



2022 CharityComms Communications Benchmark Report

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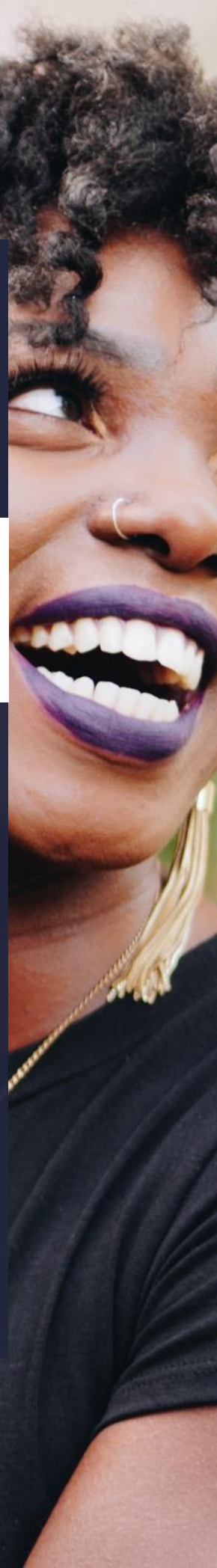


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Key findings

Comms professionals feel that comms has a good standing in their organisation

- As in 2017, the majority of comms professionals feel that comms are valued and respected in their organisation. They are seen as a strategic part of the organisation, but professionals are more satisfied with their brand and their organisation's investment in their brand compared to 2017. Almost two thirds think that comms and fundraising work towards an integrated approach.
- CEOs are more involved with comms than 5 years ago – they give more time for comms per week and a higher proportion of CEOs are active on Twitter. Comms staff are more satisfied with their CEOs involvement.
- Comms representation at senior level has improved over the last 5 years with 37% having someone at board level in a dedicated comms role (compared to 24% in 2017). A quarter of charities have a trustee in a dedicated comms role.

Most comms professionals perceive their work as effective, but there has been no change in the challenges to achieve their goals

- The majority of professionals agree that their comms are effective. Perception of effectiveness is driven by being data driven, measuring the impact of comms effectively, and by feeling valued. Income, budget and team size do not drive the comms professionals' perception of their effectiveness.
- Around half of comms professionals feel confident to effect change in their organisations. Top goals include raising awareness of services, cause and brand, and engaging communities and donors.
- Barriers to achieving those goals have not changed from 2017. Competing priorities, firefighting and lack of integrated processes are the top challenges. Professionals mentioned that they needed more managerial involvement and influences, organisational strategies and integrated thinking, as well as more time, staff and budgets.
- The median team size is 6 staff – charities have most staff in the areas of fundraising and marketing. The median non-salary budget is £5,000. Budget has stayed the same for 42% in the last year.

Comms professionals are braced for change in the next decade

- Over the past five years, the rise of digital and social media platforms has had a powerful impact on the ways in which comms is defined and delivered. It has also changed what individuals aspire to achieve with comms.
- Over the next decade, professionals expect comms to be faster, snappier and more convenient due to the advancement of digital and AI. Some predict increasing sophistication as organisations need to be able to adapt quickly to the demands of audiences and the demographic shift from boomers generation to Millennial/Gen-Z.
- However, AI technology in comms is expected to cause certain challenges, e.g. risk to authenticity, or difficulty in delivering trusted communications.

Comms professionals are excited about their work and team but worry about the consequences of cost of living on the sector

- Worries circle around current issues – i.e. how the cost of living crisis will impact fundraising and comms targets, or job security. Other worries include a lack of time, staff and resources and potential consequences, such as burnout, stress and fatigue.

- Comms professionals are excited about working with passionate colleagues, the nature of the work itself and new projects that allow them to grow and learn.

You can also view the report results in an [interactive dashboard](#) that compares 2022 data with the benchmark results from 2017.

The standing of communications in charities

Comms are valued across almost all organisations

Comms staff taking the survey are pleased with the standing of comms in their organisations. 90% believe that communications are valued in their organisations, and 65% feel that comms are respected. Comms teams also feel embedded into their organisations' strategies. 72% think comms are a strategic part of the operation and 63% feel comms are planned and delivered with an integrated approach. 75% believe that digital is seen as essential to their charity's business strategy. The value of comms seems to have increased across charities over the last 5 years as respondents were more positive in 2022 compared to 2017 (see Chart 1).

