







	Week 1: Immersion		
Week Objective	To get a general understanding of Boomer Women everyday lives, needs, desires, motivations and frustrations with the world and spaces they exist in. To gain an in-depth understanding of how they define their identities, express themselves, choose to spend their time and ultimately the people they hope to become.		
	Task 1	Task 2	Task 3
Learning Objective	Meet the community	Exploring the worlds of Boomer Women	Desires, frustrations, hopes & dreams
Activity type	Video / Text Task	Discussion	Image & Discussion
Activity title	Welcome & Introductions	In 3 words...	Past, Present and Future
Details	<p>Welcome to your first official research task on our community! We'd love to start by getting to know each of you a little better. You'll also be sharing this space with a number of other people so it'll be a good chance to hear from them.</p> <p>Ideally we'd love to be able to put a voice, face and name to your introductions! So if you're comfortable doing so, please record a video (you can ask someone to record it for you if that helps) where you share your thoughts on the questions below, and upload it using the 'Add Video' button. It doesn't need to be long, 1-2mins is perfect!</p> <p>Alternatively, if a video isn't quite your thing, or if you're facing any issues, feel free to write your answers in the space below.</p> <p>OK - let's get right into it!</p> <p>Please include in your introduction the following:</p> <p>a) Introduce yourself: your preferred first name (we don't need surnames), age, where you're from, and who you live with - including any furry housemates!</p> <p>b) Treasure Island Activity: Much like the popular Desert Island discs radio show, we want you to imagine that you're heading to a deserted island for a spell - what 3 items will you take?</p> <p>- One is for you, one is for everyone in the community, and your final one is a luxury.</p> <p>- Please also explain why you have selected these items!</p>	<p>Now that you've introduced yourself, we'd love to understand a bit more about how you feel when it comes to aspects of your daily life and routines.</p> <p>So this exercise is called 3 words. And it's pretty simple.</p> <p>Using just 3 words for each (they might be the first ones that come to mind, or you might want to think about each for a bit - we'll leave it up to you) - please describe how the following make you feel:</p> <p>a) Family (3 words)</p> <p>b) Career / Retirement (3 words)</p> <p>c) Socialising / Hobbies (3 words)</p> <p>Great! Now that you've chosen words, we'd love to hear a bit more about why you've chosen them. So for each of a), b) and c) above, please provide a brief explanation behind why you selected those words.</p> <p>Finally: what words do you think your parents might have used, and to what extent do you think they would differ from the ones you've chosen?</p> <p>Looking forward to hearing your thoughts!</p>	<p>Thanks for sharing a bit more about how you feel when it comes to your daily routines. For this week's final task, we want you to cast your mind to three different time periods and do some reflecting: into the past, in the moment, and into the future.</p> <p>More specifically, we'd like you to tell us:</p> <p>Past - If you could go back to a different time, what time would you go back to? Why?</p> <p>Present - If you could keep one thing and change one thing about now, what would they be? Why?</p> <p>Future - What do you hope for the future? How realistic does this feel?</p> <p>If you have images or videos that you want to add with your response to bring any of it to life, please do!</p>

Probes	General 'why' questions to understand their choices, motivations, drivers etc.	<p>What do you worry most about in these 3 areas of your life?</p> <p>Overall, which of these contribute most to your personal identity?</p> <p>Has COVID impacted on these areas of their life? Do they think it will going forward?</p>	<p>Do you feel the weight of responsibility in changing things for the future?</p> <p>What do you reflect on when it comes to those from other generations and how they live their lives?</p>
Output	Engaged participants; background information; starter insights on what they value in life, and their attitudes to helping others	Deeper insights about their everyday lives and how they perceive they differ from other generations	Rich insight about values, needs, and what they feel is missing from their lives practically and emotionally (ie high level needs we might be able to fulfil)

