



the **2017**
CHARITY DIGITAL
SKILLS REPORT

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2017 REPORT DETAIL

You can read the question by question Charity Digital Skills Report below, with the results split into three main sections in addition to the methodology. Scroll through the questions one by one, or click on the links below to skip to the section of interest.

Sections:

1. **Section 1 - Digital Trends**
2. **Section 2 - Digital Leadership**
3. **Section 3 - Where do Charities Go From Here?**
4. **Methodology - Including Demographics**

Section 1 - Digital Trends

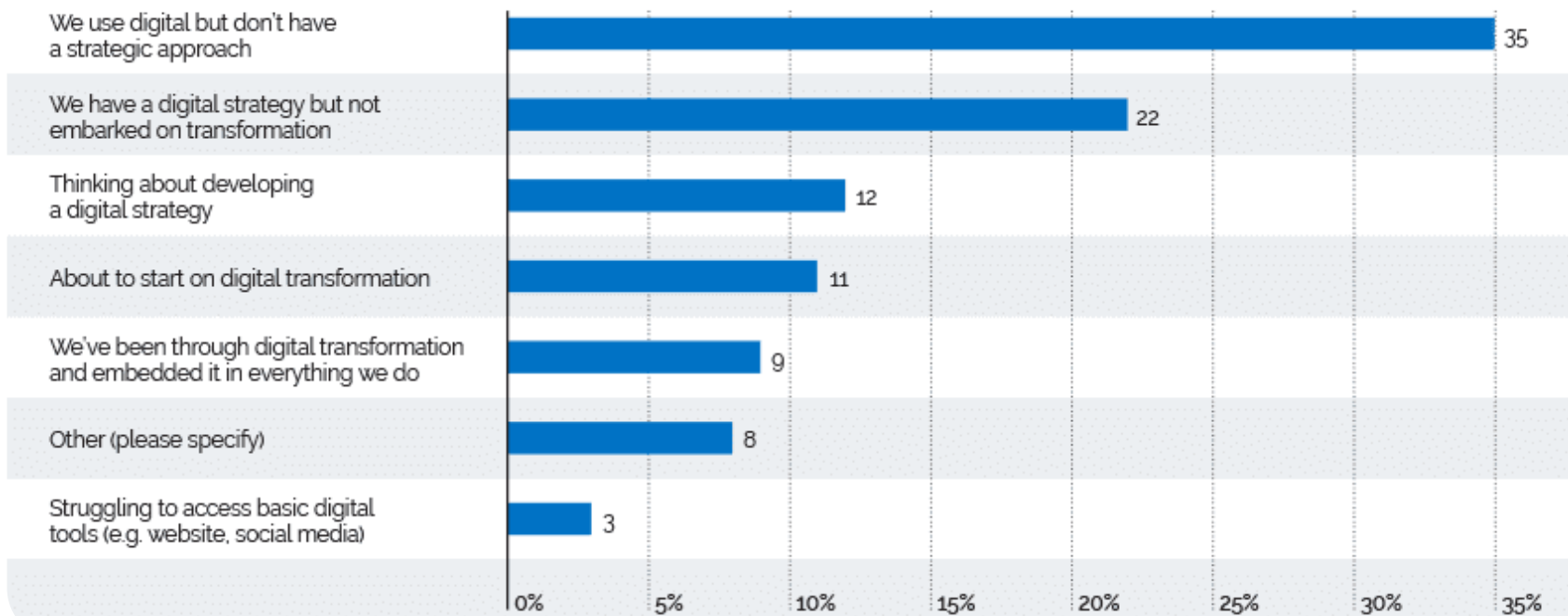
1. DIGITAL STRATEGY

Q - What stage is your charity at with Digital?



Half of charities (50%) don't have a digital strategy, and just 9% have been through the full digital transformation process and embedded it.

WHAT STAGE IS YOUR CHARITY AT WITH DIGITAL?





Analysis

- 35% of charities are using digital but don't have a strategic approach. This, along with the 12% of charities who are thinking about developing a digital strategy, and the 3% who are struggling to access basic digital tools, indicates that 50% of charities do not have a digital strategy.
- Only 9% have been through the digital transformation process and embedded it, whilst just over 1 in 10 (11%) are about to start on digital transformation.
- 22% have a digital strategy but have not yet embarked on digital transformation.

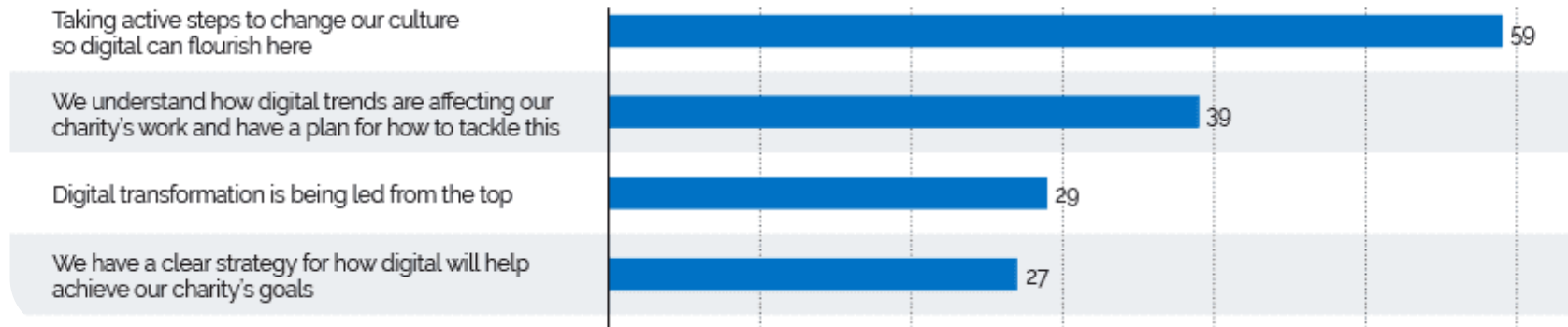
2. BUILDING BLOCKS

Q - Which of these building blocks of digital transformation does your organisation have?



