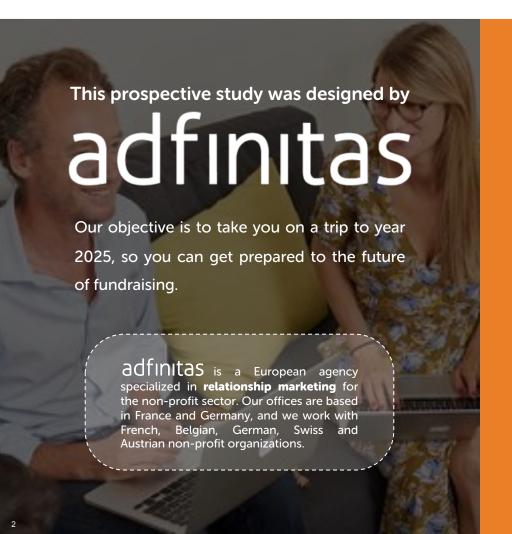
TOMORROW STARTS TODAY

Let's get started with the Fundraising of Tomorrow



Preface.

2 things to know before you start reading.



This document was originally designed for French readers.

It has been translated and updated for a larger audience, but there are still some cases and numbers related to the French market. Remember that French behaviors are representative of major trends going on in Europe & USA, and please consider the French examples mainly as a way to illustrate our predictions.



Fundraising in 2021.

Codes that speak to all of us.



A means of giving that relies on cheques and cash.

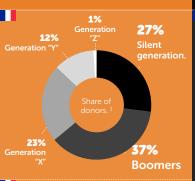
BUDGET DISTRIBUTION

Communication is still quite traditional.

ENGAGEMENT LEVERS

Fundraising motivated by tax exemption. COMMUNICATION TIMING

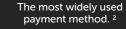
A seasonal generosity.

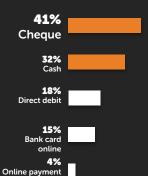


39% of donors are Upper middle class 37% are inactive

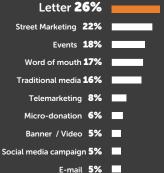
The average annual donation of the Upper middle class is €348.

The average annual donation
of those 65 years and older is €294





Solicitations that convert. ²



The consequences of the 2018 fiscal shock.

4.2%

Fundraising decreased by

between 2017 and 2018 $^{\rm 4}$

28%

of donors who gave less in 2019 report that the tax benefit of donations became less clear to them. ³

71%

of online donations are made in the last quarter. 4



of annual donations are collected in the last quarter. 4

20% in the month of December. 4





service (e.g. Paypal)



Personality 4%

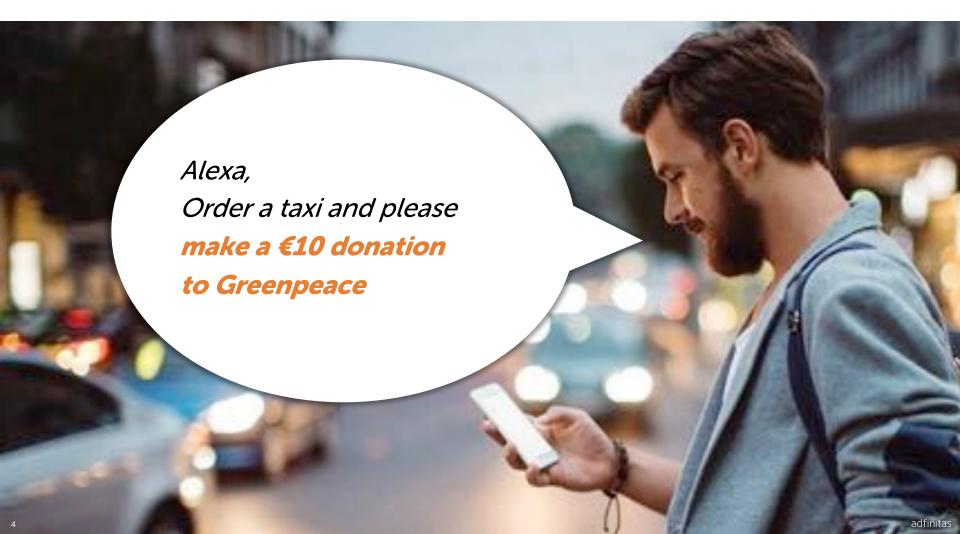
Association magazine 4%





Welcome to the year **2025**.

A world in which fundraising will have changed considerably.



In 2025....

The generational landscape will have changed.

We'll be living in a cashless society.

Artificial intelligence will be part of our daily life.

Brands and consumers will be **engaged**.

We will have entered the era of voice command.

Engagement will be through gaming.

"Local" will take on greater importance.

Cryptocurrencies will be common.

Mobilization and fundraising on **social media** will be part of the norm.

We'll all be connected and mobile.

Amateur content will finally be of good quality.

The **immersive experience** will be a must.

Interest and action will be ephemeral.

We'll be able to make the most of new contact points.

How will these changes affect...

... people's engagement?

... how we communicate?

... our way of **fundraising?**

... our working methods?

Our methodology.

This is how the presentation is structured

L 2 3

A major **change**.

Each section begins with a prediction of a significant change now in progress that will transform how we raise funds in 2025.

Supporting evidence.

Each prediction is followed by a series of reasons for believing it (current and future technological innovations / new uses and behaviours of society / evolutions of the commercial world / cases of fundraising actors).



Impact on the **Fundraising mix***.

Each prediction has various impacts across the spectrum of tomorrow's fundraising marketing (choice of media / opportunities to call for donations / brand arguments / payment methods / internal processes...).



adfinitas and the second of th





Even if they live longer

than before thanks to

they'll be 79 or older in

born between

1925 and 1945 1

progress,

medical

2025.

Gradual Boomers will be young retirees.

They'll be between 61 and 79 years old, and the vast majority of them will stop working.

born between 1945 and 1965 ¹

The "Xs" will be the new leaders.

The reasons for believing it.

They'll be between 44 and 60 years old, and will occupy the highest paid positions in society.

born between 1965 and 1980 ¹

The "Ys"
will no longer be
young people.

They'll be between 25 and 45 years old, and most of them will already be parents.

born between 1980 to 2000 ¹

The "Zs" will start working.

They'll be 25 years old and younger, and some will start earning money.

born between 2000 and 2010 ¹

adfınıtas



The "silent generation" will leave, while taking pessimism with it.

They're elderly, ready to leave a legacy, but they're no longer the population on which traditional fundraising relies.

The gradual disappearance of this generation, which is particularly sensitive to visible demonstrations of suffering (being the last one alive to have witnessed the symptoms of war), invites us to imagine other levers for the new generations of donors.



Boomers will have time to spare.

Not wishing to remain inactive in retirement, they become prime targets for volunteering.

Moreover, this generation of "Baby Boomers", named after a record wave of births, will logically lead to a record wave of deaths.⁵ It will therefore be strategic to target this ageing population for future bequests (bearing in mind that bequests and other gifts represent on average 25% of the funds collected, and up to 77% for some).



The "Xs" will be the new priority target.

They have the highest income, are comfortable with digital technology, and thus represent the highest fundraising potential.

1

The impact on fundraising.



