Open

# Raise more from the core

## Introducing the Appeal Ecosystem

**October 2026**

THE SITUATION

# We’re in a bit of a pickle

# UK giving is in decline...

**-6M**

fewer donors
than a decade ago

**-600k**

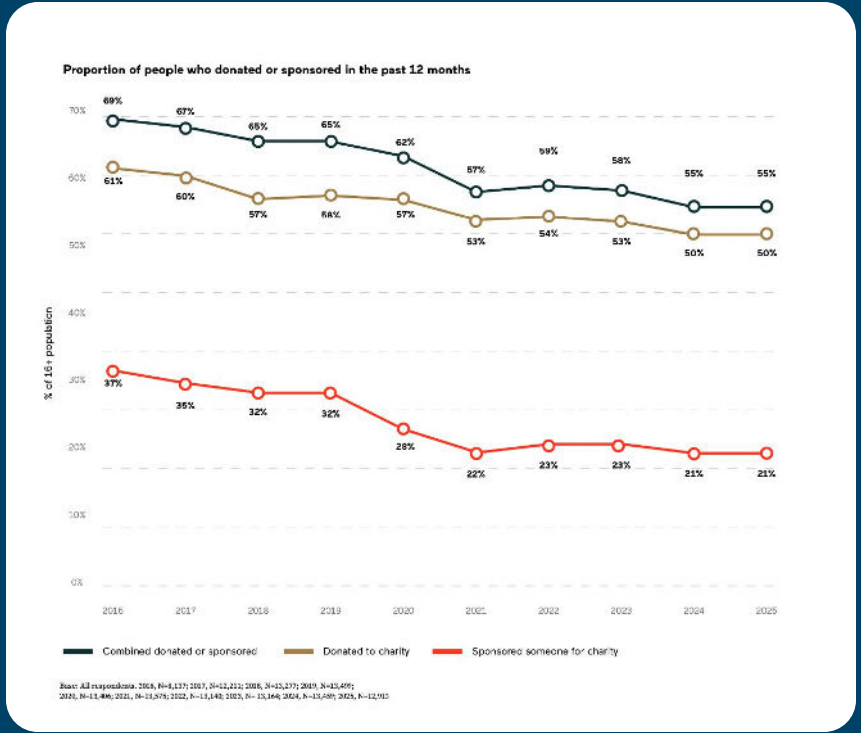
donors lost / yr
every year since 2016

**55%**

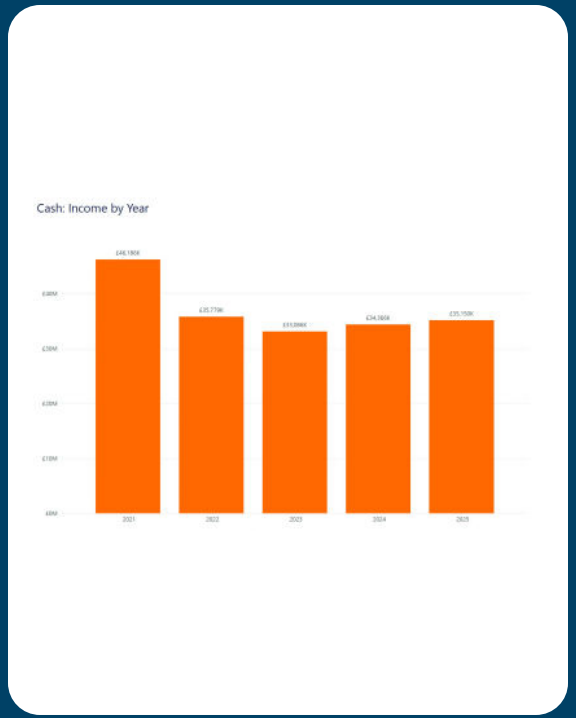
adults donated
down from 69% 10 yrs ago

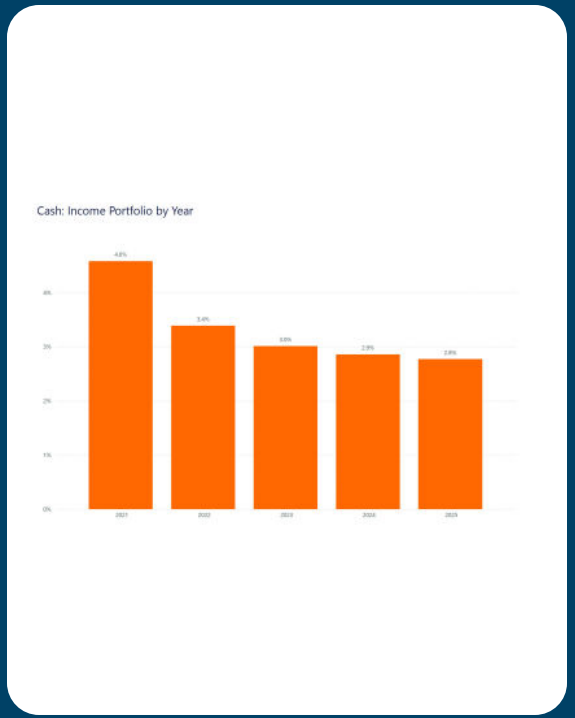
**-£1.4B**

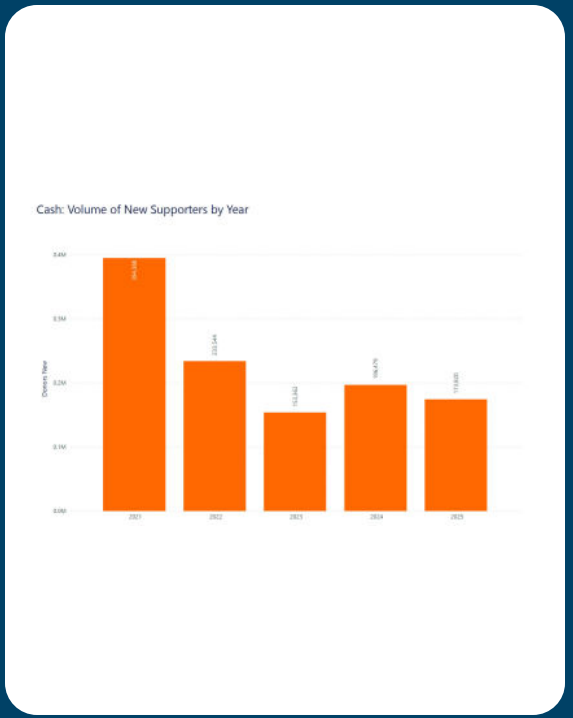
drop in donations
from £15.4B to £14B



# In real terms, cash programmes are in decline




SOURCE: Charity Benchmarks 2025

# Something isn’t working

## Cold Channels

## Warm Channels

## ❄ Cold Channels

Urgent unmet need, simple tangible solution

→

## Warm Channels

Complex more sophisticated programmatic work, stronger storytelling, recognition

## Cold Channels

Urgent unmet need, simple tangible solution

## Warm Channels

20% Active

80% Lapse

## Cold Channels

Urgent unmet need, simple tangible solution

## Warm Channels

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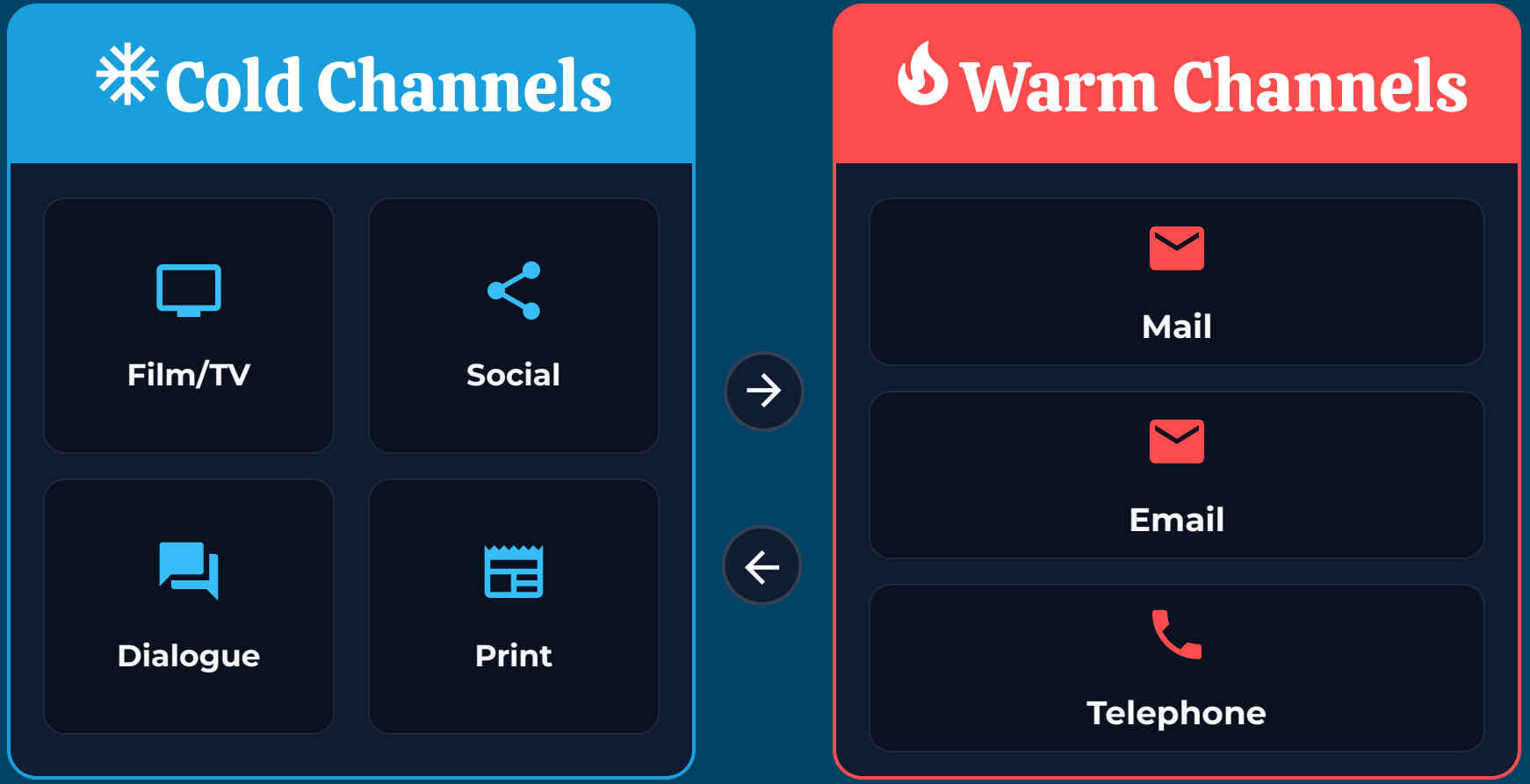
80% Lapse