Charities are starting to take a more holistic view of digital, with the majority (59%) taking active steps to improve their culture and just under 4 in 10 (39%) understanding how digital trends are affecting their work and making plans to tackle this. Whilst this is positive, the other findings were more worrying. A mere 27% have aligned their digital and organisational strategies, and **less than 1 in 4 charities (24%) rate themselves as good at digital product development.**

WHICH OF THESE BUILDING BLOCKS OF DIGITAL TRANSFORMATION DOES YOUR ORGANISATION HAVE?



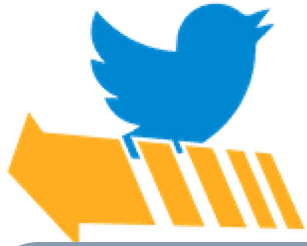
Analysis

- 59% of charities are taking active steps to improve the culture so digital can flourish there.
- 39% are on top of how digital trends are affecting their charity's work and have a plan in place for how to tackle this.
Just under a third (29%) state that digital transformation is being led from the top.
- Less than a third (27%) have a clear strategy for how digital can help achieve their charity's goals. In other words, the vast majority of charities are still not aligning their digital and corporate strategies.
- Just 9% of charities say that everyone in their charity understands their digital vision.
- Charities need to raise their game on innovation and digital product development. Only 24% think they are good at doing this from concept to launch.

3. LOOKING AHEAD

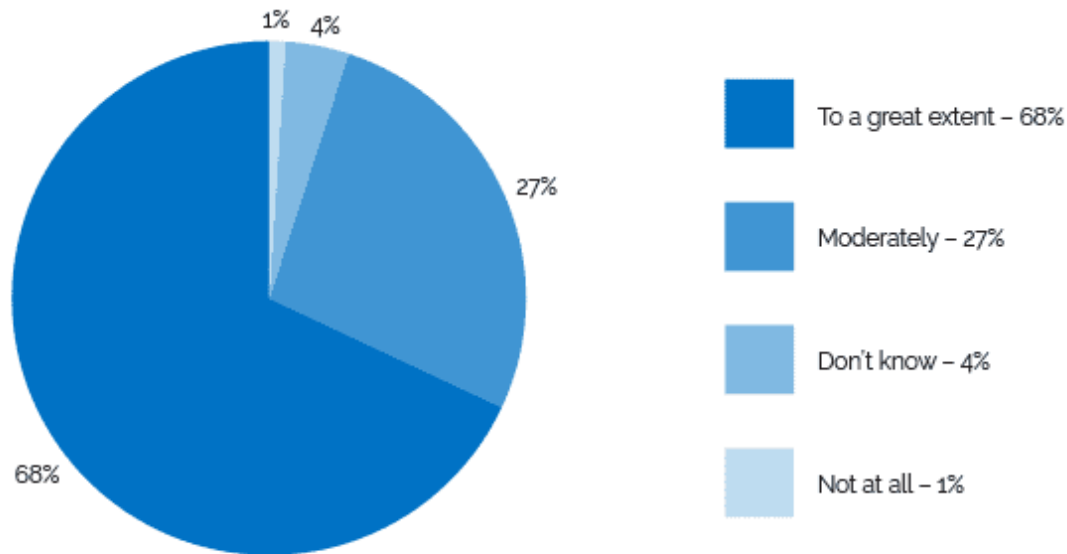
Q - Imagine the charity sector 10 years from now. As digital adoption progresses, to what extent do you think the sector will have

changed?



According to our respondents, the charity sector will look very different in 2027. 68% think that it will have changed to a great extent as a result of digital, even more so than their private and public sector colleagues.

**IMAGINE THE CHARITY SECTOR 10 YEARS FROM NOW.
AS DIGITAL ADOPTION PROGRESSES, TO WHAT EXTENT DO YOU THINK THE SECTOR WILL HAVE CHANGED?**



Analysis

- 68% think that the charity sector will change to a great extent as digital adoption increases. It is interesting to compare this with Deloitte and MIT's recent digital survey across the corporate and public sector which

found that fewer respondents (59%) anticipated disruption 'to a great extent' in their industry. In other words, charities foresee even more change than their private and public sector counterparts.

- Just 1% think it won't change, whilst 4% don't know.
- Just over 1 in 4 (27%) think the sector will change moderately.

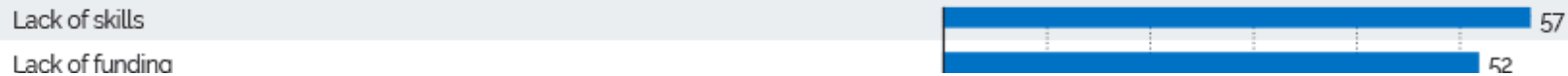
4. DIGITAL BARRIERS

Q - What are the biggest barriers to your charity getting the most from digital?



*There are multiple challenges facing charities in progressing with digital and maximising results. **Lack of skills (57%) and funding (52%) are the biggest barriers.** Half of the charities who responded (50%) say that their charity is facing other challenges that are seen as a higher priority than digital. A lack of the right infrastructure but also the wrong culture, and a lack of confidence and agility with digital are also holding charities back. Just under a third want more digital leadership in their charities.*

WHAT ARE THE BIGGEST BARRIERS TO YOUR CHARITY GETTING THE MOST FROM DIGITAL?