Chart 1: Value of comms across charities



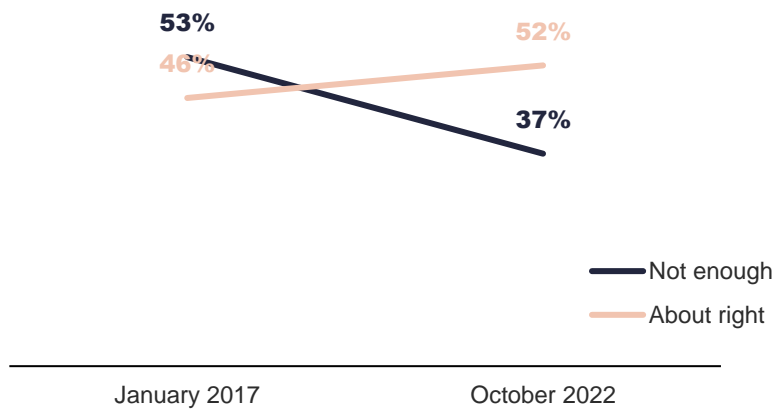
“Please indicate how strongly you agree or disagree with the following statements by ticking the box that most closely matches your view.” **Strongly agree + Agree combined**

The relationship between comms and fundraising seems to be good in most organisations as 62% of comms professionals feel that comms and fundraising work towards an integrated approach. However, 44% of comms staff said that their organisation sees comms mainly as a support for fundraising – an increase from 29% in 2017.

CEOs and trustees more involved in comms

More than three quarters of comms staff (77%) feel valued by their CEOs, and CEOs show their appreciation by increased availability around comms tasks. Almost all CEOs (92%) spend time on comms every week. On average, they give 2.5 hours per week – around one hour more than in 2017. This did not go unnoticed by comms staff: 52% of comms staff are now satisfied with the time their CEO gives for communication compared to 46% in 2017 (see Chart 2). Twitter has also become a popular tool among CEOs. 60% of CEOs are active on Twitter compared to 32% in 2012.

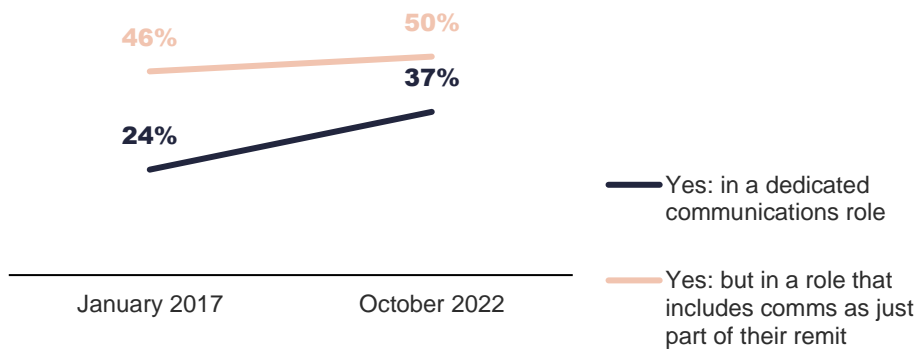
Chart 2: CEO time for comms



“Do you feel the time your CEO gives for communications is...”

But comms have also become increasingly valued among charity boards. 58% of staff think that their trustees understand the value of comms, and 52% of the respondents’ organisations, compared to 40% in 2017, have a trustee with comms expertise on their board. More than half of the organisations (55%) have a trustee responsible for comms, and 25% of the organisations even have a trustee dedicated to comms. Among the senior management team, 37% of organisations have a someone in a dedicated comms role – an increase from 24% in 2017 (see Chart 3).

Chart 3: Comms responsibility at executive board level

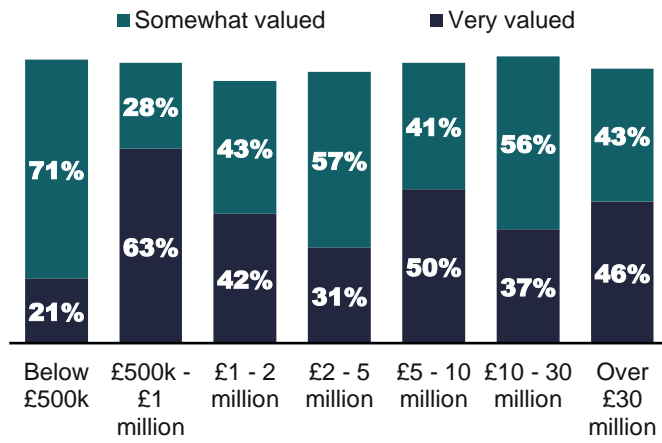


“Do you have someone at executive board level (i.e. the senior management team) responsible for communications?”

