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<https://www.youtube.com/watch?v=s58Txc2ZfbE&feature=youtu.be>



# UNDERSTANDING AND ENGAGING WITH OVER 50S

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## How to tap into this highly sought after market

Webinar written and presented by  
Jenny Robertson, Silver Marketing

Thank you for joining, the webinar will start at 11 am BST

When the webinar starts your microphone will be muted, but you can use the chat box to ask questions, and at the end there will be time to answer these questions.

Please ensure you turn on your computer audio to listen. If you have issues with your computer audio you can listen via phone:

UK: +44.20.3582.4515

Ireland: +353.1.531.4868

You will be asked to enter this conference ID: 623-409-085

# A LITTLE BIT ABOUT ME

- I love marketing, branding and communications
- Run very small consultancy called Silver Marketing with my two business partners
- Involved in the independent school sector for last 10 years as parent, marketer and development officer
- I'm a Toucan Tech customer



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# SOME CONTEXT FOR TODAY

CAF UK Giving Report 2017 – An overview of charitable giving in the UK, April 2017

*“Last year was a tumultuous one. The political shocks of Brexit and Donald Trump, the historic scale of the refugee crisis and the steady flow of upsetting and unsettling stories which dominated the headlines made 2016 an eventful 12 months.*

*It was a year of change and of challenging established norms.*

*While huge change was taking place around us, some things remained consistent. One of those was the reliable and enduring generosity of people in the UK in their support of good causes.*

*CAF has been producing UK Giving for more than a decade and, throughout that time, people’s dedication to the causes they care about has remained reassuringly consistent.”*

Dr John Low Chief Executive Charities Aid Foundation

# WHY FOCUS ON THE OVER 50S?

Under 50s



More likely to give time and energy with activity-based fundraising.

Over 50s



More likely to make a financial donation

- More than half of all donations to charity (52 per cent) now come from the over-60s, compared to just over one-third (35 per cent) thirty years ago.
- The over-60s are now more than twice as likely to give to charity as the under-30s.
- The over-60s are now more than six times more generous than the under-30s compared to less than three times more generous, thirty years ago. (source: Charities Aid Foundation)

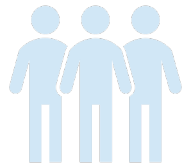
# WHY ARE THEY MORE LIKELY TO DONATE?



Free further education  
Mortgage and rent free  
Final salary pensions



Higher disposable income



Healthier lifestyle  
Socially active



Socially engaged



Recognise that they've had it good!  
Done well in life  
Want to support the younger generation



Very altruistic

# STOP AND THINK!

Think about a person or people you know in the over 50 age bracket.

Think of someone who is not a family member





# A SNAPSHOT OF OVER 50S

- In 2018, fertility rates decreased in all age groups except for women aged 40 plus (ONS August 2019)
- Across the world, the fastest growing group of marathon runners is that for those aged 90-99
- The number of those aged over 70 who are in full- or part-time employment increased 135% between 2009 and 2019. Nearly one in 12 of those in their 70s are still working, a significant increase from the one in 22 working 10 years ago. (ONS Survey 2019)
- Coming out and divorce rates are said to be increasing among over 50s
- Today's 70-year-olds were in their teens and twenties in the 60s and 70s





# A COMMUNICATION CONUNDRUM

The attitudes and behaviours of a 50 year old are so very different from someone who is 75.

+

And with the benefits of modern medicine, life-style and life-stage are no longer linked to age

=

Over 50s are one of the most fragmented audiences in the UK today and refuse to be typecast or stereotyped.