Analysis

- Skills (57%) and funding (52%) are the biggest constraints for charities.
- Distraction is also a big issue: 50% of charities are facing other challenges and digital has slipped down the list of priorities.
- Infrastructure and processes (e.g. data protection) were also rated as a significant issue by 45% of respondents.
- People and behaviours are also barriers. 43% say that their culture needs to change and 35% state that their charity lacks confidence with digital and isn't agile enough.
- Just under a third (28%) see a lack of leadership as a problem. 25% cite internal politics as a barrier, and 20% would like HR to be involved.
- The competition is changing and 27% of charities say that they are aware that they are now competing with digitally savvy organisations including those who are not just charities.
- Some charities have lost touch with areas that are fundamental for digital. 26% don't know how their audience is using digital and 21% don't know where they need to go or how to get there.



Comments

- *"I don't think we have specific barriers to digital and we are expanding how we use digital every year. Probably our biggest barrier is that we don't have enough digital-savvy staff."*

- *"Money that could be spent on digital is needed elsewhere simply to allow us to survive. We don't have the spare resources to boost digital adoption."*
- *"Most staff and trustees are embracing digital, but we have a few who are very resistant and that's holding us back. But we're dealing with it."*
- *"Opportunity cost - face-to-face client support is still (rightly and evidentially) considered our key delivery methodology - our funding base does not have spare capacity to invest in additional digital infrastructure because this would (a) mean the loss of frontline capacity which would mean (b) we'd be penalised by funders due to already unrealistic target numbers."*

5. DIGITAL SKILLS

Q - How would you rate your charity's skills in the following areas?



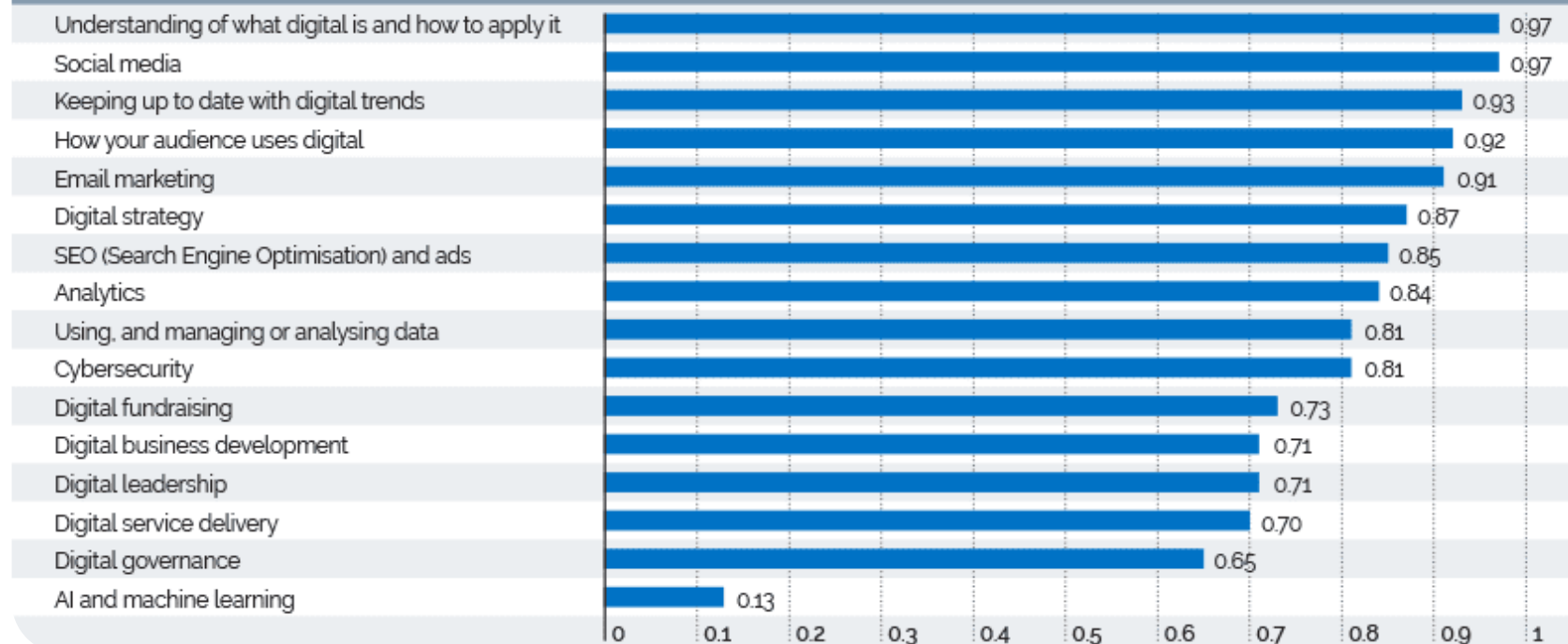
Many of the answers to these questions were clustered around the fair to low end of the spectrum, indicating that there is a good deal of scope to develop charities' digital skills. Whilst some felt confident with email marketing and email newsletters, there were significant gaps in keeping on top of how audiences were using digital and, consequently, digital service delivery.

If charities want to generate more income they will need to raise their game in digital fundraising and digital business development skills, with the majority rating their skills in these areas as fair to low. The majority rate their digital leadership and digital governance skills as fair to low. There is currently a skills gap in the sector around AI, with only 3% rating their skills in this area as excellent to good.

