

Third Sector Video Content 2019 Benchmark report



Executive Summary

Following a prolonged period of growth, there's no question that video content has properly arrived as a mainstay communications medium for charities. No longer a 'nice-to-have', video is being considered for and included in awareness, engagement and fundraising campaigns as a core asset.

You'll see that the appetite for video amongst charities is as high as ever, with 87% saying that video content is 'important' or 'very important' to their charity and 94% agreeing that they expected video to play more of a role in their communications in 2019.

However, as per last year, there's a concerning lack of video strategy across the sector driving the purpose, execution and distribution of content, and there's no doubt that this is contributing to the fall in perceived ROI of respondents' content. This is especially pronounced since there's an increasing amount of content being made per charity as the cost to entry decreases and entry level video becomes more accessible. If content isn't well planned and contextualised within a strategy, its performance and cut-through within a very noisy environment will undoubtedly suffer.

We've observed that many organisations don't know where or how to start with strategy. 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 and starting small - testing, tracking, improving and then constantly repeating as the strategy grows in scope, confidence and effectiveness (Raw can help with this if you need a hand getting started).

Interestingly, the primary objective respondents expect to achieve from their video content is perhaps one of the most illuminating insights on how attitudes and expectations have changed since last year's benchmark report. In 2018, it was conversion that was the holy grail. This year however, conversion has dropped to the bottom of the league, with engagement skyrocketing from the bottom to the top, and awareness remaining second place.

What does that tell us about how content practitioners are using video? One viewpoint would be that charities are finding increasing success in using content to prime their audience on their messaging or cause before making an ask - often elsewhere, such as via retargeting. Indeed, some of the most successful online fundraising campaigns we've seen employ this methodology - using video to tell the story and build rapport and convert elsewhere using a tactic such as remarketing.

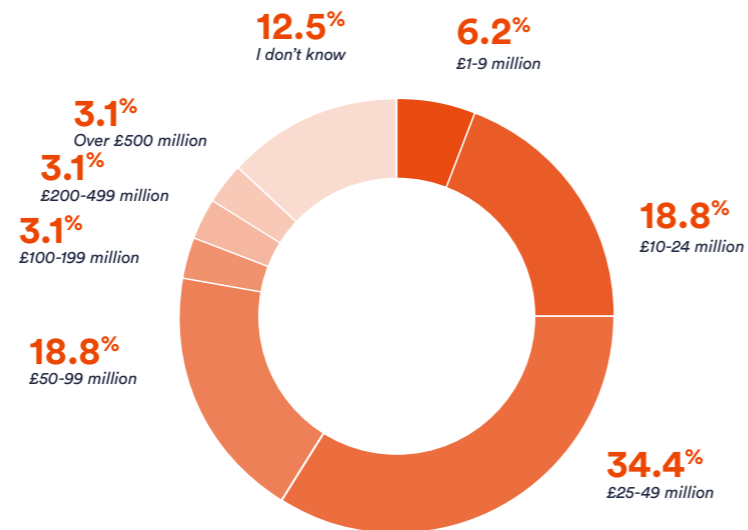
In terms of platforms, Facebook video reigns supreme in terms of the channel on which most respondents saw their video content perform best. However, producers haven't been nonchalant - more than ever before charities are tailoring creative to context and platform and experimenting with emerging technology. A huge trend has been the rise of Instagram Stories - shooting up from 16% to 91% as a format that respondents had tested in the past 12 months. Square, vertical and live video were also big risers.

Finally, and most excitingly, creativity in the sector is booming - there was a significant rise in the reported bravery of charities when creating content. This is perhaps reflected in the campaigns that were voted on as most memorable over the past 12 months. All three shortlisted represent brave, innovative and creative ways of storytelling, and I feel it's safe to say that the bar is being continually raised.

