

Bridging[✦] Generations

Wealth, Communication
and the Future of Giving

communicate et al
growing reputations

&

SA
Philanthropy
Network

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Foreword

We're delighted to present this joint initiative between leading communications agency **communicate et al** and **SA Philanthropy Network**, a first report of its kind, which leverages the former's unique research methodology, **Reputation360**.

Our two organisations have a strong history of supporting the South Australian charity and not-for-profit sector and as Australia enters a 20-year window of unprecedented wealth transfer, we have come together to consider the important role that brand and positioning plays in attracting audiences from Gen Alpha to Baby Boomers.

There are a number of considerations facing the charitable sector in South Australia with the intergenerational wealth transfer underway.

Firstly, our state sees a higher than national average concentration of operating charities - automatically creating a competitive arena for donations and volunteers.

Secondly, there is plenty of evidence that Gen Z and Millennials are increasingly defining the culture of giving, and as such, the need to carefully nuance campaigns and present brands that attract these audiences will, invariably, have been weighing on our collective minds.

But how does the balance of engagement play out when talk about intergenerational wealth must surely be driven by older Australians and their advisors? With limited resources, who are the key decision makers and how important is it to tailor engagement with the different stakeholders at play?

This paper summarises a range of established and commissioned research alongside other key data sets to minimise any bias in predicting future communication and branding opportunities for the South Australian charity sector.

Kate Hannemann



Managing Director, **communicate et al**

Kay Burton



Founder **SA Philanthropy Network**

Executive summary and Reputation360

South Australia is entering a period of accelerated intergenerational wealth transfer that presents a substantial and largely under realised opportunity for local not for profits and charities.

Nationally, an estimated \$150 billion moved through inheritances in 2024, with between \$3.5 trillion and \$5.4 trillion expected to change hands over the next two decades. South Australia will receive a meaningful share of this transfer, shaped by an older population profile, high household asset retention, and long established patterns of home ownership.

Critically, the estate value profile in South Australia is well suited to charitable bequests. Indicative analysis suggests that:

- **Metropolitan Adelaide estates** commonly fall in the **\$600,000–\$1.5 million range**, driven primarily by mortgage free housing, superannuation balances, and modest investment portfolios.
- **Inner east and coastal Adelaide suburbs** often sit above this range, with a material cohort of estates exceeding **\$2 million**.
- **Regional South Australian estates** are typically lower in absolute value but remain significant, often **\$400,000–\$900,000**, and are frequently less encumbered by debt, particularly where property has been held across generations.

These ranges matter because even modest proportional gifts – 1 to 5% of an estate, translate into transformational funding for many South Australian organisations, while remaining aligned with donors’ family priorities.

Despite this underlying capacity, charitable participation remains low. Across Australia, only around 6.5% of wills include a charitable gift, and approximately 1% of inherited wealth is directed to for purpose organisations.

There is no evidence that South Australia currently exceeds this baseline. For local charities, this gap reflects untapped potential rather than community reluctance, particularly given South Australia’s strong sense of place, long donor relationships, and high trust in locally embedded institutions.

For organisations that invest in legacy giving, bequests are among the most powerful funding sources available. They typically grow around twice as fast as mass market giving, deliver substantially higher return on investment, and provide a disproportionately high share of unrestricted income, a critical advantage for charities seeking long-term resilience in an environment of rising service demand and constrained government funding.

Demographic trends further amplify the opportunity. South Australia has the second oldest population in the country, a median age higher than the national average, and deaths are projected to rise steadily over coming decades, expected to outnumber births by the 2060’s.

Each estate represents a moment of reflection on personal values, legacy, and community impact. Importantly, wealth transfer is often staggered: in more than a third of cases assets pass first to a surviving partner, who typically revisits their estate planning within the following decade. This creates a prolonged engagement window rather than a single point of decision.

Considered more broadly, South Australia’s estate value profile, demographic trajectory, and relatively low penetration of charitable bequests position legacy giving as one of the most strategic revenue opportunities available to the state’s not-for-profit sector. Organisations that act now, building legacy capability, strengthening adviser relationships, and articulating their role in South Australia’s future are well placed to secure enduring support as generational wealth transitions reshape the State’s philanthropic landscape.



“What risk do charities face if they don’t act?”

- Legacy income volatility if Baby Boomers disengage
- Missed opportunity during the next 10–15 years (as estate decisions cluster)
- Increasing competition between South Australian charities for a finite donor base

Reputation360

To better understand the challenges and opportunities the not-for-profit sector faces in balancing engagement needs, communicate et al's Reputation360 methodology was employed to minimise research bias and to garner insights from as many different sources as possible.

Central to this research approach was sentiment analysis and a survey conducted with SA Philanthropy Network's database in late 2025 and early 2026.

The findings were cross-referenced with an array of other datasets, research and mega trends that paint a picture of the complexity of engaging with such varied generations.

The Generations

When we talk about the generations at play in this intergenerational wealth shift, we have considered the conventional generations, their typical engagement preferences and widely held acknowledgements of their respective attention spans:

Typical attention spans as they relate to unsolicited content/marketing:

- Gen Alpha: Seconds
- Millennials: 30-90s
- Gen X: 2-5 mins
- Baby Boomers: 5-15 mins+



Gen Alpha BORN 2010-2024

Discovery
TikTok/YouTube

Engagement
Games/Video

Trust
Creators

Conversion
Parents

Millennials BORN 1981-1996

Discovery
Social + Search

Engagement
Video/Audio

Trust
Peers

Conversion
Mobile

Gen X BORN 1965-1980

Discovery
Search + Email

Engagement
Articles

Trust
Expertise

Conversion
Web

Boomers BORN 1946-1964

Discovery
TV/Print/Facebook

Engagement
Long-form

Trust
Authority

Conversion
Human touch

Research findings

Conducted in December 2025 and January 2026, the survey of South Australian charities, not-for-profits and donors shed a light on the differences of giving and requests based on a person's age/generation. The full survey results are provided in the responses section, segmented by charities and donors, to highlight the key drivers influencing donor consideration.

SA Philanthropy Network survey

1. Giving rates:

- Younger generations (Gen Y, Gen X) are more likely to give occasionally rather than regularly.
- Older generations (Boomers, Silent Gen) are more likely to give regularly (weekly or monthly).
- Non-givers are more common in younger groups.
- Silent Generation shows the strongest consistent giving; Millennials the weakest.

2. Last time donated:

- Gen X & Gen Y: Most donated this month, some donated this quarter, small share hasn't donated recently.
- Baby Boomers: Strong pattern of donating this month, with more giving this quarter than younger groups.
- Silent Generation: Nearly all donated this month, most consistent recent donors of all generations.

3. Next 2-3 years donation frequency:

- Gen X: Mixed expectations, many expect to give a few times a year or monthly. Smaller share plan to give less frequently.
- Gen Y: Similar to Gen X, majority expect to give a few times a year or monthly, with some showing lower-frequency intentions.
- Baby Boomers: More likely to expect regular monthly giving than younger groups; fewer expect to give rarely.
- Silent Generation: Strongest commitment, almost all expect to give monthly or more often, with very few lower-frequency givers.

4. Preferred way to donate:

- Younger generations (Gen Y and Gen X) tend to prefer online giving, donate less regularly and are more likely to give occasionally rather than consistently.
- Baby Boomers show a mix of online and traditional giving, donate more regularly than younger generations, and maintain relatively steady habits.
- Silent Generation stands out strongly, they prefer traditional mail-based giving, donate most consistently, and expect to continue regular giving in the future.

5. Giving back, advised by a professional:

- Gen X & Gen Y: Most have not been encouraged to give by a professional adviser, though a small group in each has had occasional encouragement.
- Baby Boomers: Even fewer have received adviser encouragement, with an even larger majority saying no, never.
- Silent Generation: Almost no one has been encouraged by an adviser, the lowest level of adviser involvement across all generations.

6. What prompts donors to give money:

- Gen X & Gen Y: Both show a broad spread of motivations, their reasons for giving being "because it's the right thing," wanting to "make a difference," and supporting "causes they care about". Gen Y leans slightly higher on personal connection to the cause.
- Baby Boomers: Similar pattern to Gen X and Gen Y, but with a stronger emphasis on "making a difference" and "values/beliefs." Their motivations are more consistent and less varied.
- Silent Generation: Far more concentrated, overwhelmingly driven by values, beliefs or faith, with minimal representation across other motivations.

7. Reason for donating to their most recent cause:

- Gen X & Gen Y: Most recent donations were made because someone asked them to give or they felt a personal connection to the cause. Gen Y shows a slightly stronger influence from peer or social prompts.
- Baby Boomers: Donations are more commonly driven by knowing someone affected or having a personal connection, with fewer giving simply because they were asked.
- Silent Generation: Almost all recent donations were driven by habit, routine, or longstanding commitment rather than external prompts or personal stories.

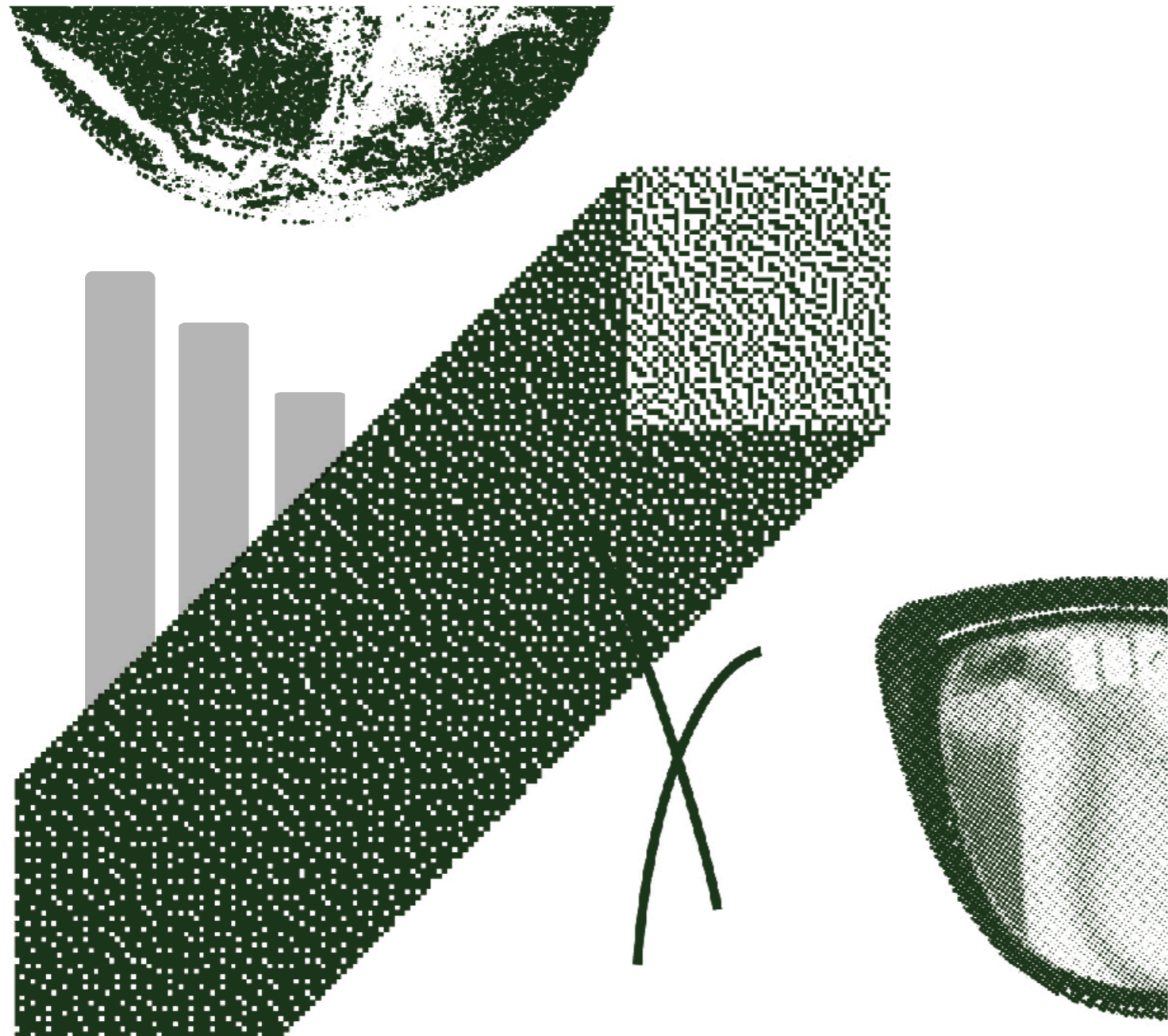
SA Philanthropy Network survey cont.

8. Most important thing for a charity to do:

- Gen X & Gen Y: Both place the most importance on transparency, clearly showing how funds are used. They also value communication and impact reporting, though at lower levels.
- Baby Boomers: Similar to Gen X and Gen Y, but with an even stronger emphasis on transparency as the top priority, followed by consistent communication.
- Silent Generation: Far more concentrated, almost entirely focused on trust/transparency, with very little importance placed on any other factors.