HOW WOULD YOU RATE YOUR CHARITY'S SKILLS IN THE FOLLOWING AREAS? (RESPONSE BREAKDOWN)

| | Excellent | Good | Fair | Low | Very low |
|--|-----------|------|------|-----|----------|
| Understanding of what digital is and how to apply it | 9% | 36% | 42% | 11% | 2% |
| Social media | 17% | 44% | 28% | 7% | 2% |
| Keeping up to date with digital trends | 7% | 32% | 31% | 24% | 6% |
| How your audience uses digital | 5% | 24% | 38% | 26% | 6% |
| Email marketing | 5% | 31% | 39% | 17% | 6% |
| Digital strategy | 4% | 22% | 38% | 25% | 9% |
| SEO (Search Engine Optimisation) and ads | 6% | 24% | 29% | 27% | 12% |
| Analytics | 4% | 26% | 34% | 22% | 10% |
| Using, and managing or analysing data | 3% | 16% | 38% | 26% | 14% |
| Cybersecurity | 7% | 23% | 30% | 24% | 13% |

HOW WOULD YOU RATE YOUR CHARITY'S SKILLS IN THE FOLLOWING AREAS? (AVERAGE RATING)



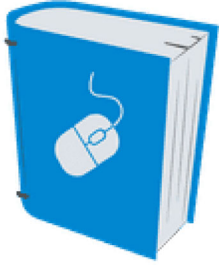


Analysis

- Whilst 36% rate their understanding of what digital is and how to apply it as good, 53% rate themselves as fair or low.
- Close to two thirds (63%) see their digital strategy skills as fair or low, whilst 55% rate themselves as fair or low at keeping up to date with digital trends.
- Almost two thirds (64%) think their skills in staying on top of how their audience uses digital are fair to low. This is reinforced by the 57% of charities who see their digital service delivery skills as fair to low, suggesting that they could be missing out on ways to reach their audience and stay relevant.
- However, charities are more confident with some digital channels. 70% say they have good to fair email marketing skills, and almost half (44%) are good at social media. 60% are good to fair with analytics. **There is room for improvement though with SEO and ads - 56% rate themselves as fair to low.**
- **Handling data has emerged as a skills gap.** 64% rate themselves as fair to low with using, managing and analysing data. This is a particular concern given that these are key areas for digital fundraising that the sector is likely to be more reliant on in the wake of changes in fundraising regulations. There is room for improvement in cybersecurity skills - 54% rate themselves as fair to low.
- Consistent with this is the finding that **61% of charities rate their digital fundraising skills as fair to low**, with more charities (69%) rating their digital business development skills as fair to low. Unless charities develop their skills in these areas they could miss out on income.
- **56% state their digital governance skills as fair to low**, with the same number giving their digital leadership skills the same rating.
- Worryingly, 68% of charities say that they have low to very low skills in AI. By having such a low skill base in this area, charities are likely to miss out. The government is investing in AI and it is predicted that the industry could add £654 billion to the UK economy.

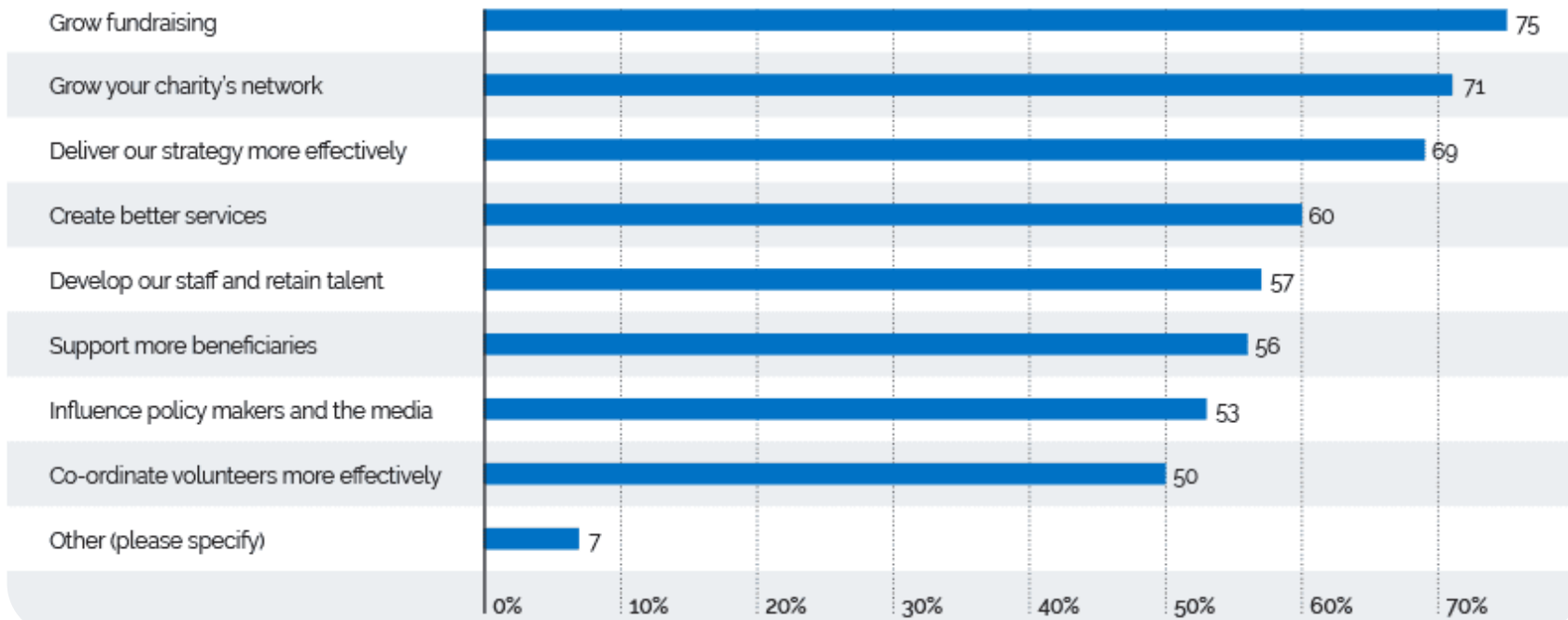
6. HOW COULD DIGITAL MAKE AN IMPACT?