## Cold Channels

- Film/TV
- Social
- Dialogue
- Print

## Warm Channels

- Mail
- Email
- Telephone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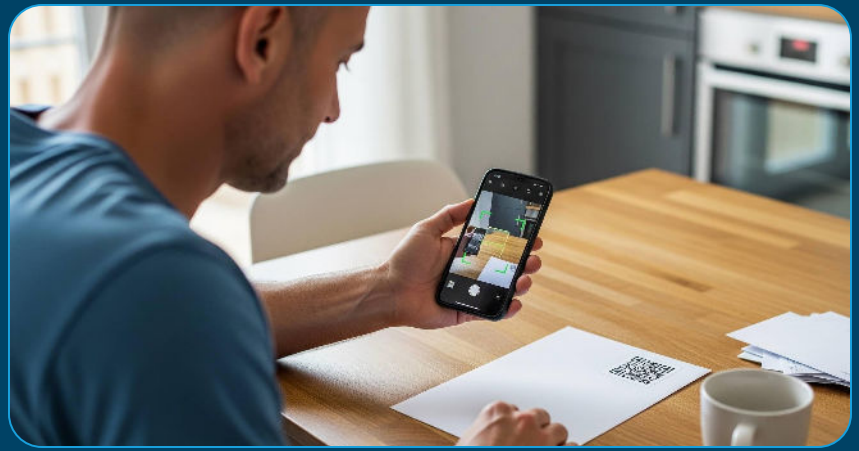
# Our supporters don’t live in one channel

DONATE NOW



# We need to get out of our channel silos and think differently

**We need to stop briefing for a channel execution and start briefing for an appeal that will travel across ALL channels and audience**

Mail

Email

Phone

Instagram

Tik Tok

**We need to stop briefing for a channel execution and start briefing for an appeal that will travel across ALL channels and audience**

Facebook

SMS

Whatsapp

RCS

# Appeals need to become more sophisticated...

THE REQUIREMENTS

# We need an approach that ticks all the boxes

### Donor Retention

Focus on **improving donor retention** by engaging all our segments.

### Individual Value

Increase **individual donor value** and grow mid value segments.

### Multi-Channel Deployment

Can be deployed **across channels** to meet our donor behaviours.

### Maximize Appeal ROI

Leverages **more value from the time, money and effort** invested in developing appeals.

### Manage Complexity

Enables us to **handle increased complexity** efficiently across operations.

### Agile Testing

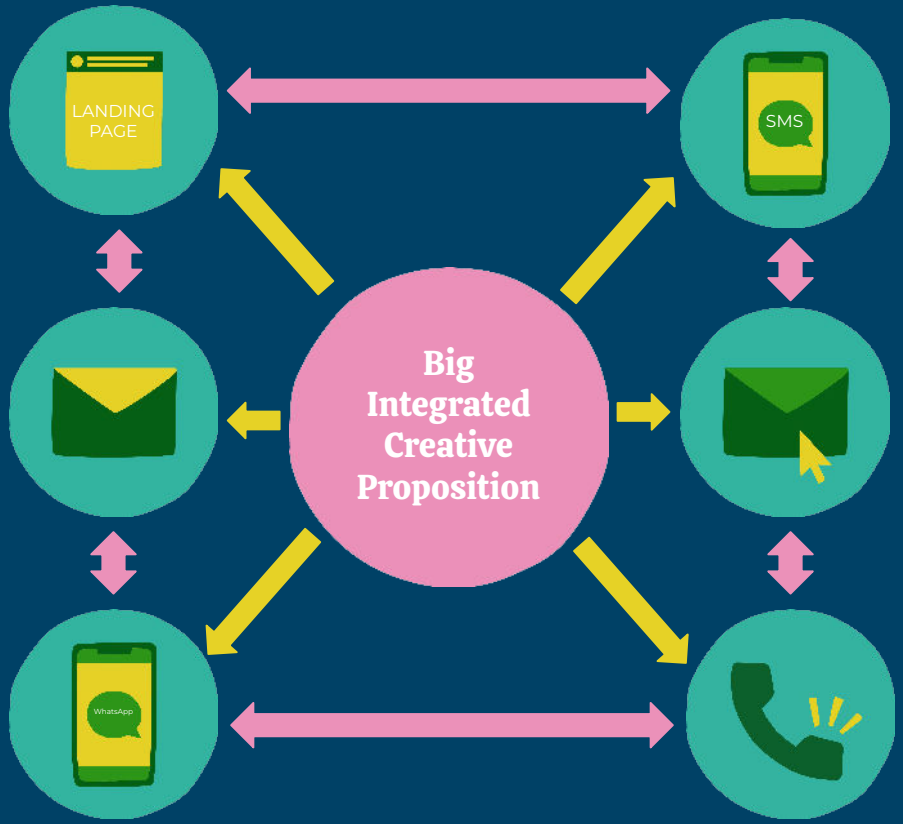
Cost effectively test **new creative and propositions** in cold channels.

# A new blueprint for appealing to our supporters in all the channels

# Deploying a ‘big creative’ idea that can be activated across audiences and channels

# We call this the Appeal Ecosystem

# THE APPEAL ECOSYSTEM



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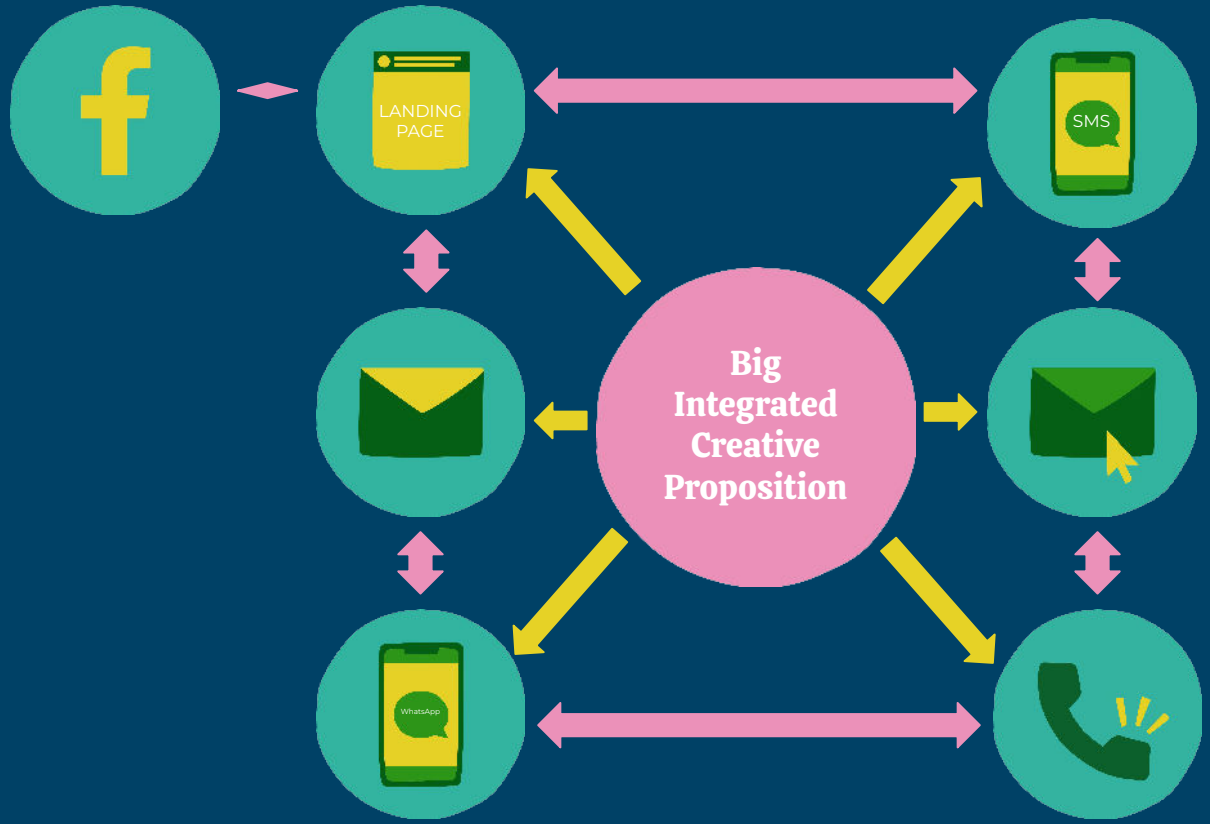


# Each ecosystem is deployed over 4 to 6 weeks

THE APPROACH

# Time to tell the story properly

STEP 01

## Unpack the story

STEP 02

## Build the need

STEP 03

## Show the impact

STEP 04

## Make the ask

# THE APPEAL ECOSYSTEM

## Appeal Ecosystem 1: Spring

4 to 6 weeks

## Appeal Ecosystem 1: Summer

4 to 6 weeks

## Appeal Ecosystem 1: Winter

4 to 6 weeks

# With a clear ROI focused model to determine:

## Choice of Channels

Selecting the optimal mix of communication streams per audience segment.

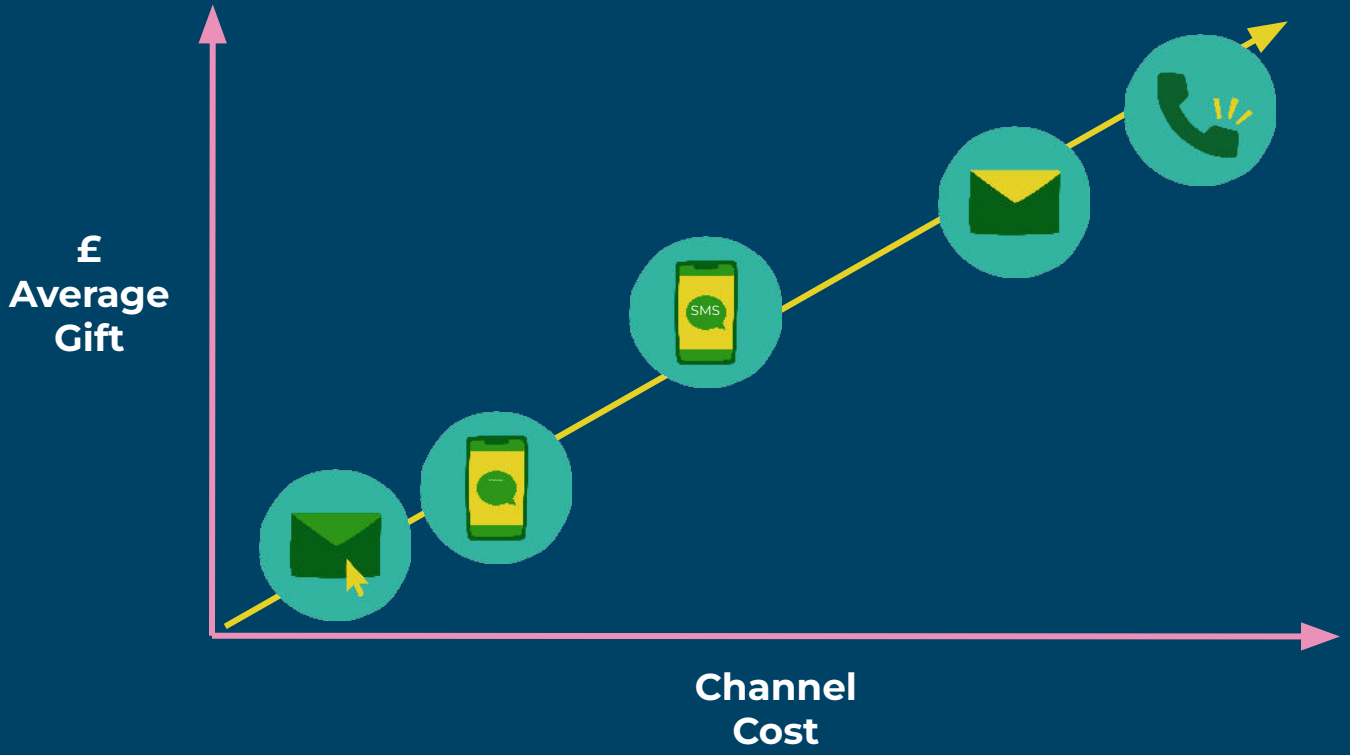
## Frequency

Balancing touchpoint cadence over time to maximize engagement.