# SIMPLE SEGMENTATION IDEAS



- Busy and active
- Working
- Time poor
- Individual & independent
- You may be part of a large social and professional network
- Healthy



- Retired
- Doing more as a couple or with friends
- Time rich but busy
- Still looking for professional recognition or engagement
- Socially active
- May have some health issues but they won't be holding them back



- May be single
- Hungry for social interaction
- Looking to occupy their time
- You will be part of a smaller but very important social network
- May need some hand-holding
- Likely to have health issues

Warning! With the 50+ age group you cannot apply an age criteria to any of these segments

# 10 IDEAS TO HELP WITH SEGMENTATION

1. *Understand and define the breadth of your audience – don't forget grandparents and former staff*
2. *Identify those in the know who can give you the low down!*
3. *Undertake research with a small sample group – engage, listen and learn*
4. *Create links and groups based on friendships, professional interests, charitable engagement etc*
5. *This is the sandwich generation – find out about the draws they have on their time*
6. *Identify some indicators of financial status*
7. *Decide whether you are engaging with people to friend-raise or fund-raise*
8. *Use your segmentation research to shape your proposition or case for support*
9. *Create fundraising plans and events around your segmentation strategy*
10. *Engaging with your donors may be more difficult if you or your team are in their twenties or thirties*

# PRACTICAL TIPS

#1 Written communications

#2 Visual style

#3 Digital vs traditional media

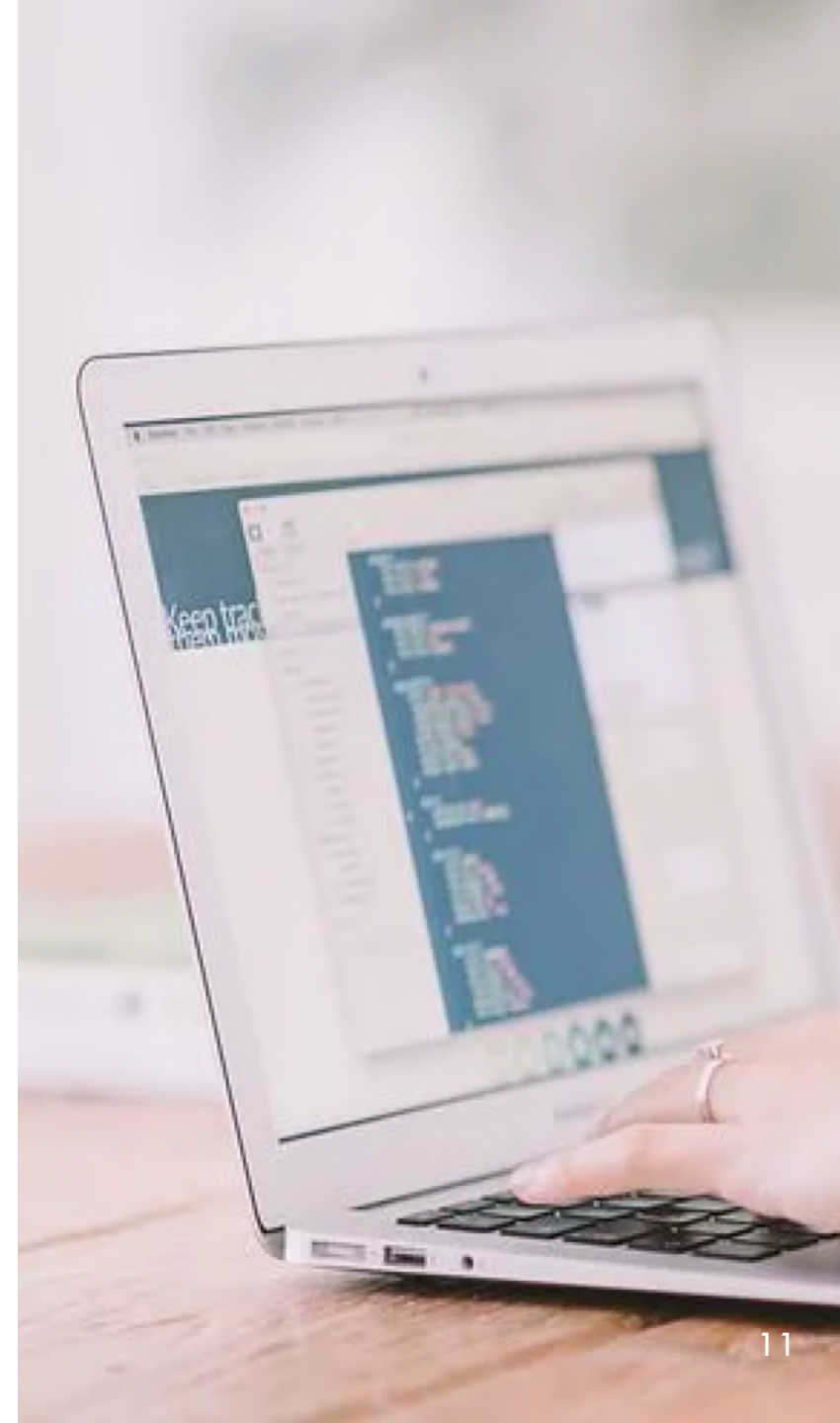
#4 Telephone campaigns

#5 Legacy campaigns

#6 Events

# TIP #1: WRITTEN COMMUNICATIONS

- Use a size 12 font
- Take care with style and grammar.
- Don't underestimate the negative reaction to a mis-placed apostrophe.
- Avoid teenage abbreviations, slang and jargon.
- Know the different between an invite and an invitation
  
- Use an adult to adult tone and don't be patronising.
- Present facts clearly and provide details.
- Older people have the time to read and enjoy long copy and want to know more.
- Busy working parents are looking for something short and succinct



## TIP # 2: VISUAL STYLE

- Use interesting photos of real older people