Staff in smaller organisations less valued and supported

Even though comms seem to be valued in charities with advances in many areas, staff of smaller organisations paint a different picture. Comms staff working in organisations with their income below £500k feel less valued than staff in bigger organisations (see Chart 4). Smaller organisations also miss out on comms experience on their boards: Among organisations with an income below £500k, 36% have no one responsible for comms in the senior management team, and 57% have no one responsible for comms among their trustees (compared to 13% for the management team and 34% for trustees among all respondents).

Chart 4: Perception of appreciation for comms by charity income



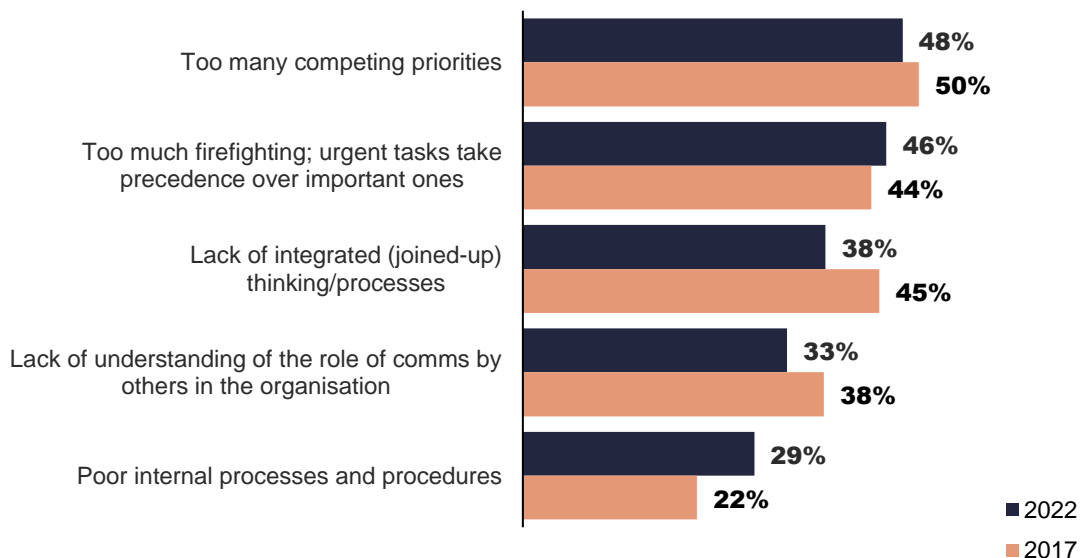
“How valued do you believe communications is in your organisation?”

Effective comms work

Comms goals and barriers have not changed in 5 years

Comms teams' top goals have not changed in the last 5 years. They see their top tasks in raising awareness of their charity's services (47%), cause (42%) and brand (39%), as well as engaging communities (37%) and acquiring donors (36%). However, the barriers to achieving their goals have not changed either (see Chart 5). Comms teams face too many competing priorities, and often feel that urgent tasks take precedence over important ones. Even though more comms staff than in 2017 perceived their comms to be delivered with an integrated approach, 38% think that a lack of joined-up thinking is one of the major challenges that impair comms work. Other challenges included poor internal procedures or a poor strategy in general as well as a lack of understanding comms by others in the organisation.

Chart 5: Comms teams' barriers to achieving their goals



“Leaving time and resource issues aside, what do you think most gets in the way of you achieving your comms goals? Please choose your top 3 challenges.”

What drives effective communications?

Yet, comms teams are satisfied with their work. The majority (87%) perceive that communications in their organisations are ‘very’ or ‘somewhat’ effective, and 81% think that their colleagues perceive their work as effective as well.

A Driver analysis showed what aspects are important for comms professionals to perceive their work as effective (see Chart 6). The two most important drivers of perceived effectiveness were whether comms professionals perceived comms in their organisations as

- data-driven and impact measured and as working with fundraising
- valued in general.

Comms professionals' perception that comms were respected and a strategic part of the operation was also a significant indicator of their perceived effectiveness, although not as important as the top two. Other factors, such as the total income of an organisation, the time a CEO spends on comms, or the comms teams' size or non-salary budget did not play a role (i.e., were not statistically significant) in perceived effectiveness.

Chart 6: Drivers of comms staff perception of their effectiveness



Results of a driver analysis. Figures refer to the relative importance of each variable in explaining comms staffs' perceived effectiveness of their own work. The model explains 27% of the variance in perceived effectiveness.

The results give an indication as to what comms professionals need to feel effective. While data-driven and impact measured comms seem to be very relevant in staffs' perception of their own effectiveness, less than half of the respondents report that comms are in fact data driven (44%) and that they measure the impact of comms effectively (48%) in their organisations.