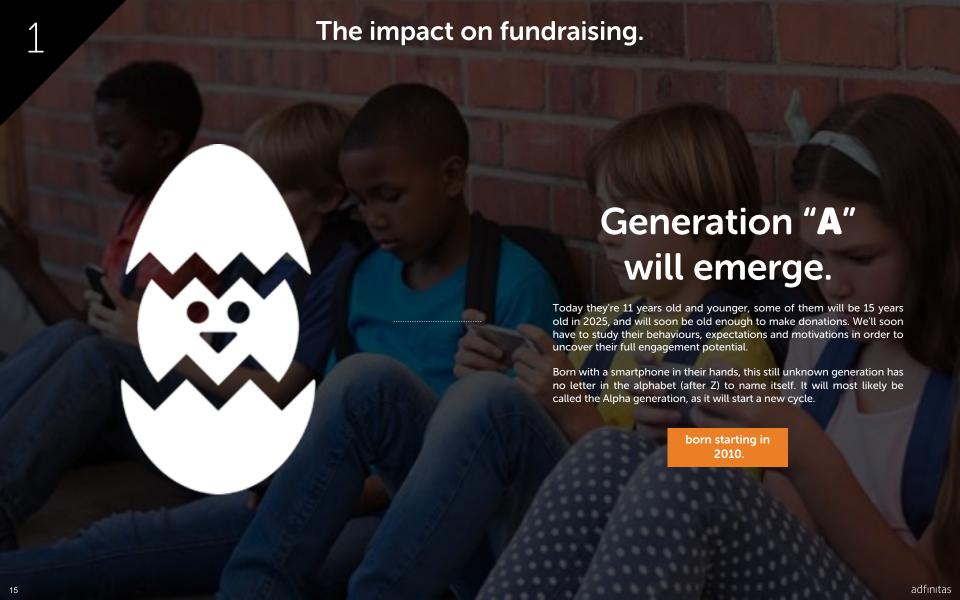
The "Ys" should no longer be referred to as "young people".

Most of them are parents, have responsibilities, and a larger budget than in 2021.

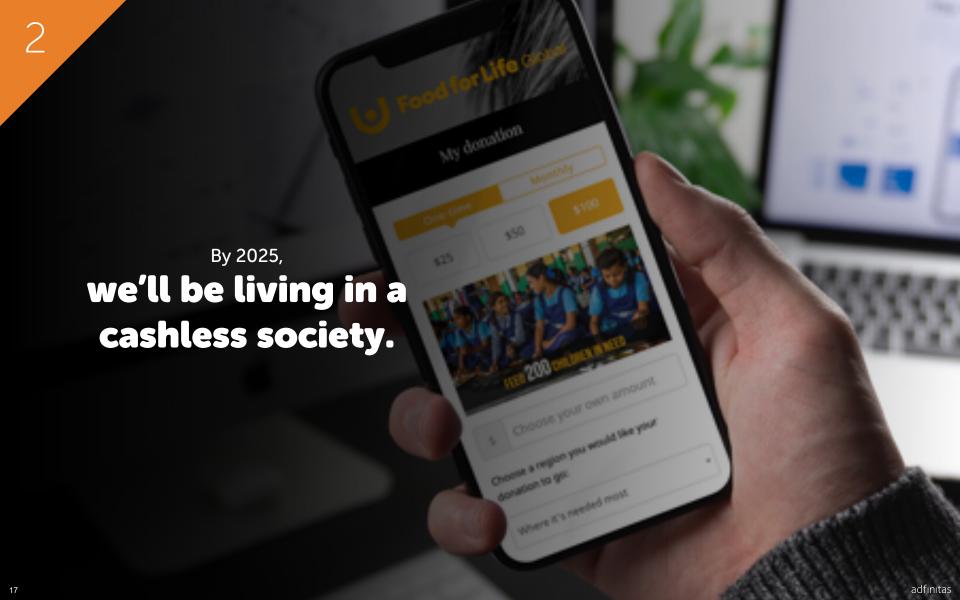


The "Zs" will be old enough to make their first donation.

They start working and earning money.







The reasons for believing it.

INNOVATION

Many dematerialized payment solutions already exist.







SOCIETY

Cash is gradually dying out, and cheques are disappearing.



Contactless payment is widespread. For 57% of the French, the smartphone will be the primary payment method in 2025.

Young people settle their accounts through apps, and no longer in cash. 10

In UK, 6,000 ATMs have been shut down in 2020 (16+ per day). ¹¹

In Europe checks represented only 2% of total transactions in 2020.

MERCHANT

Physical points of sale are opening up to new forms of payment.



FUNDRAISING

Dematerialized donations are becoming easier.

Amsterdam's homeless accept contactless donations from



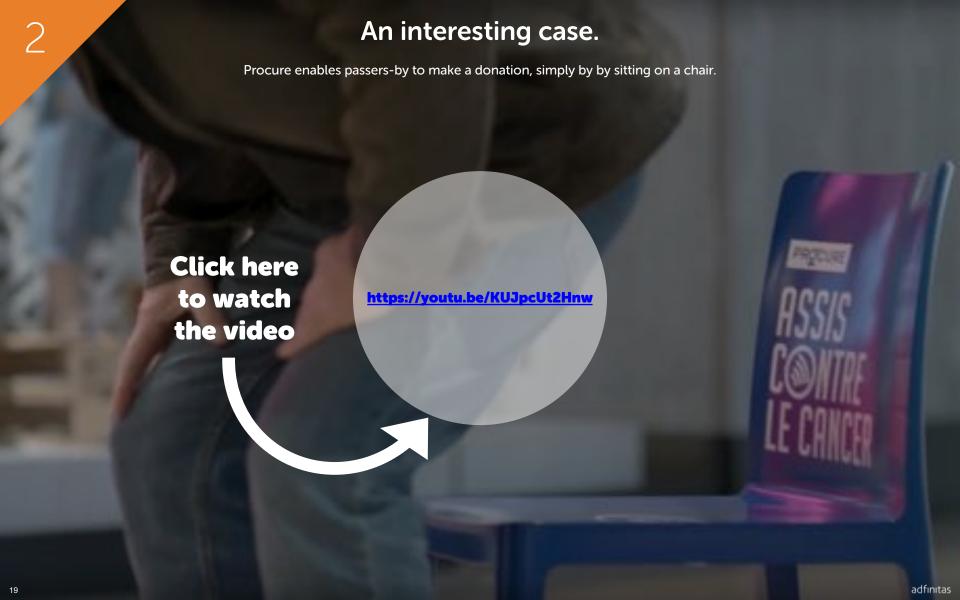
An initiative called Helping Heart. ¹⁵

The Tencent Charity Foundation ¹⁶ raised 325 million euros in 2019.

Apple Pay is used by The Salvation Army
Street Fundraisers. 17

In London, 92 terminals for contactless donations (£3) have been installed (Underground / Shops / Galleries). 18

18



A digital acceleration due to COVID-19

The invitation to respect barrier gestures has provided a boost to dematerialized payment methods and introduced traditional targets to digital technology.

The contactless payment limit has been raised to €50 in France and £100 in UK.

An additional 110 million contactless payment cards were issued worldwide in 2020. 19

There is no payment limit with Apple Pay (you can buy a car with it!)

All merchants are equipped.

Any baker / waffle seller now accepts contactless payment from €1, and they even recommend it via signs, for sanitary and hygienic reasons, to the detriment of cash. ²⁰

Carrefour accepts payments by smartphone.

adfinitas has encouraged and taken note of the transformation of uses.

The experience of the months of lockdown and opening-up has led to a significant increase of the share of digital donors, to the detriment of cheques. Even senior citizens have started using it, helped by QR codes codes that are systematically placed on Print fundraising communications (people were afraid to go to the post office).

IMPACT 1

Passer-by will no longer have an excuse to say "no" in the street.

Not giving will be synonymous with an assumption of being disinterested / cheap / without means.





IMPACT 2

We'll need to ensure that all paper communication materials are connected so as to avoid missing any donation opportunities.

Place a QR Code on all Print media.

(Or other visual recognition system).

Poster / Press advert / Mailing.