9. How people can be more influenced to donate

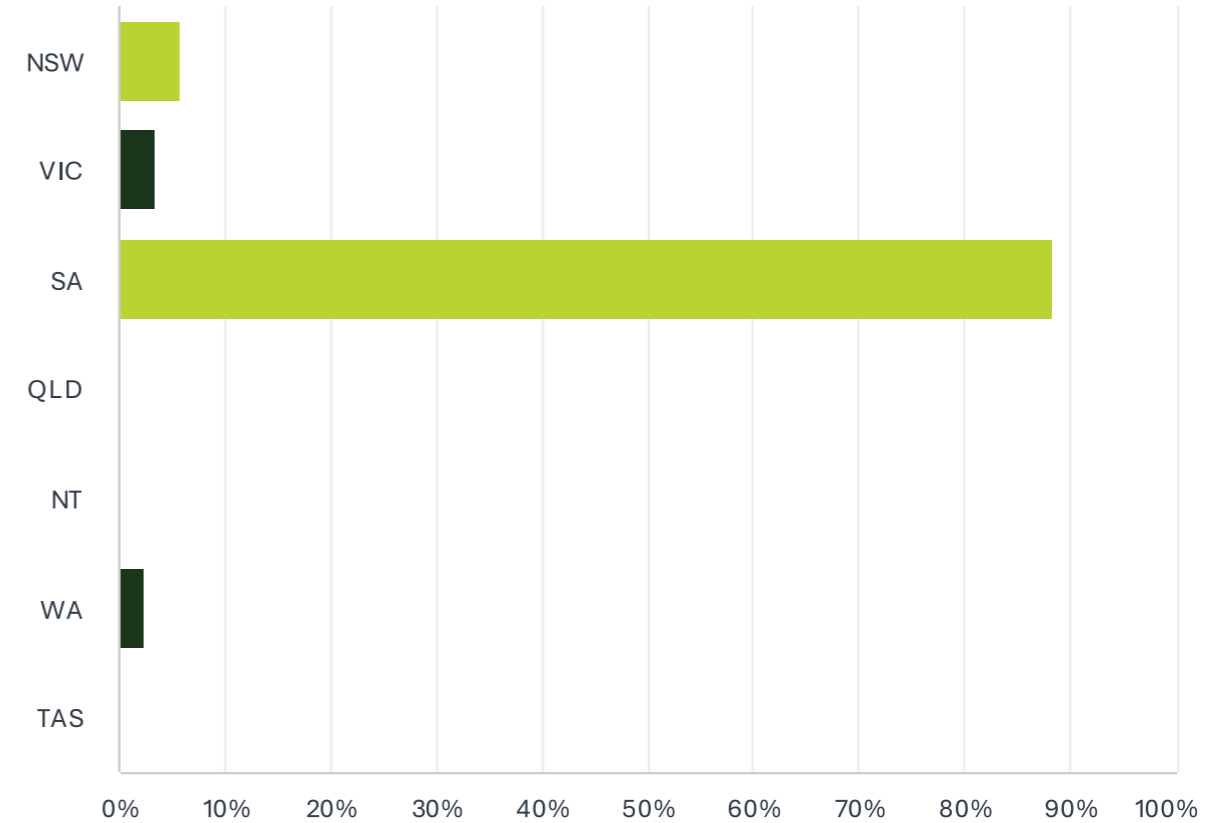
- Gen X & Gen Y: Most encouraged by direct emails/texts, online exposure, and website appeals, with Gen Y showing higher interest in social media than Gen X.
- Baby Boomers: Prefer direct email/texts and traditional media exposure, with less interest in social-media-driven prompts.
- Silent Generation: Almost exclusively engage through "other" personalised or self-directed channels, showing minimal interest in typical outreach methods.



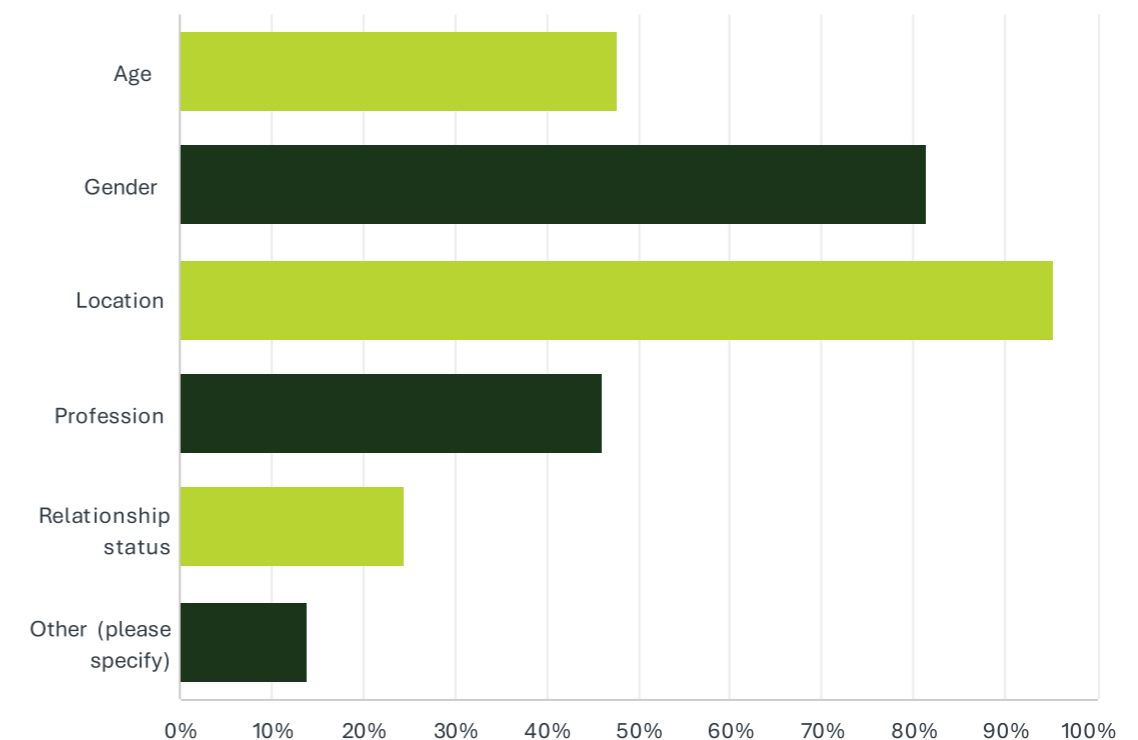
SA Philanthropy Network survey responses

86 Charities / Not-for-profit responses:

Question 1. Please select the state/territory where you primarily operate from.

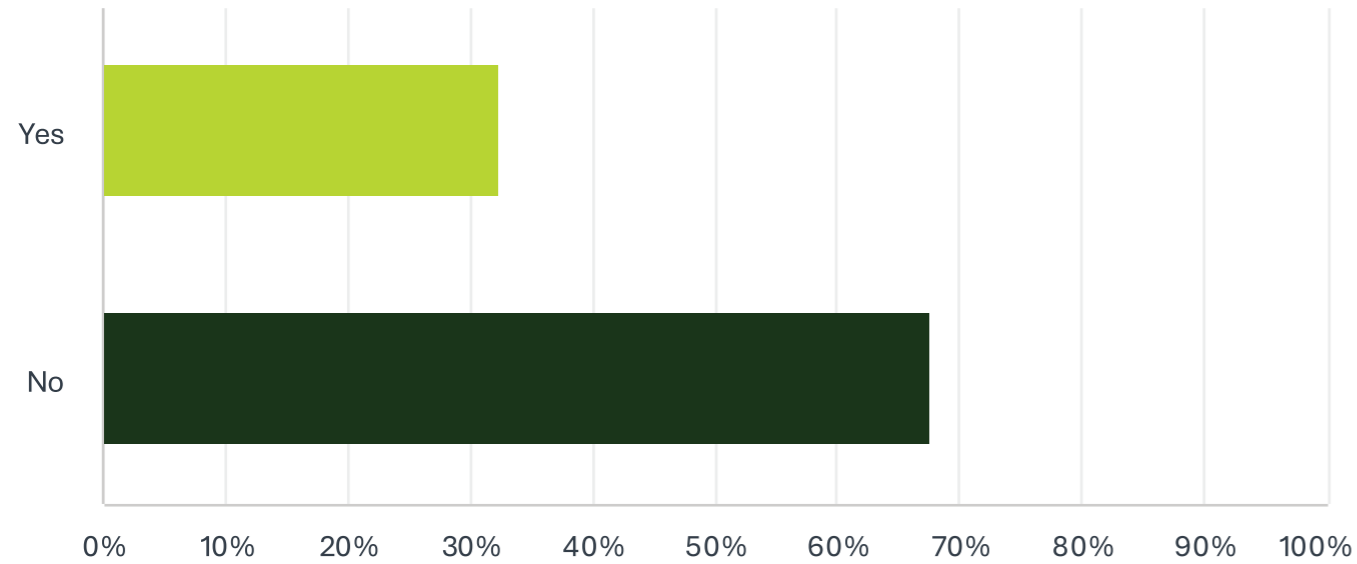


Question 2. How much do you typically know about your donors?