Q - What could your charity do if it increased its digital skills?



75% of charities think growing their digital skills would help them increase fundraising, whilst 71% see opportunities to grow its network and 69% to deliver its strategy more effectively.

WHAT COULD YOUR CHARITY DO IF IT INCREASED ITS DIGITAL SKILLS?



Analysis

- Charities have a clear sense of what developing their digital skills could offer them. 75% say it would help them increase fundraising, whilst 71% believe it would help them widen their network and 69% believe they could deliver their strategy more effectively.
- 60% think that more digital skills would help them create better services, develop and retain staff (57%), support more beneficiaries (56%), and co-ordinate volunteers more effectively (50%). This indicates that the messages about the economies of scale offered by digital and the opportunities to be more efficient and save money are hitting home.
- 53% think that digital skills could help increase influence with policy makers and the media.

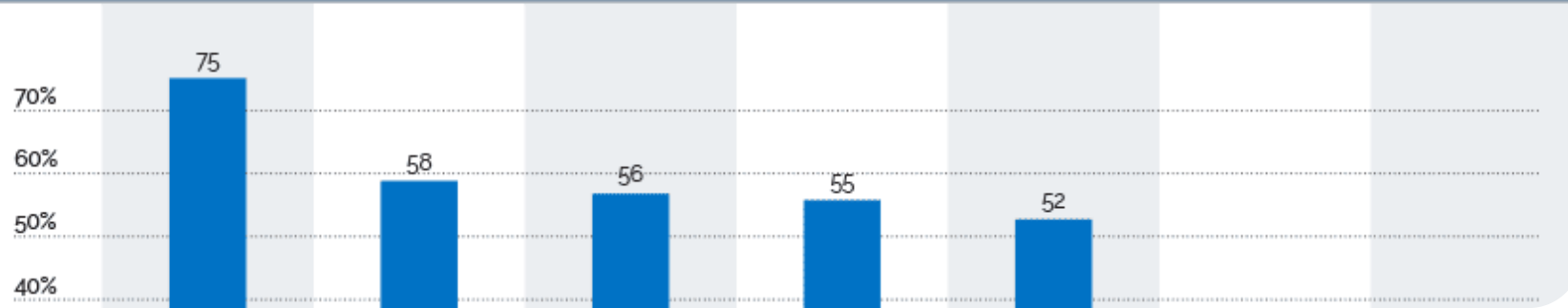


7. TRAINING PREFERENCE

Q - How would you prefer to learn about digital?

The majority of charities like to learn face to face, but more than half prefer e-learning, webinars and informal peer to peer support.

HOW WOULD YOU PREFER TO LEARN ABOUT DIGITAL?



Analysis

- 74% of charities prefer face to face training, but e-learning (58%), webinars (55%) and informal peer to peer support (56%) are also popular.
- More than half of respondents (52%) would like mentoring.
- 15% need more support from their manager.

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Section 2 - Charity Digital Leadership