## Strategic Asks

Tailoring ask levels according to our supporters RFV .

# THE APPROACH



# This approach also enables us to focus on growing the value and volume of the mid-value file

# To do this level of sophistication and complexity requires a clear and structured development process...

# Our Methodology

Our ecosystem methodology is delivered through a series of structured phases, outlined below and explored in more detail on the following slides.

**01**

## Building the Foundations
(One Off)

FOUNDATION

**02**

## Annual Planning
(per year)

ROADMAP

**03**

## Ecosystem Plan
(per appeal)

ECOSYSTEM

**04**

## Appeal Core Creative
(per appeal)

CREATIVE

**05**

## Channel Deliverables
(per appeal)

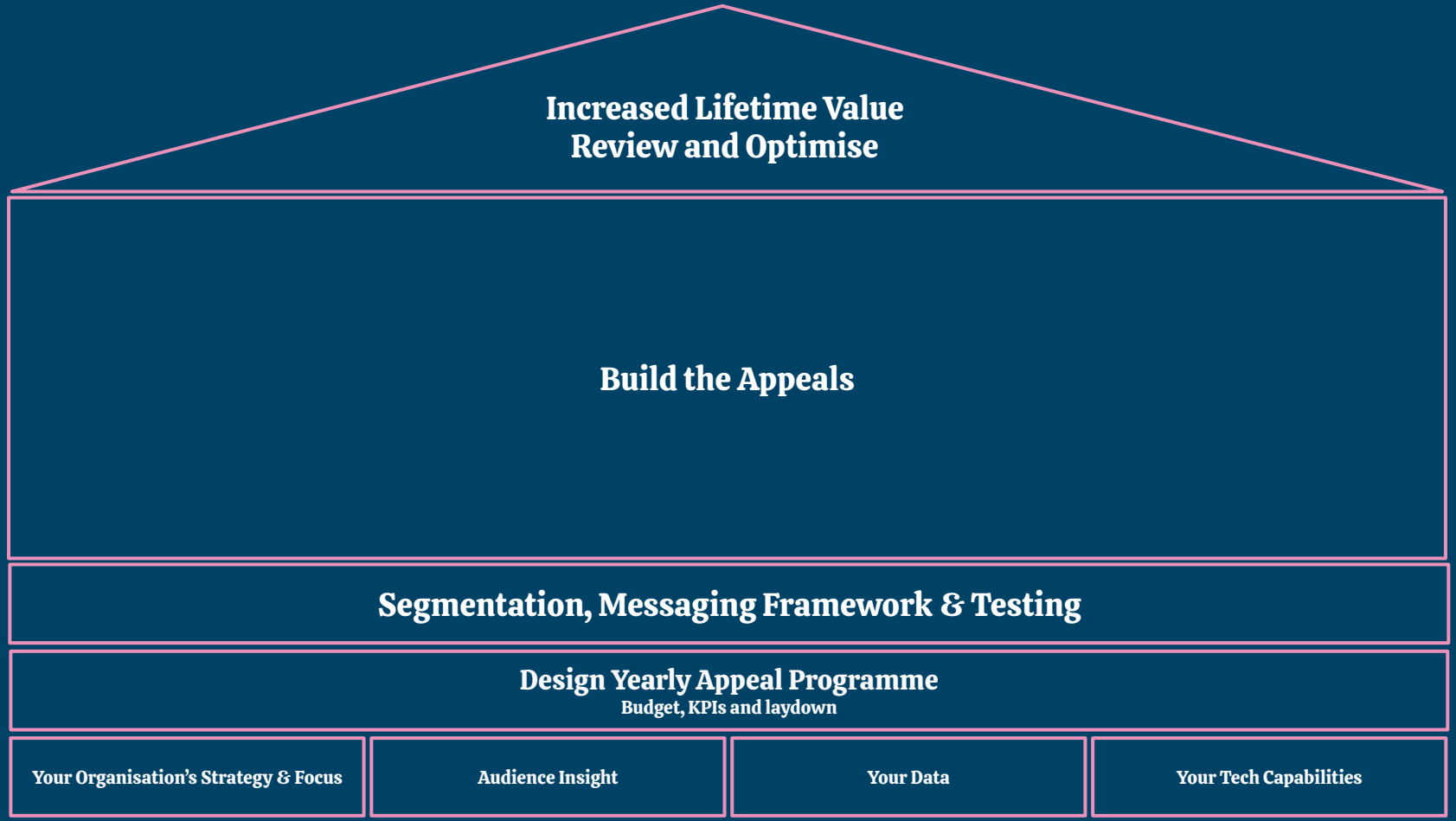
DELIVERY

**6 weeks**

**10-12 weeks (exc production)**

# So let’s get into the detail

Increased Lifetime Value
Review and Optimise
Build the Appeals
Segmentation, Messaging Framework & Testing
Design Yearly Appeal Programme
Budget, KPIs and laydown
Lay foundations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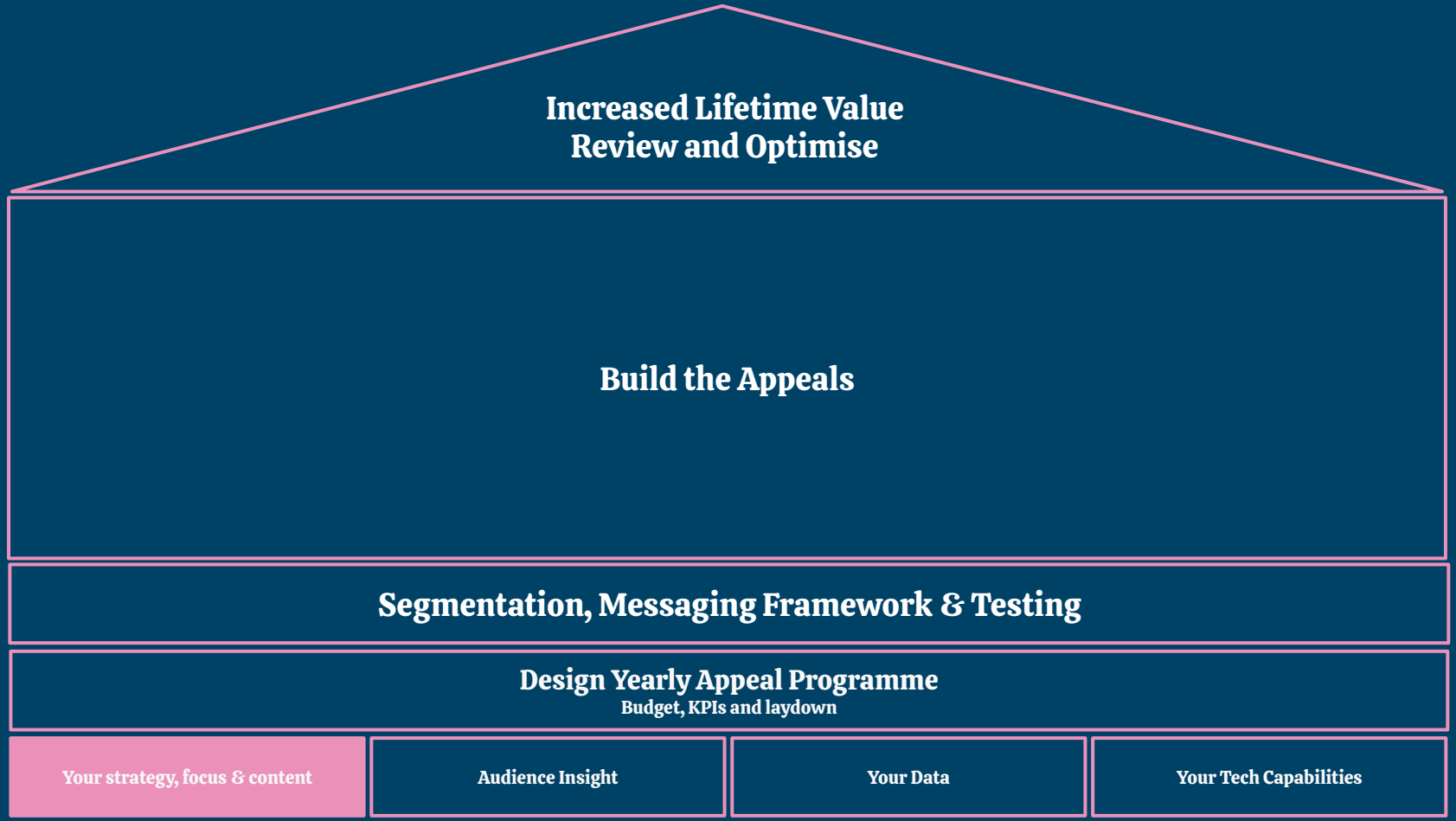
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# Laying foundations: Your strategy, focus & content

**01**

What is your organisation going to be doing over the next 12 months that your audiences will be interested in and motivated by?

**02**

What's different or unique about that?

**03**

What is your organisations and fundraising strategy trying to achieve?

**04**

What projects or programme areas best to bring it all to life?

**05**

What brings the need to life? What solutions are you providing?

**06**

What content will they provide?

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# Laying foundations: Audience Insight

**01**

Where did your donors first give, and what was it to?

**02**

What actions have they taken subsequently?

**03**

What asks/ appeals have they responded to?

**04**

What channels do they consent to hearing from you in?