- Over 50s are still aspirational – imagery needs to reflect this
- Show real experiences, not stereotypes or airbrushed models
- Much of the stock imagery is American – take care to avoid this
- Most overused and disliked shots are:
  - Happy multi-generational groups
  - Couples on the beach
  - Couple on bicycles
  - Touching!





# TIP # 3: DIGITAL VS TRADITIONAL MEDIA

- Vast range of digital fluency
- Full end-to-end donation process online and offline
- Ensure your website is clear and easy to navigate.
- Avoid blue and green in favour of red, yellow and orange.
- Older people are increasingly embracing digital channels
- Research vs transactions
- Heavy users of print and traditional media.
- Newspapers, magazines, brochures, leaflets and printed invitations



# TIP #4: TELEPHONE CAMPAIGNS

- Speak clearly
- Imitate the tone, speed, and pitch of voice
- Take time, allow pauses and gaps, don't rush in to fill them
- Be aware of memory loss and so don't be afraid to repeat yourself
- Listen carefully, and summarise for certainty
- Build a rapport and develop a relationship rather than generating sales
- Be positive, adult to adult and honest. Do not be patronising.
- Consider carefully whether you should call during Pointless!
- Follow up calls with a letter or email and give detailed information



# TIP #5: LEGACY CAMPAIGNS

- Average age to make a will is 47
- Retirement is the most financially complicated time of anyone's life
- Gap between a last will and death is seven years
- Ensure you have a well articulated case for support
- Consider a legacy tree or piece of public design to generate a conversation.
- Understand their motivations
- Older people deeply mistrust financial services
- Trust and transparency is essential – make sure the process is crystal clear
- Older donors often prefer to be part of a “generous community of suppliers” rather than being singled out or named – consider setting up a legacy society

# TIP # 6: EVENTS

- Hearing starts to decline age 65
- Carefully consider seating plans, table sizes and background music
- Toilets!
- Accessibility and parking
- Driving or Driver
- Status and seating plan
- Timing and day of the week
- Give plenty of notice – they go on lots of holidays – often in term time!