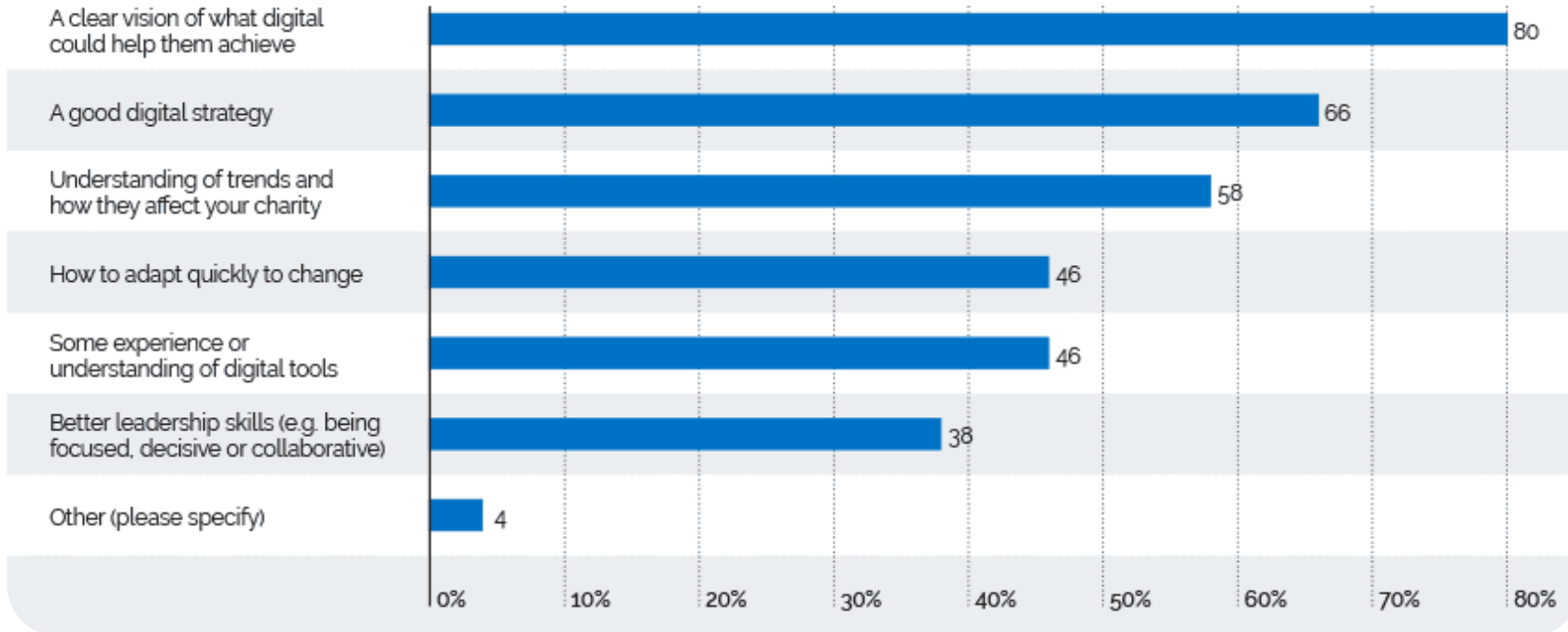
8. DIGITAL LEADERSHIP SKILLS

Q - What digital skills and knowledge would you like to see your leadership team develop

Charities want their leaders to step up to the plate with clearer visions of what digital can offer their organisations and good digital strategies.



WHAT DIGITAL SKILLS AND KNOWLEDGE WOULD YOU LIKE TO SEE YOUR LEADERSHIP TEAM DEVELOP?



Analysis

- Charities are crying out for more digital leadership. 80% of respondents want their leadership team to provide a clear vision of digital and what it could help them achieve, whilst 66% want a good digital strategy. More than half (58%) of respondents wish their leadership teams understood how digital trends are affecting their charity, whilst 46% want them to have some experience or understanding of digital tools.
- 46% want their leadership teams to be more agile and adaptive to change.

- 38% think that better leadership skills such as being more decisive, focused and collaborative would help their charities in digital.



Comments

- "A big obstacle we face is fear of digital - we need to overcome this before we can move to understanding and then begin to make changes."
- "An understanding that there needs to be a justification for adopting a new platform - rather than 'we need LinkedIn' without considering what the best platform for an objective would be."
- "Less of a 'headline' attitude - far too many leaders start sending emails around about a digital trend or fad, no matter how ill-suited it is, two weeks after the opportunity has passed by."

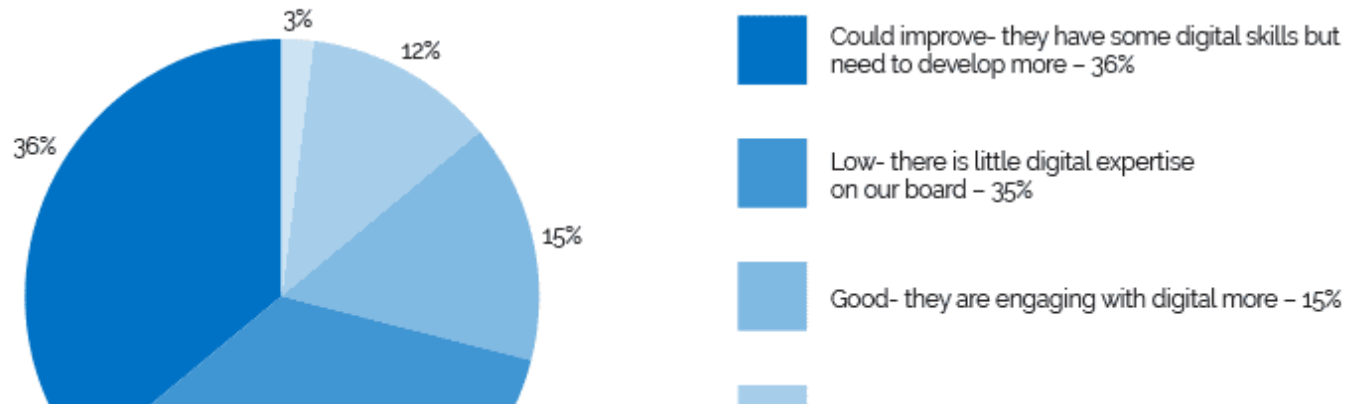
9. YOUR BOARD'S DIGITAL SKILLS

Q - How would you rate your board's digital skills?



Almost three quarters (71%) of charities cite their board's digital skills as low or having room for improvement.

HOW WOULD YOU RATE YOUR BOARD'S DIGITAL SKILLS?



Analysis

- Very few charities excel in this area, with only 3% rating their board as digital savvy.
- Just 15% rate their board as good and engaging further with digital.
- 36% say that their board could improve - they have some digital skills but need to develop more.
- 35% rate their board as having low skills in this area, with little digital expertise on the board.