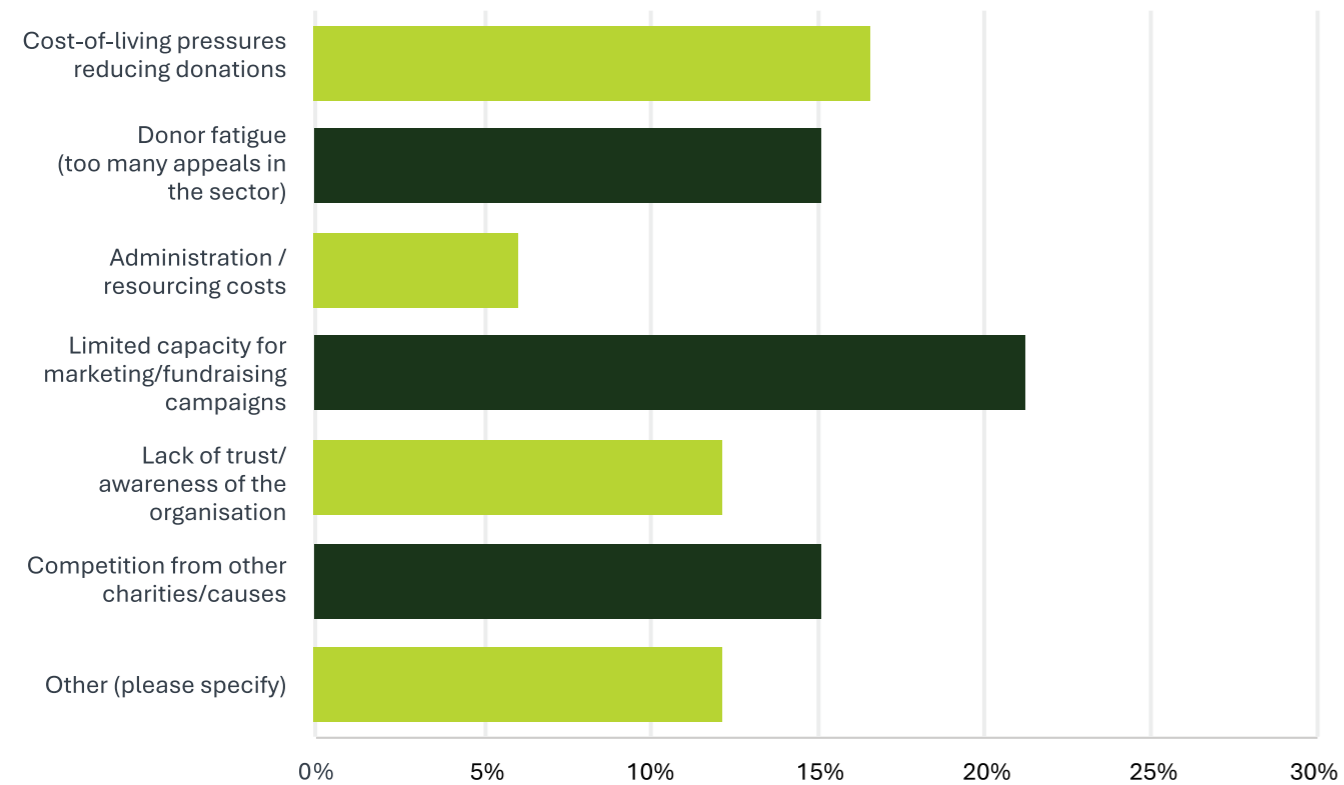


SA Philanthropy Network survey responses

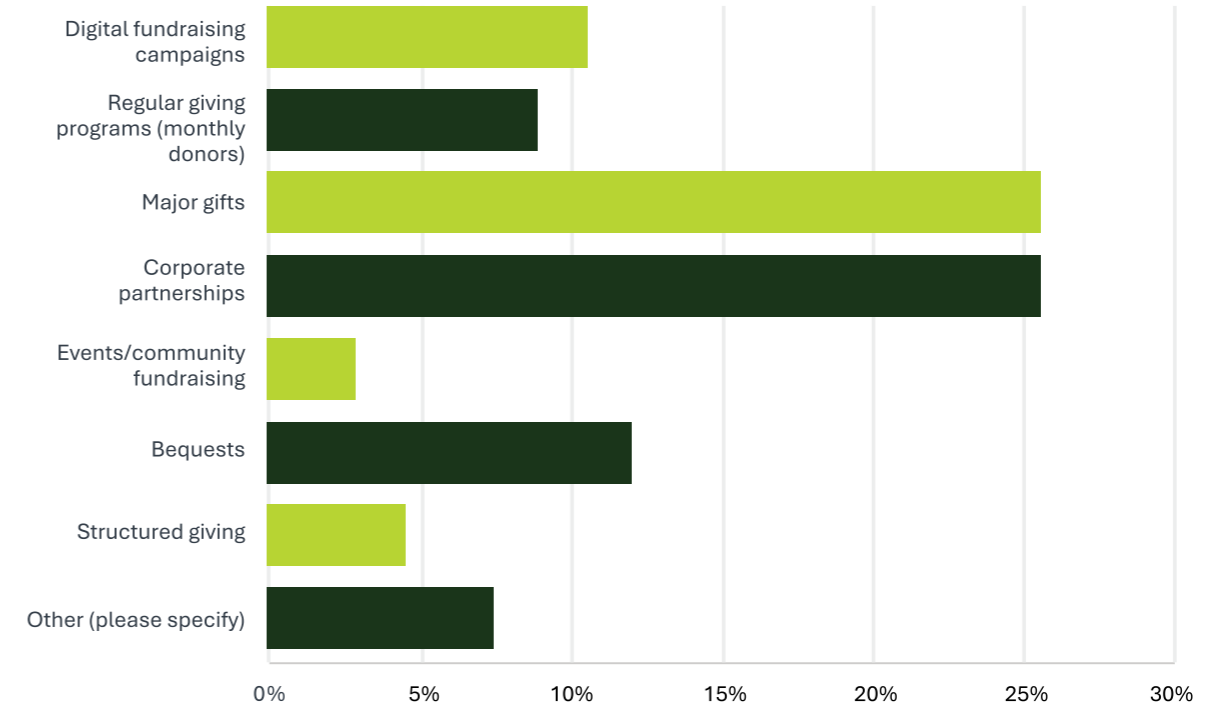
Question 3. In your donor engagement / communication strategy do you consider and prepare different material to cater for different age groups?



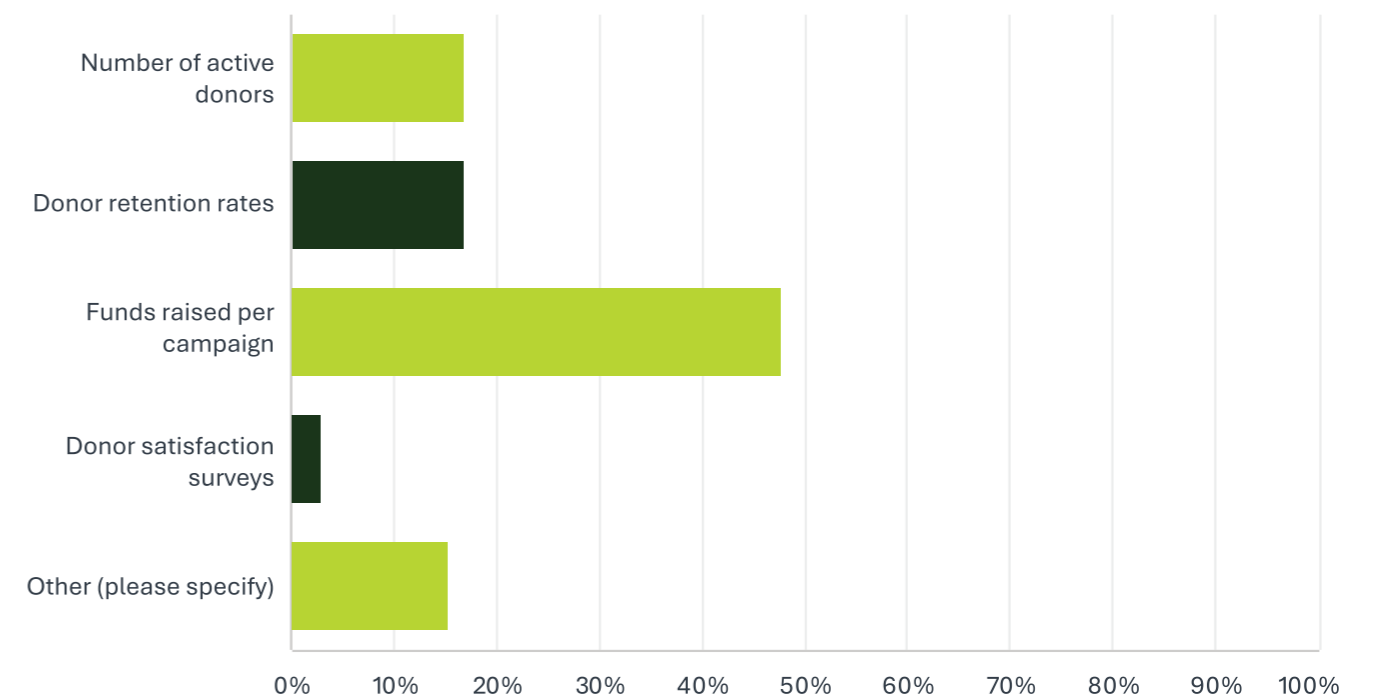
Question 4. What do you see as your biggest barriers to attracting and retaining donors?



Question 5. Where do you see the greatest opportunity to grow donor support in the next two years?

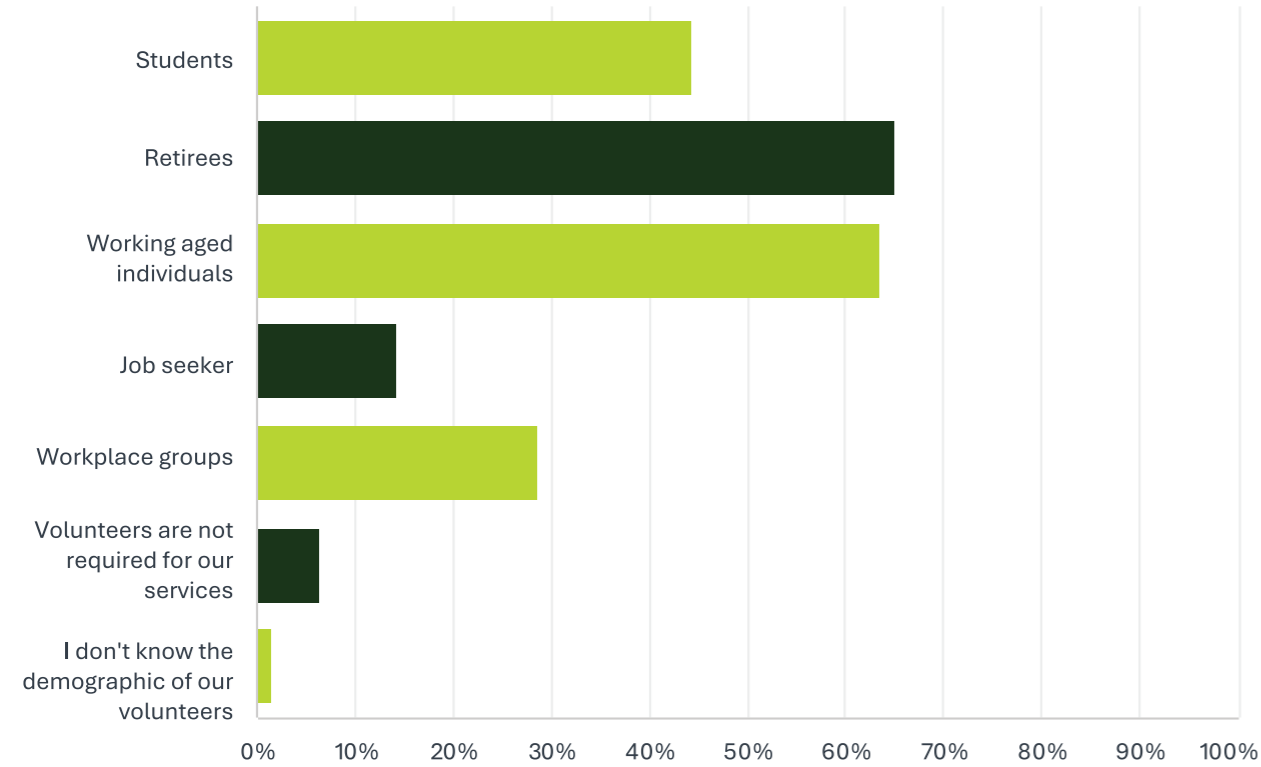


Question 6. How does your organisation currently measure success in donor engagement?