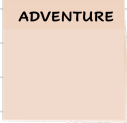
	Week 2: Their Habits & Hopes and Fears		
Week Objective	A deep dive into the lives and routines of Boomer Women: how do they spend their time, what do they prioritise in their lives. This will be used as a platform to delve further into their hopes, fears and motivations, particularly around the areas of Finances, Health, Retirement and Adventure / Excitement		
	Task 1	Task 2	Task 3
Learning Objective	Detailed understanding of how Boomer Women spend their time across a given week	Insight into Hopes and Motivations for Boomer Women across key subject areas of Finance, Family, Health, Retirement and Adventure	Insight into Fears and Frustrations for Boomer Women across key subject areas of Finance, Family, Health, Retirement and Adventure
Activity type	Discussion	Image & Discussion	Image & Discussion
Activity title	The 'Your Time' Weekly Planner	Your Hopes for the future	What's standing in your way?
Details	<p>Welcome to Week 2 on This Life! We'd love to kick things off this week by hearing more about your weekly routines, and in particular how you spend your spare time. With that in mind, we'd like you to consider the Weekly Planner image below.</p> <p>We'd like you to imagine that each of the Post-Its across the week represents the spare time you have available to do the things you want to do. By this, we mean doing hobbies, personal interests, and the things that matter to you outside of your usual daily household routines, or any work or family commitments you might have.</p> <p>Keeping this mental image in mind, please paint a picture of your week for us by describing the following:</p> <ul style="list-style-type: none"> - If you had the choice, what would be your ideal way to fill this time? What would you choose to do? - In reality, how much spare time do you have for yourself and your hobbies and interests across the week, and does this differ by the day (e.g. weekday vs weekend)? - Finally, how do you prioritise what you do with this available time? <p>Please be as specific as possible by referring to the actual activities and hobbies that you love to do across a given week so we get a picture of what matters to you.</p>	<p>As much as we'd love for it to be true, unfortunately it's very unlikely that we are able to have all the spare time available to us that we'd like. More often than not, our weeks are split up across considering, and planning for, a number of different factors in life.</p> <p>These might include things like Health, Family, Finances, Retirement and a sense of Adventure.</p> <p>This is the first of a two-part activity and we'd love to start off by hearing about your hopes and motivations when it comes to these 5 areas.</p> <p>We'd like you to imagine that you have a big whiteboard with a post-it for each of these areas on it - like the one we've provided below.</p> <p>We'd like you to take your digital marker, and answer the following two questions for each of these 5 areas:</p> <ol style="list-style-type: none"> 1. What are your hopes for the future when it comes to: Your Health, Your Family, Your Finances, Your Retirement, Your Sense of Adventure or Excitement 2. What are the motivations for these hopes? Why do they matter to you? <p>Once you've had a chance to post your thoughts for all 5 areas, you're ready to take on the 2nd part of this task in</p>	<p>Thanks for sharing your hopes with us! We'd now like you to reflect on what you previously wrote down, and then tackle the below as part two of this activity.</p> <p>Unfortunately we all know that things don't always pan out the way we might want, or hope, them to. So we'd now like you to consider the same 5 areas - Health, Family, Finances, Retirement and a sense of Adventure - and share with us your concerns or fears you might have about them in the future.</p> <p>We've given you a new whiteboard to consider, but this time we'd like you to use your digital marker to answer the questions below for those same areas:</p> <ol style="list-style-type: none"> 1. What are your fears for the future? In other words, what might prevent you from realising the hopes you shared with us, when it comes to: Your Health, Your Family, Your Finances, Your Retirement, Your Sense of Adventure or Excitement 2. How much control do you feel you have when it comes to overcoming these concerns? <p>Please note, this is once again a private activity so other respondents on the community won't be able to see your responses.</p>
Probes	<ul style="list-style-type: none"> - Probe on any mentions of charitable / volunteering use of time and why this matters - Do they wish they had more time available to help others? 	<ul style="list-style-type: none"> - Do they prioritise within these 5 areas: i.e. are some more important than others? Why? - Do you expect these priorities to change in the future? 	<ul style="list-style-type: none"> - What strategies or tools might they consider to help combat these fears or concerns? - Who do they expect to offer them support in these areas?
Output	Understanding of how Boomer Women want to spend their spare time	Priorities in the lives of Boomer Women and how they spend their time	Potential barriers that might stand in the way of Boomer Women achieving their hopes