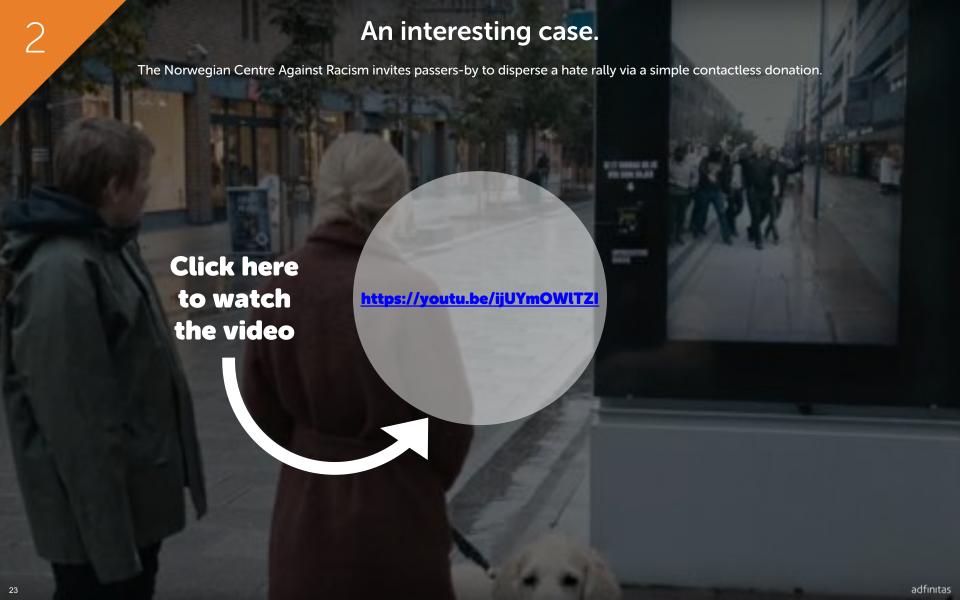
Offer donor experiences on **interactive screens**, with the possibility of **contactless** donations.

DOOH / Street Fundraising.



Some paper campaigns will no longer include a donation form

Street fundraisers will need to be equipped to collect dematerialized donations.



2

On September 20th 2021, during the Digital Fundraising Week (organised by *iR*^iser) we ask **144 fundraisers** from different european countries (& USA) the following question:

In your opinion, in 2025, will the majority of donations be digital?

(due to the progressive disappearance of cash & checks)

Here is what the survey said:

YES. 85%

NO. **15%**



artificial intelligence will be part of our daily life.

The reasons for believing it.

INNOVATION

Artificial intelligence is increasingly human.

Neon

A system for creating calculation-based virtual beings that look and behave like real humans.

Each Al has a unique physique and personality, and the ability to display emotions and intelligence ²¹



SOCIETY

Artificial intelligence is everywhere in our daily lives.



MERCHANT

Al is accepted because it specializes in boring tasks.

Media are **automating**

the writing of news stories so that their journalists can concentrate on in-depth articles.

In particular Business media, that leave the writing of daily microarticles on stock market movements to artificial intelligence.

Rather than competing with humans, they enable humans to focus on creative tasks.

Netflix automates AB testing to elect the most engaging content. ²³

Some firms use AI to create automatic company audits. ²⁴

FUNDRAISING

Chatbots are already being used to solicit donations.



adfinitas



A digital acceleration due to COVID-19

Artificial intelligence to support the end of the lockdown, and to quickly assist people facing the most distress.

COVID-AI: artificial intelligence to prevent new waves of infection. ²⁶

After everything written about the STOP-COVID application, some French people have launched another project based on self-identification (symptoms and movements).

COVID-Bot: a ChatBot for COVID-19 self-diagnosis. ²⁷

It enables you to find out if you are (or are not) infected with the virus via 23 questions..

The French State has also created dedicated ChatBots on WhatsApp and Facebook Messenger ²⁸

Google Assistant answers questions about what to do. ²⁹

IMPACT 1

Beyond helping to automate media plans or campaign assessments

Al can facilitate the work of fundraisers.

Use AI to manage the donor relationship.

Encouraging incoming calls with the help of conversational AI (chatbot or voice) to offer the donor an information service and answers to any questions in real time, for example during the year-end holidays (the strongest period for fundraising) or during crises (humanitarian / public health...).



Use AI to manage "basic" **contents.**

Content-based calls for donations, that can be written and disseminated automatically, in response to a news event. (E.g.: Natural disaster)



Use AI to detect high potential **profiles.**

Futurus Group's Gratitude To Give initiative has developed a predictive technology that gives a "gratitude score" to registered contacts (based on their history/behaviour...) to know if they have the potential (or not) to make a donation.



IMPACT 2

Al will be able to help donors choose a charity.

Work on your



To give Artificial Intelligence concrete

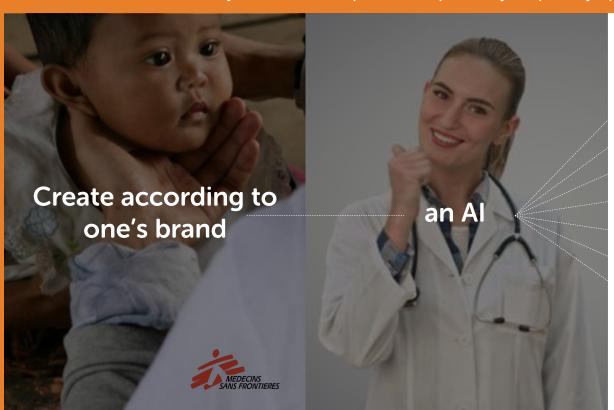
reasons to choose your association above others (topics/results), when they advise donors.



adfınıtas

IMPACT 3

If each AI is capable of having a unique personality, each charity will have to develop an AI with a personality that perfectly represents its positioning.



with:

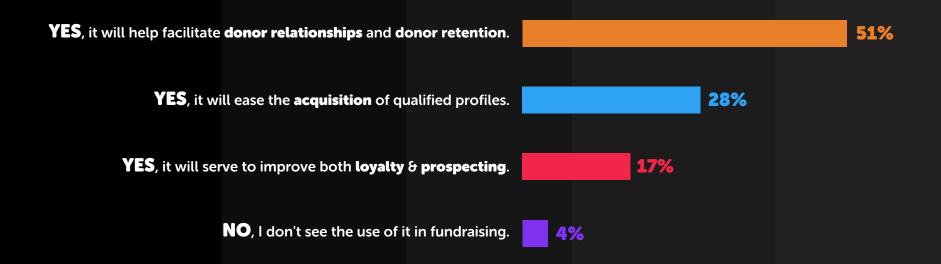
a gender
a face
a physique
a style
a tone
a voice
a way of speaking

A charity could also create several artificial intelligence models: 1 per country / 1 per expertise / 1 per type of relationship with the public...

On September 20th 2021, during the Digital Fundraising Week (organised by *iR*^iser) we ask **134 fundraisers** from different european countries (& USA) the following question:

In your opinion, in 2025, will artificial intelligence influence the way you work?

Here is what the survey said :







The reasons for believing it.

INNOVATION

The forced transparency of digital technology obliges us to behave better.



SOCIETY

Individuals get involved through donations and responsible consumption.



€320 billion in 2025 (90 in 2020). 33

MERCHANT

Companies are committed to the most high-profile causes.

101 French companies are committed to investing **€73 billions**

for the climate. 34

A decision made on August 29, 2019 during the meeting of French

COTOHO
PARS
PROTECTPARADISE.COM

333 models of electric vehicle will be available in Europe in 2025. 35

Brands are refining their logos so as to use less ink.



Coca Cola is committed to recycling as much waste as products sold. 36

FUNDRAISING

Skills patronage is in vogue.

Facilitators exist.

LinkedIn opened a volunteer marketplace where any professional can decide to offer his skills to charities as a way of volunteering.



For companies, skills patronage is 60% tax deductible. 38

SNCF (railway company) employees can devote 10 days per year to help charities. ³⁸

25,000 companies have already taken part in skills sponsorship. 38

35 adfinitas

4

A digital acceleration due to COVID-19

Consumers, brands, citizens and employees who are giving of their time, and taking the time to rethink the "the world after".