# SOME LIGHT RELIEF DURING LOCKDOWN

<https://www.bbc.co.uk/programmes/m000dpqm>

The screenshot shows the BBC Radio 4 website interface. At the top, there is a navigation bar with the BBC logo, 'Your account', and links for News, Sport, Weather, iPlayer, Sounds, and More. A search bar is located on the right. Below the navigation bar, the main header features the BBC Radio 4 logo and the program title 'Conversations from a Long Marriage'. To the right of the title, there is a 'LIVE PM' indicator and a 'Sched' button. Below the header, there are two tabs: 'Home' and 'Episodes'. The main content area is divided into three sections. The top section is a large image of a woman (Joanna Lumley) and a man (Roger Allam) sitting on a couch. Below the image is a 'Listen now' button with a speaker icon. The middle section is a dark blue box with the title 'Episode 1 - Why Didn't You Ask Me to Dance?' and the text 'Series 1 Episode 1 of 4'. Below this, there is a short description: 'Joanna Lumley and Roger Allam play a couple who've been married 'for ever'. Their conversations are practical, passionate, hilarious - and familiar to every couple.' To the right of the description, it says 'Available now' and '28 minutes'. At the bottom of this section is a 'Show more' link. The right sidebar contains three sections: 'Last on' with the date 'Wed 22 Jan 2020 11:30' and 'BBC RADIO 4'; 'More episodes' with a 'PREVIOUS' section stating 'You are at the first episode' and a 'NEXT' section for 'Episode 2 - Sally's Your Friend Series 1'; and a link to 'See all episodes from Conversations from Long Marriage'.

# ANY QUESTIONS



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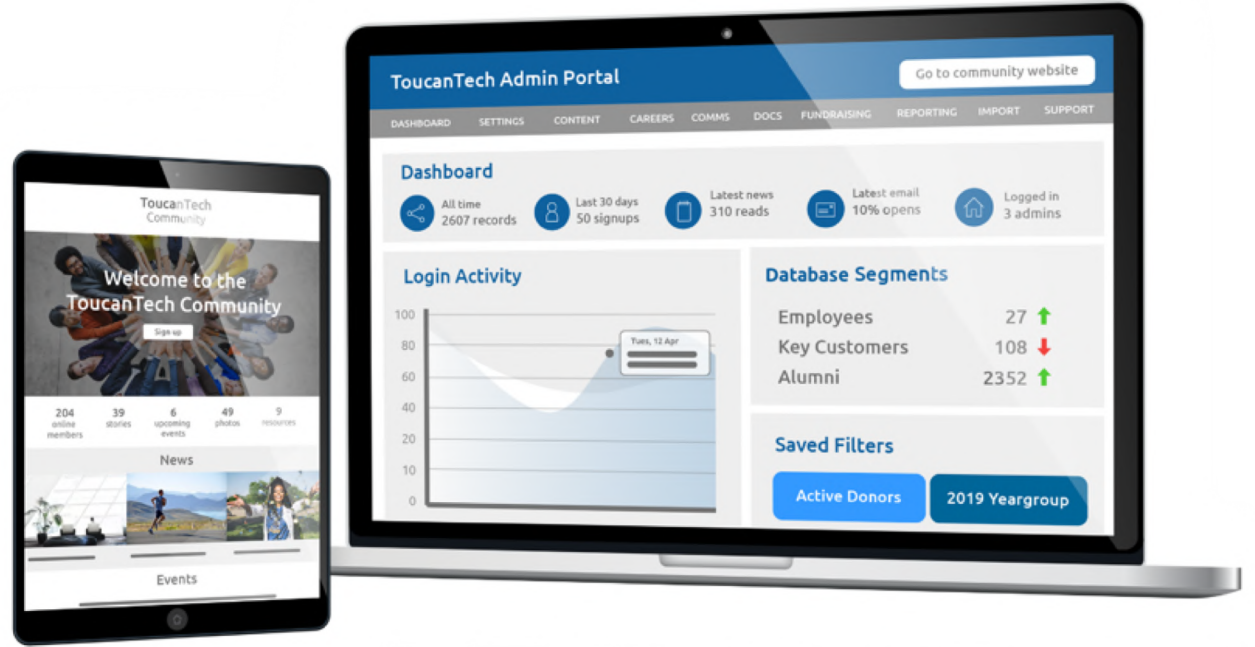
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# About ToucanTech

ToucanTech is an easy, affordable and beautiful fundraising CRM and website software to manage your supporter records, email newsletters, online payments, events, mentoring, careers and more!



**Any questions?**

Please contact Amy – [amy@toucantech.com](mailto:amy@toucantech.com)  
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