IMAGES

📅 WEEKLY PLANNER 📅						
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
						

Client Requests

HOPEs



HOPEs

FEARS



	Week 3: Societal Influences		
Week Objective	To understand what and who are their biggest influences when forming opinions on key subjects; how this is shaped, what can disrupt these, or how and why these shift over time.		
	Task 1	Task 2	Task 3
Learning Objective	The realities of life, influences and decision making.	Understand attitudes towards ageing and perceptions in society	Authentic marketing and engagement from brands
Activity type	Image & Discussion	Image & Discussion	Discussion
Activity title	The Best & Worst	Age is just a number?	Who says it best?
Details	<p>Welcome to Week 3 on the community. We've really loved getting to know more about each of you, and lifting the lid on what might make you tick in certain areas of your lives.</p> <p>We'd now like to turn our attention to those around you in your life, and the influence they might have. With this in mind, we'd like you to think about you and your friends / peers. What's the best and worst people of your generation, when it comes to characteristics, behaviours or beliefs around:</p> <p>a) Supporting friends and family b) Engaging with politics and society / the wider world c) Supporting or giving to social causes/charities</p> <p>If you can think of any relevant examples of people or objects that might embody the Best / Worst for these areas, we'd love to see you post a picture or image to bring the example to life!</p> <p>Finally, we'd also like to encourage you to keep an eye on your notifications tab in the top right corner of the platform. This will be your reminder to respond to any additional questions or queries that Katya or Chris might have to dig a little deeper into your already much appreciated responses!</p>	<p><u>For this task, we want to start by sharing a fact* that might surprise you.</u></p> <p><u>Who among you remember the 'Golden Girls', the 80s sitcom featuring single women in their 50s in Miami? Well, you may be surprised to learn that in the 2022 reboot of Sex & the City, Carrie and her crew are presented as the same age as the Golden Girls! It's true - see for yourself [hyperlink: https://www.tiktok.com/@brownstonedmama/video/7048634765389614382]</u></p> <p><u>For many, the concept and image of ageing has undergone a significant make over in the past decades. For today's activity, we want you to find and post an image of someone you feel embodies your philosophy towards your days ahead and how you think about the concept of 'age', and explain why!</u></p> <p><u>As a bit of added inspiration for the discussion, please take a look at fun examples we've put together. The first is the image below, and the second is this link to an ad from Saga Holidays [hyperlinked to YouTube] which tackles the idea of ageing in an interesting way. What do you make of these?</u></p> <p><u>We can't wait to see what you choose to share with us - and we bet you'll want to see what everyone else thinks, too! Feel free to comment on others' posts and share your thoughts on their inspirations - remembering that everyone is entitled to their own views :)</u></p> <p><u>*We'll admit, this may be a Hollywood fact more than a</u></p>	<p>We're going to keep the TV theme running for this next activity, but this time we're turning our attention away from the shows, and towards advertising.</p> <p>You might want to think about this task for a day or two because we'd like you to find 3 marketing campaigns from any source (social media, news, blogs, websites, newspapers etc.) from 3 different companies or brands.</p> <p>We'd then like you to share images, videos, links or screenshots from those campaigns so we can get a clear idea of the ones you're referring to. For example, you might share a picture you took of Toyota's latest advert on TV.</p> <p>Before you begin, we'd like you to choose something slightly different for each of your 3 examples:</p> <p>a) Choose one campaign that you LOVE and made you happy. Tell us why.</p> <p>b) Choose one that made you ANGRY. Tell us why.</p> <p>c) Choose one that made you CHANGE SOMETHING in your life. Tell us what you changed and why.</p> <p>Once you've uploaded yours, you'll be able to see what your fellow community members chose. Feel free to comment and share your thoughts on their choices!</p>
Probes	What are the greatest influences on the 'best' and 'worst' of your	- What does it mean to age gracefully these days? Does	What does authentic marketing mean to you? What are the
Output	Uncovering uncomfortable truths: permission to discuss	Define attitudes towards ageing and how these may	Insights around communication, storytelling, imagery and what

	Week 4: Influences & Decision-Making		
Week Objective	To understand what and who are their biggest influences when forming opinions on key subjects; how this is shaped, what can disrupt these, or how and why these shift over time. Alongside, we will unpack what drives trust with this audience, and subsequently how this relates to decision making in their lives.		
	Task 1		Task 3
Learning Objective	Exploring the realities of habits around media consumption and sources of information	Understanding the drivers of trust in the lives of Boomer Women among	Uncover the key factors in decision making for Boomer Women; influences, steps, evaluation
Activity type	Image / Discussion	Discussion	Discussion
Activity title	A day in your life: Media	Who do you trust?	How you make decisions
Details	<p>Welcome back to the This Life community and into Week 4. This week we'll be exploring activities around sources of information in your life.</p> <p>To start off, we would like you to draw a map of a day in your life where you share the moments throughout your day that you are consuming media, information, or news. You can use whatever is easiest for you to complete your map, whether that might be doing it on a laptop or tablet, or drawing it on a piece of paper and then taking a picture of it on your phone to upload. Whatever is easiest for you!</p> <p>We'd love for you to map the following:</p> <p>a) All the moments e.g. the moment you wake up, on the train, at dinner b) The media sources e.g. Newspaper, Magazine, Radio, News app, Television, Social Media (e.g. Facebook, Instagram, Twitter etc.), Messaging apps (e.g. WhatsApp or iMessenger), YouTube & anything else! c) The types of media/stories e.g. Global news stories, viral memes, celebrity gossip, facts vs inspiration d) Value score - how much of an impact it makes on you out of 10?</p> <p>Add images, videos and links to the types of things you're consuming! We would love to see what you're watching, reading or listening to!</p>	<p>Thanks for telling us all about the different media that you use. For this task, we now want to hear more about sources in the world that you may or may not place your trust in.</p> <p>There are many different types of sources that we can receive information from, some of which you may have mentioned in the previous task: traditional media (like TV, radio, newspaper, magazines), social media (Facebook, Instagram, Twitter etc.), podcasts and blogs, and then of course people in the world such as your peer groups, family, friends, politicians or local council representatives.</p> <p>We'd like you to think about trust in the context of receiving reliable information, and some of the examples above, and tell us:</p> <ul style="list-style-type: none"> - Which sources, brands, websites, news channels, people do you trust the most, and why? - And then, which of these do you trust the least, and why? 	<p>We've spent this week talking about different influences in your life, from the media, to friends and family. But today we'd like to turn the focus squarely back on you.</p> <p>We want to know: How do you make big decisions? Do you have a set process? Do you seek advice from others, or go it alone? Who influences those thoughts?</p> <p>To help us to understand decision-making in your life, we'd love for you to think back a relatively recent example in your life when you had to make a big decision about one of the following: Your Health, Your Household, Your Retirement, or Your Family.</p> <p>Please tell us what the decision was that you were facing, and then help us to understand how you made it by answering the following:</p> <ul style="list-style-type: none"> - who did you consult: media, friends & family etc. - what steps were involved in this process? - How did you measure the outcome and how did you feel about it? - what would you do differently knowing what you know now? <p>Please note, this is another private activity, so other community members won't be able to read what you share with us.</p>