Not to mention all of the volunteers, SMEs and employees who offered their time, and gave free products and services to caregivers and the most vulnerable (e.g. food / hotel nights).

Malt launched **#ReadyToHelp**: volunteer freelancing. 42

An initiative that demonstrated that sponsoring skills while at the computer was possible.

"The world after" was the term in 2020.

Used in the vast majority of the new advertisements of the big brands of the commercial and association world, it is also used as a Hashtag on all social networks. Consumers, citizens and employees want to start from scratch, to positively transform the world.

Brands follow, and exponentially launch policies to help each other during the crisis, and new CSR commitments. 43

IMPACT 1

We'll have to respond to the challenge of skills sponsorship, a useful practice for both companies and associations.

Take advantage of skills sponsorship: a lever for commitment, growth and **recruiting**. 38

Making it possible for your employees to get involved in a fair cause (and related to your business) contributes to serving society, but not only that.

It also contributes to the well-being of employees in search of meaning, and by extension to the company's growth.

70%

of French people are ready to commit during their working time.

(85% among 18-24 year olds)

63%

of French people believe that it is legitimate for a company to make it possible for its employees to get involved.

(75% of those under 35).

65%

of French people find that skills sponsorship is an opportunity to strengthen their relationship with the company.

(for 57%, an opportunity to evolve).

71%

of French people find that skills sponsorship is an opportunity to get out of their routine.

(for 64%, an opportunity to acquire skills).

61%

of French people have better self-esteem after having taken part in a solidarity action within a company.

23%

of French people are looking for work that is useful to society in general.

IMPACT 2

All major brands will have a partner association.

Co-create

engaging campaigns.

All of the big brands are looking for raison d'être (and for a concrete expression of their commitment). This is an opportunity to partner with one of them so as to take advantage of its visibility and its production system (shared products), because citizens will also become more and more involved through their consumption



IMPACT 3

Getting involved will become the norm.



IMPACT 4

People will look for other ways to act than just giving.

Provide the means to act concretely on a **daily basis**.

Getting involved is no longer just about giving money. People want to act, share Hashtags, sign petitions, participate in learning or mobilization events, complete challenges (e.g. WWF Act For Good), become volunteers.

This is pushing us to develop new engaging ways to collect money (e.g.: donating energy by staying connected to a web page: Unicef / The Hope Page), but also simply new ways to act.

Goodeed makes it possible to donate money without spending a cent, simply by viewing ads. 40

IMPACT 5

Younger generations will be more and more involved through their actions.

Find ways to engage

young people through giving

The younger generations of are naturally aware of the different causes (e.g.: it is no longer necessary to explain to them that plastic pollutes the oceans) and are ready to give time and effort to get involved (volunteering / consumption / signing petitions).

But if these generations are acting more and more on their own (good news in itself), will they continue to give (since donations usually enable the general public to act indirectly)?

Associations will have to prove that their action enables them to do things that citizens cannot do alone.

adfinitag



The reasons for believing it.

INNOVATION

The market for for voice assistants is already competitive ⁴⁴.



400 million devices

Microsoft Cortana.



500 million devices

Apple Homepod Siri.



1 billion devices

Google Assistant

8 billion virtual voice assistants by 2023

SOCIETY

"Ys" in the Upper middle class are ready for voice command.

Payment

by voice command is being adopted for small purchases⁴⁵.

Around €10 or less.

In USA 35 million consumers are expected to shop using a smart speaker in 2021.

In USA, 70% of consumers already prefer to conduct queries by voice instead of taping.

- 60% of the owners of personal voice assistants could see themselves
- 69% of users of voice-activated speakers are 25-49 years old. (vs. 39% of all users) 46
- 53% of users of voice-activated speakers are from the upper middle class (vs. 30% overall) 47

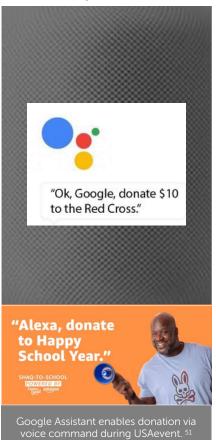
MERCHANT

Major distributors are investigating this subject.



FUNDRAISING

The charity sector is already on the move.



adfınıtas

IMPACT 1

Call centres will gradually evolve.



More efficient and instantaneous DRTV

After hearing a call for donations on television, donors will no longer have to dial a phone number and be put in touch with a call centre, they'll be able to use their voice assistants to make a donation.



IMPACT 2

Gifts by voice command must become commonplace for you.



IMPACT 3

The voice content will be of key importance.

Create

voice content

Commercials of about 15 seconds.

Other content that can be be much more complete.



Some after-sales services answer questions on social networks via voice messages.

22% of Internet users were listening to podcasts in 2019. (65.5% of 15-24 year olds) 52 with the audience increasing by 30% in 2020.

IMPACT 4

The voice content should be associated with visual / digital content.

Use visual content to support sound. 53

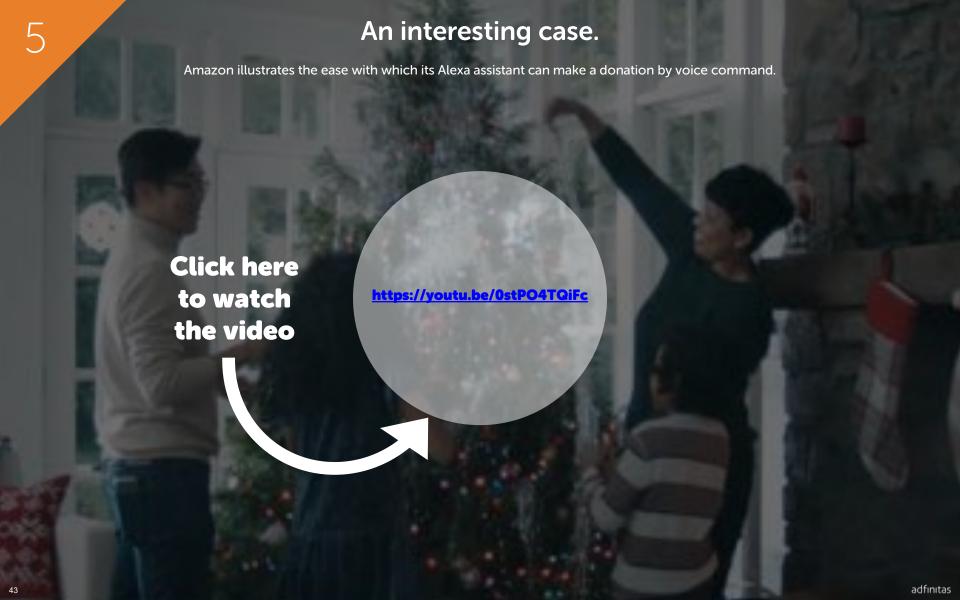
Internet users mostly use voice commands to buy products that they already know.

To buy a new product (or donate to a new association), the results must offer a good mix between voice content and visual content (text / image / video displayed on the smartphone / tablet).





2 adfını

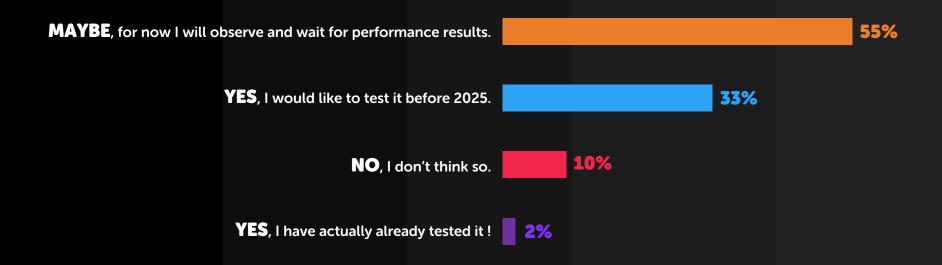


5

On September 20th 2021, during the Digital Fundraising Week (organised by *iR*^iser) we ask **126 fundraisers** from different european countries (& USA) the following question:

Do you think voice-activated giving be a significant fundraising channel in the year 2025?