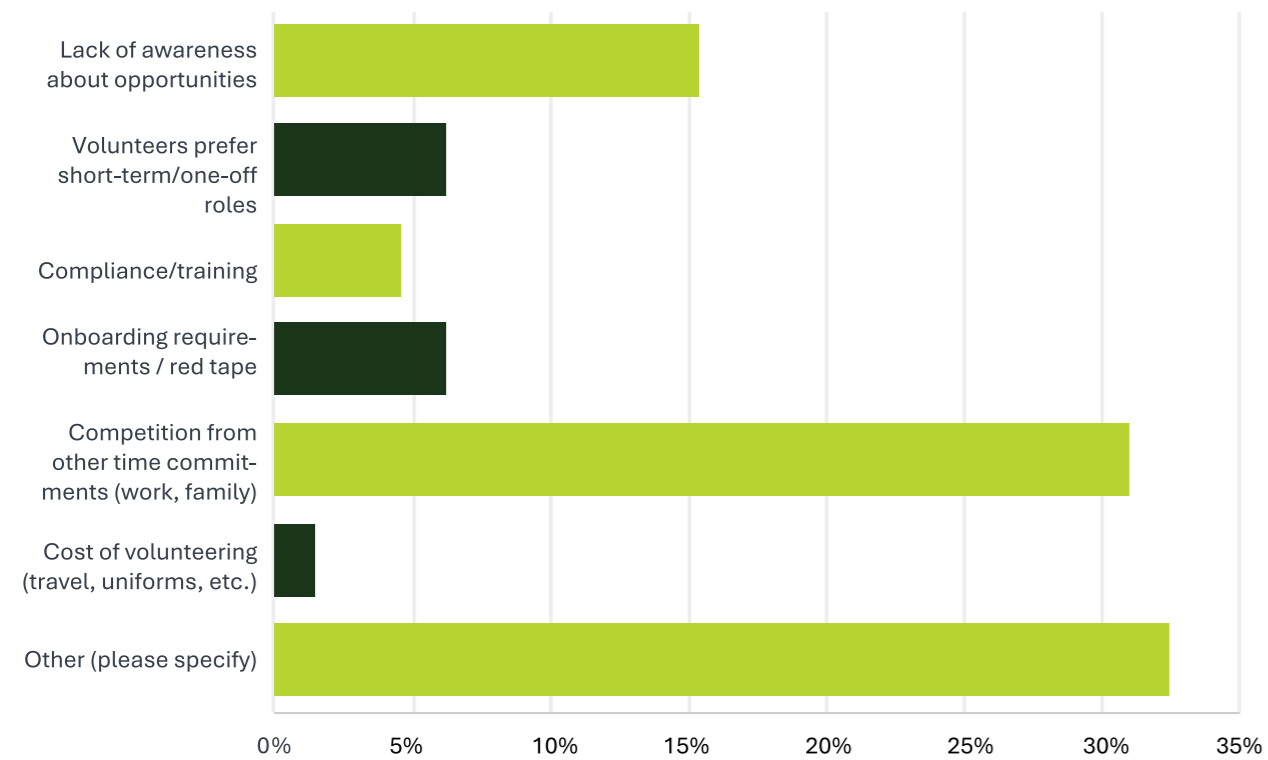


SA Philanthropy Network survey responses

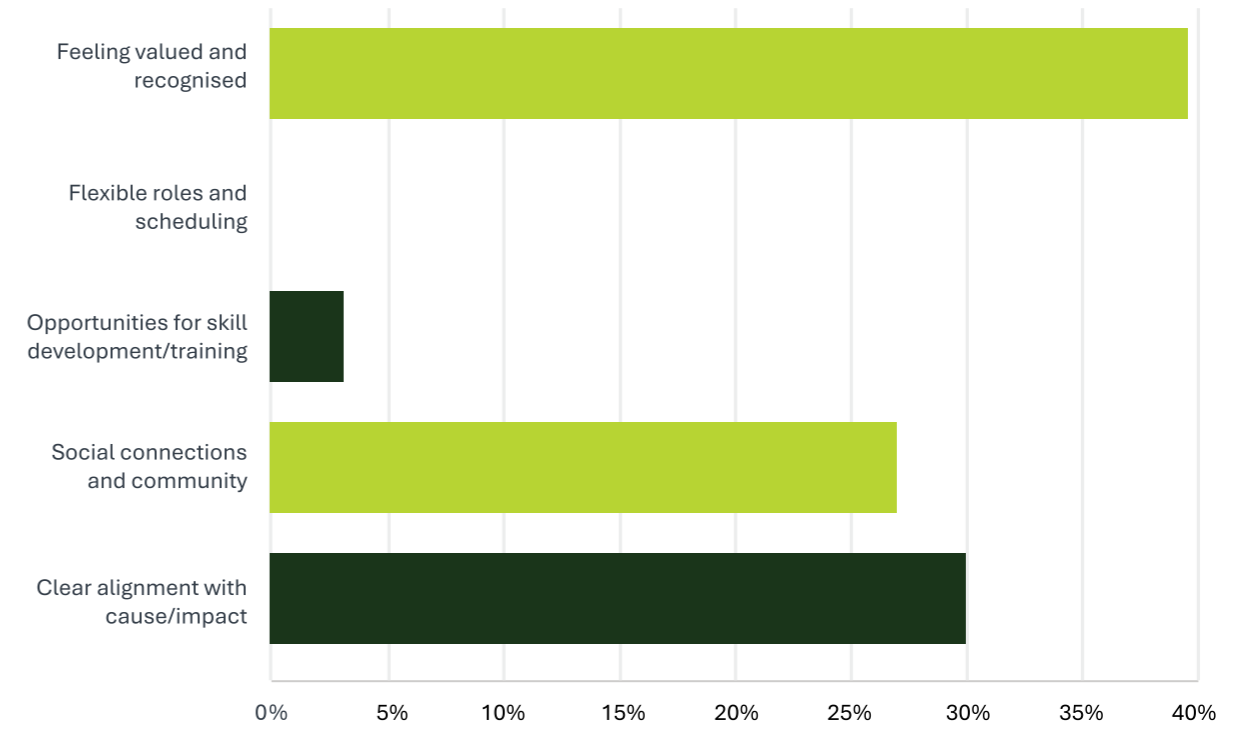
Question 7. What is the cohort of your volunteers? Select all that apply



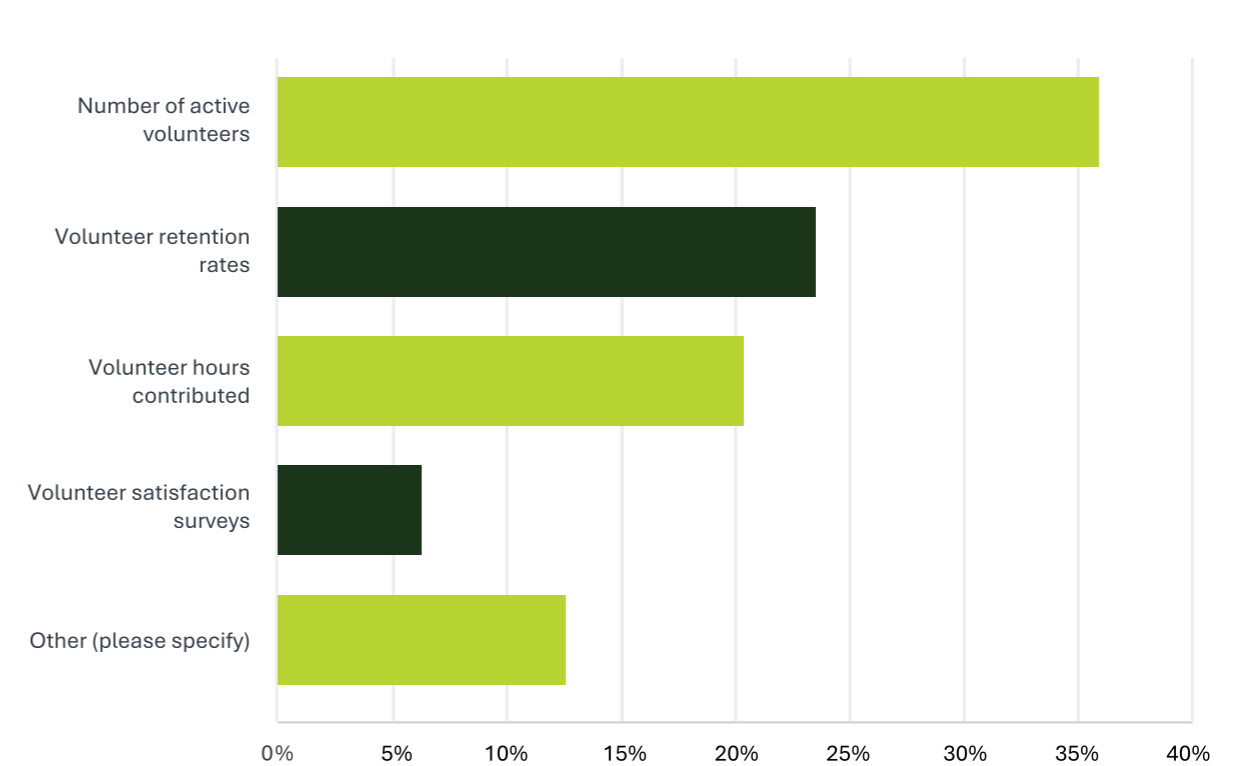
Question 8. What is the main barrier preventing more people from volunteering with your organisation?



Question 9. What do your volunteers value most in order to maintain a long-term relationship with your organisation?



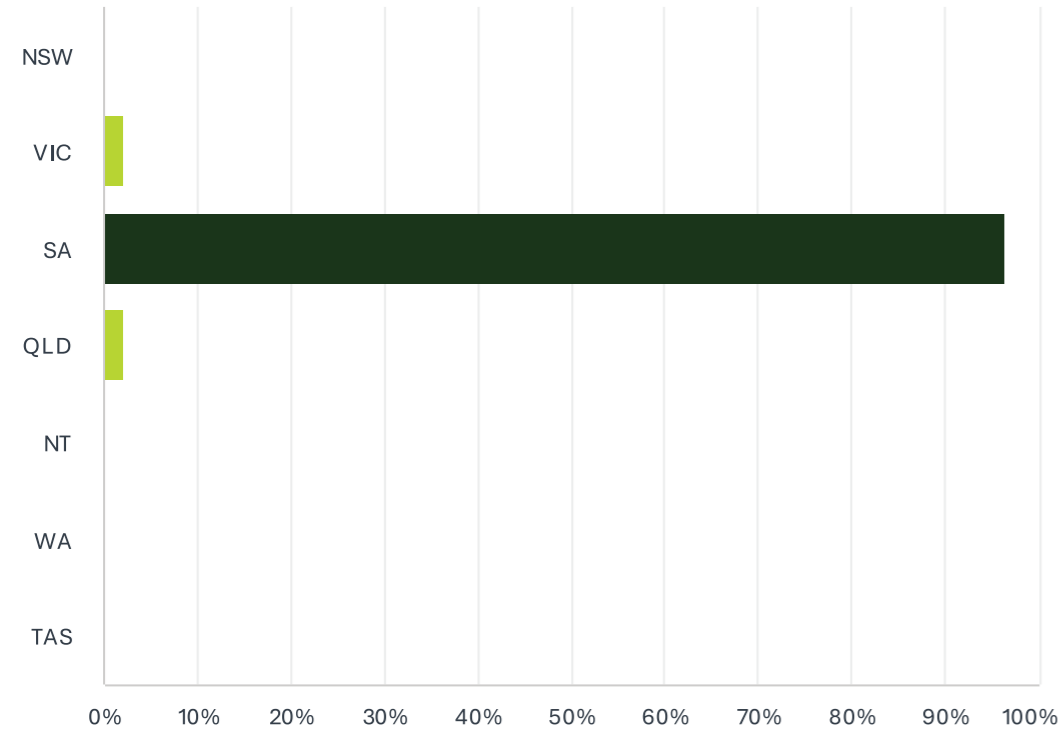
Question 10. How does your organisation currently measure success in volunteer engagement?



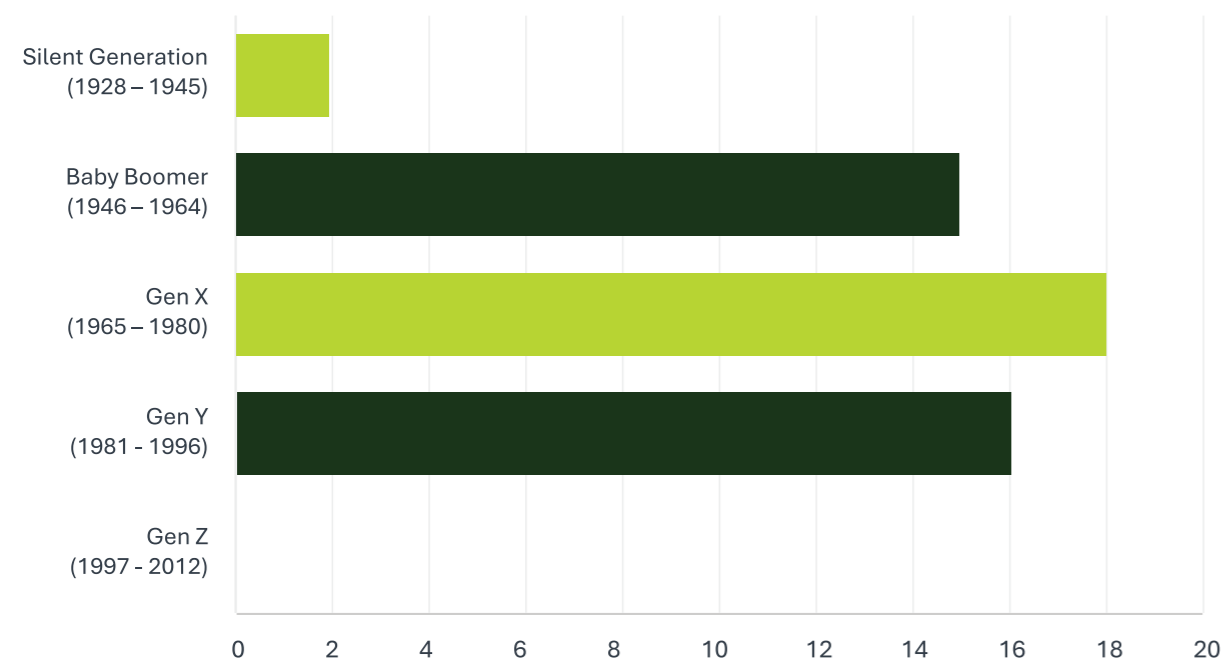
SA Philanthropy Network survey responses

51 Donor responses:

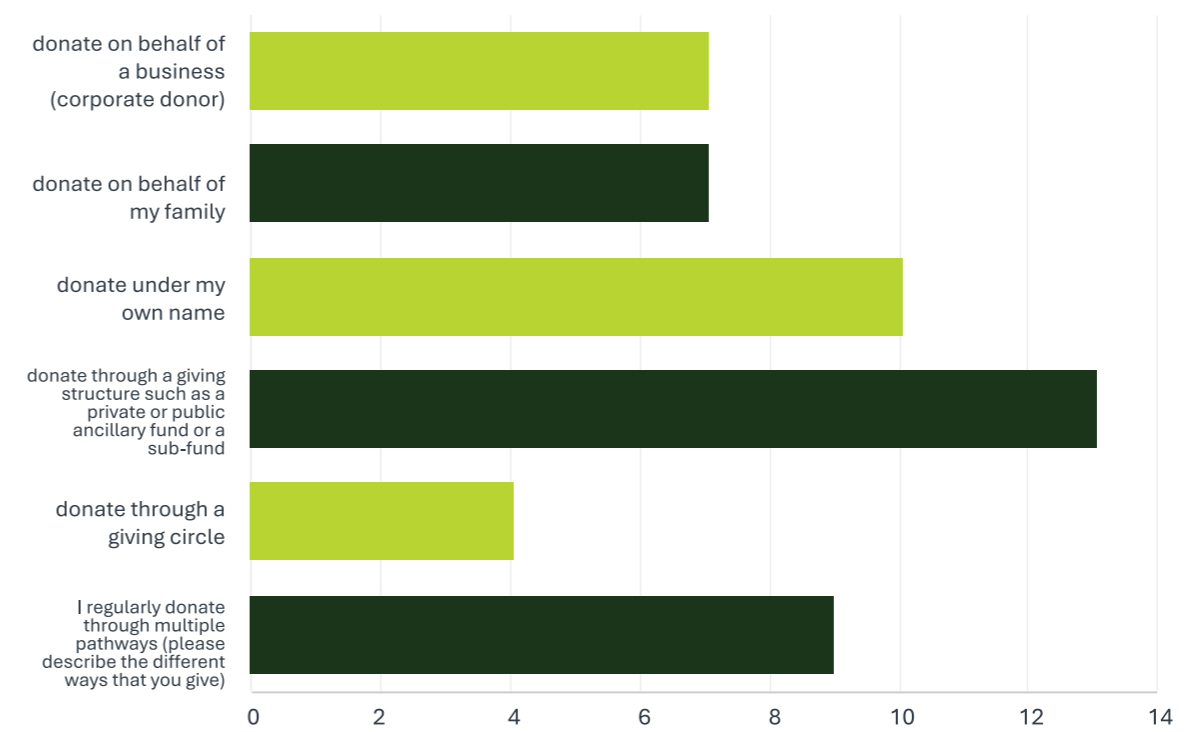
Question 1. Please select the state/territory where you reside.