The results also show that comms staff might adapt their expectations to the resources available as organisation income, team size and non-salary comms budget did not contribute to respondents' perception of their effectiveness. However, the results do not indicate that comms teams might not achieve more with increased resources. When we asked how their communications could be more successful, respondents did mention more budget and staff, alongside the existence and focus on long-term strategies, and managerial involvement.

“Our comms/marketing would be more successful if our organisation fully costed out the staff and budget required to deliver on comms objectives - over a sustained period of time. This would help focus the minds on ROI and what is the top priority.” (*Health, medicine, hospitals, hospices, 52 staff in comms role*)

“If we had a budget that matched expectations and needs to deliver strategy” (*Grant making trusts / funders, 2 staff in comms role*)

“We need to be more focused on our strategy priorities and review returns on investments made and impact” (*Mental Health, 7 staff in comms role*)

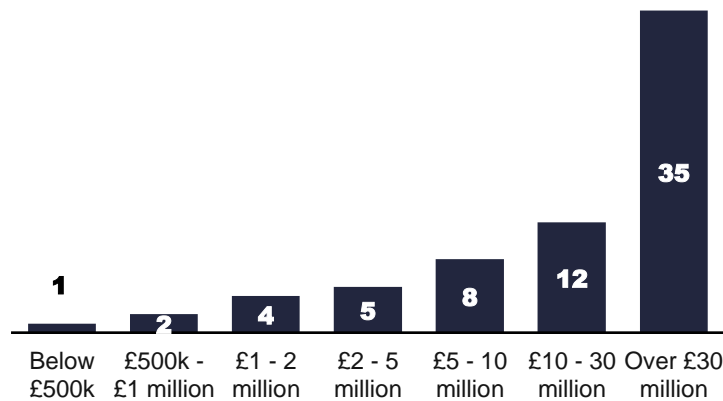
“Longer time to plan things - often having to deal with things on the fly and firefight”
(*Community care, 2 staff in comms role*)

“If we had more involvement with decisions being made at exec level, and more buy in from management generally” (*Voluntary sector umbrellas, 2 staff in comms role*)

Resources

The median of comms teams size is 6 staff, and unsurprisingly, larger organisations also have larger comms teams (see Chart 7).

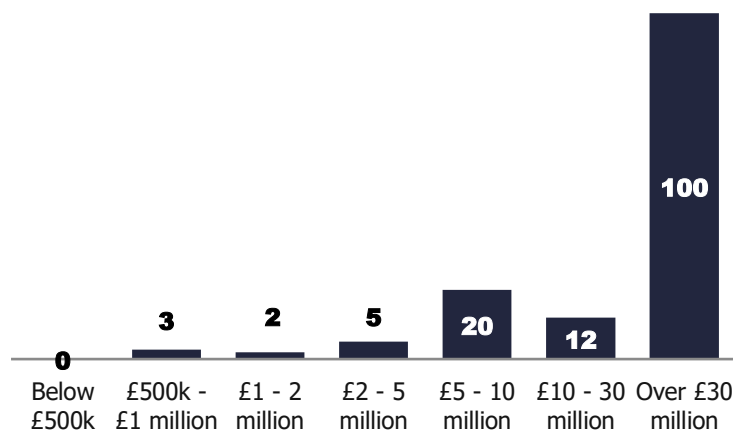
Chart 7: Median team size by income



"How many people in your organisation work in a communications role?"

Respondents' organisations median non-salary comms budget was £5,000 with larger organisations having higher comms budgets (see Chart 8). For 30% of respondents the budget had increased from the past year. 42% said it had stayed the same. However, many organisations with a total income below 500k have to deal with no comms budget at all. 54% of respondents from those organisations said they had zero budget for comms (compared to 26% among all organisations).