**05**

What else can we learn about them? - from YouGov Profiles or your own research

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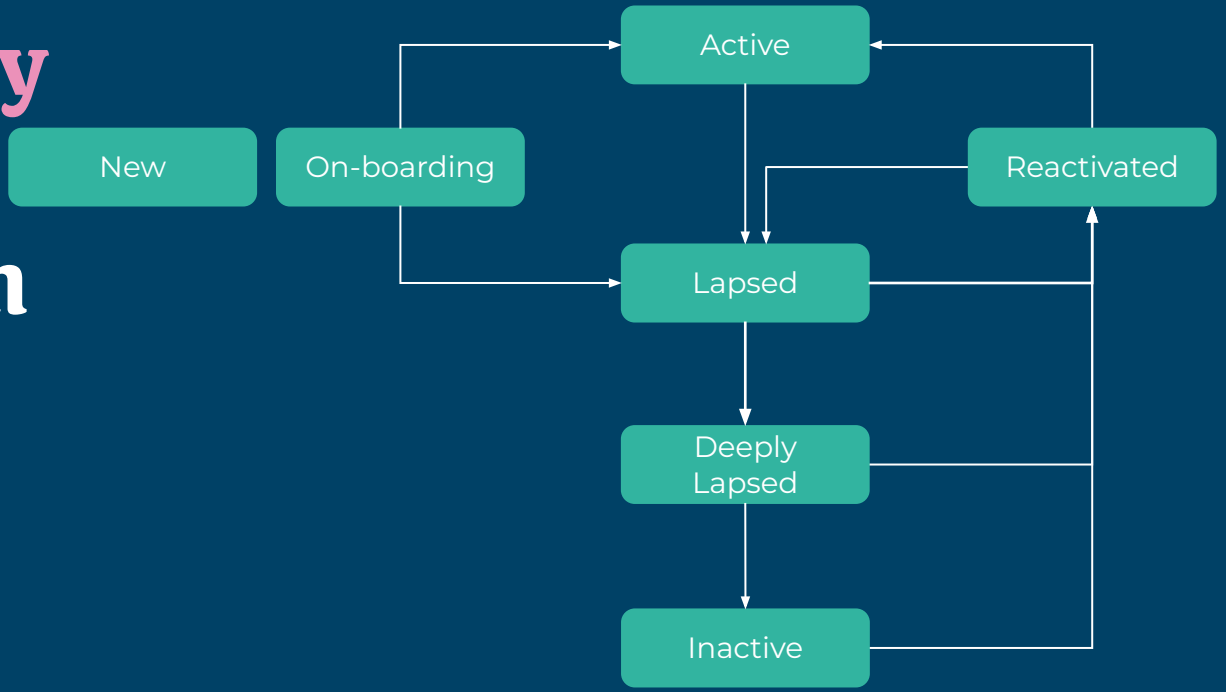
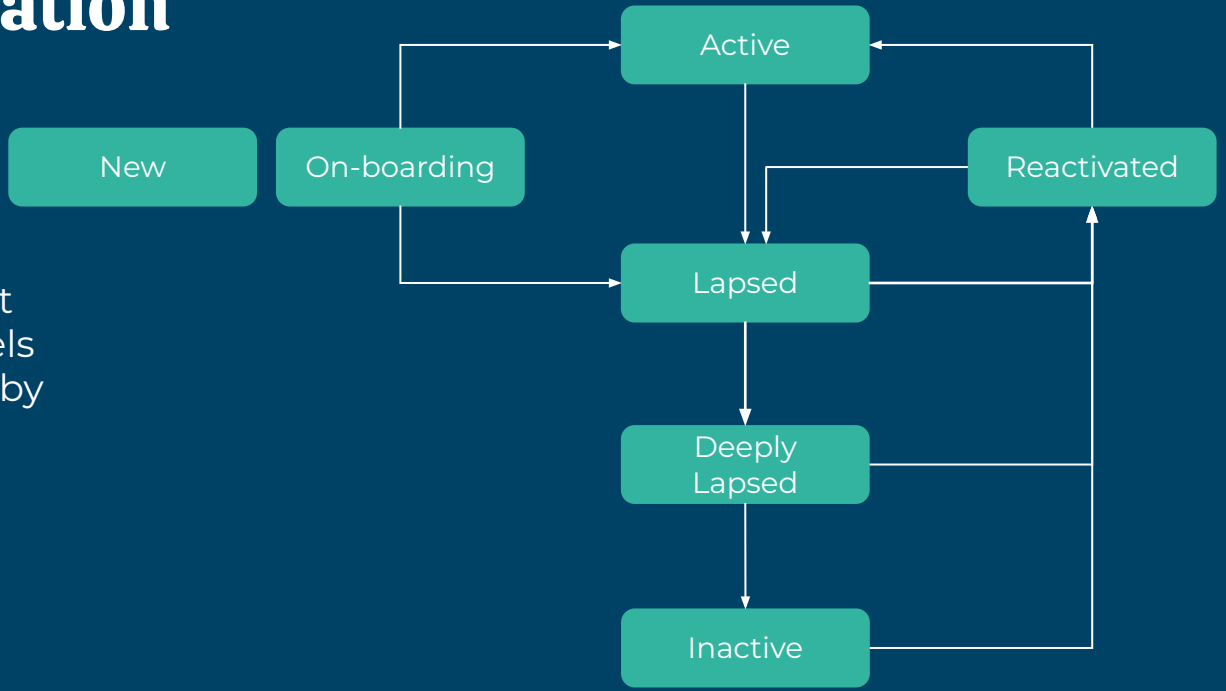
# First, we apply the Growth Segmentation Model to your data



# Laying Foundations:
# Growth Segmentation

- The model is refreshed annually, based on the previous years behaviours.
- Using this model we can set strategic objectives, channels strategy, prompts and asks by segment



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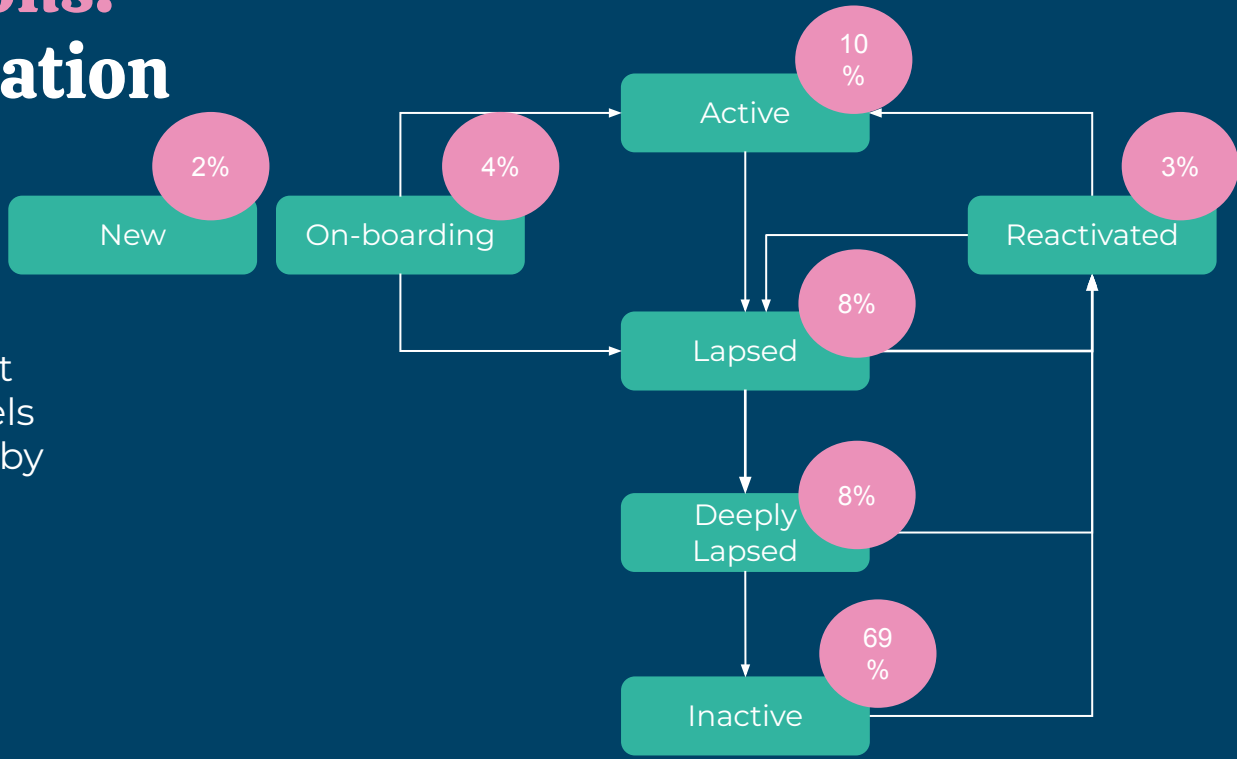

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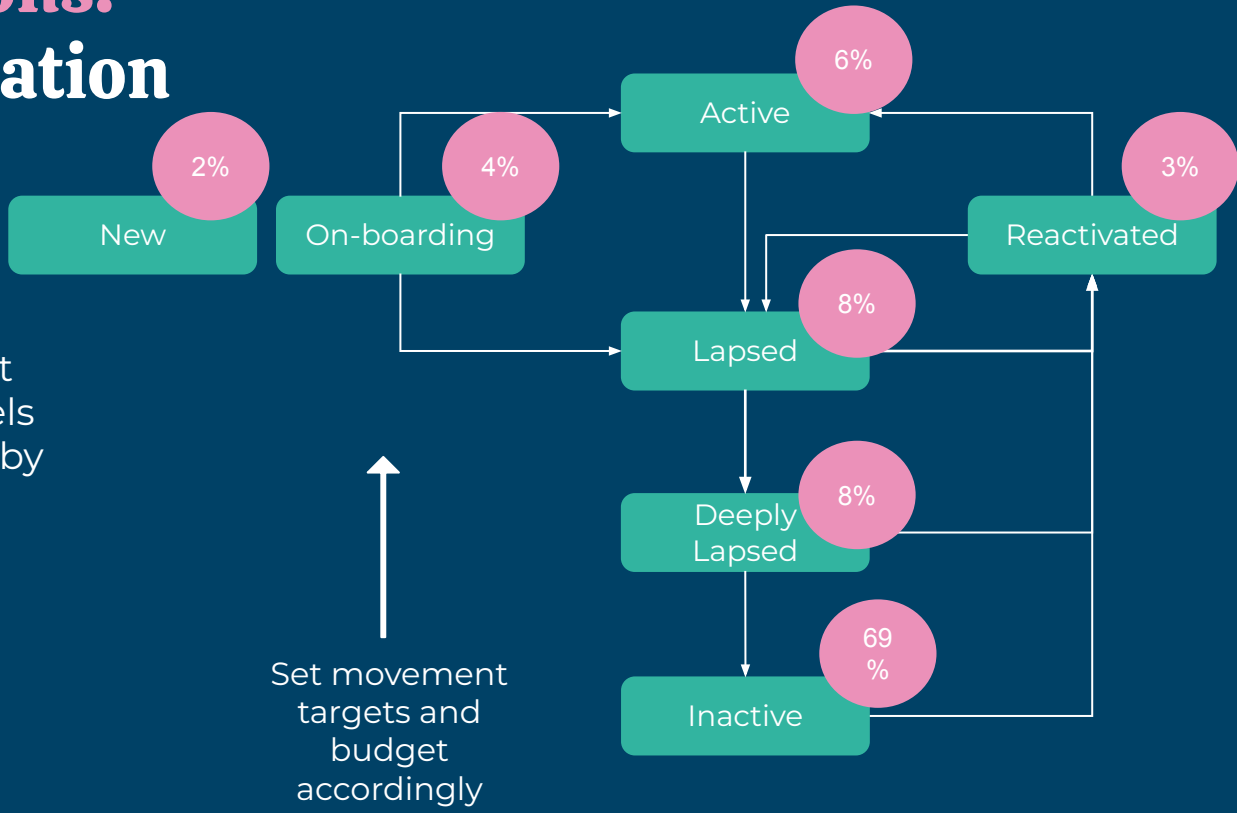