Here is what the survey said:





6

engagement will be done through gaming.



The reasons for believing it.

INNOVATION

The popularity of E-sports illustrates the success of Live Streaming.

22 billion

hours of gameplay viewed on Twitch during last year. 54 SOCIETY

People are addicted to gaming.



MERCHANT

Brands are gamifying the customer relationship.



FUNDRAISING

Charity Gaming is beating records.



47

A digital acceleration due to COVID-19

The lockdown led to a boom in video games, across all age sectors and all devices (consoles / computers / Smartphones).

Nintendo Switch sales more than **doubled** between 2019 and 2020. ⁶²

According to Ted Polak (gaming expert), even though the video game market expects to see a slowdown with the end of the lockdown, the underlying growth will still continue, since "Once people have tried it, they continue being players".

IMPACT 1

Caritative gaming events are a must-have to try.

Enter into a **partnership** with an existing event

Some events only acts for one association per year, which is why it's important to approach them quickly.

You can also get in touch with gamers.



or start your own

charity gaming

event on Twitch. 59 (\$83 million raised in 2020)



IMPACT 2

Getting involved must be fun.

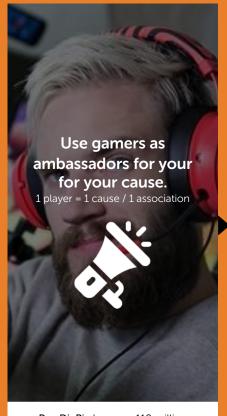
Suggest missions / challenges in the form of a game.

A practice widely used by the WWF. 60



IMPACT 3

Gamers will be the new influencers.



PewDiePie has over 110 million subscribers on Youtube.

IMPACT 4

Getting involved must be motivating.

Gamify

the relationship to enhance donors' value.

A different status depending on the amount and recurrence of the donation.

Badges according to the actions performed (e.g.: Helping an elderly person).



9 adfinita

An interesting case.

Islamic Relief launches Virtue Reality:
An app that presents international aid as a strategy game.

Click here to watch the video

https://youtu.be/1-PTbD4oPd4



6

On September 20th 2021, during the Digital Fundraising Week (organised by *iR*^iser) we ask **131 fundraisers** from different european countries (& USA) the following question:

Do you think that by 2025 you will have already raised money through Twitch?

Here is what the survey said:





In 2025, "local" will take on greater importance.

The reasons for believing it.

INNOVATION

Geolocation is becoming more and more accurate.

Bluetooth 5.1

provides accuracy to the centimetre. ⁶³

Versus 1 metre previously.

SOCIETY

People give more and more value to the things around them

95%

of the French⁶⁴ want their department store to support the **local economy**.

The website "Parisianavores" enables you to find places to go out within an hour of Paris.

MERCHANT

Retailers are increasingly investing in "Drive-to-store".



FUNDRAISING

Fundraising returns to its roots.

50%

of donors prefer to give to local associations. 3

Rather than to large associations or foundations.

adfinitas

An interesting case. #SoyonsHumain (Let's Be Human) from the Abbé Pierre Foundation can be used to share the geolocation of anti-homeless actions in order to denounce them. TRSI began her JE f depois bisselles #40 more broaden VILLE SHWEATE VON LES SHEEK . adfınıtas 55

A digital acceleration due to COVID-19

Radius of one kilometre, fear of overcrowded stores and support for small merchants, the crisis has restored the value of proximity.

A turnover multiplied by **1.5** to **2** times for certain local businesses. ⁶⁶

While, on average, the activity of shops has decreased by 50% because of all of the restrictions, some local shops have taken advantage of the lockdown to attract consumers (delivery / "good" products / fewer people).

Business at local supermarkets increased by an average of 28%.

Naturalia saw its turnover increase by 40%.67

The **SPA** allowed in-shelter adoption during the 1st lockdown. ⁶⁸

In terms of figures, solidarity between neighbours has not increased during the crisis. ⁶⁹
But the fact that many French people fought to continue helping animals and as well as people in difficulty during the lockdown showed that local solidarity really means something.

Insecurity was the cause most supported by young people during the lockdown (ahead of health). 70

IMPACT 1

Push technologies for drive-to-store will be used for "drive-to-give" or "drive-to-help"

Create notifications & banners that are

geolocated.

Partnerships to be set up with Waze / Google Map / Uber in order to:



Suggest to Internet users to make a donation via their mobiles when passing by an



Suggest to Internet users to come and help (volunteering) when passing by an



Propose to Internet users to take part in a citizen gathering as they're going by it.



Propose to Internet users to stop in for a visit when passing by a shelter, for example

IMPACT 2

Local involvement will once again become essential.

Create national campaigns with

local adaptation.

Messages broadcasted on billboards, radio, internet, TV... may differ according to the local association's needs, or according to regional customs.

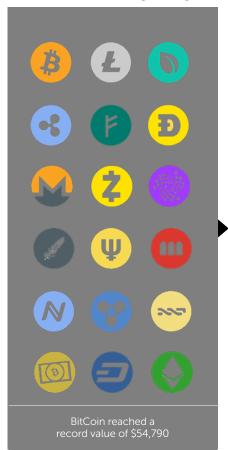




The reasons for believing it.

INNOVATION

Cryptocurrencies are diversifying, and their value is growing.



SOCIETY

Finance professionals are taking a serious look at the subject.

Consulting firms, banks and pure players are hiring **experts**.

Deloitte /JP Morgan / IBM / KPMG are publishing job offers related to the Blockchain. 71

By 2025, the Bitcoin market will exceed \$21 billion. 72

MERCHANT

It's now possible for everyone to invest.



FUNDRAISING

Donation by cryptocurrency is already possible.

The Giving Block launches #BitCoinTuesday

A part of GivingTuesday that enables Internet users to make donations in cryptocurrencies, immediately converted into dollars and tax-deductible in the same way as traditional donations. ⁷⁴

Cryptocurrency donations are growing in tandem with the increase of the market value of cryptocurrencies. ⁷⁵

Facebook is developing its cryptocurrency called Libra. 76

In collaboration with the Ethereum solution, Unicef has been accepting donations in cryptocurrencies to fund technology for the benefit of children. 77

adfinitas

An interesting case.

Keplerk enables the general public to invest in Bitcoin via a simple QR Code to be scanned in tobacco shops.



IMPACT 1

Associations will have to be able to collect donations in cryptocurrencies.

Ethereum, give it a try.

The Ethereum technical solution makes it possible to collect donations in cryptocurrencies as "easily" as donations in Euros (by cheque / transfer / PA / cash).

The solution collects the currencies, "blocks" them until the association has met its collection targets, and converts them into Euros. ⁷⁸



IMPACT 2

Cryptocurrencies will continue to diversify.

Creating his **OWN** cryptocurrency.

"Mon Ami Poto" (=My Friend Poto) is for example a project sponsored by Cyril Hanouna (French anchor) that aims to create a solidarity cryptocurrency: Potos.

(I volunteer for one day = I win a "Poto") 79





By 2025, mobilization and fundraising on social networks will be commonplace. adfinitas

The reasons for believing it.

INNOVATION

Crowdfunding is not a volatile trend.



SOCIETY

We have all become dependent on each other.

People spend

2h41

per day on social networks. 81

That is nearly 15% of of their waking hours.

4.5 hours / day consumption by GenZ

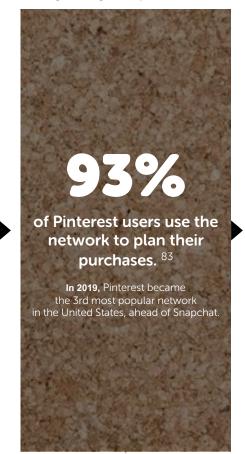
All generations are on social networks. 82

90.5% of "Y" people 77.5% of "X" people 48.2% of Boomers

The collaborative economy is everywhere (Co-creation / Carpooling...)

