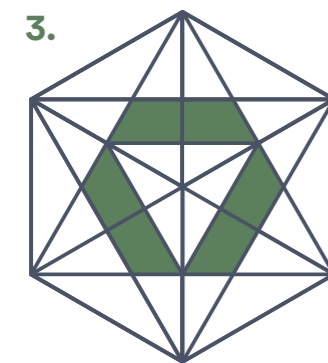
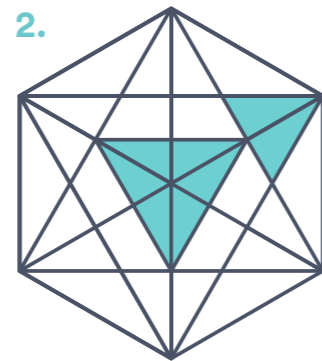


Assess

An audit of your existing content, audiences and perceptions of your brand or cause in order to understand your objectives and desired outcomes.

Plan

A practical plan for producing and delivering your content

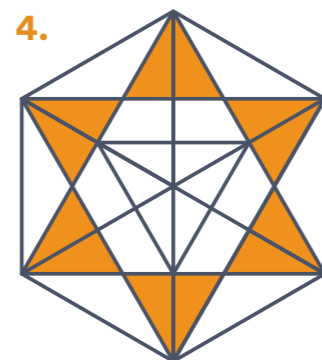


Create

Draw on audience insight to develop creative approaches which are true, effective and unexpected.

Reach

Ensure your content is seen by the right people, at the right time, in the right place and analyse the outcomes for your next campaign.



Sharing expertise in the third sector

We facilitate free knowledge share events to help charities network, keep up with trends and make the best possible use of their content.

Our aim is to build a supportive network in which charities and agencies alike share expertise, knowledge and support to aid growth in the charity sector.

These events are invite-only to those working in the third sector.

To be the first to hear about the next one, email hello@raw.london or sign up to our mailing list at raw.london

Benchmark Report team



Ryan Wilkins

Founder & CEO

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Ryan founded Raw over 12 years ago and is passionate about taking a strategic approach to video content. With more than 25 awards to his name, Ryan is considered an expert in content marketing strategy and is a regular speaker at prestigious industry events across the world.



Fiona Koch

Account Planner / Director

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Fiona has over 4 years of communications strategy experience in the social sector, having consulted for leading innovators with the global nonprofit Ashoka in Ireland. She joined Raw London in 2017 after completing her M.Sc. in Media & Communications at the London School of Economics.



Charlotte Harris

Marketing Director

charlotte@raw.london

Charlotte is a qualified marketing specialist with over 5 years experience across non-profit, B2B and B2C sectors. She specialises in digital and content strategy, working closely with clients at Raw London to make sure their campaigns reach as far and wide as possible.

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