Ryan Wilkins
CEO, Raw London

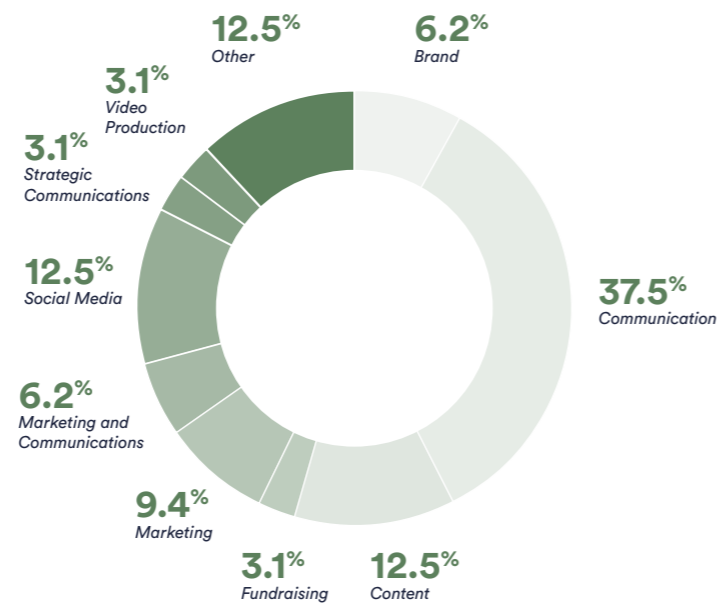


Charity income



Charity size

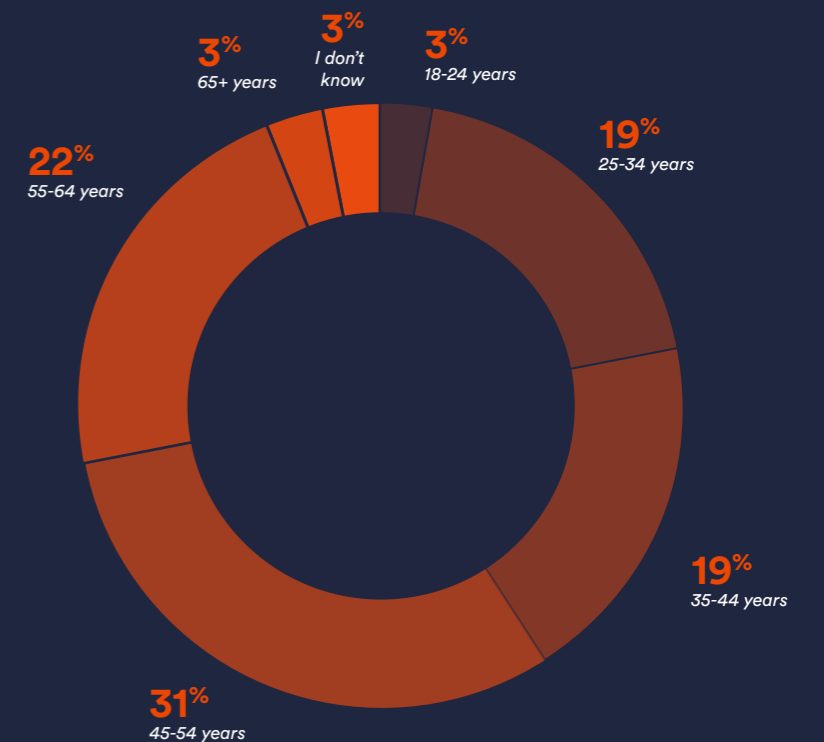
Respondent department



Respondent level of seniority



Target audience: Age

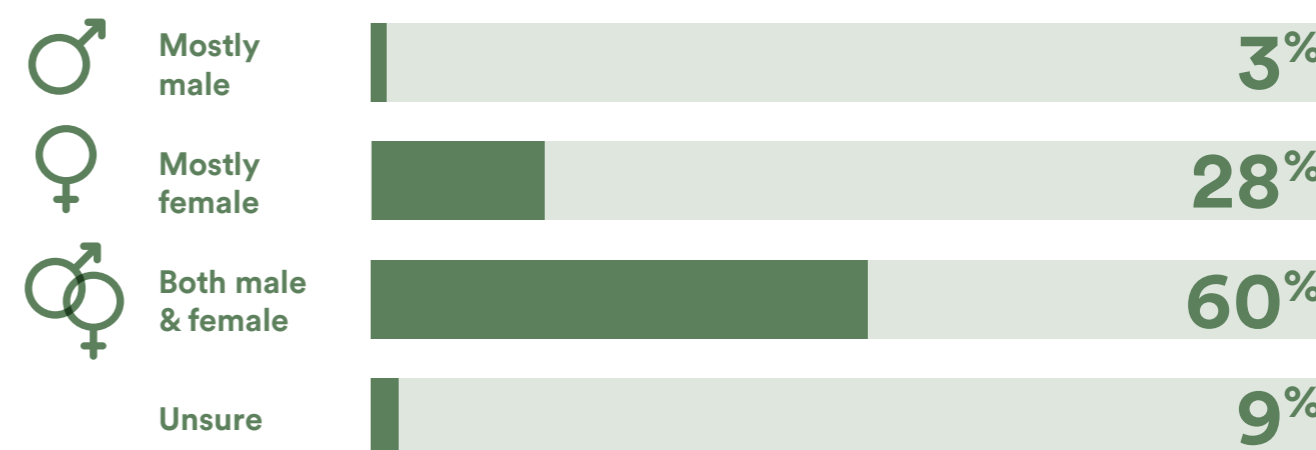




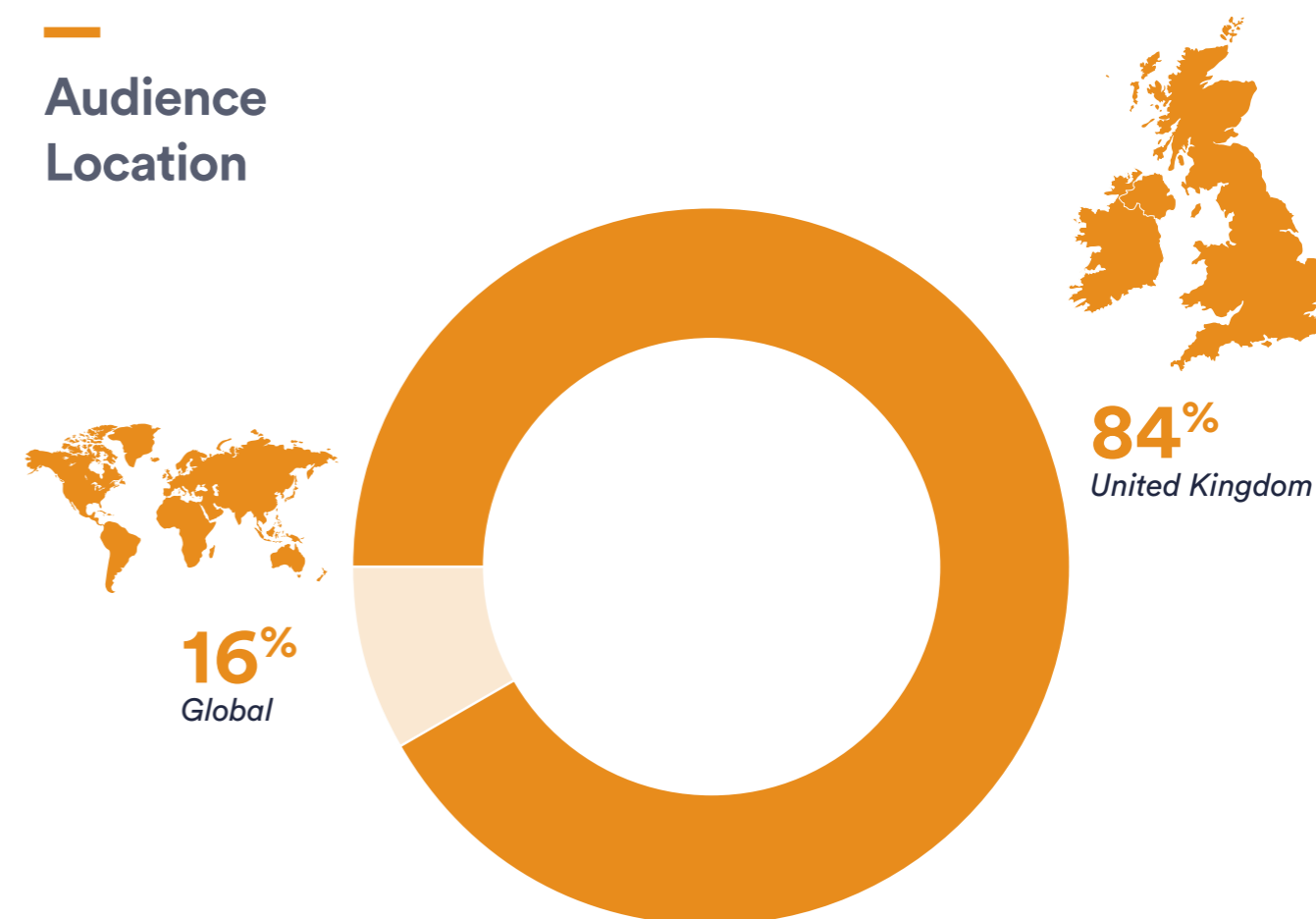
We see similar audience demographics for many charities. Millennials are a popular group, as they tend to be very active in the digital space.

The 45+ age range 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.

Audience demographics: Gender balance



Audience Location



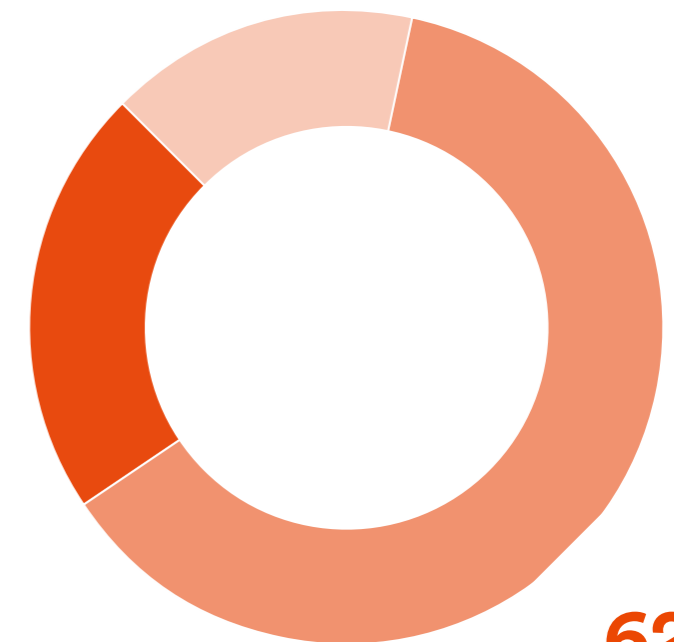
ASSESS

How are charities setting objectives for video?