MERCHANT

Social Commerce is growing in importance.



FUNDRAISING

Fundraising on social networks is not anecdotal.

In 2020, Fundraisers (Facebook & Instagram) has raised more than

€2 billion

\$5 billion in five years. 84

Donations after a call from an acquaintance have increased by +4pt in 1 year (13% to 17%). ²

65 adfinitas

A digital acceleration due to COVID-19

Physical distancing is mandatory, but social distancing is impossible: virtual gatherings have replaced real gatherings.

+354% paying users in Q1 2020 for the ZOOM video conferencing application. ⁸⁹

From January to March, the tool for professionals increased its sales figure by 169%.

The Houseparty application organises "In The House" the **first online festival.**90

The brand, a symbol of virtual get-togethers during the 1st lockdown, brought together 40 celebrities online between May 15 and 17, 2020 as a replacement for physical festivals.

IMPACT 1

Collective engagement, viral potential and the use of social networks will be "mandatory".



IMPACT 2

Internet users will need tools to more easily convert their knowledge in order to go further together.



Create missions to carry out together.



Create events (e.g.: citizen movements) as a relav.



Create petitions to sign and share



Create Hashtags



An interesting case.

The Instagram filter #ActFor2020 made it possible to choose a cause to champion in 2020, while spreading the message within one's social circle. ⁹⁶

SU ACT FOR 2020

UN FILTRE
CONTRE LES
INJUSTICES



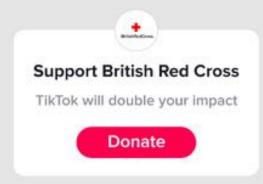
IMPACT 3

No fundraising opportunity should be missed.

Constantly solicit for **donations** on social networks.

Instagram (donation sticker on stories) / Facebook / Twitter (Good Tweet).

Today, only 57% of associations have a donation button on Facebook (57% on Instagram). 70



IMPACT 4

Online solidarity events will complement or replace physical events.

Organise digital gatherings.

100% digital events that are less expensive and able to involve an unlimited number of people, or the ability to experience physical events from home, support them, and interact with participants:

Donor/volunteer meetings.

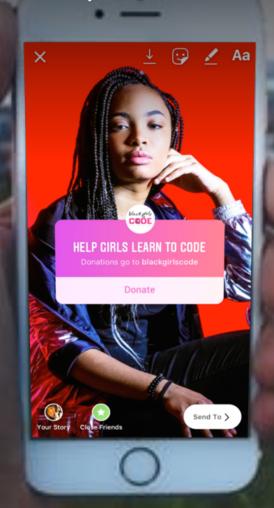
Trade shows, conferences and celebrations.

Solidarity Sports Challenges.



An interesting case.

Instagram creates its "Donate" Sticker, a simple button to add to your Stories in order to encourage donations. 85



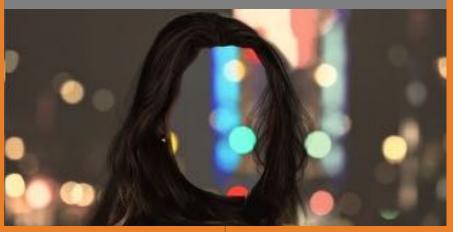
IMPACT 5

Influencers will naturally be involved, and we'll be able to use them for free.

Take advantage of

influencers

for no cost.



IMPACT 6

Social networks will no longer be synonymous with "youth". Social media strategies will have to be multi-generational.



66% of Twitter users are between 35 and 65 years old.



26% of of Pinterest users are over 55 years old



71% of Instagram users are under the age of



79% of LinkedIn users are over 37 years old.

Adapt social media strategies to each generation⁸⁸.



52% of YouTube users are between 25 and 49 years old.



40% of TikTok users are between 16 and 24



Facebook remains the major social network, used massively by Boomers and generations X and Y.

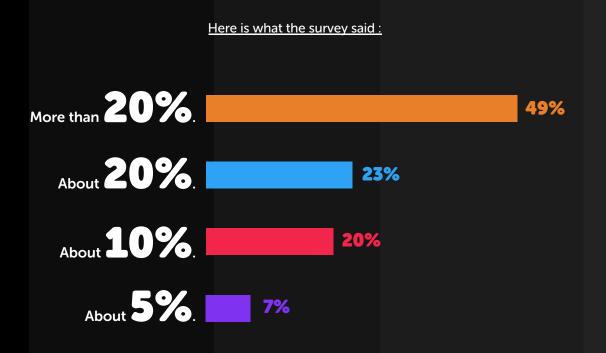


90% of Snapchat users are between 13 and 24 years old.

9

On September 20th 2021, during the Digital Fundraising Week (organised by *iR*^iser) we ask **122 fundraisers** from different european countries (& USA) the following question:

By 2025, how much of your fundraising marketing investment do you think will be dedicated to social media?

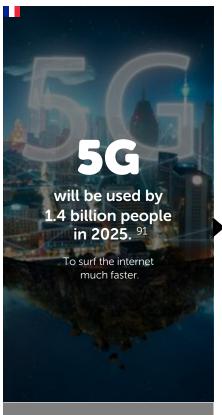




The reasons for believing it.

INNOVATION Shasheen takin

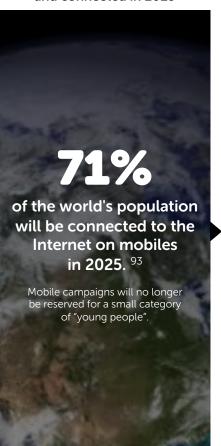
5G has been taking hold since 2020.



In China, they're already looking at 6G (100 times faster than 5G). 92

SOCIETY

We'll be (almost) all equipped and connected in 2025



MERCHANT

Leaders are already aiming to connect 100% of the world's population.

Google & Space X
are working together
to make the internet
a tool that's accessible

The goal: To eventually connect 100% of the world's inhabitants via a satellite connection:

Starlink.

to the whole planet. 94

FUNDRAISINGE

The actors of engagement are surfing on the trend.

In 2018, Aides launched its first 100% mobile fundraising campaign. 95

"Pouce-toi le Sida!", a media campaign on Smartphone, which invites mobile web surfers to send a donation of €3 by SMS (in order to cover the cost of 15 condoms).

75 adfinitas

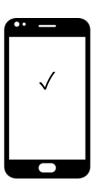
The impact on fundraising.

IMPACT 1

Everything should be designed for mobile use.

Think "Mobile Only".

For the past 10 years, we 've been hearing about "Mobile First" (the principle is to build your event-based or lasting digital platforms by thinking first of a use on mobiles, before adapting them for computers). In 2025, many campaigns will be "Mobile Only", built exclusively for Smartphones.



IMPACT 2

Size will no longer be a problem.

Produce and distribute rich content and and interactive experiences.

The download speed of a campaign landing page is key. An overloaded page is likely to be too slow to load, forcing digital (and digital fundraising) professionals to create "simple" pages with text, video and a few images. In 2025, sites will have much less to worry about on mobile thanks to 5G. We'll be able to offer rich experiences with considerable content.



IMPACT 3

All people will become digital targets.

Take advantage of growing **reach**.

The more people are connected, the more we will be able to reach them through digital campaigns. Only a few households won't use a Smartphone on a daily basis.



IMPACT 4

Recipients will be easier to reach.

Connect donors and recipients.

If Space X and Google manage to make the internet accessible to the whole planet (with an access price close to zero), associations will be able to put donors and beneficiaries in contact (e.g.: FaceTime with a person on the other side of the world who has just undergone an operation thanks to donations, in order to check on how this person is doing).