10. LEADERSHIP CONSEQUENCES

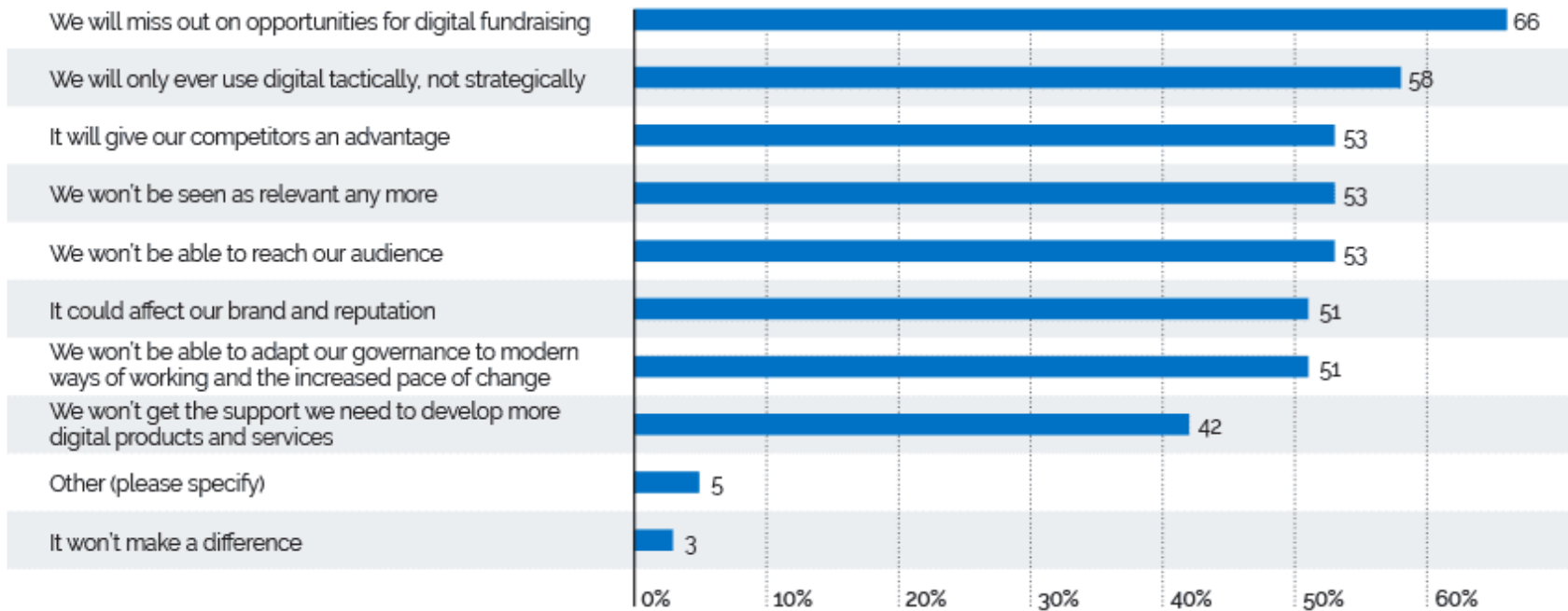
Q - What do you think will happen if your board or leadership team don't increase its skills and confidence with digital?

Charities are hungry for their boards and leadership teams to develop digital skills in

order to seize opportunities in digital fundraising, develop competitive advantage, and stay relevant to their audience.



WHAT DO YOU THINK WILL HAPPEN IF YOUR BOARD OR LEADERSHIP TEAM DON'T INCREASE ITS SKILLS AND CONFIDENCE WITH DIGITAL?



Analysis

- Unless boards and leadership teams develop their digital skills, 66% are worried that they will miss out on opportunities for digital fundraising.
- More than half are worried about giving competitors an advantage (53%), losing touch with their audience (53%) or their charity becoming irrelevant (53%). 51% are worried it could damage their brand and reputation.
- 58% are concerned that their charity will only ever use digital at a tactical level, not adopt it strategically. Others are worried about the consequences for their ways of working, 51% are concerned that the skills gap

at leadership level means that they won't be able to adapt their governance to modern ways of working and the increased pace of change. 42% are worried they won't get the support they need to develop digital products and services.

- Just 3% think that digital skills amongst their board and leadership team won't make a difference.



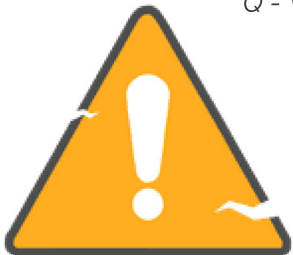
Comments

- "Board-level lack of digital understanding is a massive risk. And, in their ignorance, boards often underestimate its seriousness."
- "It will reduce our effectiveness to increase fundraising and therefore grow our services."

Section 3 - Where Do Charities Go From Here?

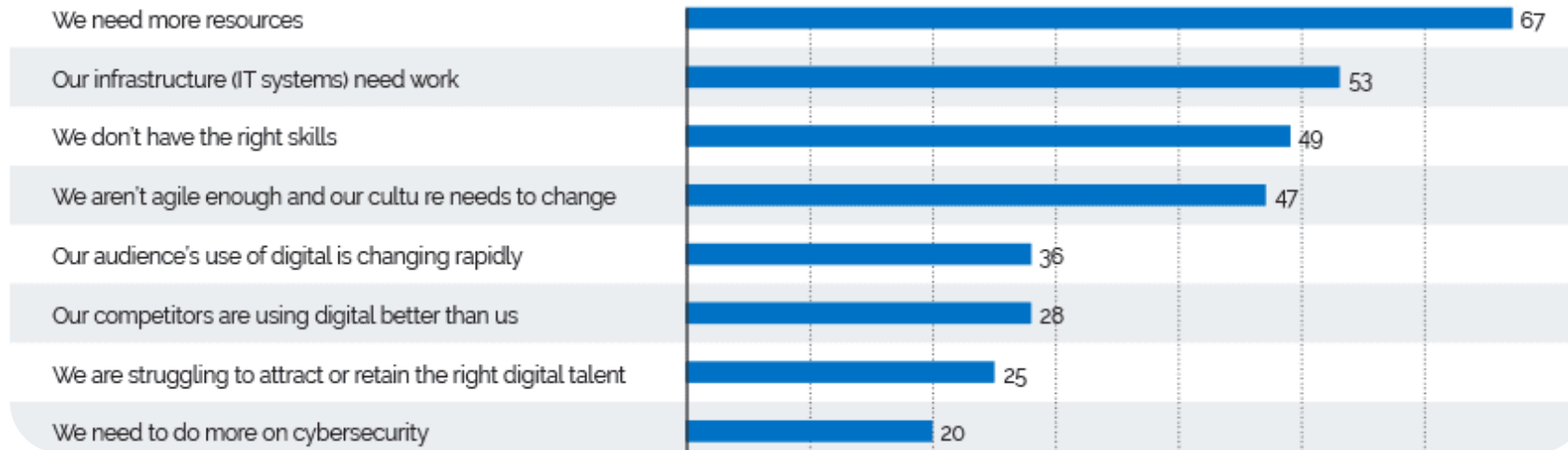
11. DIGITAL BARRIERS

Q - What do you see as the biggest threats to your charity increasing its use of digital



Nearly half of all charities see a lack of resources, weak infrastructure and not having the right skills in place as the greatest threats.