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

22%
Awareness

16%
Conversion



62%
Engagement

It's very interesting to see how the most important objective for video has swung significantly from 'Conversion' to 'Engagement'. We've long been advocates for utilising video (*on social channels especially*) as a tool for priming audiences - building rapport and a case for support through emotive storytelling. It's usually the most effective strategy to structure the user journey so that the conversion itself occurs at a later stage, such as via retargeting or a DM campaign.



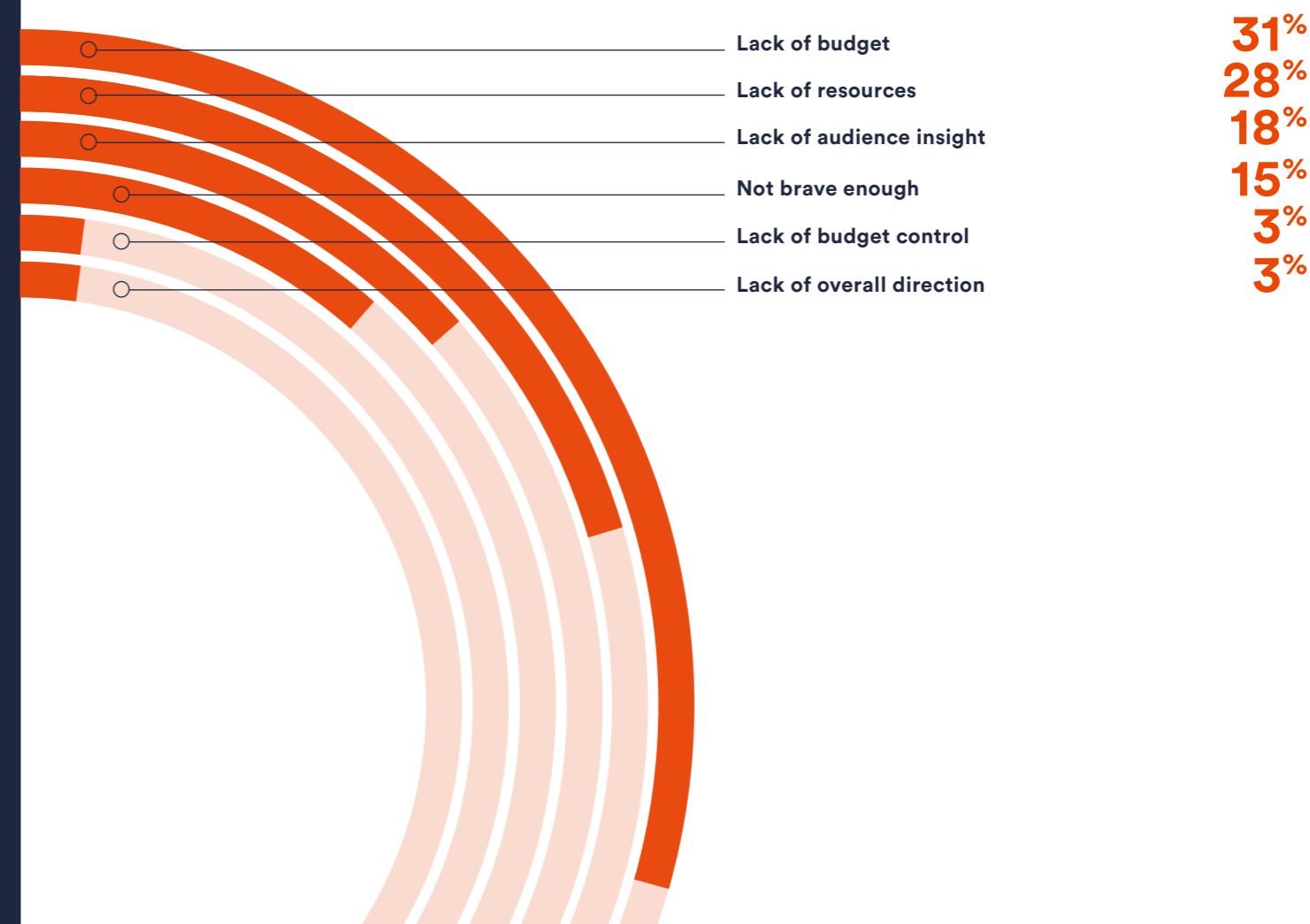
Top-10 best performing types of content

- 1st Case study / story films
- 2nd Awareness / brand films
- 3rd Social-style editorials
- 4th Event films
- 5th Fundraising films
- 6th 'How-to' films
- 7th Corporate partnership / pitch films
- 8th Recruitment films
- 9th Educational films
- 10th Internal communication films



Case studies and awareness/brand films continue to dominate as the best performing content types, with the hierarchy of other content remaining largely the same as last year. Our savvy clients tend to achieve fantastic value from investing in high quality case study films which are deployed across a myriad of functions across the business - from website and social, to in-person pitches and corporate partnerships, through to recruitment and onboarding. It's the content type that never stops giving when used strategically.

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



“[we don't hold] video budget in the team so having our hand forced by those with budget to create what they want, not what we think the audience wants/needs.”

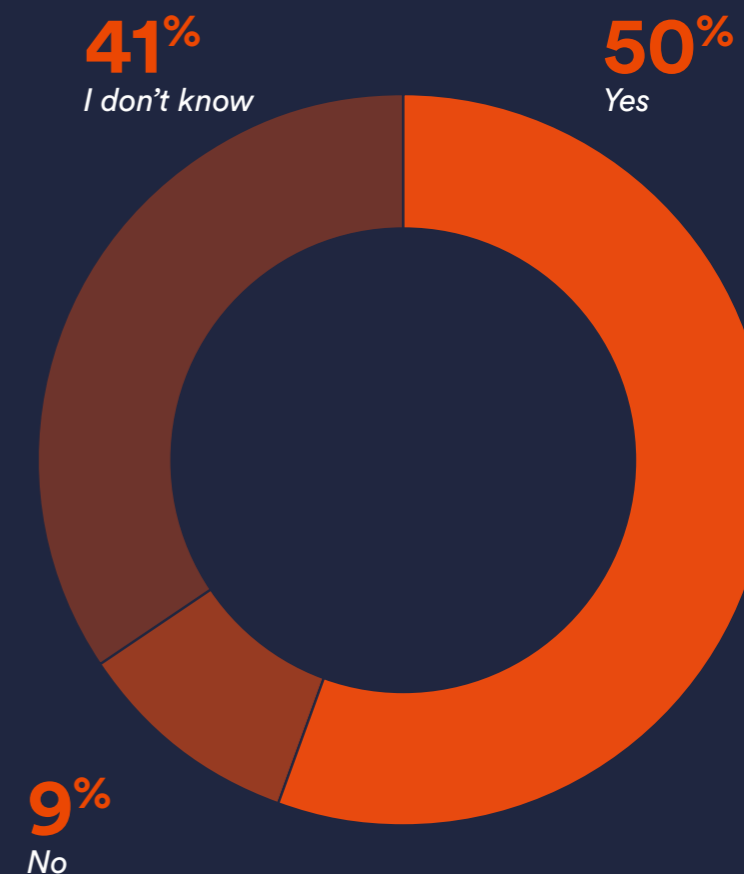
Survey Respondent

Unsurprisingly, lack of budget remains the main barrier for charities in achieving their content ambitions; this is unchanged from last year.