6 adfinitas

On September 20th 2021, during the Digital Fundraising Week (organised by iRaiser) we ask **120 fundraisers** from different european countries (& USA) the following question:

> In your opinion, in 2025, on which main device category will you most succeed to reach your digital donors?

> > Here is what the survey said:

SMARTPHONE / TABLET

DESKTOP / LAPTOP 2%

By 2025, **Amateur content** will finally be of good quality.

The reasons for believing it.

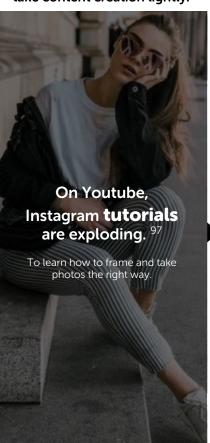
INNOVATION

People have professional photo equipment in their pockets.



SOCIETY

The younger generations don't take content creation lightly.



MERCHANT

Brands are again inviting users to create and share content.

The **GoPro** application makes it easy to create stories.

15-second videos automatically edited, and designed for broadcasting on social networks (addition of visual and sound effects).

QUIKSTORIES

FUNDRAISING

Charities launch photo & video contests.

Greenpeace highlights the best amateur photos.

Annual competition.



80

An interesting case.

Booking.com created a video spot using only content created by its employees.



11

A digital acceleration due to COVID-19

Internet users have grown accustomed to creating content at home because of the lockdown.

The #HandWashChallenge generated **67 billion** views on TikTok (a record). 98

The steps for learning the right way to wash your hands has been reproduced by millions of Internet users around the world.

+500% live streams on Instagram between March 8 and 15, 2020. 99

(Globally, calculated by #IGLive mentions).

Over the next 10 days, the use of Facebook and Instagram Live apparently doubled in 30 markets.

Impact on fundraising.

IMPACT 1

The return of the UGC must not give power to individuals (committed but amateur), despite the expertise of associations.

Control the production of amateur content.

The quality of current and future material, combined with the perfectionism of the younger generations used to working on their content like experts, suggests that the content produced by Internet users in 2025 will be on a par with professional content.

This change that may seem like good news, especially since the younger generations are more and more naturally sensitive to many causes and engaged on social networks, but risks may arise if it is not brought under control.

Indeed, humanitarian and social action cannot be improvised. While Internet users can have an increasingly strong influence, and can nowadays create very beautiful content in terms of form, the responsibility of associations is to control what is promised / proposed in terms of substance, so as to prevent inaccuracies or avoid initiatives that could be detrimental to the cause.



The impact on fundraising.

IMPACT 2

Citizens will be able to contribute, in the service of the cause.

Invite the general public to **Create** live content.

Photo / Video / Story / Article / Hashtag / Tweet.

UGC (User Generated Content), initially presented by agencies as a holy grail, then perceived by brands as a scourge (given the very poor quality of the content generally posted by Internet users), is once again becoming an opportunity for brands.

In the future, it will therefore be strategic to design social campaigns that invite donors to take part in the association's daily struggles, by presenting and identifying live positive initiatives or negative situations (e.g. taking a video of a new anti-homeless device in front of a store when passing by and sharing a hashtag to denounce the problem, as the Abbé Pierre foundation did with the www.soyonshumains.fr platform and the "Pics d'Or" ceremony)

IMPACT 3

Influencers and personalities will no longer be your only spokespersons.

Ask your **Staff** and volunteers to **Create live** content.

Photo / Video / Story / Article / Hashtag / Tweet

In the commercial world, big brands are increasingly using their employees to communicate about their offer. In a professional way on Linkedin, but also for advertising purposes (for example, by including them in TV spots).

In the future, solidarity actors could use their teams to communicate live about their actions / needs / results (e.g.: A doctor without borders broadcasting a video in real time from a hospital abroad in order to illustrate the lack of resources), and become spokespersons for the cause.



the immersive experience will be a must.



The reasons for believing it.

INNOVATION

The virtual reality market is becoming ultra-competitive.

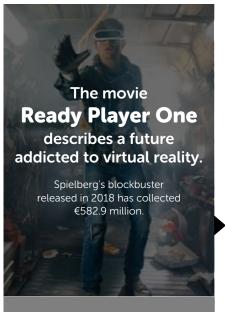




Virtual reality helmets are increasingly "autonomous" (they no longer require a game console).

SOCIETY

People are increasingly fond of experiences.



The younger generations prefer the immaterial to the material, the experience to buying (ordering an Uber rather than buying a car / renting an Airbnb rather than buying a house).

Boomers want to experience as much as possible during their retirement.

MERCHANT

Brands are using augmented / virtual reality to present their offer.

Ikea

proposes 3D visualization of its furniture. 101

An application that uses augmented reality to give an idea of how the furniture will look in a customer's apartment.



FUNDRAISING

Fundraisers are already immersing donors.

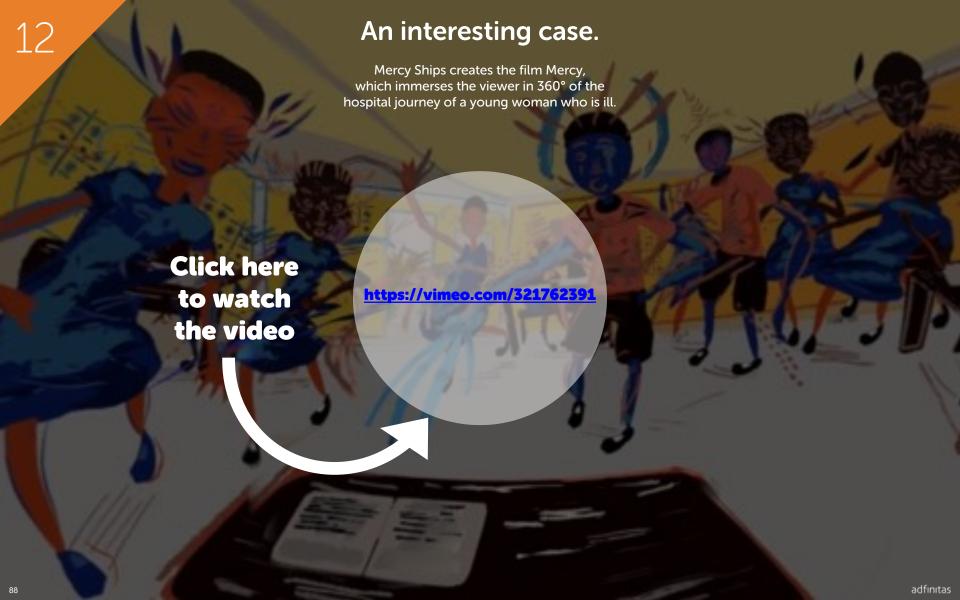
The **Donate Now**

button is now available on 360° videos. 103

A new feature announced by Facebook Ads in 2019.

In 2016, Amnesty International already offered passers-by the chance to discover daily life in Syria via a virtual reality headset. 104

adfinitas



A digital acceleration due to COVID-19

The inability to move freely and to go to closed public spaces has served to demonstrate the interest of virtual reality to the general public.

330,000 virtual tours per day of the Louvre Museum during the first lockdown.¹⁰⁵

In 71 days, the Museum recorded almost as many virtual visits as for the entire year 2019. A tool (until now "reserved" for enthusiasts / early adopters) tested by a great many people, who were able to continue experiencing without having to change locations or come into contact with the world.

The impact on fundraising.

IMPACT 1

Virtual reality will be increasingly used to give donors an immersive experience.

Use virtual reality to ...

... **experience** the daily life of a person in difficulty.

For example, a day in the life of a person living with the illness.

...understand the daily life of a humanitarian.

For example, a volunteer's day abroad.

...visualize results.

For example, the harvest from a farm set up with donations.

...immerse yourself in a physical event.

For example, exchange with a representative of the association via a connected robot.

IMPACT 2

Augmented reality will be used more and more to revitalize print campaigns.