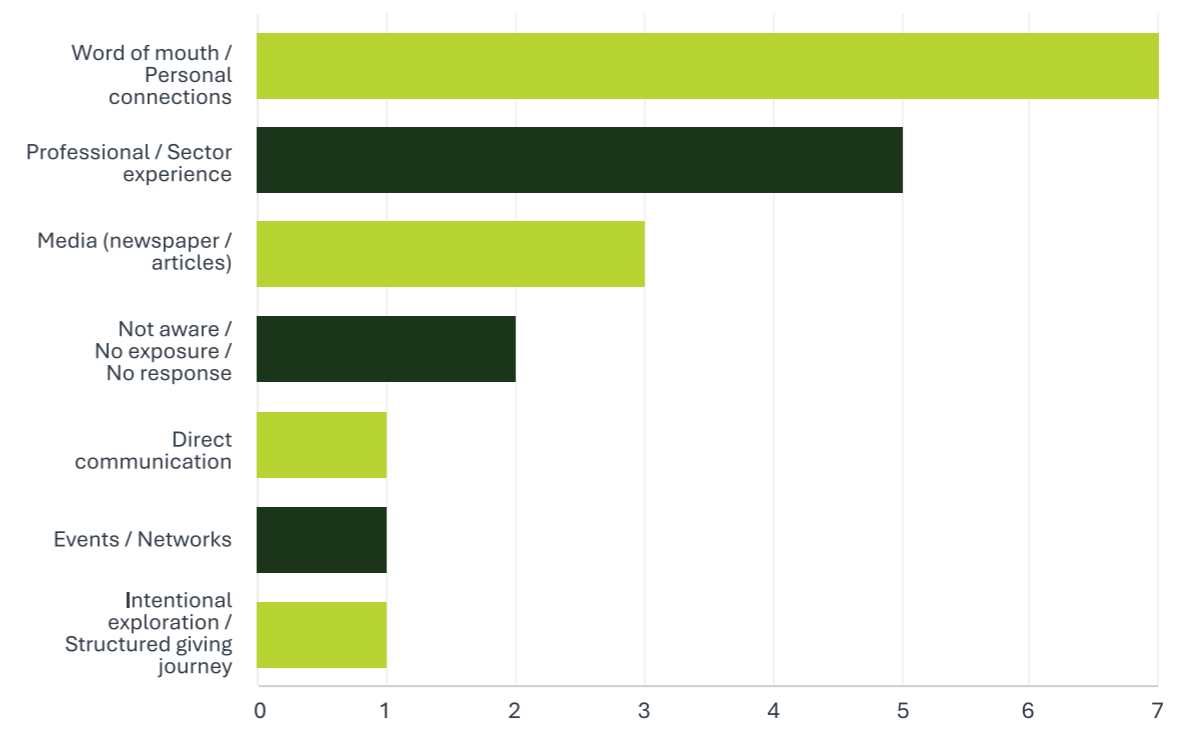
Question 2. Which generation do you fall into?



Question 3. Which one best describes your giving status. I typically...

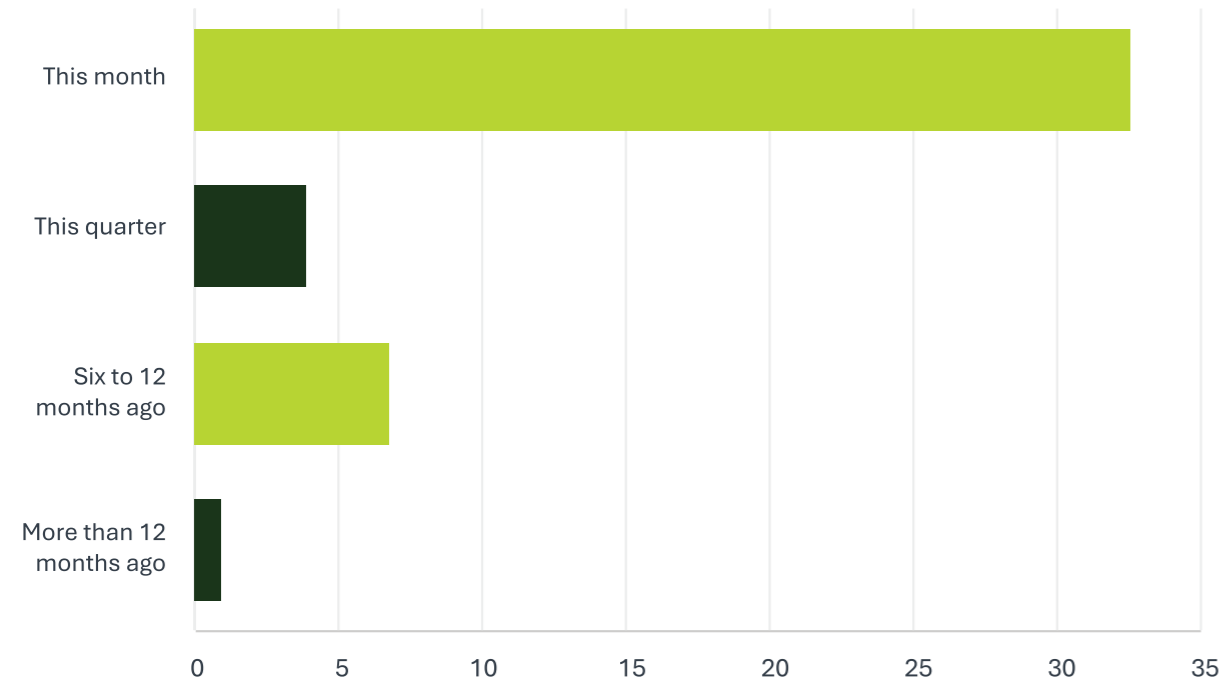


Question 4. How did you first hear about structured giving or a giving circle?

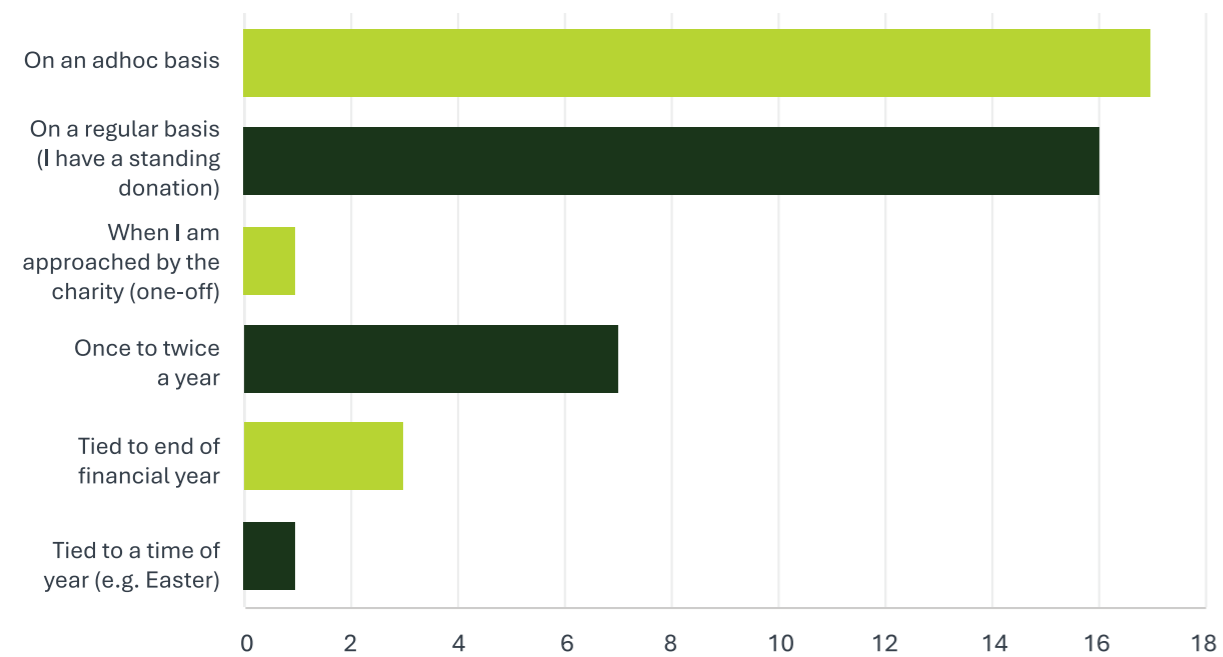


SA Philanthropy Network survey responses

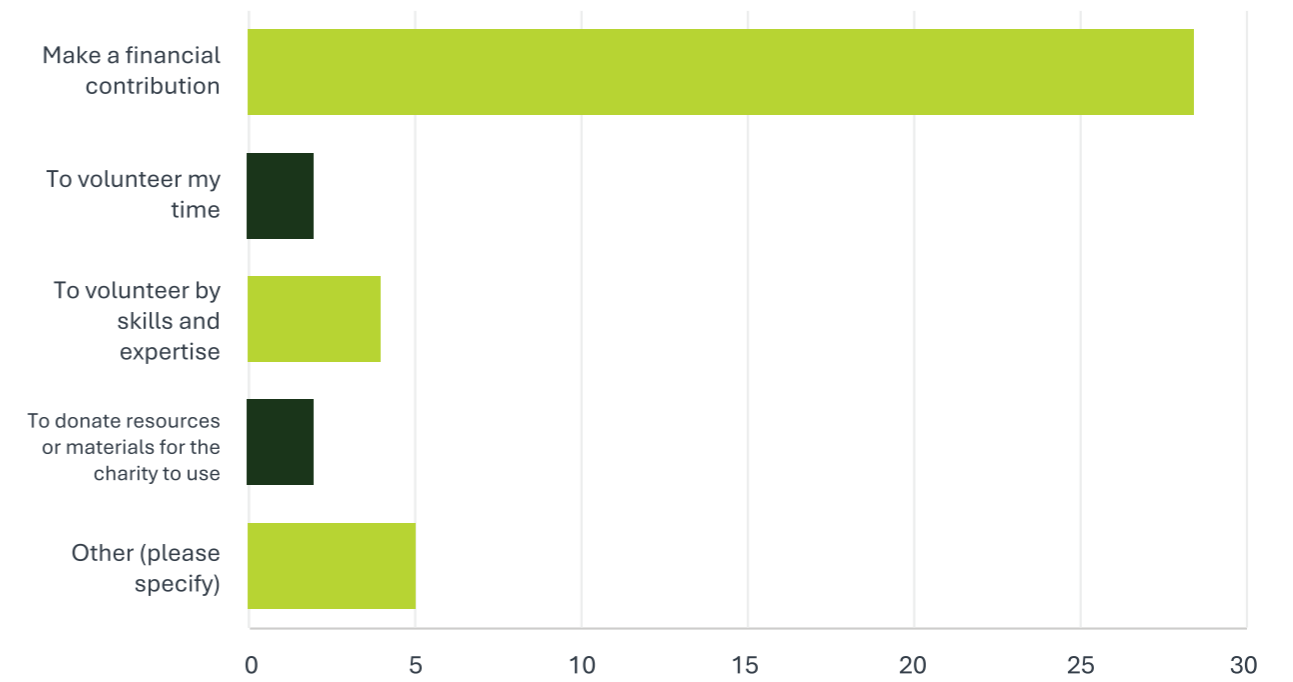
Question 5. When was the last time you donated?