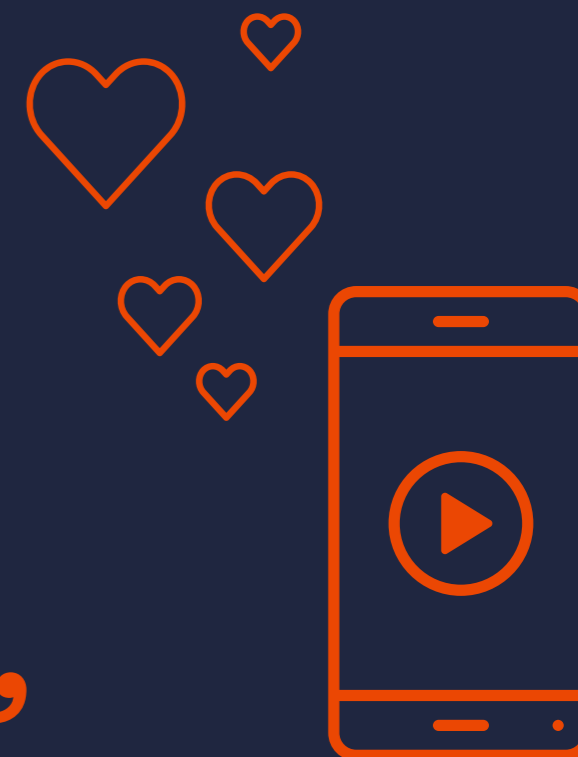
However, as we see video become a central pillar in communications and marketing, rather than a nice-to-have, we hope to see budget allocations rise this year.

Overall, do you feel video content provides a good return on investment (ROI)?



“ [video] increases engagement and loyalty to the charity, therefore encouraging people to fundraise for us later on. ”

Survey Respondent



“ [we look to create] content that people are interested in and are searching for. ”

Survey Respondent

“ [video] is a great way to educate, which is one of our key objectives. ”

Survey Respondent

“ We put too much expectation (and money) into a 90 sec video, and not enough thought about wider content strategy and user journeys. ”

Survey Respondent

“ We do not have systems in place to analyse [ROI] fully. It is largely guess work. ”

Survey Respondent



“ [ROI is] hard to demonstrate in a meaningful way for senior staff. ”

Survey Respondent

“ Audiences are used to consuming stories through video and the algorithm has (usually) supported their reach. ”

Survey Respondent

“ We don't always specifically measure [ROI]. I'd err towards saying yes it does, but the honest answer is - I don't know because we don't always measure it / it's not always considered important - rightly or wrongly. ”

Survey Respondent

“ [Video] tends to deliver the views/ engagement we look for at a lower cost than other methods. ”

Survey Respondent

“ Videos aren't audience-led enough, with concepts driven by insight. ”

Survey Respondent

“ Sometimes [video delivers] when the creative is right and the audience is well-defined; if not, the ROI can be terrible. ”

Survey Respondent

“ [we have a] lack of evidence of outcomes / impact. ”

Survey Respondent

“ I think video is the most powerful communication tool. I don't think the costs versus the return are scrutinised enough on most productions to see how the ROI has performed. ”

Survey Respondent

“ [ROI is] hard to assess because lots of the metrics that are measured are great in principle - video got xx views, likes or comments - but without the surrounding attitude change research, it's hard to track the difference it's made. ”

Survey Respondent

“ Every team wants a video and turnaround is too tight to produce effective content. Costings aren't really considered so I think a lot of it is wasted. ”

Survey Respondent

“ Engagement on our social channels and YouTube channels has increased impressively since we've started to focus on video content more. ”

Survey Respondent

“ [ROI] can be very difficult to measure. We used to calculate a per-view ROI, but also make films which were designed to be shown to (and convince) a small number of targeted decision-makers. ”

Survey Respondent

“ If a picture speaks a thousand words, then video speaks a million words. ”

Survey Respondent

“ Great for retargeting viewers. ”

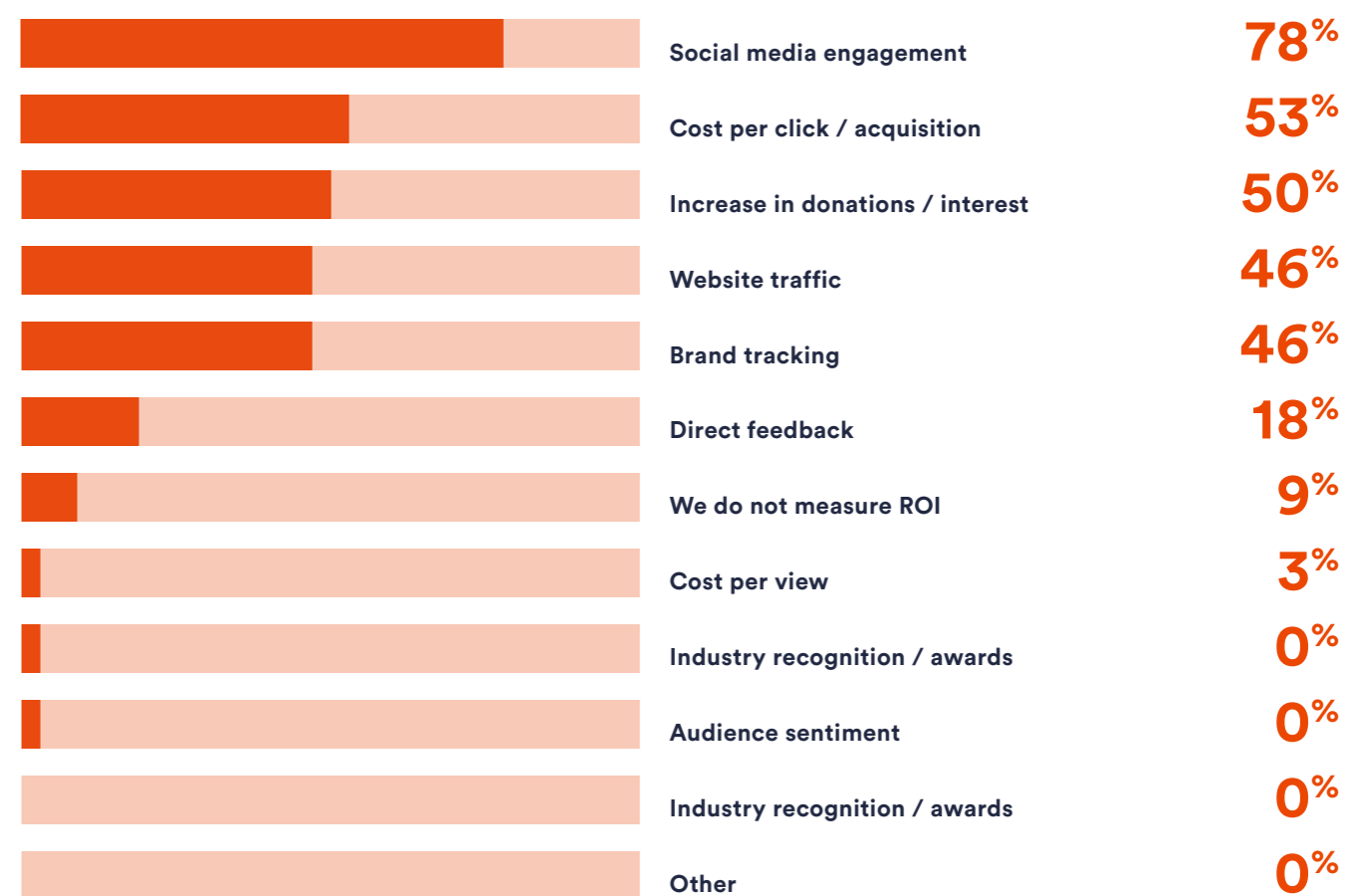
Survey Respondent

Achieving and proving ROI from video has always been a hot topic, generating a wide gamut of opinion. Last year's results stated that 73.9% of you felt that video provided a good ROI, so there's a clear migration this year towards a more 'unsure' opinion (however the small number that felt that video didn't provide ROI largely remained the same).