Probes	<p>Where do you look for facts vs inspiration?</p> <p>Why are these the moments that you look for specific types of content? What feeling are you looking for?</p> <p>What impact do these have on your mood, emotions or the rest of your day?</p> <p>How quickly do you react with action or further conversation? What does this usually look like? E.g. sharing, debating with friends etc.</p> <p>How important is the shareable aspect?</p> <p>How much do you care about the social kudos of sharing interesting, viral or provocative content?</p>	<p>Why is it important to be able to trust these different sources?</p> <p>What could be done to help improve trust with those sources which are currently untrustworthy?</p>	<p>What is the most important part of your decision making process?</p> <p>What other big decisions do you think you'll be faced with in the short to medium term?</p>
Output	Where to market to Boomers; what they expect to see and what	Indicative steer on level of trustworthiness of influential	Rich insight about how Boomer Women make decisions in

	Week 5: Financial Deep Dive		
Week Objective	Develop an intimate understanding of how Boomer Women approach finances, looking at aspects of the emotional impact, how decisions are made, and perceptions and attitudes towards specific financial products and activity such as Wills		
	Task 1	Task 2	Task 3
Learning Objective	Perceptions towards level of financial empowerment Boomer Women feel in their lives, and their role in decision-making.	Understand what makes dealing with financial issues easier; tools, advice,	Attitudes and perceptions towards specific financial products (e.g. wills) and how this influences expectations for the future
Activity type	Discussion	Online Safari & Discussion	Discussion
Activity title	Your World of Finance	Your Financial Tools	Making a Will
Details	<p>We wrapped up last week with an activity on how you make decisions. We'd now like to focus on particular area of decision-making for this week: Finances.</p> <p>We'd like to return to the 3 Words activity we introduced in week 1. But this time, we'd like you to tell us the 3 Words that come to mind when you think about: Financial Decision Making.</p> <p>Once you've written down your 3 words, we'd like you to think about the following:</p> <ul style="list-style-type: none"> - How would you describe your attitude towards risk and money, and what influences this? - How content are you with your financial decision making? - What are your biggest concerns with financial decision making? - Where could you do with more assistance? 	<p>As the second activity of this week's focus on finances, we're sending you on another online safari! We want to understand the extent to which you use financial tools or sources that are freely available online.</p> <p>We'd like you to post a link, or a screenshot, or an image an online resource or tool that you regularly use, or refer to, or consult when considering your future financial plans.</p> <p>If you don't regularly use an online tool or source, we'd love you to conduct a quick web search to find out more information about a financial issue that's important to you, and share back an image or link of whatever you find that you think is useful.</p> <p>Once you've posted your link / screenshot / image, we'd love to know:</p> <ul style="list-style-type: none"> - Why is this tool or source useful for you? - To what extent do you discuss topics like these with your family when it comes to your financial future? 	<p>For this week's final activity, we're going to turn our focus to some specific financial options that might feature in your future financial considerations.</p> <p>Specifically, we'd like you to visit and read this page [link to website containing information on Wills [link TBC]]</p> <p>Once you've done so, we'd love to understand:</p> <ul style="list-style-type: none"> - What is your initial emotional response to this page? How does the thought of contemplating a discussion about wills make you feel? - Does anything confuse you, or raise any questions you'd want to understand further? - To what extent is information like this useful for you and your financial planning? <p>Thanks for sharing all your financial thoughts with us this week! We look forward to broadening our scope next week as we look to broader issues in the world around us</p>
Probes	<ul style="list-style-type: none"> - What would help to address some of these concerns? - Who do you turn to for trust when it comes to financial decision making? 	<ul style="list-style-type: none"> - Are there topics that are more or less appropriate to discuss with family members? - Which topics might be taboo, or difficult to discuss with family members? - How do you handle tricky or difficult financial discussions with family? 	<ul style="list-style-type: none"> - What are the key pieces of information you need to make informed decisions in this area? - What levels of support would you require to feel confident about these plans?
Output	Deeper understanding of decision-making specifically in the	Identify where Boomer Women are turning to for	Initial understanding of the role of wills (we will return to this