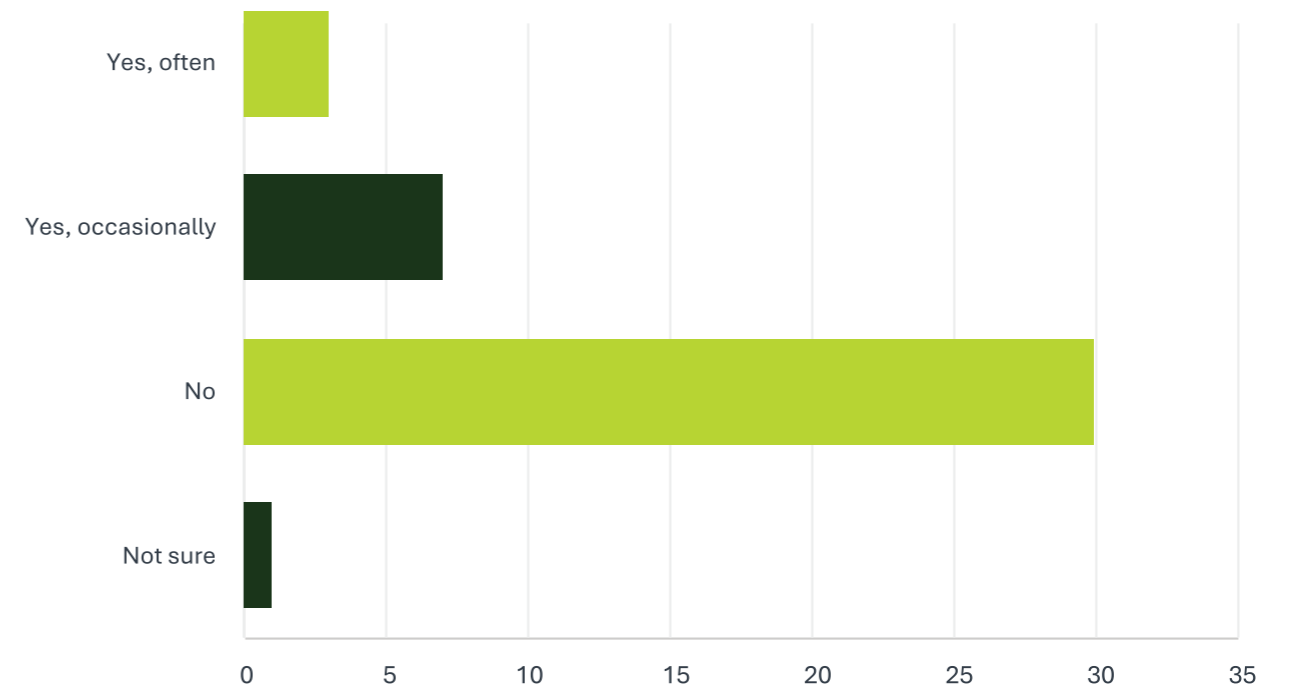
Question 6. Over the next 2-3 years, how often would you expect to donate money to your charity of choice?



Question 7. What was your preferred way to donate to your charity or not-for-profit of choice?

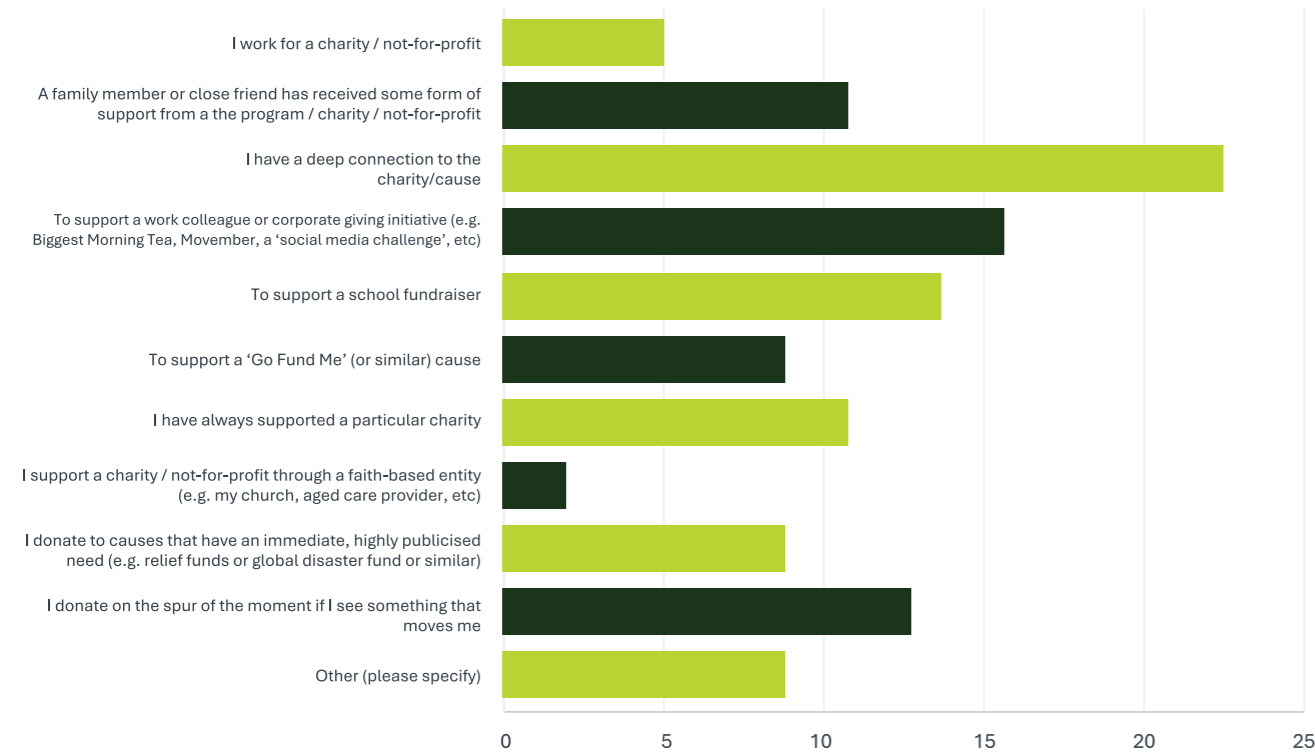


Question 8. Have you ever been encouraged to give back through philanthropy by a professional adviser? e.g. your financial adviser, lawyer, or accountant

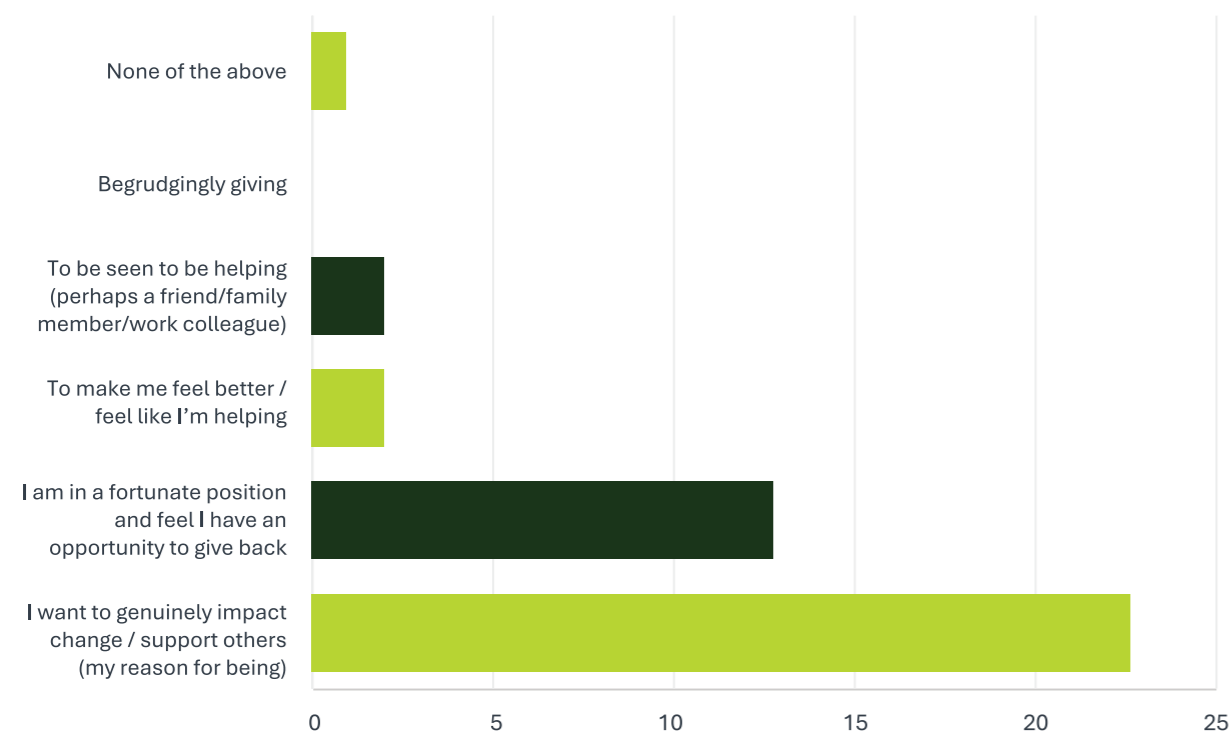


SA Philanthropy Network survey responses

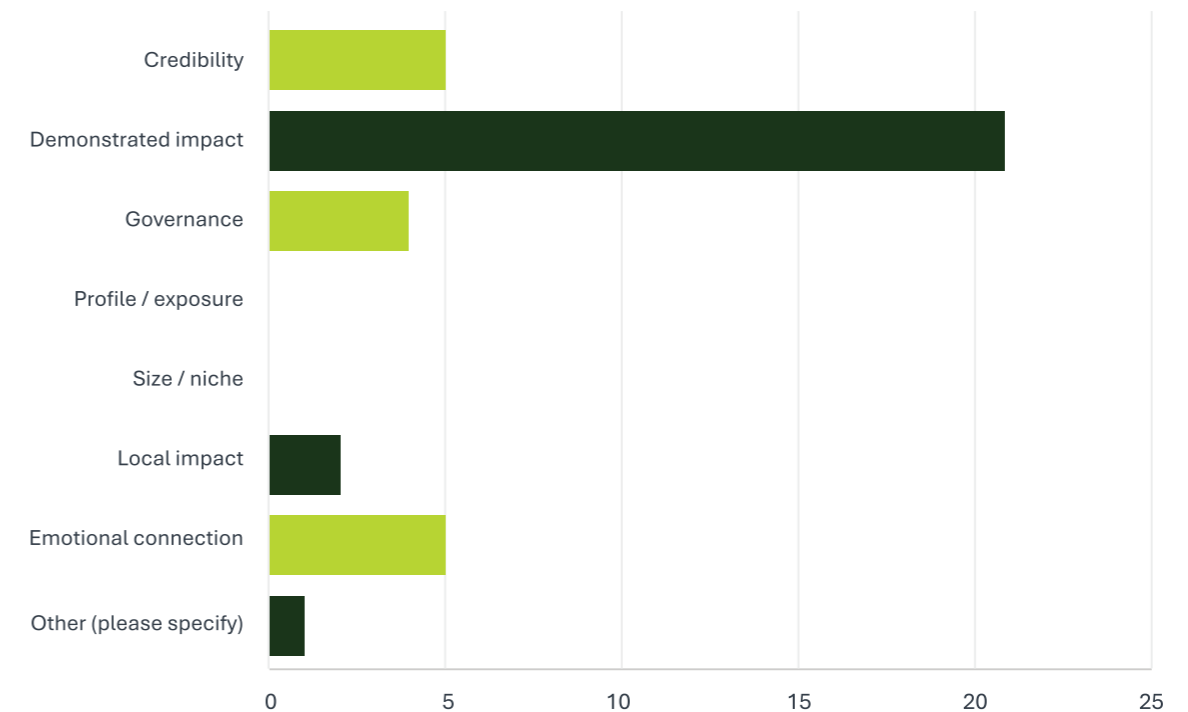
Question 9. What prompts you to donate money, time or resources to a charity? (Select as many that apply)



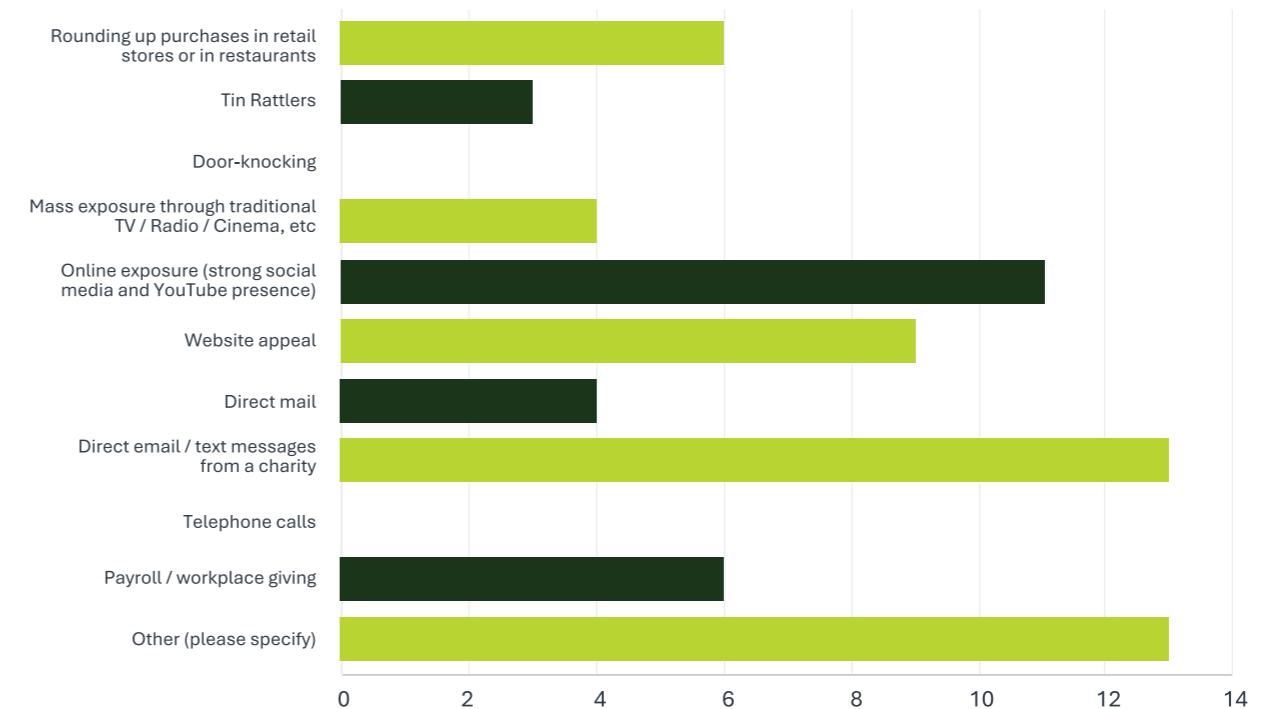
Question 10. Thinking about the times you've most recently donated money to a cause, what was the reason for donating? (Be as honest as you can be)



Question 11. What is the most important thing a charity needs to do / demonstrate for you to donate to the cause?