# LAYING FOUNDATIONS: GROWTH SEGMENTATION

| Segment | Segment description | Primary objective | Prompt / ask strategy | Channel approach | Target |
|---|---|---|---|---|---|
| Onboarding | | | | | |
| Active | | | | | |
| Reactivated | | | | | |
| Lapsed | | | | | |
| Deeply lapsed | | | | | |
| Inactive | | | | | |

# LAYING FOUNDATIONS: GROWTH SEGMENTATION

| Segment | Segment description | Primary objective | Prompt / ask strategy | Channel approach | Target |
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| **Onboarding** | | | | | |
| **Active** | Donated in two consecutive years | Protect and grow value and/or frequency | Confident, targeted asks. Test either a slightly higher prompt or an additional ask, not both at once. Introduce choice and reinforce supporter identity. We couldn't do this without you. | Full multi-channel programme. Sequenced appeals, one clear core story across all touchpoints. Appeals, impact and thank yous. | ↑ X% Avge Gift |
| **Reactivated** | | | | | |
| **Lapsed** | | | | | |
| **Deeply lapsed** | | | | | |
| **Inactive** | | | | | |

# LAYING FOUNDATIONS: GROWTH SEGMENTATION

| Segment | Segment description | Primary objective | Prompt / ask strategy | Channel approach | Target |
|---|---|---|---|---|---|
| **Onboarding** | First full year after a supporter's first gift | Secure the second gift quickly and establish a habit of giving | Tangible ask at/or just below first gift value. Build confidence by showing the impact of their first gift and clearly signposting what happens next. Keep the emotional story consistent. | Lead with the channel of first response. Follow quickly with one complementary channel. Tight timing, and short storytelling.. | ↑ X% Response |
| **Active** | Donated in two consecutive years | Protect and grow value and/or frequency | Confident, targeted asks. Test either a slightly higher prompt or an additional ask, not both at once. Introduce choice and reinforce supporter identity. We couldn't do this without you. | Full multi-channel programme. Sequenced appeals, one clear core story across all touchpoints. Appeals, impact and thank yous. | ↑ X% Avge Gift |
| **Reactivated** | Missed last year but gave the year before | Re-engage emotionally and secure a low-risk re-entry gift | Lower prompts and lighter pressure. Focus on news- related relevance and ease rather than guilt ("where are you? We need your money"). Use new products or mechanics that feel accessible and are audience-led. | Fewer channels, clearer message. One primary channel with a light reminder. Avoid heavy frequency. | ↑ X% Response |
| **Lapsed** | Gave again after at least one year of inactivity | Stabilise behaviour and prevent a second lapse | Do not push value. Repeat the product, ask type or tone that brought them back. Prompt at the same or slightly lower level to rebuild confidence and trust. | Mirror the reactivation channel first. Follow with one reinforcing channel only. Timing is more important than volume. | ↑ X% Response |
| **Deeply lapsed** | No donation for two or more years | Test residual affinity and identify who is still reachable | Very low-barrier, single ask with a clear humanitarian emergency purpose. No assumptions about the relationship. Accept non-response as insight. | One primary channel only. No reminders unless there is explicit engagement. | ↑ X% Response |
| **Inactive** | No donation for three or more years | Permission or exit, not income | Do not lead with an appeal. If asking at all, focus on consent, relevance and choice. Emotional value outweighs financial value. | Minimal contact. Consent-led digital journeys where appropriate. Clear option to stay connected or step away. | ↑ X% Response |

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# Laying foundations: Your tech capabilities

01

**DATA ORGANISATION**

How is your data organised?

02

**SYSTEM INTEGRATION**

How joined up are your systems across channels and consent?

03

**USER JOURNEY**

How frictionlessly can you facilitate donations/ actions

04

**ACTION REPORTING**

How well can you report on the actions your donors take?

05

**LIMITATIONS**

Are there any limitations that will hinder a coordinated approach like this?

# Understanding your tech capabilities enables us to develop an integrated channel strategy

# LAYING FOUNDATIONS: GROWTH SEGMENTATION

| Channel | Primary role in the journey | Which audience it is best for | How it works with other channels | Making response easy and frictionless |
|---|---|---|---|---|
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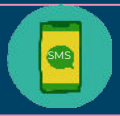
|  | | | | |
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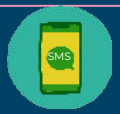
|  | Immediacy and decisive action. Converts intent quickly. | Active, mobile-native supporters. | Never introduces a new story. Reinforces messages supporters have already seen via mail or email at key moments. Ask for low value instant PSMS gifts. | PSMS and RGPSMS, instant upgrade to Direct Debit. |
| | | | | |
| | | | | |
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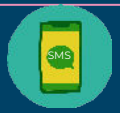
# LAYING FOUNDATIONS: GROWTH SEGMENTATION

| Channel | Primary role in the journey | Which audience it is best for | How it works with other channels | Making response easy and frictionless |
|---|---|---|---|---|
| | Emotional storytelling, personalised asks and impact reporting. Sets the core story and main ask. | Loyal, reflective, older and higher-value supporters. | Introduces the appeal narrative and anchors value. Digital channels echo the same language, imagery and ask levels. | BRE for postal response. QR codes and short URLs drive straight to a fast digital appeal page. |
| | Momentum and reinforcement. Builds urgency over time. | Digitally active warm supporters across values. | Mirrors the mail story, reinforcing key moments and responding quickly to developments. Flexible pacing across the appeal period. | Single clear CTA. Mobile-first donation pages. Pre-selected amounts where possible. Directs people to find out more, visit appeal page and join WhatsApp Appeal Group. |
|  | Immediacy and decisive action. Converts intent quickly. | Active, mobile-native supporters. | Never introduces a new story. Reinforces messages supporters have already seen via mail or email at key moments. Ask for low value instant PSMS gifts. | PSMS and RGPSMS, instant upgrade to Direct Debit. |
| | Encourages a two way interaction and a great way to build engagement and trust. Close to a conversation. | All supporters who want to become more engaged and increase their understanding of the work and your impact. | Join from all channels. Supports both asking, campaigning and stewardship. Moves people from awareness to commitment. Allows for new content to be sent directly to supporters. Very sharable. | Clear, simple links. Lightweight but rich messages that feel human, not broadcast. |
| | Point of truth and conversion. | All supporters. | Brings all channels together. Headlines, imagery and asks reflect what supporters have already seen but builds the story with richer content. | Mobile-first design. Minimal form fields. Reassurance on security, impact and values. |
| | Deepens relationships and increases value conversion to RG. | Highly engaged supporters, regular givers and mid-value prospects | Follows exposure to mail, email or SMS. Builds on an existing story and invites deeper commitment or upgrade. | Simple verbal asks. Secure links sent by SMS or email during or after the call. Clear choice, no pressure. |