I feel that as video becomes a central pillar in many digital campaigns, it's expected (and welcomed) that its effectiveness comes under more scrutiny. Measuring the impact of awareness-raising content is never easy, but we'd suggest that, beyond paid brand tracking methods, engagement remains a reliable indicator that the right audience has been reached with a message powerful enough to cut-through. It's also worth considering if any softer audience actions could be introduced to help with tracking, such as a newsletter sign-up.

How have you measured your ROI in the past?



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



Greenpeace UK
'Rang-Tan'



War Child UK
'#EscapeRobot'



RNLI
'Float to Live'

PLAN

How are charities planning their content?



87%

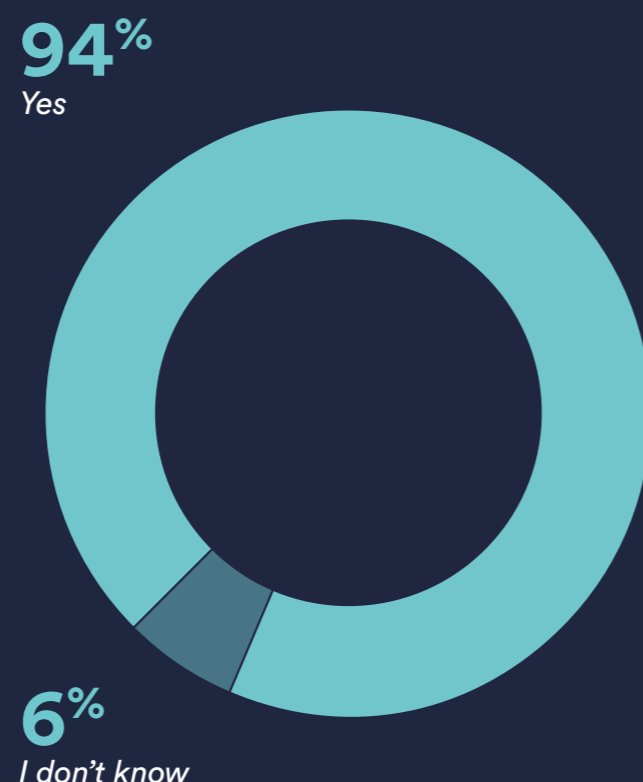
of respondents said that video content is 'important' or 'very important' to their charity.

We've seen an increase here, from 79% last year, suggesting that charities are catching up to wider consumer trends around video content and marketing.

Audience appetite for video shows no sign of slowing down, especially on social media, so charities are right to focus their priorities and resources on video.



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



An almost identical response to last year (95.7% said 'Yes') indicates that the appetite for building video content into campaigns and longer-term strategies continues to be a top priority for many charities, and there's little sign of this ambition slowing any time soon.



Just **16%** said that video content is 'well integrated' across the charity.

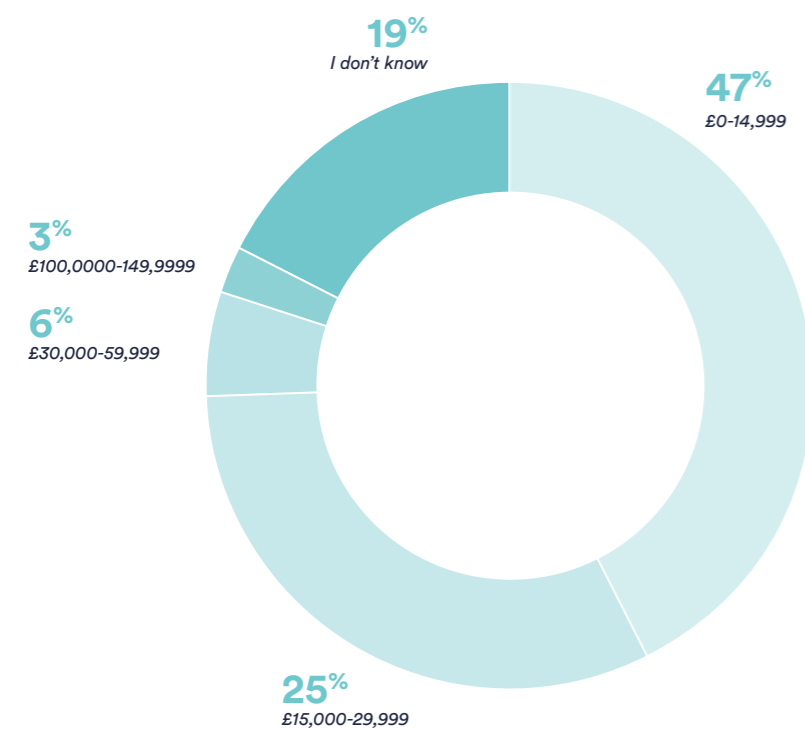
53%
were neutral

31%
said that video content was 'not well integrated'

Charities are still struggling with integration across departments when it comes to commissioning or project managing video content.

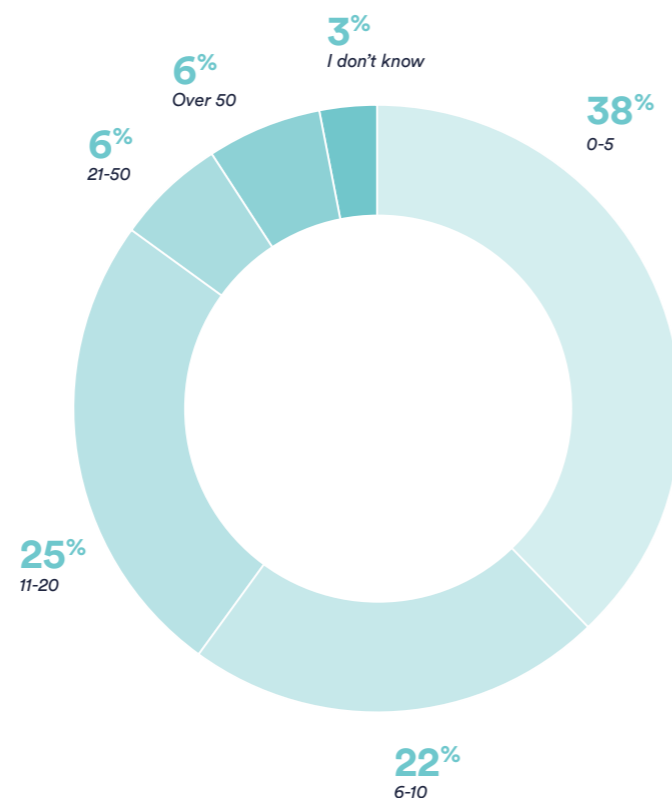
However, there is a positive trend here: last year, just 9% of respondents said that content is 'well integrated', compared with this year's 16%. However, there is clearly still room for improvement.