	Week 6: Changing the World		
Week Objective	Exploring their views and opinions of the world's social problems, how they form opinions around these topics, the role they would like to play in creating change and who they feel is responsible for making this change.		
	Task 1	Task 2	Task 3
Learning Objective	Problems that matter to them and how they engage with these	The likely biggest influences on these issues in the future	Introducing the role of charities and understanding perceptions of how they engage with charities currently
Activity type	Discussion	Image & Discussion	Discussion
Activity title	The world around us	The Year 2050	Let's talk about Charities
Details	<p>We wrapped up last week by asking you to think about the future, from a financial planning perspective. But this week we want to broaden this out to talk about wider, societal issues that you might consider as being important to you.</p> <p>When you consider your impact on the world, and perhaps the legacy you might imagine yourself having on those around you:</p> <ul style="list-style-type: none"> - What comes to mind when you think about your own legacy? - With this mind, how might you prioritise your impact when it comes to your immediate family and circle, vs broader societal issues or causes? - Finally, if we gave you a magic wand that had the power to solve one world social problem (e.g. food poverty, climate change, social injustice, mental health, cruelty against animals, homelessness etc.), what would you choose to solve and why? <p>As always, if you'd like to record your response in the form of a video, or post an image that expresses your thoughts, please feel free to do so!</p> <p>We look forward to hearing your thoughts!</p>	<p>There are many people having an influence on some of the biggest issues of the world today. Hot-takes and opinions about them come and go, and vary greatly. But we want you to put your future-forecasting hat on for this activity.</p> <p>We want you to post an image of someone you believe is having the biggest impact on the world today, that will most influence the world for the better by 2050!</p> <p>Once you've done so, we'd love to hear:</p> <ul style="list-style-type: none"> - Why did you choose this person - and how do they make you feel? 	<p>After 6 weeks on the community, the time has come to reveal a bit more about who we're doing this research on behalf of!</p> <p>You may or may not have guessed, but the focus of this particular project is on charities! We're still a couple of weeks out from telling you exactly which charities are involved in this project, but we not want to bring them front and centre into the conversation for the next couple of weeks.</p> <p>To start our conversation, we'd like you to consider what we've spoken about this week - the legacy you might like to leave behind, who might influence the world the most in the future - and share your thoughts on the following:</p> <ul style="list-style-type: none"> - How would you describe the role of charities when considering the big issues in the world today? - How would you describe your relationship with charities as part of your life today? <p>We look forward to hearing your views before exploring this theme in more detail next week!</p>
Probes	- Are there any causes or topics that you feel particularly	- What do you think will be most important to this person	Do you trust some charities over others? Why?
Output	Identifying the causes that Boomers most care about, within the	The influential figures that Boomers regard as credible	Initial perceptions and attitudes towards the role of charity