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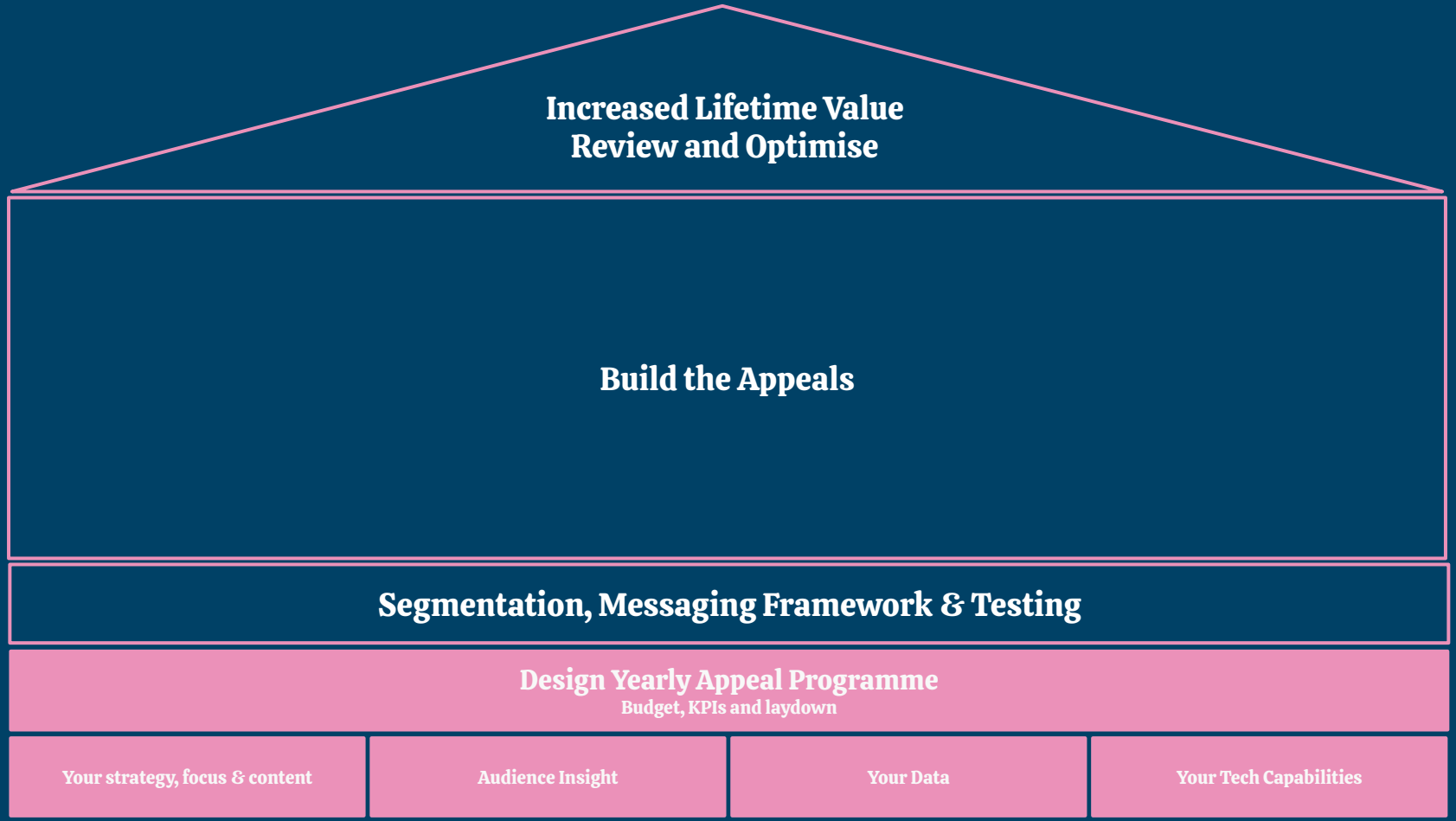
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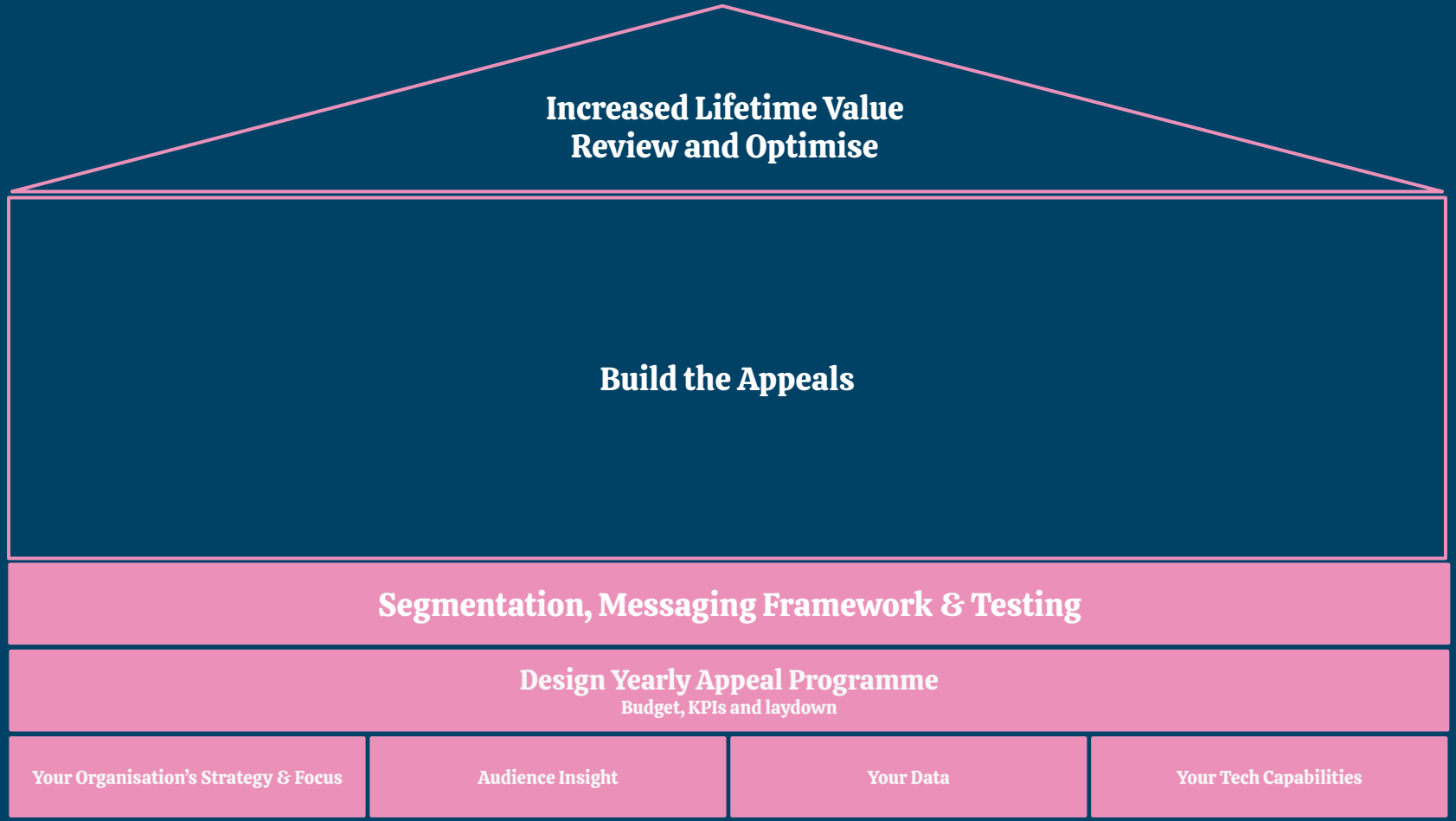
DESIGN YEARLY APPEAL PROGRAMME

# Review the foundations and make a plan together

# Following this discovery, you then develop an **annual plan** with KPIs, content direction and timings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# TEST AND LEARN

## Messaging

Which messaging matters:

- Urgency vs Agency
- Identity vs collective impact
- Existing vs New Programmes

## Segmentation & Ask

What is the best ask:

- Prompt & Shopping Lists
- One-off vs Regular
- Choice

## Integration & Journeys

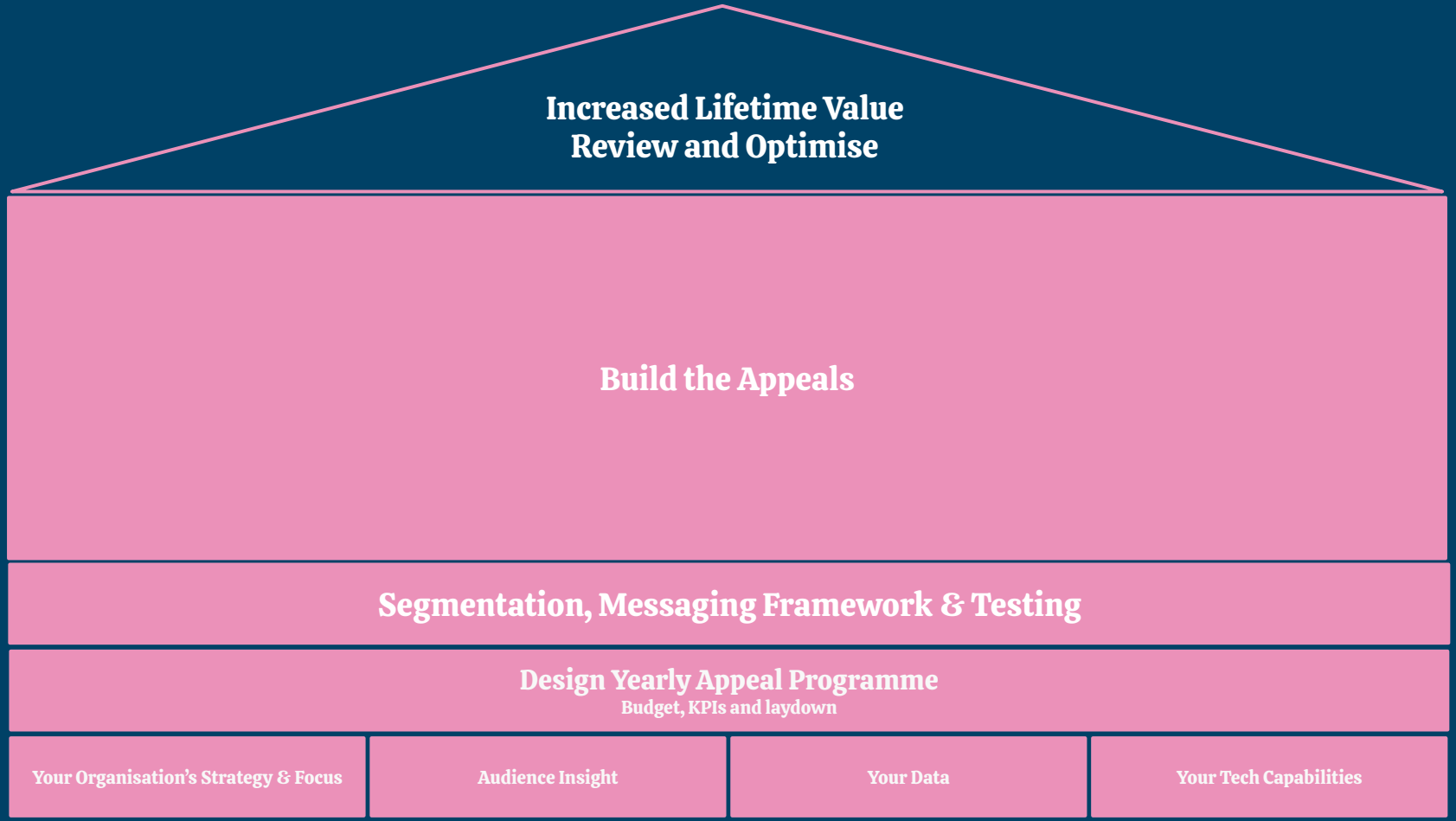
How channels work together:

- Timings
- Sequencing
- Social Retargeting

## Format

Channel format testing:

- Static vs video
- A4 form vs DL form
- Long copy vs short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# Build the Appeals

01

## Big Creative Idea

A single ‘big idea’ that runs consistently through all campaign executions.

02

## Multi-Week Appeal Plan

Structured plan showing how the story unfolds over time detailing journeys, channels, segmentation, asks, actions, and timings to drive desired outcomes.