WHAT DO YOU SEE AS THE BIGGEST THREATS TO YOUR CHARITY INCREASING ITS USE OF DIGITAL?



Analysis

- More than two thirds of charities (67%) cite lack of resources as a threat.
- Just over half (53%) say that their IT infrastructure needs to be improved.
- People and culture are imperative. 49% don't have the right skills amongst their workforce, and 25% are struggling to attract or retain the right talent. 47% think that their charity isn't agile enough and its culture needs to change.
- 36% say keeping pace with their audience is a challenge as it's changing rapidly. Almost a third (28%) are worried that competitors are using digital better than them, with 19% saying that their market is changing rapidly.



Comments

- "There is a lack of will at Board and SMT level – it's not seen as a priority."
- "We need modern leaders that trust teams to operate autonomously."
- "Internal pressure: other teams with more tangible results are invested in far more heavily."

12. DIGITAL IMPORTANCE TO YOU

Q - How important is it to you to work for a charity that is actively developing its digital capabilities and skills



The overwhelming majority of respondents told us that it was important to work for a charity investing efforts in digital

HOW IMPORTANT IS IT TO YOU TO WORK FOR A CHARITY
THAT IS ACTIVELY DEVELOPING ITS DIGITAL CAPABILITIES AND SKILLS?



Analysis

- 86% of respondents want to work for a charity that is progressing in this area.
- Just 14% were neutral on this topic.
- None stated that it wasn't important to them.



13. DIGITAL CONSEQUENCES

Q - If your charity doesn't increase its use of digital, what will you do?

36% of respondents will either look for a job with a digitally savvy charity or are unsure if they can commit to their role for the long term if their organisation doesn't make progress with digital.

IF YOUR CHARITY DOESN'T INCREASE ITS USE OF DIGITAL WHAT WILL YOU DO?



Analysis

- 59% of respondents aim to tackle this issue by working with management.
- However, whilst 21% plan to stay in their role they are unsure what they will do in the long term.
- 15% will look for a job with another charity who see digital as a priority.
- Meanwhile, 5% are considering leaving the charity sector altogether.



Comments

- "Board-level lack of digital understanding is a massive risk. And, in their ignorance, boards often underestimate its seriousness."
- "It will reduce our effectiveness to increase fundraising and therefore grow our services."

14. COMMENTS

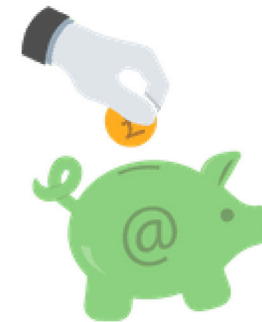
Q - How else could digital skills help your charity?

"We depend on income from training and the other services we provide (all of which is re-invested - we don't make a profit), but there is increasing competition from newer, more nimble training providers. We are in danger of losing our good reputation as the go-to training provider if we don't keep up or indeed lead!"



"It's so frustrating - the charity has the will but not the resources and patience they need. I have the digital marketing skills that I need, a blank cheque in terms of being able to access as much training as I want and a well-thought-out strategy - but the pressure to raise funds and fill event places means that SMT constantly order more fundraising and over-rule me to engage in practices that are damaging our reputation (multiple daily fundraising posts across all channels, directly tagging celebs in posts, pestering followers through constant tagging). I'm constantly pulled off digital marketing to 'fill-in' elsewhere and the charity are impatient and won't allow the strategy and plans to come to fruition. I'm out of here - I'm not damaging my own reputation any longer than I have to!"

"Digital skills are a fundamental part of everyday life, so it is vital that we incorporate these into every area of our business. This needs to be done in a way that enhances and supports what we provide offline as well - it is not something to think about separately but needs to be ingrained in our thinking all the time throughout the whole user journey on and offline. We need to empower all our staff with appropriate digital skills to their roles, so we can make the most of every available opportunity. If we improve our digital skills across the organisation, and subsequently the services we provide through digital channels, we can transform the reach, experience and support for our key audiences."



"As a membership organisation we see cost savings in communicating with our members and publishing."



*"The biggest barrier for me in my current organisation and others is cultural and infrastructure related (especially in relation to IT). Larger charities are very stuck in their ways and change management is very difficult and even more difficult to influence at Head of and manager level - you need serious clout at SLT and board level which most charities lack. **People still see digital as a website and social media, not about behaviours, skills, governance, etc., and as long as that prevails, charities will struggle. Often said but digital transformation isn't what is needed - business transformation is, with digital at the core.**"*

"The big prize for us is using digital to drive transformational collaboration which will help beneficiaries in a more rounded way."

"I strongly believe a better understanding of the impact of digital trends is necessary for non-profits to still be relevant in the next 5 to 10 years. Charities need to reinvent their roles and need to be aware of the impact of technologies like Blockchain and Internet of Things."

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