Question 12. How would you like to hear about charity initiatives? Would any of the following activities encourage you to give to charity / not-for-profit? (Select as many that apply)





Associated insights on generational influence

Many studies of philanthropic behaviour report that family conversations and peer norms help shape how people think about charity - including how older adults approach giving. Research notes that charitable impulses often start within families, and younger generations frequently cite family examples as key influences on their own giving. While this is more commonly documented for Millennials and Gen Z, it implies that inter-generational influence does occur around giving values and practices.

Younger family members who are vocal about causes, and who model advocacy or participation, can help cue older generations to reflect on their own giving practices - including legacy intentions.

Younger generations, especially Millennials and Gen Z, rely heavily on technology and social validation in how they give and share (social media, peer networks, online fundraising).

This technological framing doesn't just create new giving channels it can shape expectations:

- Baby Boomers increasingly use digital communication like email and social if they see peers and younger family using it.
- Seeing younger relatives champion causes online or through community engagement can cue Baby Boomers to use these channels themselves or rethink how they participate.

This dynamic shows indirect influence - not necessarily younger generations telling older ones what to do, but setting norms and platforms through which older donors learn and give.



The role of wealth advisors and other professionals

Interestingly, in our own SA Philanthropy Network survey respondents suggested little-to-no influence from professional advisors. This flies in the face of international research which points to:

- Younger adults increasingly seeking financial conversations about giving and legacy earlier in life - sometimes prompting older generations to think differently about charitable bequests.
- Professional advisers (financial planners, wealth managers, estate lawyers) increasingly facilitating inter-generational philanthropy discussions, where younger family members' values and interests are explicitly included in legacy planning.

In addition, younger donors' adoption of tools and digital giving platforms, and recurring giving models is increasingly influencing how charities market planned giving and legacy vehicles, making them more accessible to Baby Boomers in the process.

Organisations targeting planned giving now often incorporate cross-generational engagement strategies, acknowledging older donors' expectations and choices are shaped by:

- Younger family preferences
- Shared financial planning
- Digital donor experiences

Sentiment analysis

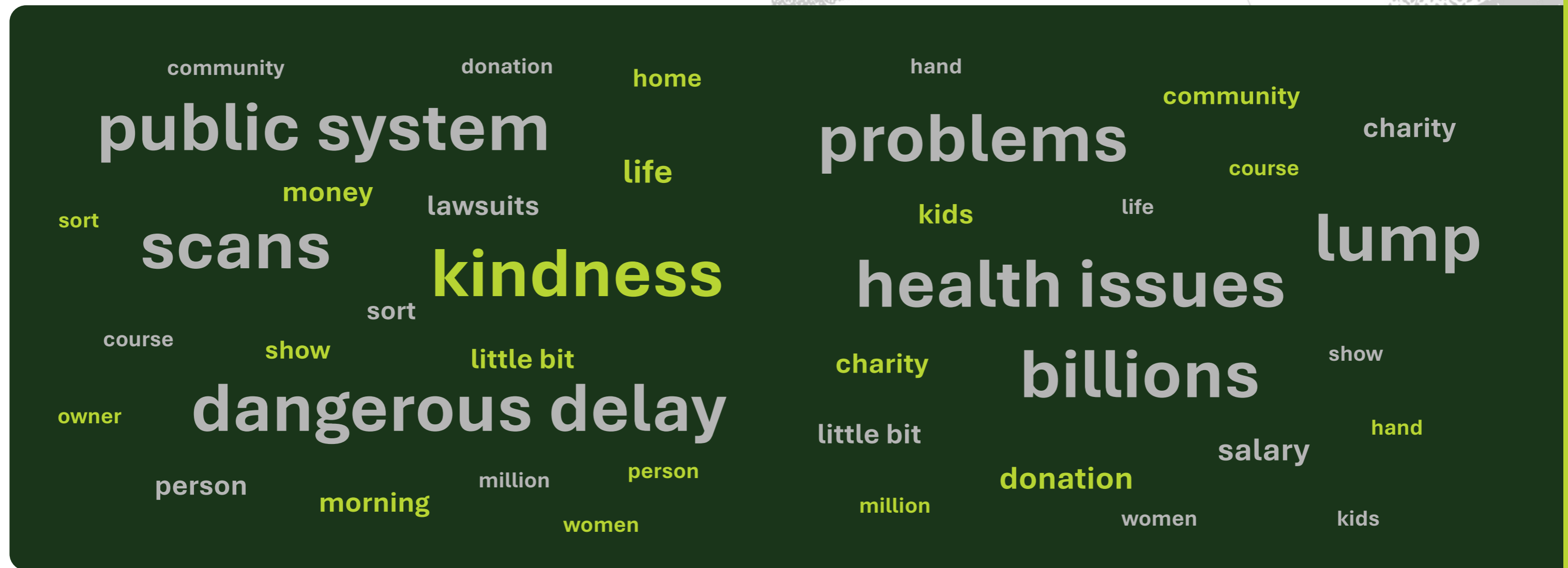
Our team established a sentiment scan that assessed more than 3,000 public references relating to donation patterns in the South Australian market.

The assessment was conducted from open-source platforms such as social media, news reports, blogs, forums and websites during the past 12 months to April 2026.

Importantly, we should acknowledge the backdrop of cost-of-living pressures that have seemingly influenced commentators' ability and appetite to donate money to charity.

Also influencing broader commentary is the political tension felt across the country with significant debate occurring about 'supporting our own' before sending taxpayer money overseas.

Common conversation drivers also point to 'charity starting at home' especially as personal health issues become prevalent in older generations, with commentators noting their ability to volunteer or donate money is limited.



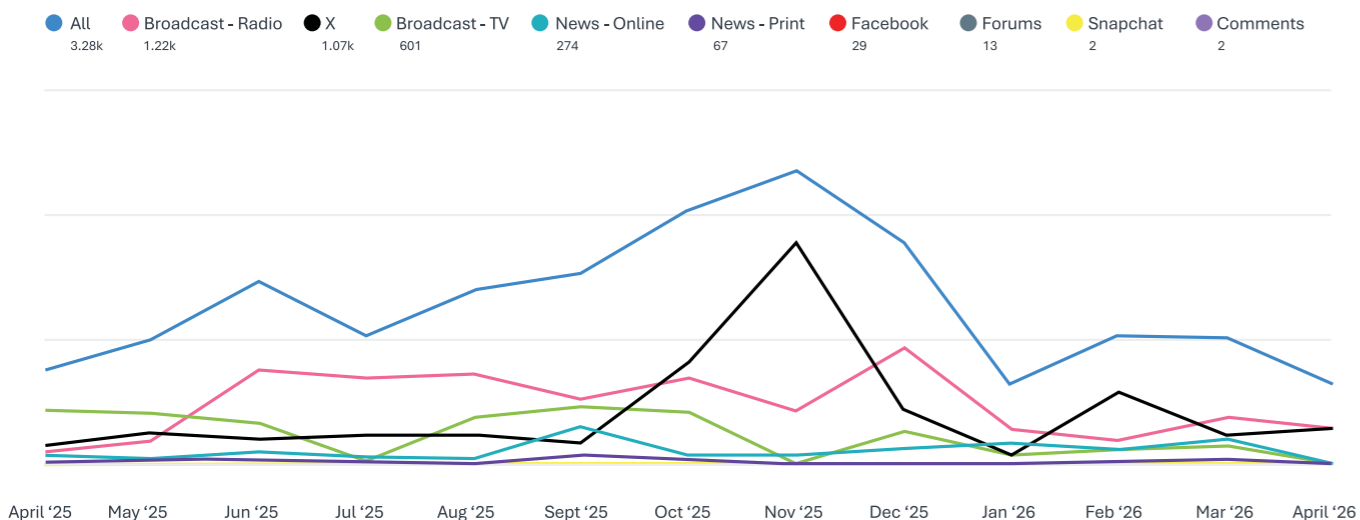
● Positive ● Negative

Sentiment analysis cont.

The graphic below shows the volume of commentary relating to the propensity to donate money which points to two peaks that likely relate to end of financial year (June) and festive / Christmas appeals through to November but dropping sharply in December itself.



Also of interest, is the breakdown of where we see those conversations playing out with overall volume focused on radio consistently throughout the year with mainstream media including print and TV still featuring prominently – pointing to an industry that still warrants time and engagement, especially reaching Gen Y and older.



One news article, an op-ed piece by Unicef Australia Chair Ann Sherry in The Australian from 20 March 2026 points to the need to, “reach the right people with the right message at the right time.” In particular, Ms Sherry talks to the approximate 65% of Australia’s intergenerational wealth transfer inherited by women. She goes on to say:



“Today’s philanthropic structures were not deliberately designed for today’s economic reality, where women are increasingly business owners, investors and inheritors of significant wealth. The opportunity before us is not to persuade women to give more. It is to modernise the system around them so it better reflects how they choose to engage.”

The process to undertake sentiment scans allows us to also efficiently review other existing research in the area of intergenerational wealth.

A national survey by Australian Will platform – Safewill, noted that “more than one in three Australian parents have considered leaving part or all of their estate to charity instead of their children.”

The company’s CEO, Adam Lubofsky is quoted as saying, “Attitudes towards inheritance are becoming more values-driven. For decades, it has been assumed children inherit automatically. What we’re now seeing is parents thinking more carefully about the kind of impact they want their estate to have, whether that’s supporting their children, backing a cause they care about, or a combination of the two.”

“Current sentiment”

- Against a backdrop of economic uncertainty, the adage “charity starts at home” is felt across public commentary.
- Gen X and Baby Boomers, who are at the coal face in dealing with the inheritance from the Silent Generation are potentially already well equipped financially and are driven to make a mark in society.
- The combination of personal and business wealth offers the potential to look after family while also supporting community.
- The spread of traditional, social and even gaming/entertainment media provides both opportunity and a resourcing and content skills challenge for many organisations.

Engaging generations

In the words of the classic 1965 song by The Who, 'This is my generation baby' - and if charities and not-for-profit organisations want to resonate with a range of influential stakeholders when it comes to the intergenerational wealth transfer then they need to understand the nuances and motives for engaging with brands.

Gen Alpha

Gen Alpha's media environment is highly personalised, immersive, and fast-moving. Content is filtered through algorithms from a very young age, meaning attention is selective and highly conditioned.

This generation is accustomed to touch-based interfaces, voice assistants, short-form video, and real-time feedback. As a result, they expect communication to be intuitive, responsive, and participatory rather than one-directional.

Importantly, while Gen Alpha are "digital natives," they are not passive consumers. They actively remix, respond to, and co-create content. Communication strategies that treat them purely as an audience, rather than as collaborators, are unlikely to succeed.



Ideal communication methods

1 Interactive and participatory communication

Gen Alpha engages best when communication is two-way or multi-directional. Polls, quizzes, games, augmented reality (AR) filters, choose-your-own-path narratives, and interactive storytelling all outperform static messaging. Interactivity makes information feel relevant and personalised.

2 Visual-first and multisensory approaches

Text-heavy communication is less effective for Gen Alpha, particularly in early adolescence. Visual storytelling, through video, animation, emojis, symbols, and motion graphics, is central to comprehension and engagement. Sound design, haptics, and spatial interfaces (such as AR and VR) further enhance message retention.

3 Short, modular content

Gen Alpha processes information in small, digestible units. Content should be modular, allowing ideas to be consumed independently while still forming part of a broader narrative. This does not mean shallow content, but rather layered content that rewards deeper exploration for those who choose it.

4 Play-based and experiential learning

Gamification is not a gimmick for Gen Alpha; it is a core cognitive framework. Points, levels, avatars, challenges, and progression systems can be powerful communication tools when aligned with meaningful outcomes. Play fosters experimentation, reduces fear of failure, and sustains attention.

Gen X and Gen Y

Generation X is often characterised as independent, pragmatic, and sceptical of authority. They grew up during periods of economic restructuring, rising divorce rates, and shifting workplace norms. As a result, they tend to value self-reliance, evidence-based decision-making, and authenticity. They are comfortable with technology but do not see it as central to their identity.