03

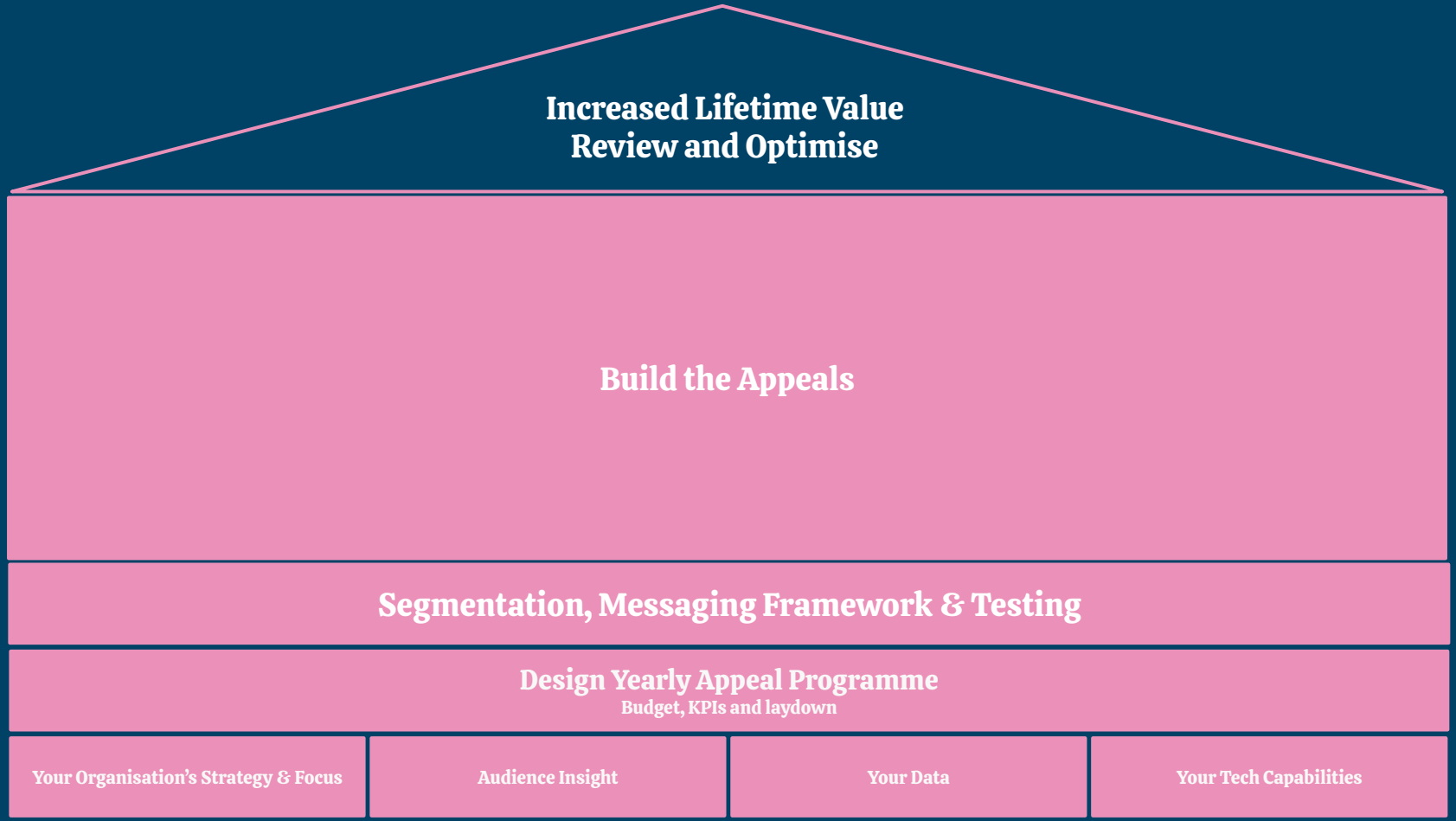
## Campaign Assets

High-impact creative assets designed to bring the narrative and strategy to life across all touchpoints.

04

## Rapid Testing & Optimization

Flexible framework providing the opportunity to test cold audiences quickly and cost-effectively.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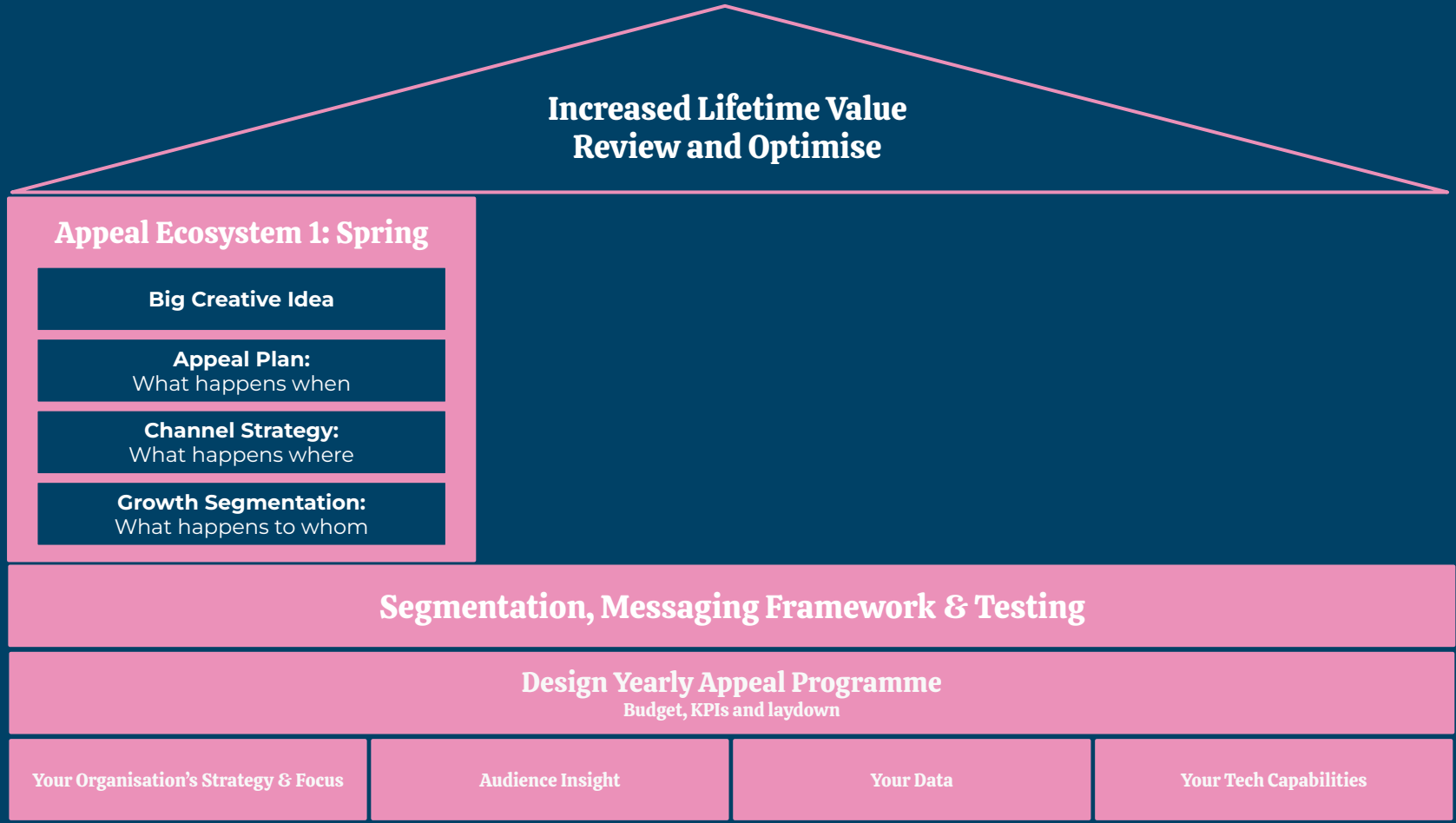
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Channel Strategy:
What happens where
Growth Segmentation:
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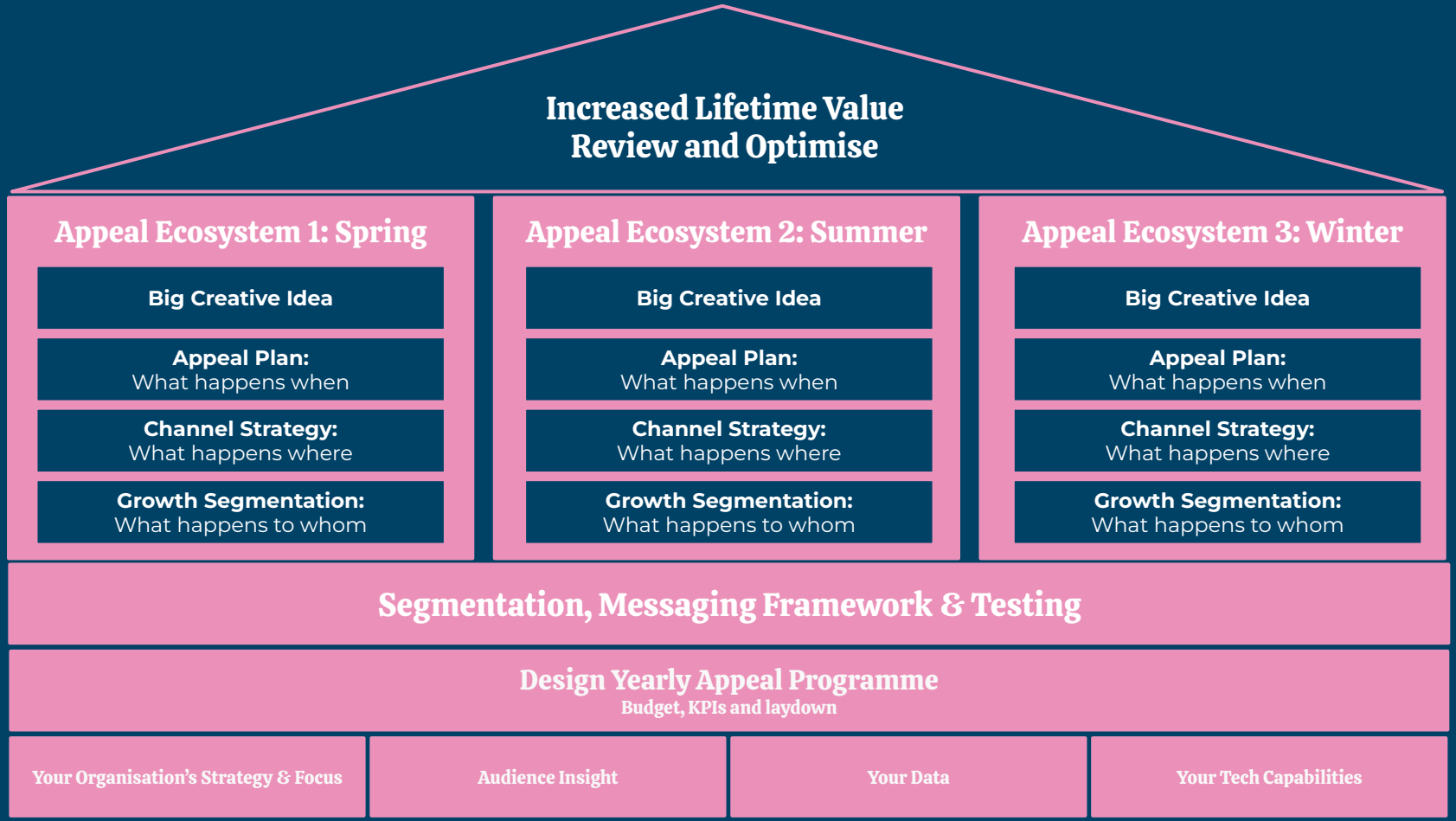
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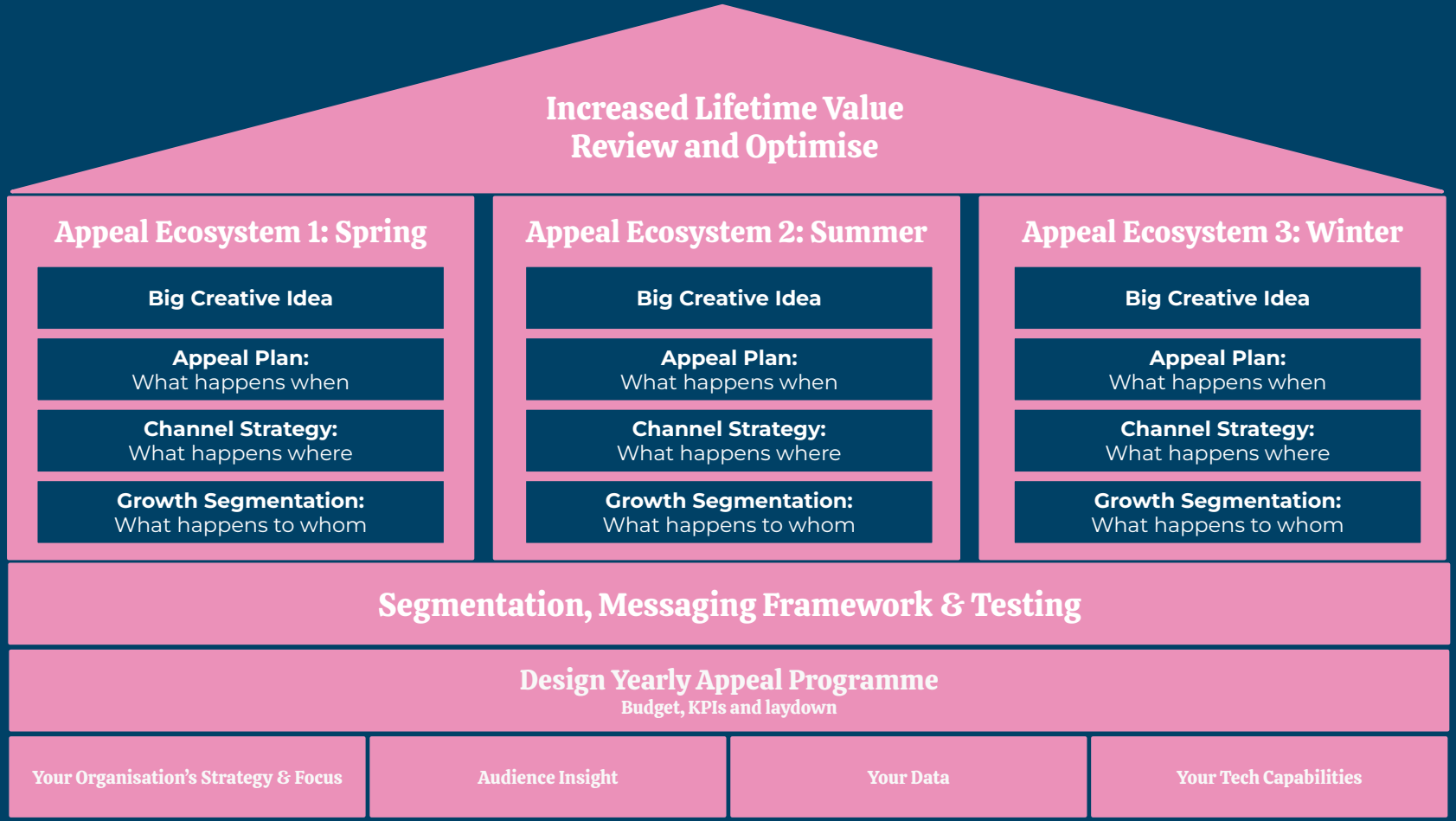
What happens to whom
Segmentation, Messaging Framework & Testing
Design Yearly Appeal Programme
Budget, KPIs and laydown
Your Organisation's Strategy & Focus
Audience Insight
Your Data
Your Tech Capabilities