Chart 8: Median non-salary budget (in k) by income

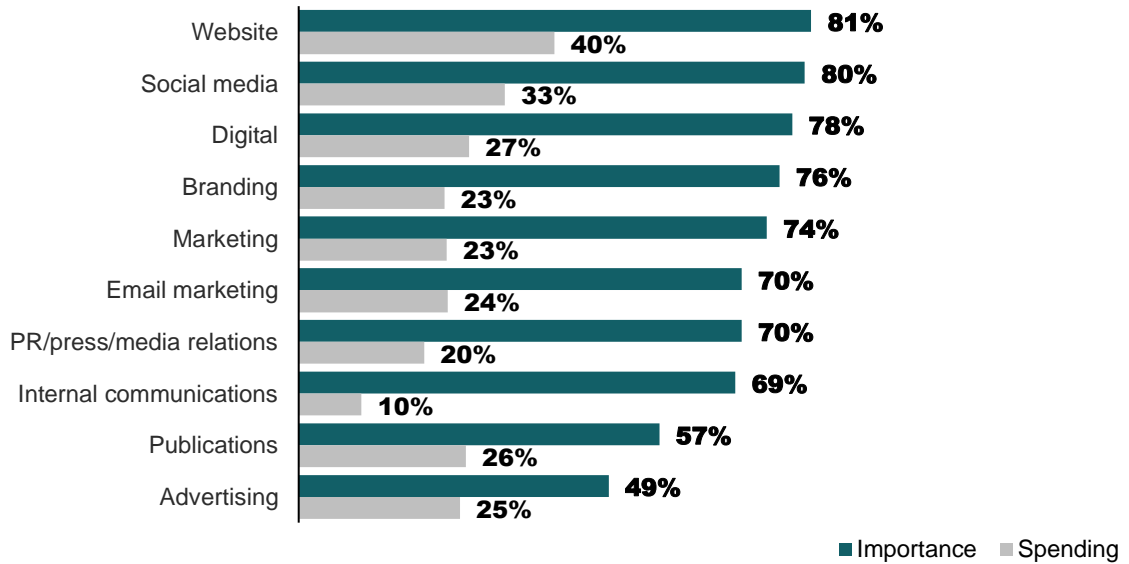


"What is your organisation's communications budget (not including salaries)?"

The top 3 channels where comms teams spend their budget are their website, social media, and digital. While these three are also seen as the most important channels (see Chart 9), there might be an imbalance among other functions. For example, a quarter of respondents selected advertising among their top 3, although fewer (49%) find it essential or important. The data also shows how

outward facing comms budgets need to be spent. Internal communications were selected by 10% among the top 3 channels they spend on, even though 68% of respondent see internal communications as essential or important.

Chart 9: Importance vs spending on comms channels



“How would you describe the importance of the following functions to your organisation?” **Essential + Important combined**, “Approximately, which of the following channels does your charity spend most on? Please choose the top three.”

What worries and excites you about your work in 2022?

People most worried about the cost of living crisis

The cost of living crisis is the predominant issue comms professionals are worried about. The consequences of the crisis are predicted to be detrimental to all aspect of income and financial stability. Many respondents expressed concerns about their work in relation to the crisis, such as missing comms targets, additional pressure on their work, and job insecurity.

“Cost of living crisis and impact on revenue.” (*Health, medicine, hospitals, hospices, 2 staff in comms role*)

“Pending financial and market instability, cost of living crisis, meaning less funds for charity but more need being created.” (*Education and literacy, 8 staff in comms role*)

“Cost of living crisis affecting fundraising and therefore comms targets” (*Environment and conservation, 2 staff in comms role*)

“Increasing demands and trying to get voices heard among the noise. Cost of living crisis will put further pressure on our work support fundraising.” (*Disability, 1 staff in comms role*)

“Cost of living and price increases on charity, reduced income from supporters, leading to reduced budgets and ultimately job losses.” (*Health, medicine, hospitals, hospices, 12 staff in comms role*)

Other worries included a shortage of time, staff, and resources, that have led to constrained productivity and work morale, and impeded projects.

“Workload stress and fatigue. Lack of organisational budget for comms resource. Lack of development routes for entry-level comms professionals to advance” (*Finance and money, 25 staff in comms role*)

“The pace and desire to improve, loads of great ideas and plans to make things better, but the capacity and resource to achieve that is challenging.” (*Disability, 90 staff in comms role*)

“We're very understaffed and have several big projects on simultaneously, while also recruiting for new team members. With all this going on, I feel like I don't have the time I need to do the day-to-day parts of my role.” (*Heritage and regeneration, 3 staff in comms role*)

“Having the budget and time to achieve what is needed and retaining talented staff with no in house progression routes” (*Grant making trusts / funders, 2 staff in comms role*)

What excites you about your work in 2022?

Despite the bleak outlook as a result of the cost-of-living crisis, respondents also mentioned a substantial number of positive factors in their roles. Those included the nature of the job itself and the possibility of making a difference, as well as the motivation generated from a work environment with respectful and passionate colleagues, or the prospects of a larger team allowing to focus on comms projects.

“The incredible stories that I get to share, and the amazing team who makes that impact

happen” (*Health, medicine, hospitals, hospices, 1 staff in comms role*)

“Changes in the team meaning increased focus on comms and more planning and developments to come.” (*Mental Health, 2 staff in comms role*)

“Being part of a team of people I admire and respect.” (*Disability, 9 staff in comms role*)

“The work. We champion co-design - working with communities in acute housing poverty to improve living conditions. Forever inspired by the people and communities we work with. We are always learning.” (*Int. development, disaster relief, 1 staff in comms role*)

“The possibility to change lives for the better and be with inspiring groups of people” (*Disability, 12 staff in comms role*)

“The opportunity to raise the charity profile and support from the local community. Seeing the difference this can make to the service offered to service users.” (*Health, medicine, hospitals, hospices, 2 staff in comms role*)

But respondents were also excited about learning opportunities and future projects that will help them fulfil their aspiration to bring about positive change in society.