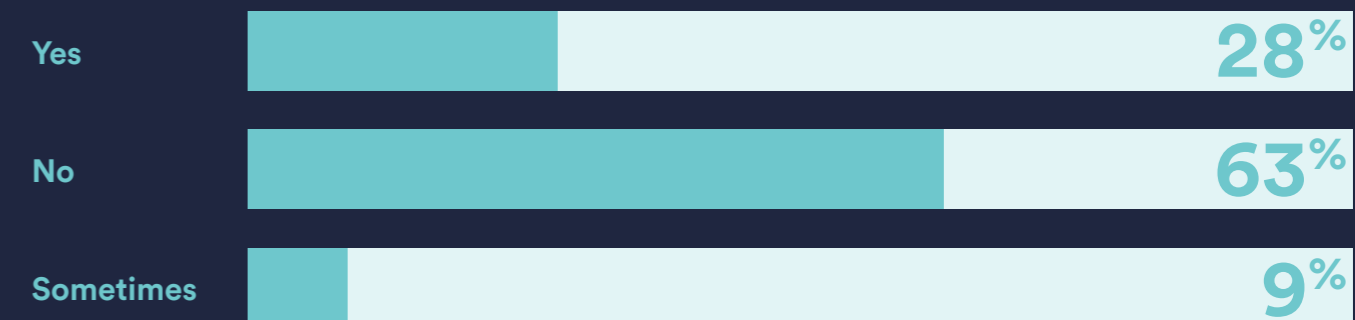


What is your average investment in video content per quarter?

Approximately how many videos do you publish per quarter?



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



As charities continue to increase their ambition, 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 of content strategy (see our *Relay events*) and we support charities on a more formal basis by offering a holistic strategy solution, which begins with a content and competitor audit followed by a strategy workshop with content stakeholders.



50% of respondents said that a content strategy was something that they hoped to implement in the future.

“We have a content strategy that’s largely principle-based as opposed to being channel specific.”

Survey Respondent

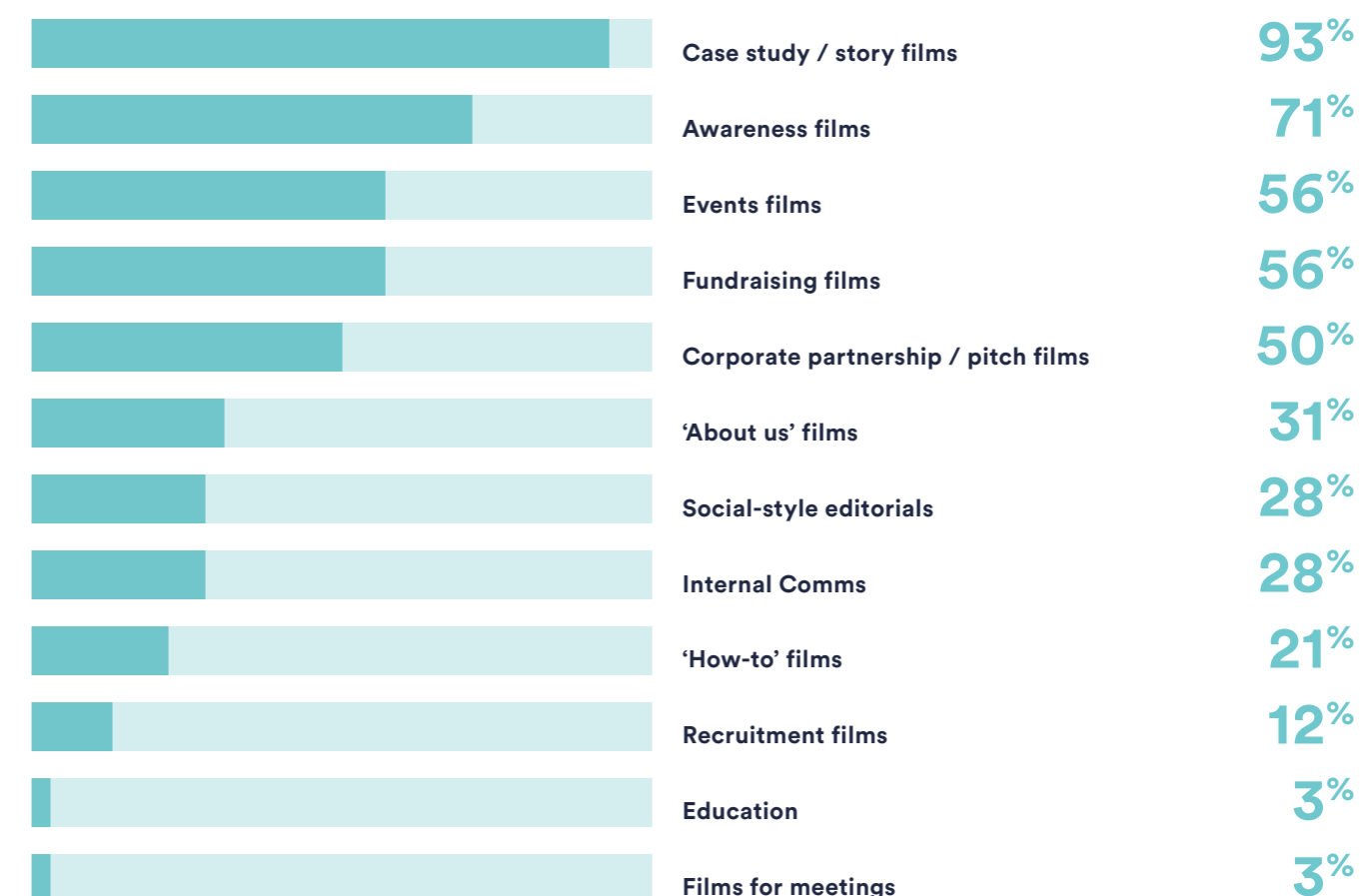
“We plan to [implement a strategy], but it depends on organisational buy-in, particularly from non-comms specialists who may not see the benefit of spending budget on content.”