Increased Lifetime Value
Review and Optimise
Appeal Ecosystem 1: Spring
Big Creative Idea
Appeal Plan:
What happens when
Channel Strategy:
What happens where
Growth Segmentation:
What happens to whom
Appeal Ecosystem 2: Summer
Big Creative Idea
Appeal Plan:
What happens when
Channel Strategy:
What happens where
Growth Segmentation:
What happens to whom
Appeal Ecosystem 3: Winter
Big Creative Idea
Appeal Plan:
What happens when
Channel Strategy:
What happens where
Growth Segmentation:
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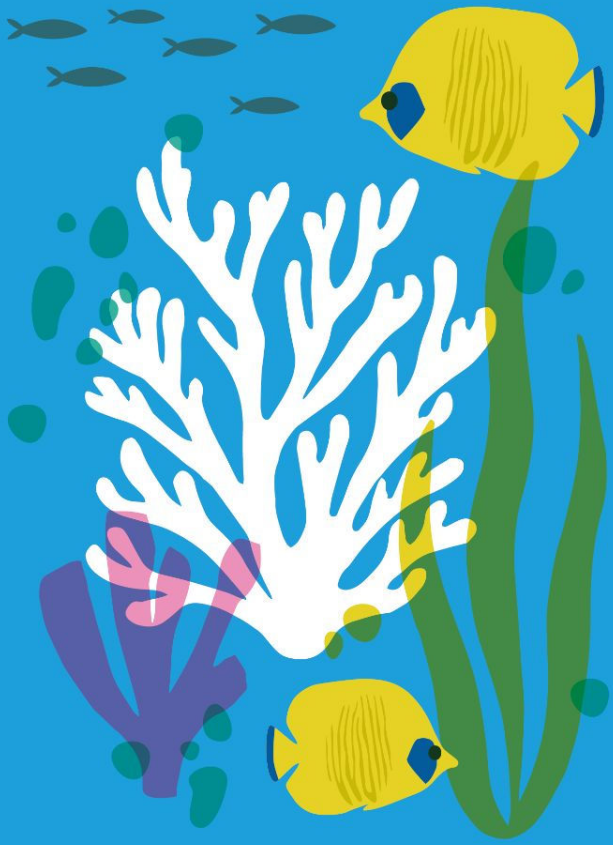
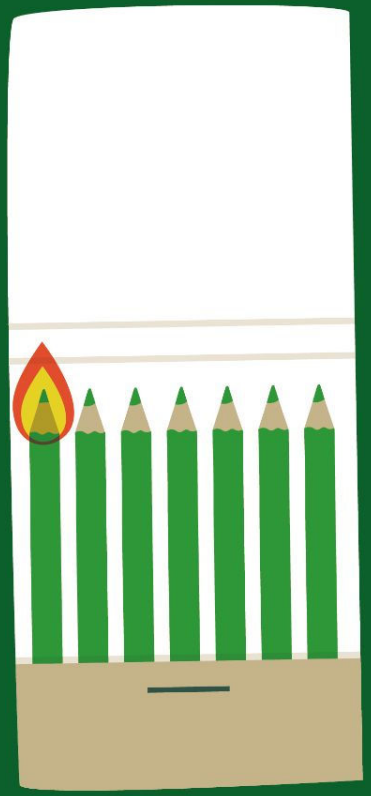
# The outcome

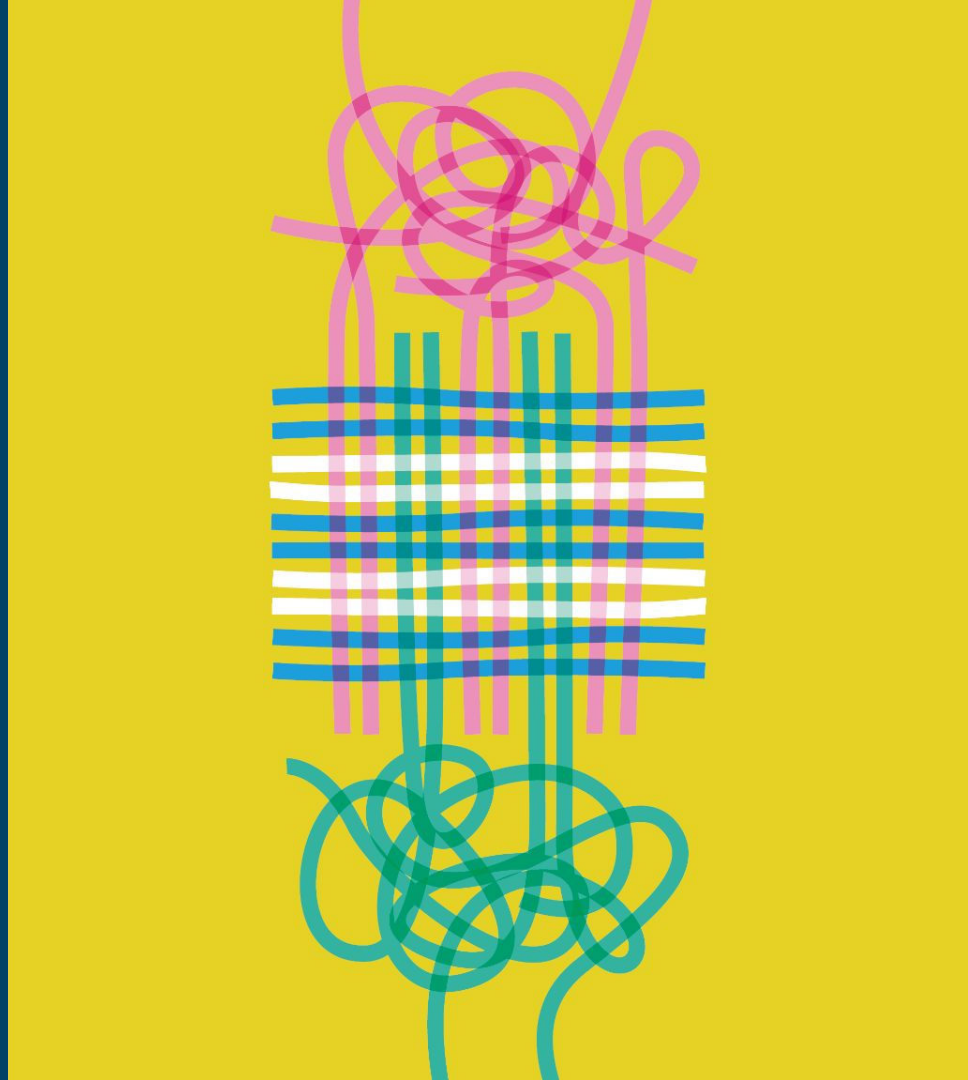
The ecosytem gives us a more strategic way to drive lifetime value



It leverages our creative proposition to do more



# Helping break down silos and facilitating collaboration across teams



# Doing a better job at answering the different needs of our donors

And it turns appeals from a single moment into a journey that drives engagement and value

THE REQUIREMENTS

# We need an approach that ticks all the boxes

### Donor Retention

Focus on **improving donor retention** for the most profitable donors.

### Individual Value

Increase **individual donor value** to grow mid value segments.

### Multi-Channel Deployment

Can be deployed **across channels** to meet modern donor behaviours.

### Maximize Appeal ROI

Leverages **more value from the time, money and effort** invested in developing appeals.

### Manage Complexity

Enables us to **handle increased complexity** efficiently across operations.

### Agile Testing

Cost effectively test **new creative and propositions** in cold channels.

# Thoughts?