	Week 7: Role of Charities		
Week Objective	Exploring their understanding and perception of charities, what creates and breaks trust, the barriers and drivers to engage with charities, and their expectations from engagements with a charity.		
	Task 1	Task 2	Task 3
Learning Objective	Charity trust, influence and perception	Understanding drivers of loyalty when it comes to charity causes	Why and how they support their preferred charity / cause
Activity type	Image & Discussion	Discussion	Image & Discussion
Activity title	Your Favourite Charity Campaign	Charity over the years	Your story, Your cause
Details	<p>As mentioned at the end of last week, we're going to be focusing our discussions on charities for rest of the time on this community. And we want to start off by asking you to tell us about your favourite, or most memorable, marketing campaign for a charity. This might be something that has been lodged in your mind for years, or it might be something that comes to mind from having seen something more recently. Either way, we'd love for you to share your favourite charity campaign with us to get things started!</p> <p>So for this activity, please share a link or image or video of your favourite charity campaign. This can either be a screenshot, or a link to a Youtube video, or an upload from a picture you've taken of something in a newspaper/ magazine, or a piece of post. Once you've done so, we'd love to hear about why you've chosen this charity campaign to share.</p> <p>What do you like about it, and why do you think it's memorable for you?</p> <p>We look forward to hearing what you have to share!</p>	<p>For today's activity, we'd now like to understand more about how your relationship with charities might have changed over the years. There are two parts to this task that we're interested in:</p> <p>- Firstly, we'd like you to think back to the late 80s - early 90s (roughly 30 years ago), and tell us about a charity that you've been connected to since that time, if there is one. This could either be one that you regularly support, or perhaps one that you've just always felt a fondness for or recognised them when you see their advertising or mentioned in the media. Which charity would this be for you, and what makes you feel connected to it?</p> <p>- Secondly, we'd now like you to think about a charity that has only entered onto your radar in the past 5 years or so. What made you notice this charity, and what has drawn you to it?</p> <p>- Finally, when it comes to the connection you feel for these charities, what is similar, and what's different about they created that connection with you?</p>	<p>For this week's final activity, we'd love to hear your personal story when it comes to a specific charity that is close to your heart.</p> <p>We want you to think closely about one specific charity that means the most to you in your life. This could be for any number of reasons, which we'd love to hear more about below. Once you've got your special charity in mind, please share the following with us:</p> <p>- What is your special charity and why does it resonate with you?</p> <p>- How did you first get involved with the charity?</p> <p>- Finally, what are all the ways that you have supported this cause or taken action in the past? E.g. donated, volunteered, signed a petition, attended a protest, fundraised, campaigning.</p> <p>We look forward to hearing all your stories.</p>

Probes	<p>How could you make this campaign even better?</p> <p>How would you have liked to get involved in this campaign?</p> <p>Would you still be interested in this campaign if it came from a different charity? (Older/ younger/ bigger/ smaller?)</p>	<p>In what ways do you feel that the way charities connect with the public in general has changed over the years?</p> <p>What do charities do well / less well in the modern age?</p>	<p>- How have organisations been more or less successful with their efforts in the past?</p> <p>- What do you think is the most influential action an organisation could do to guarantee your support for this cause?</p> <p>- How does your passion for this cause compare to others you might be aware of?</p>
Output	Detailed insights on the most motivating and engaging way to	What prompts loyalty and connection to charities, both	An understanding of the key motivations to support and how

	Week 8: The specifics of Charity		
Week Objective	Unpacking the specific behaviours, attitudes and perceptions towards the key areas of charity support, and how this might have changed over the years for each respondent: Volunteering (incl. Fundraising), Campaigning, & Regular Giving		
	Task 1	Task 2	Task 3
Learning Objective	Boomer Women attitudes and behaviours towards Volunteering	Boomer Women attitudes and behaviours towards Campaigning	Boomer Women attitudes and behaviours towards Regular Giving
Activity type	Poll & Discussion	Poll & Discussion	Poll & Discussion
Activity title	Tell us about Volunteering	Let's now chat about Campaigning	Finally, how do you feel about Regular Giving?
Details	<p>For this week's activities, we want to get into the nuts and bolts of the most common ways people generally engage with charities. To start off, we'd like to discuss Volunteering in more detail. Volunteering could mean a number of things: helping out physically with a cause, helping to organise others, co-ordinating fundraising efforts, doing a sponsored activity, or fundraising for causes on your own, among many other actions.</p> <p>Firstly, we'd like you to answer the following question. Which of the below statements most accurately represents your feelings about volunteering with charities:</p> <ul style="list-style-type: none"> - It's my preferred way of showing support to charities I care about - It's something I would like to do more of, but current circumstances don't allow me to (Time/money/health) - It's not something I've tried before, but might be willing to give a go - It's not something I would consider getting involved in to show my support <p>Great - thanks for sharing that with us. We'd now like you to help us to understand a bit more about your previous answer by sharing the following with us:</p> <ul style="list-style-type: none"> - Why did you select the answer that you did? - What could charities do more of to encourage you to increase your involvement with volunteering? - What barriers or obstacles do you feel currently exist that might 	<p>We'd now like to consider another aspect of engaging with charities, specifically campaigning. Once again, this could mean a number of things: physically attending or organising events to raise awareness, signing petitions for a cause, promoting awareness either offline or online, writing to MPs or authorities to demand change.</p> <p>Firstly, we'd like you to answer the following question. Which of the below statements most accurately represents your feelings about Campaigning with charities:</p> <ul style="list-style-type: none"> - It's my preferred way of showing support to charities I care about - It's something I would like to do more of, but current circumstances don't allow me to (Time/money/health) - It's not something I've tried before, but might be willing to give a go - It's not something I would consider getting involved in to show my support <p>Great - thanks for sharing that with us. We'd now like you to help us to understand a bit more about your previous answer by sharing the following with us:</p> <ul style="list-style-type: none"> - Why did you select the answer that you did? - What could charities do more of to encourage you to increase your involvement with campaigning? - What barriers or obstacles do you feel currently exist 	<p>Finally, we want to hear your views on Regular Giving. This could take many forms but primarily relates to tangible or financial items, rather than your time (as we would regard that as volunteering). It might include donating of items to causes in need, monthly financial donations, or donating to causes that catch your eye from time to time.</p> <p>Firstly, we'd like you to answer the following question. Which of the below statements most accurately represents your feelings about Regular Giving with charities:</p> <ul style="list-style-type: none"> - It's my preferred way of showing support to charities I care about - It's something I would like to do more of, but current circumstances don't allow me to (Time/money/health) - It's not something I've tried before, but might be willing to give a go - It's not something I would consider getting involved in to show my support <p>Great - thanks for sharing that with us. We'd now like you to help us to understand a bit more about your previous answer by sharing the following with us:</p> <ul style="list-style-type: none"> - Why did you select the answer that you did? - What could charities do more of to encourage you to increase your involvement with Regular Giving? - What barriers or obstacles do you feel currently exist that might get in the way of doing more Regular Giving?
Probes	Ask for client specific probes	Ask for client specific probes	Ask for client specific probes
Output	Specific attitudes and behaviours towards Volunteering, including	Specific attitudes and behaviours towards Campaigning,	Specific attitudes and behaviours towards Regular Giving,