Survey Respondent

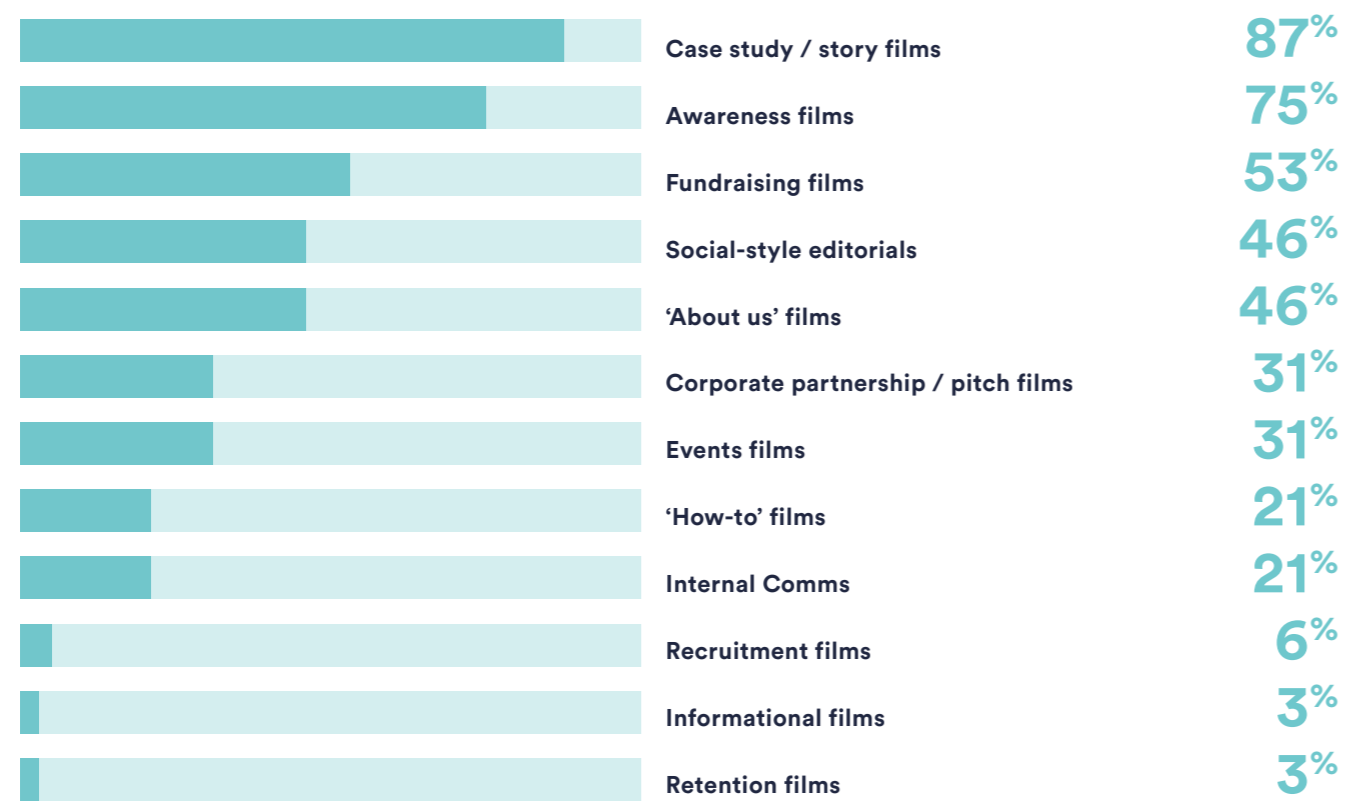
“Our content strategy is currently being developed but proving challenging to bring all directorates together across the organisation.”

Survey Respondent

What types of video made up your content mix in 2018?



What types of content are you going to be focussing on next year?



We're not surprised that case studies and awareness films continue to be the most popular, although it is interesting that they trump fundraising films, suggesting that charities see the value in investing in awareness and brand building through video.

This is also reflected in an increase in 'About us' films. Corporate partnership / pitch films have noticeably crept up this year - could this reflect a sector-wide decision to diversify funding streams?



31% of respondents said that they feel their charity is 'brave' or 'very brave' when developing content.

38%
were neutral

31%
said they were 'not very brave' when developing content

The number of respondents considering their charity to be 'brave' or 'very brave' when developing content has increased by a huge 10% compared to last year.

This coincides with our experience working with charities, as we've seen a leap in confidence and an increased willingness to take risks this year. Often this is because clients recognise the increasing need to stand out in an ever-crowded space.



— CREATE

What creative challenges and considerations are affecting the sector?

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



Managing stakeholders can be tricky, especially when large numbers are involved in a project.



Our advice for optimising this process includes: keeping the project team as small as practically possible, creating and sharing a clear timeline which sets out milestones, feedback points and responsibilities early on in the project, appointing a single project lead to manage the project team, involving key stakeholders in face-to-face meetings at key points, ensuring that feedback is consolidated and includes everyone's notes and finally that the project lead is given the trust and autonomy to run with it!

40% of respondents say they know their audience 'well' or 'very well'.

41%
were neutral

19%
responded 'not very well'



We see a slightly worrying increase in charities who feel they don't know their audience well - up from 9% last year.

Are audiences harder to understand, or are the stats harder to measure? Does this have anything to do with stricter data management at Facebook or other social companies? It will be interesting to see what happens to this value next year.

Do you tailor creative to specific channels?

Yes

81%

No

16%

I don't know

3%



Tailoring creative to specific channels is more important than ever. It's likely you've found what works on Facebook may not work so well on Instagram, for example.

While formats and specifications are important for optimisation and accessibility, as marketers we also have to understand how and why our audiences use each channel so that our content resonates in the appropriate context.

Just **3%** of respondents said they use more animation than live action.

97%
of respondents use more live action than animation



This result represents a small drop in the number of you reporting that you predominantly use animation in your video communications. Animation is an especially effective medium for communicating more complex and/or less engaging subject matter to audiences.

We have a PDF on animation process best practice along with explanations on the different styles available and associated terminology. Email hello@raw.london for a copy.



In the chart below, it's encouraging to see a slight rise in respondents considering video to be effective for conversion and fundraising. Including a clear call-to-action is a great way to ensure that audiences are always given an option - whether that's donating money, sharing content or engaging in some other way.

We are big proponents of using video as a primer, so it's great to see

Video is popular as a primer.

Respondents agreed that "We find video to be effective for converting/fundraising"

63%

Agreed that "We always include a call to action in our videos"

69%

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

72%

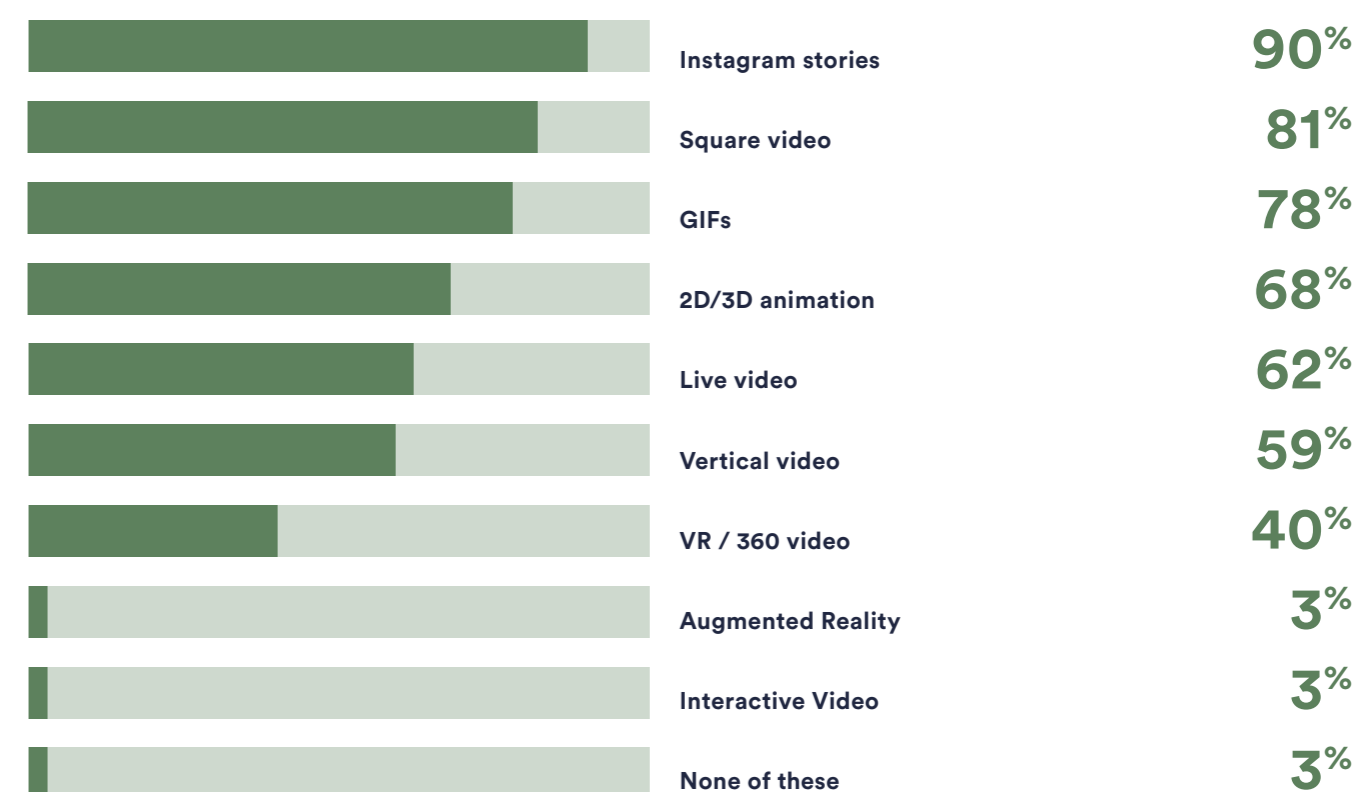


The results in the chart to the right are vastly different to last year, showing charities are taking better advantage of the options available to them.