“Comms is increasingly seen as important, the job market is vibrant, there are opportunities for good people - I'm looking forward to getting promoted and trying new things.” (*Health, medicine, hospitals, hospices, 11 staff in comms role*)

“The prospect of using culture and heritage to regenerate communities that have experienced severe deprivation after years of austerity and the opportunity to reconnect and energize communities to great better places to live, work and invest.” (*Art and culture, 6 staff in comms role*)

“Opportunity for repositioning organisation and being bolder” (*Training and employment, 5 staff in comms role*)

Changes in Communications

Comms increasingly online

Comms staff across all sectors mentioned the rise of digital and social media platforms as the most significant change over the last 5 years. This acceleration was perceived to be driven particularly following the COVID-19 pandemic. Many comms professionals felt that the growth in digital had brought greater productivity and accessibility, including “the collection of data from multiple sources to allow digital targeting.” (*Education and literacy, 1 staff in comms role*) or “social media, more use of video and awareness of accessibility needs.” (*Sport and outdoor activities, 1 staff in comms role*). In some organisations, this has led to a shift in how comms operate, as well as an increase in appreciation:

“Organisations definitely have come round to the value of digital! Senior leadership teams now do understand that social media, email marketing, SEO, etc. all have value to any org.” (*Disability, 2 staff in comms role*).

“A better understanding of the different aspects of communications. How social media differs from traditional marketing, and I think there's been huge growth in digital marketing.” (*Human and civil rights, 15 staff in comms role*)

“Digital becoming embedded in what Comms is rather than a separate operation.” (*Education and literacy, 8 staff in comms role*)

However, comms professionals also expressed certain concerns about the rapid growth of digital and social media. They described an increased risk of ‘cancel culture’ and algorithm changes as information is conveyed rapidly online. This was particularly mentioned in relation to Finance and Money sectors and in relation to organisations working with young people who are more susceptible to online risks.

Other respondents reflected on how comms and its goals have been redefined over the past years. They mentioned how comms have become braver and more focused on behaviour change and on letting people speak on their own behalf:

“Greater focus on change in behaviours/impact of comms, rather than on outputs and reach alone.” (*Housing and homelessness, 4 staff in comms role*).

“Getting much bolder and braver. I am inspired by RSPB and Scope recently being bold in criticising the government. I think there's an appetite now to step out of comfort zones and use communications for influence more than marketing. The other thing would be a move from speaking on behalf of people we support, to handing over the mic/camera/pen to the people with lived experience.” (*Grant making trusts / funders, 6 staff in comms role*).

Over the next decade comms will become faster AI generated

Comms professionals’ predictions for the next decade included that comms will be faster and more convenient. They also predicted that a surge in digital communication would come with increasing

demands, and the challenge to deliver truly engaging communications – especially towards younger generations.

““Communications will be much shorter, we will need to grab the attention of our supporters a lot quicker as attentions spans of users significantly decrease.” (*Health, medicine, hospitals, hospices, 1 staff in comms role*)

“There will be even more digital communications and shorter, snappier comms will be important for mass audiences with technical content reserved for high value philanthropic audiences.” (*Health, medicine, hospitals, hospices, 54 staff in comms role*)

“Cheaper ways to communicate, move away from using paid social media to promote content” (*Family welfare, 5 staff in comms role*)

“Greater importance to create true two-way communications and interactions - less reliant on the 'broadcasting' of communications and the need to truly engage digitally with audiences.” (*Housing and homelessness, 4 staff in comms role*)

“Customer demographic changes - it seems many charities still focus their strategies heavily on older generations and their behaviours. As boomers age out of the market, it'll be interesting to see how charities adapt to a Millennial/GenZ-first approach, and what that'll look like.” (*Disability, 11 staff in comms role*)

Many participants also elaborated on the potentials of Artificial Intelligence (AI). One expected that “70 percent of enterprises will use AI technology in the next 10 years, adding \$13 trillion in added value globally.” (*Community care, 10 staff in comms role*). But many also mentioned drawbacks of AI in comms, such as misinformation and the challenge to deliver trusted comms, and the need for stricter regulations in return.