	Week 9: Evaluating Charity Options		
Week Objective	Providing an opportunity for Boomer Women to evaluate and consider relevant charity options for their consideration, and using this exposure to build out their ideal legacy / wills product		
	Task 1	Task 2	Task 3
Learning Objective	Understand spontaneous perceptions of legacy and gifts in will products, and how this influences how Boomer Women want to be remembered	Compare and Contrast to Legacy products	Key considerations for Boomer Women when it comes to creating their ideal legacy product and information
Activity type	Discussion	Website review & Discussion	Discussion
Activity title	Charitable gifts that keep on giving	Understanding more about Legacy options	Building your own Legacy option
Details	<p>By 2025, 60% of the UK's private wealth be will be in hands of women who were born between 1945 - 1965, a fact that might surprise some of you. As a result, one of the areas that charities are specifically interested in is Wills and Legacy planning. When it comes to someone thinking about how they might want to be remembered, and what they might want to leave behind, this is an important topic for most charities.</p> <p>We're going to spend this week talking about this in a bit more detail. We're conscious that for some it might be an area that you may have had more or less exposure to, but it's something we're very keen to understand and learn from your experiences and thoughts. To start off, we want to understand a little bit about your thoughts on the topic:</p> <ul style="list-style-type: none"> - Firstly, what emotions come to mind when you think about the topic of Wills and Legacy planning for you? - What questions might you have when it comes to thinking about Wills and Legacy planning, particularly when thinking about them in the context of charities? - Finally, to what extent do you think about Wills & Legacy planning when it comes to thinking about how you might want to be remembered, if this is something you even think about? <p>We know these topics aren't always the easiest to talk about, but your experience and opinions will greatly help to influence how charities can continue their important work in this area moving forward so we're very interested in hearing the thoughts you have to share.</p>	<p><u>Thanks for sharing your thoughts on Wills and Legacy options in our previous activity.</u></p> <p><u>We'd now like to share more information with you on this topic, and understand the extent to which it might influence your thoughts on the topic.</u></p> <p><u>First, please visit and read this page - Charity Guide to Legacy Giving [https://charitydigital.org.uk/topics/topics/small-charity-guide-to-legacy-giving-10122]. Once you've done so, we'd love for you to answer the below questions, and ideally post screenshots of the relevant parts of the page that help to support your answers (or copy and paste the relevant passages of text if that's easier).</u></p> <ul style="list-style-type: none"> <u>- Did anything on this page surprise you, or particularly stand out as interesting for you? If so, why?</u> <u>- After having read the article, to what extent might this information have influenced that way you feel about Wills and Legacy options for charities?</u> <u>- Finally, does anything on this page influence the way you feel about how you might plan your resources when it comes to charities?</u> <p><u>Remember, if you are feeling affected by something we are talking about here, you can find support from a number of sources via the list on the BBC website, here: https://www.bbc.co.uk/programmes/articles/4MmhHDSbdDmTpVJhBs2v4P/y/information-and-support-bereavement</u></p>	<p>We've spent this week talking in detail about Wills & Legacy options and understanding your thoughts about them in the specific context of charities.</p> <p>For the final activity of this week, we want to give you the opportunity to build out the structure of your ideal Will or Legacy option. The ambition behind this task would be to provide the skeleton of what you would want to see and hear in order to encourage more people like yourself to actively consider how charities could play a role in future financial planning, specifically when it comes to wills and personal legacies.</p> <p>To help with your thinking, you might find it helpful - and we'd certainly encourage you to do so - to Google wills, legacies and charities and see how different bodies might be talking these options, and how they make them available today.</p> <p>Once you feel ready to do so, we'd love to hear what you would want to include when it comes to the following:</p> <ul style="list-style-type: none"> - What are the key questions any charity should be able to easily answer when it comes to thinking about Will and Legacy options? What information do you want or need to be able to find quickly and easily? - What are some of the key features, benefits, or advantages that might encourage you, or someone like you, to more actively consider this as an option with a charity as part of their financial planning? - Finally, as we've discussed this week, this topic can be an