The biggest difference is Instagram Stories - which only 15.6% of respondents had tried this time last year, compared to 91% this year.

Another exciting thing to note is the increase in charities using square format picture, which has seen a rise from 12.2% to 81% this year.

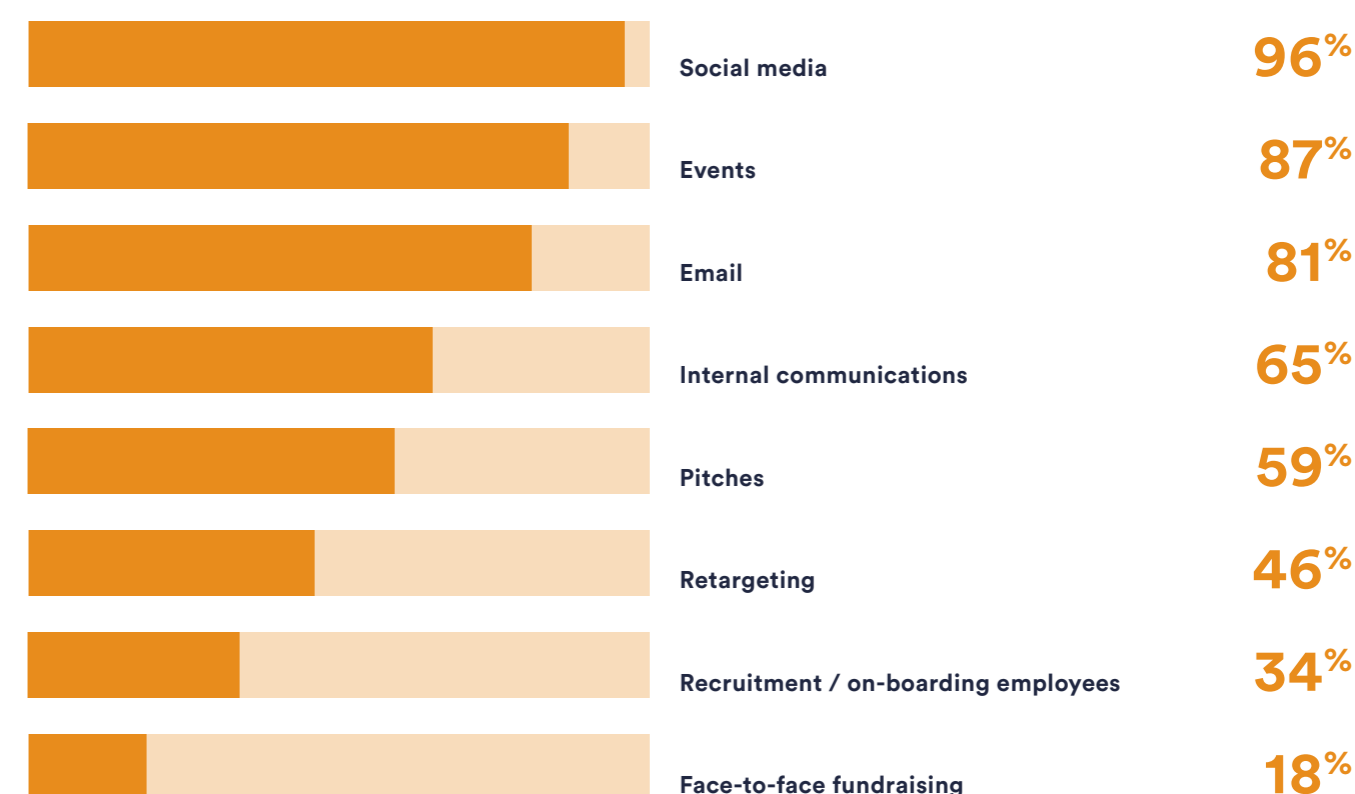
In the past 12 months, have you experimented with any of the following?



REACH

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

Do you use video in any of the following scenarios?



60%

of respondents said that paid online video distribution is 'not very effective'.

This is one of the most surprising results, but I can understand that it can be difficult to prove ROI of paid online video distribution.

It's key to set out a clear strategy before launching your campaign, so that you can identify the KPIs that matter to you and measure only the most important results. Not doing this can mean you become overwhelmed with numbers and struggle to contextualise your results. We're experts in this field and can help to develop and get the most out of your strategy.



Video works, but measuring impact proves challenging



It's thrilling to see that 100% of respondents see the long-term benefits of video in audience perception! The fact that 72% find video content's effectiveness hard to measure echoes results in Q11 (on lack of audience insight as a barrier) and Q27 (feeling that they don't know their audience well). It would be interesting to explore these trends in more detail in our next report.



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

- 1st** Facebook
- 2nd** Instagram
- 3rd** Twitter

It's no surprise that Facebook came out on top as the channel with best results for video.

According to the 2018 State of Social Video Report, Facebook was voted the number one platform where consumers enjoy watching brand videos. The same report also found that video is consumers' number one favorite type of content to see from brands on social media, and is also the favoured method by which to find out about a new brand / product before purchasing.



Source: animoto.com/blog/business/2018-social-video-marketer-trends/

Most important metrics for results

- 1st** Engagement
- 2nd** Conversions
- 3rd** Impressions
- 4th** Reach
- 5th** Donations
- 6th** Traffic

“For us, success comes from choosing the right channel for each campaign.”

Survey Respondent

”

Engagement once again ranks above conversion, reach and traffic for the most important metric of success.

The long-term benefit of audience engagement is that it creates a loyal supporter base, which can boost conversions in the long run. It's also a great way to get direct feedback, gather data and extend the reach of your organic campaigns.

However, there are cases where too much weight can be put on engagement while other metrics go overlooked - so be sure to have a clear view of the big picture.



Just 19% of respondents are 'satisfied' or 'very satisfied' with their videos' performance on social media.



About Raw London

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

We work with charities to deliver long-term content strategies, individual campaigns and effective videos. We've won 45 major international awards 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 placed 15th in the Televisual Corporate Top 50 Agencies in 2019.

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
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Benchmark Report team



Ryan Wilkins

Founder & CEO

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Ryan founded Raw over 13 years ago and is passionate about taking a strategic approach to video content. With more than 45 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 four 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

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Charlotte is a qualified and experienced marketer specialising in digital and content strategy. Her focus is on making sure our content is as effective as possible and has been recognised for her work on both short and long-term campaigns.

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