““Misinformation will continue to be a challenge. Also, increased in automation/AI present opportunities but also risk to credibility and authenticity.” (*Mental Health, 1 staff in comms role*).

“The most significant changes in communications will be changing nature of how people receive and engage with information and the increasing power of algorithms and AI technology that will be make it more difficult to deliver trusted communications.” (*Art and culture, 6 staff in comms role*)

“Better regulation of social media for the good of both individuals and organisations.” (*Mental Health, 1 staff in comms role*)

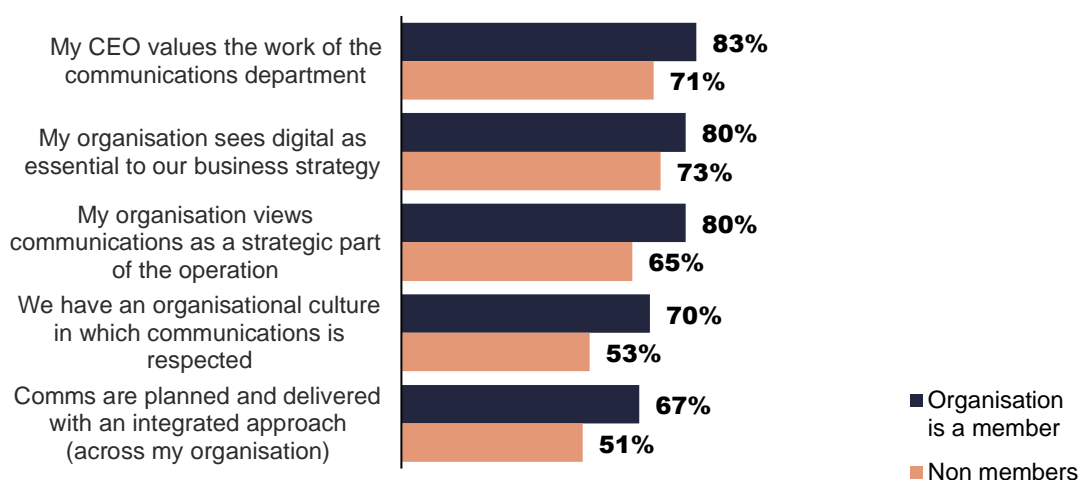
“A merge in platforms and a more integrated and streamlined way to communicate, in addition to more (needed perhaps) regulations” (*Children, 1 staff in comms role*)

CharityComms membership

46% of respondents work in organisations that are members of CharityComms. CharityComms had quite different answers to the 17% of respondents who were neither individual nor organisational CharityComms members.

Respondents whose organisations were CharityComms members were more likely to feel that comms had a good standing in their organisation (see Chart 10); they felt that comms were more respected and valued by their CEOs, with comms and digital as important parts of their organisations.