The impact on fundraising.

IMPACT 3

One day, virtual reality could enable you to make a donation during the experience, via an integrated donation button, and a connection of the headset to the bank account.

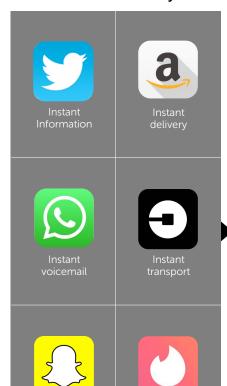




The reasons for believing it.

INNOVATION

The most widely used services are the ones that build on immediacy.



SOCIETY

People no longer want to wait.



of French people say they're more impatient today. ¹⁰⁶

82%

Accustomed to the speed of new technologies, people quickly get bored, they change interests as often as they change their shirts.

On Facebook, users stop a video on average after 18 seconds.

MERCHANT

Big brands are facilitating rapid consumption.

Brut.

\$40 billion. 107

Brut (250 million unique viewers per month), a 100% French digital media has specialized in creating short videos to summarize each news from different universes. This success story relies on the laziness of Internet users, who cannot concentrate more than a few minutes. This is a symptomatic example of today's most consumed formats ("snackable" contents, mostly videos with subtitles allowing viewers to watch them without sound).

FUNDRAISING

Fundraisers are playing on opportunities.

Giving Tuesday: **\$2 billion**

collected in 2019 in one day. 108

20 billion social media impressions.

Giving Tuesday was launched in France in 2028.

88% of French people prefer to make small donations frequently rather than large donations once in a while. ³

922 million pledges to rebuild Notre Dame de Paris, the majority of which were received in a few days (a record for fundraising). 109

94

Instant



The impact on fundraising.

IMPACT 1

Associations will have to quickly stay on top of current events.

Share content

Live.

Facebook / Twitter / Instagram.

Being "live" doesn't mean foolishly overreacting to all current events as opposed to the long-term, but rather showing donors that the association is active and grounded in reality.

IMPACT 2

Speeches and actions should be summarized by symbols.



MPACT 3

Donations will be more timely but in smaller amounts.

Facilitate opportunities for spontaneous **micro-donations**.

Rounding up at the cashier and digital rounding (e.g. Amazon order)

Solidarity days.

Micro-campaigns on micro news items / emergencies for micro-fundraising and micro-projects materialized during the year.

Kiosks for dematerialized donations in public places linked to the cause (e.g. a donation to protect the oceans at municipal pools).

40% of those who gave more in the last 12 months did so because making donations is increasingly convenient (e.g.: rounding up at the cash register).³

73% of occasional donors² make an average annual donation of under €50.

IMPACT 4

Communications will be more numerous and ephemeral.

Create

Stories.

Invest in video stories, the new king of social networks, which allows you to maintain a daily relationship with your followers.

Assembling a dedicated team.

Create (within the agency or advertiser) a team dedicated to analysing news and creating live content (i.e. that is quick and inexpensive to create because it will only be useful for a very short period of time).

adfınıt

we'll be able to make the most of new contact points.

Contact point #1.

оон
Street fundraiserswill take over physical places.

Create "pop-up" stores. 90

Street fundraising is often seen by the general public as an overly aggressive collection technique (passers-by are "disturbed" during their walk and are pushed to give). In the future, associations will have every interest in creating pop-up stores like the big brands in the commercial world in order to give passers-by experiences linked to the cause.

A "pull" marketing strategy rather than a "push" marketing strategy already tested by the NGO Help Refugees in its PopUp Store "Choose Love", in which visitors can buy products that will be made available to people in need (e.g. a child's coat / a blanket / a life jacket / a food kit...).



Contact point #2.

CONTENT

Television channels will no longer be the queens of reach*.

Partner with content **creators**.

In 2025, television will no longer be considered as a medium in its own right but as a simple support. The only lasting differentiation: television will be viewed mainly for live programs (e.g. sporting events). The new kings of visibility will no longer be the channels (e.g. TF1 / M6) but rather the creators of multi-channel content (e.g. Netflix / Disney / Amazon / Apple).

Tomorrow, these content creators (aware of their visibility power) will open their doors to advertisers / partners. While this won't necessarily be in the form of advertising agencies (because these services are designed around a paying business model), content creators will be able to create content in partnership with brands (e.g. the documentary Our Planet created by Netflix in partnership with WWF). 91

*"Reach" refers to the reach of a campaign, in terms of people reached.









Contact point #3.

SOCIAL MEDIA

Making the most of growing social networks will be essential.

Start a relationship with Generation Z on **TikTok**.

Launched in 2016, this social media app for sharing short videos is exploding among Generation Z. The network opened its advertising service at the end of 2019, and on April 29, 2020 the possibility of making donations.

In France, $45.7\%^{92}$ of under-13s say they use TikTok. The application has already been downloaded 2 billion times worldwide, and claims 800 million active monthly users (that's more than WhatsApp or Facebook Messenger).

Creating content for this social network can be a profitable investment in the long run. Indeed, a presence on TikTok will create a link between your association and Generation Z, who will remember you when they're old enough and have the means to give.



*Dance to save lives.

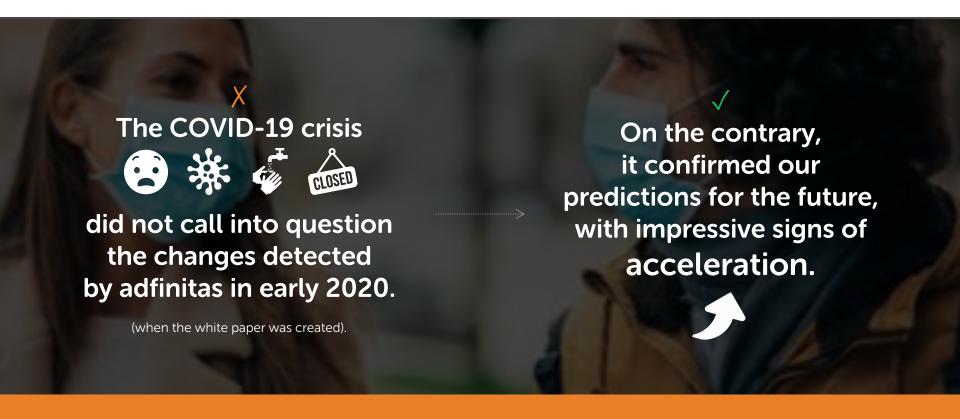


CONCLUSION

What are the main lessons to be learned?

COVID-19 sidebar.

Tomorrow starts Today: Major changes detected at the start of 2020, and confirmed during the rest of the year.



The new usages related to lockdowns and opening up are not simply a bubble that will burst at the end of the crisis. While some sudden changes will naturally fade and return to "normal", many practices will be forever impacted, because this exceptional period will have allowed people to test new things.

Everyone has a card to play!

Associations/foundations small or large, local or international, specialists or generalists, all have the opportunity to use technological and behavioural changes as an opportunity to involve more people.

With this acquisition objective in mind, the power of seniority will be the last remaining advantage of the historical fundraising brands.

BEHAVIOUR

Open targeting.

Fundraising will no longer rely on elderly and wealthy donors looking for an annual tax exemption opportunity (only 50% of people are concerned). Opening up the targeting means having a long-term vision and avoiding reliving the tax crisis of 2018.

ARGUMENTS

Inspire commitment.

We must give every person the desire and the concrete means to act, through donations or otherwise, whatever their generation, their sensitivity, or their budget.

FUNDRAISING

Involve as many people as possible.

Involving a wider audience throughout the year means a change of the current fundraising pattern: A large number of small donations spread throughout the year, rather than a small number of large donations a few times each year.

INTERNATIONS PROCESS

Adapt technically.

The fight for volume (rather than value) requires us to learn how to increase the number of fundraising opportunities throughout the year (diversification of sources), and how to collect a large volume of small donations.



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