Generation Y, by contrast, entered adulthood in a period of rapid globalisation, social media expansion, and economic volatility. They experienced the Global Financial Crisis, rising housing costs, and changing employment structures. Millennials are generally more collaborative, socially conscious, and purpose-driven. They are highly digitally fluent and expect seamless, integrated communication across platforms.



Ideal communication methods

Value-oriented and outcome focused communication 1

Both Gen X and Gen Y respond strongly to communication that clearly explains “what’s in it for me” and “why this matters.” Abstract messaging or vague promises are less effective than content that demonstrates tangible benefits, real-world outcomes, and practical relevance.

For Gen X, this often means highlighting reliability, long-term value, and risk reduction. For Gen Y, it means showing impact, social value, and personal alignment with broader goals.

Evidence-based storytelling 2

These generations prefer communication grounded in facts, data, and real examples. However, raw statistics alone are insufficient. Effective messaging combines evidence with narrative—using case studies, testimonials, and real-world scenarios to make information meaningful and memorable.

Efficient, on-demand access 3

Both cohorts expect communication to respect their time. Information should be easy to find, well-organised, and accessible when needed. Long, unfocused messages are likely to be ignored. Clear headings, summaries, and layered content structures improve engagement.

Two-way engagement mechanisms 4

Gen X and Gen Y value being heard. Surveys, feedback loops, consultations, and interactive platforms foster a sense of participation and ownership. Communication should create opportunities for dialogue rather than relying solely on broadcast models.

Baby Boomers

Baby Boomers grew up in a period characterised by post-war economic expansion, strong institutional authority, and relatively stable career pathways. Many experienced long-term employment, unionised workplaces, and predictable retirement structures. These conditions fostered a worldview centred on loyalty, responsibility, and incremental progress.

They also witnessed major social transformations, including civil rights movements, the expansion of higher education, and shifts in gender roles. As a result, Boomers often combine traditional values with progressive social ideals. They tend to respect expertise and experience, while remaining open to evidence-based change.

Importantly, Boomers are not technologically disengaged. Many actively use smartphones, social media, and online banking. However, they approach digital tools pragmatically rather than as identity markers. Technology is valued when it improves efficiency or connection, and rejected when it feels confusing, intrusive, or unreliable.



Ideal communication methods

Relationship-based engagement 1

Baby Boomers respond strongly to communication that prioritises long-term relationships rather than short-term transactions. They prefer ongoing engagement built through regular updates, personal contact, and consistent follow-through. Trust develops over time and is closely linked to perceived organisational integrity.

For charities, membership bodies, and public institutions, this means investing in stewardship programs, dedicated relationship managers, and structured follow-up processes.

Information-rich and contextual communication 2

Boomers tend to prefer comprehensive information presented in logical formats. They value background, explanation, and historical context. Rather than short promotional messages, they respond better to well-developed narratives that explain why an issue exists, how it evolved, and what solutions are proposed.

Personalised and direct outreach 3

Direct communication remains highly effective with this cohort. Personal letters, phone calls, tailored emails, and small-group briefings convey respect and recognition. These approaches signal that the individual is valued, not merely part of a database.

Personalisation should reflect genuine understanding rather than superficial data-driven targeting.

Stewardship and feedback mechanisms 4

Boomers want to see the results of their engagement. Whether through donations, volunteering, or advocacy, they expect feedback on outcomes. Regular impact reports, progress updates, and invitations to review or advise reinforce their sense of contribution and ownership.

Case studies

The following case studies are regarded within industry as instances of charities or not-for-profits that have tackled the issue of multi-generation engagement head-on and are experiencing positive results.

This report's authors do not have direct engagement with the named organisations and do not claim to have contributed to the projects referenced.

Sydney Children's Hospital Foundation

Dual-track engagement

Generations engaged: Millennials /Gen X alongside Baby Boomers

Sydney Children's Hospital Foundation runs parallel but connected strategies:

- Younger supporters engage through peer driven fundraising, digital storytelling and event-based giving.
- Older supporters are approached through stewardship, impact reporting and legacy conversations.

The connective tissue is storytelling anchored in family experience. Campaigns highlight children, parents and grandparents - acknowledging that healthcare giving is inherently intergenerational. This framing makes it natural for younger adults to advocate and fundraise, while guiding older donors toward longer term philanthropic decisions.

Key lesson:

Different campaign mechanics can support the same longterm funding objective.



St Vincent de Paul Society Australia

Family-centred legacy narratives

Generations engaged: Baby Boomers, Gen X, Millennials

St Vincent de Paul Australia increasingly frames legacy giving within broader family narratives - emphasising compassion, dignity and local impact rather than purely financial outcomes. Younger generations are engaged through volunteering, advocacy and community awareness, while older generations encounter legacy conversations through parish, newsletter and relationship based channels.

This enables bequests to be positioned not as a private financial act, but as a continuation of shared family values, often encouraged or affirmed by younger relatives.

Key lesson:

Legacy giving grows when it is socially affirmed, not isolated.



National Trust (UK)

One brand, generation-adapted engagement

Generations engaged: Gen Alpha → Silent Generation

The National Trust has successfully maintained relevance across generations by allowing each cohort to interact in ways that feel natural:

- Children and young people engage through experiences, education and digital interaction.
- Millennials and Gen X connect through memberships, volunteering and environmental values.

- Older supporters participate through memberships, philanthropy and bequests.

Importantly, the messaging remains consistent: “for everyone, for ever.” This longterm framing makes legacy giving feel like a natural extension of lifelong participation.

Key lesson:

A longterm mission can unify very different forms of engagement.



Oxfam Australia

Family, values and participation across generations

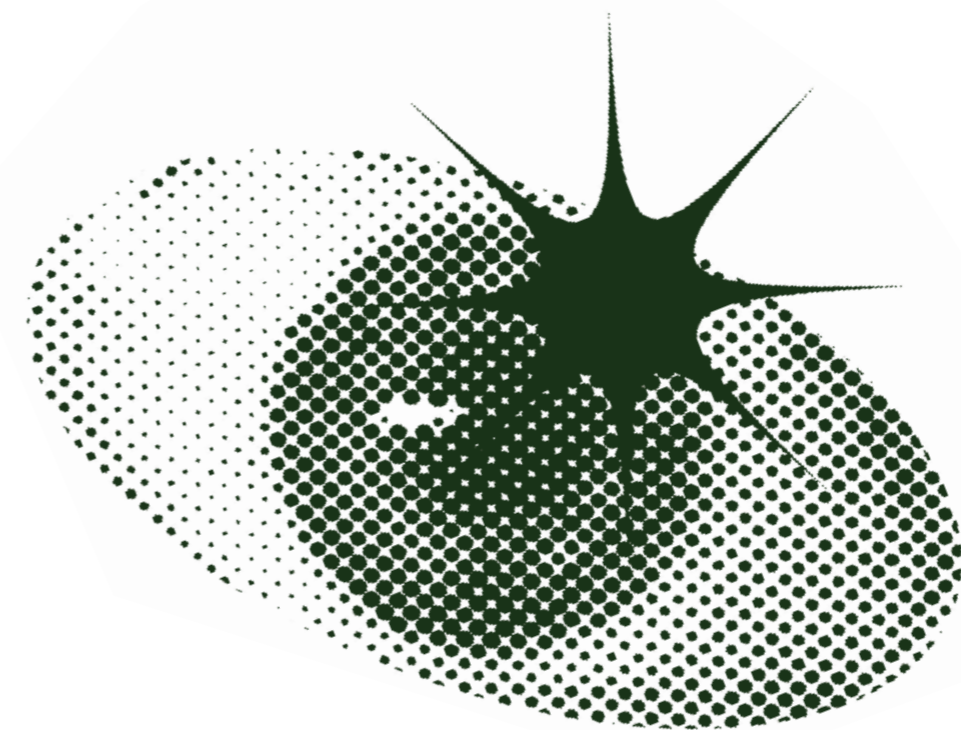
Generations engaged: Gen Alpha → Baby Boomers

Oxfam Australia has deliberately designed its engagement pathways to allow different generations to connect through different roles within the same cause ecosystem. Older donors are more likely to engage through regular giving, appeals and bequests, while younger audiences encounter Oxfam first through school programs, youth activism, social campaigns, and digital storytelling.

Crucially, Oxfam connects these experiences through shared values and clear mission language, allowing families to discuss the organisation across generations. A grandparent’s longterm support is reinforced, not replaced, by a child’s involvement in school or community action. Over time, this creates continuity rather than fragmentation in donor relationships.

Key lesson:

One cause, multiple entry points - but a single, coherent narrative.



Setting yourself up for success

This paper brings a range of research and inputs together to allow you to make an informed decision that best suits your organisation's immediate and mid-term needs.

As intergenerational wealth transfer accelerates, you may not need to reinvent your marketing or fundraising approach but you may need to become more deliberate.

The following practical actions are designed to help organisations better understand who they currently engage, and how they might evolve communication and storytelling to remain relevant across generations.

1. Build a clear picture of who you are really engaging today

Many charities assume they know their audience, but few have confirmed this with evidence. Organisations should begin by auditing existing data sources - donor databases, CRM records, event registrations, email lists and website analytics, to understand the age profile and giving behaviour of their current supporters.

Even imperfect data can reveal whether younger audiences are emerging, which segments are ageing, and where engagement gaps may exist. This baseline insight is essential before investing in any new engagement strategy.

2. Build a clear picture of who you are really engaging today

Website and digital analytics provide a low cost way to understand audience demographics and content preferences. Charities should review age profiles, device usage, content dwell time and traffic sources to identify how different generations currently interact with their brand.

For example, mobile heavy traffic may indicate growing Gen X or Millennial engagement, while strong desktop and email interaction often correlates with older donors. These insights can inform channel mix and content formats without requiring major new investment.

3. Audit communication channels for relevance, not just reach

Most charities use a wide mix of channels, but fewer consider whether each channel is still appropriate for the audiences they want to reach. Organisations should review newsletters, appeals, social platforms, events and direct mail through a generational lens - asking which audiences each channel genuinely serves, and which it does not.

This process often reveals opportunities to simplify activity, repurpose content more strategically, or refine messaging for specific cohorts rather than relying on one-size-fits-all campaigns.

4. Refresh storytelling to reflect values across generations

The research suggests that while motivations differ by generation, shared values such as impact, trust, purpose and community remain consistent. Charities should review their core storytelling to ensure it communicates why the work matters, not just what the organisation does.

Older audiences respond to stewardship, continuity and legacy, while younger audiences are more likely to engage with stories of participation, agency and visible outcomes. Adaptation does not require creating new stories for every audience, but rather tailoring emphasis and framing.

5. Design engagement pathways that allow for progression over time

Effective intergenerational engagement recognises that supporters move through different stages of involvement across their lives. Charities should consider how entry level actions (digital engagement, volunteering, peer-to-peer fundraising) connect to deeper relationships (regular giving, major support, legacy consideration).

Mapping these pathways helps organisations remain relevant to supporters as their capacity, confidence and priorities change, rather than losing them at life transition points.

6. Treat legacy conversations as a brand issue, not just a fundraising one

Finally, charities should view legacy giving as an outcome of longterm trust and alignment, not a standalone ask. Ensuring that brand values, impact reporting, governance transparency and communication tone are consistent across all touchpoints makes eventual legacy discussions feel natural rather than confronting.

In practice, this means legacy giving should be supported quietly and consistently across marketing, communications and engagement activities, not limited to occasional campaigns.



Information sources

A wide range of third-party reports, research and data was assessed in developing this report. We acknowledge the efforts to produce and share, in an open-source environment, the research and material especially from the following organisations:

- SA Philanthropy Network
- South Australian State Government
- Australian Federal Government
 - Australian Charities and Not-for-profits Commission
 - Australian Communications and Media Authority
 - ABS
- Philanthropy Australia
- The Funding Network
- Australian Communities Foundation
- Volunteering SA&NT
- Nielsen
- Meltwater

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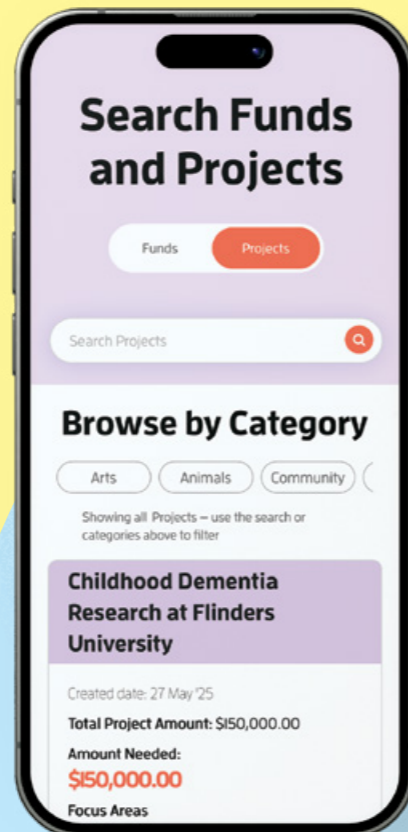
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