Probes	<ul style="list-style-type: none"> - Do you have any specific experience with charities or other organisations when it comes to Will and Legacy planning? - How easily understood is the legacy giving area of financial planning? To what extent is this seen as daunting, or not? - How does the role of family discussions enter into this conversation? - - To what extent is it more important to you to consider these 	<ul style="list-style-type: none"> - What can charities do to make this type of information feel more digestible and accessible? - How do you feel about charities talking about and providing information of this type? 	<ul style="list-style-type: none"> - What are the key areas or information needs that charities might be missing today?
Output	Understand unprompted attitudes and perceptions towards Wills,	The role and types of information that is / isn't useful	Guidance on information needs, preferred features and

	Week 10: Individual Charity Perceptions & Attitudes		
Week Objective	Our Boomer Women will be divided into smaller groups that are focused on individual charities most suited to their stated interests during recruitment. We will then explore their perceptions and opinions and websites from client charities and competitors, before revealing the clients to them and understanding their perceptions further.		
	Task 1	Task 2	Task 3
Learning Objective	Understand initial perceptions of charity website and what's working / could be improved	Understand how a comparable competitor fares in comparison to charity's website	The one piece of golden advice you would give to encourage people your age to take action for this charity
Activity type	Image Upload & Discussion	Screen Recording	Discussion
Activity title	We're going on an online safari	We're going on an online safari (2)	The Big Reveal
Details	<p>Welcome to the final week of Chapter 1 on our research study. As always, we are hugely appreciative of all the effort you've already put into this community so far. We've learnt so much and can't wait to uncover the last few weeks with you.</p> <p>For this activity, we are sending you on a digital safari to investigate a specific charity's website, and share back your thoughts! To do so, we want you to look at the following websites, and then tell us the following: [share a relevant competitor website for each charity].</p> <p>1. From this website, we would love you to find, screenshot and share the following:</p> <ul style="list-style-type: none"> - Something that inspired you. - Something that motivated you to take action. - Something that did NOT resonate or motivate you to support. <p>Please also explain each of your choices as to why you chose what you did!</p> <p>Finally, was there anything you expected to see, that you didn't?</p>	<p>Now we want you to look at the following charity's website: [Share link to charity client's website].</p> <p>We want you to do the same activity as yesterday, this time we are going to ask to record your screen and listen to your thoughts as you narrate them to us which exploring the website.</p> <p>In short, how this will work: please read the prompts below to think about what we would like you to focus on, then open the website link below and start reading the website. As you do so, talk through your thoughts out loud so we can hear them while looking at what you're browsing. Ideally we would hear your thoughts over 3-5mins! [Full instructions included for participants here].</p> <p>From the charity website find and talk us through your thoughts on the following:</p> <ul style="list-style-type: none"> - Something that inspired you. - Something that motivated you to take action. - Something that did NOT resonate or motivate you to support. <p>Please also explain each choice once again.</p> <p>Finally, how did this compare to the website(s) you looked at in the previous task?</p>	<p>The time has come for us to reveal which organisations are behind our This Life online community.</p> <p>No fewer than SEVEN charities have in fact come together to sponsor this whole project, and find out more about people like you. Each of the smaller groups you've been in for the past few week has one or two charities behind it. Watch the video(s) below to see who 'your' charity or charities are...!</p> <p>What do you think of this news? What would you like to say to them? We'd love you to record a short video message back. Make sure to include:</p> <ul style="list-style-type: none"> - your reaction to this news of who is behind all the work you've been doing. Are you surprised? Indifferent? Is it good or bad? Why? - if you had one piece of advice for this charity/ these charities to engage women like you, what would it be?
Probes	<ul style="list-style-type: none"> - How could this website have been improved? - Did any pages in particular stand out to you? 	Specific client probes where relevant.	Specific client probes where relevant.
Output	Understanding what it is about the participating charities that	Understanding current website perceptions and how to	Immediate action points for charity and perceptions from
Client request	Key competitor website for their charity	Any particular webpage we should send them to first (if	Client intro video