Chart 10: Value of comms by CharityComms membership

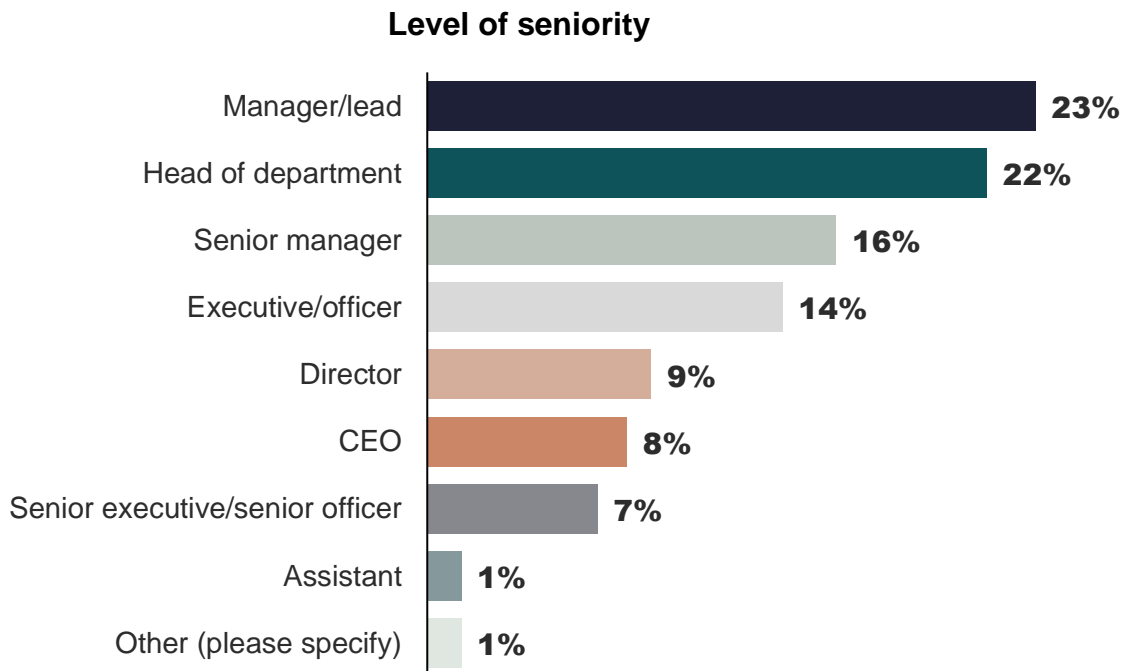
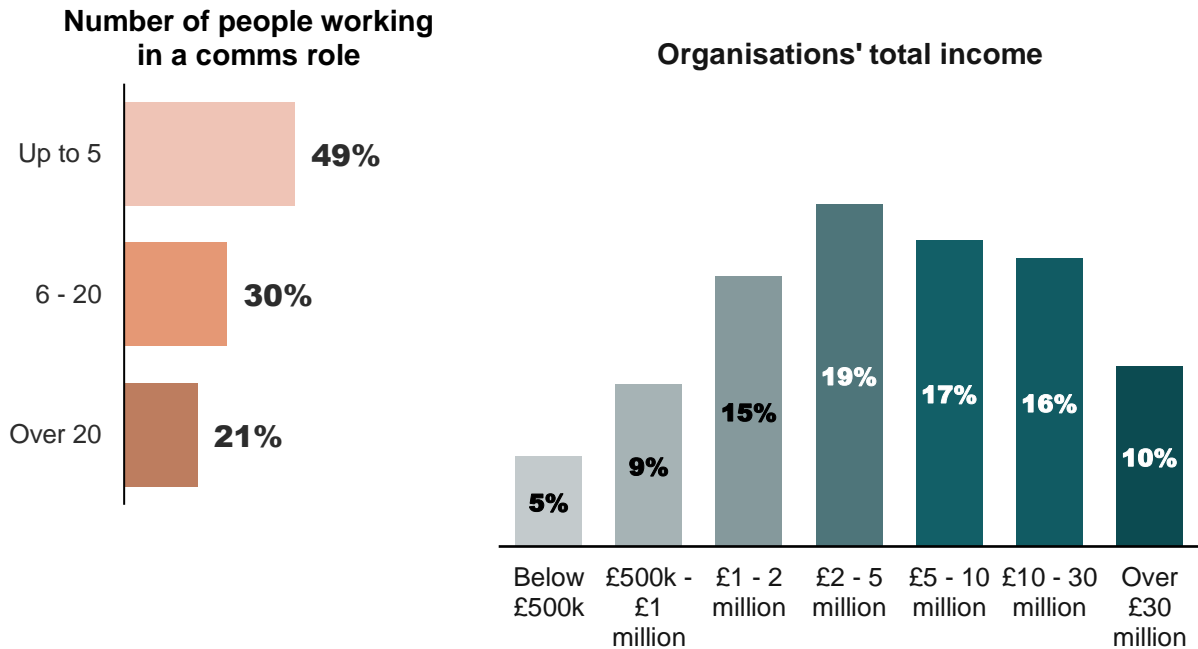


“Please indicate how strongly you agree or disagree with the following statements by ticking the box that most closely matches your view.” **Strongly agree + Agree combined**

In addition, non-members are more likely to miss out on other important aspects that show the value of comms in charities. For example, non-member organisations were less likely to have board members responsible for comms. 24% of non-member organisations did not have an executive board member responsible for comms compared to 13% among all organisations. At trustee level, the difference was even starker with 53% of non-member organisations without a trustee responsible for comms (compared to 34% among all organisations). CEOs in non-member organisations were less likely to be on Twitter (48% compared to 60% among all respondents’ organisations).

Methodology and sample

The data in this report is taken from a survey we ran between **12 October – 14 November 2022**. Communication professionals from 534 charities completed the survey (compared to 273 in 2017), with all sizes of charity, and levels of seniority represented.





CharityComms flies the flag for communications as a vital strategic function at the heart of charities and connects communications professionals through sharing best practice.

We are the membership network for communications professionals working in UK charities.

Our wide range of live and on-demand events include conferences and seminars, specialist groups and workshops, while our podcast uses compelling subjects to share insight and best practice. Our website is full of free guides, toolkits and tips created by charity sector experts specifically for the sector.

Our members are the heart of CharityComms and we're here to support you with whatever communications needs you might have.

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About us

nfpResearch is a leading market research agency in the not-for-profit sector. We put information in the hands of charities, to help them to help as many people as possible.

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