

Researching Website Donation Pages 2.0

What's changed 3 years on?

AUGUST 2019

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About the research

This research is version 2.0.

In 2016, we conducted the first Website Donation Pages Research report and benchmark scorecard. THE research was well thought out and considered:

- It had quantitative parts - donor surveys, Donation Page benchmark, & supplied conversion data;
- and qualitative parts – donor interviews, UX testing, & objective expert opinion.

But there were flaws.

Doing things a bit differently

So, with version 2.0 in 2019, we've changed it up a bit. We wanted to simplify the research and focus on the most important elements. This time around:



We've made a \$20 donation to 60 orgs



We've gone international – 45 Australian and 15 International orgs



Each org was benchmarked against 49 points of criteria (only a few variations on 2016's research)



All orgs have again been ranked in a scorecard, with points from 0 (not important) – 3 (super important) given to each criteria

The purpose of this research

We want to help charities in Australia and around the world to build their skills and capacity in digital – for fundraising, for campaigning, and to achieve their mission.

At Parachute Digital, we want to provide useful information that supports non-profit orgs to keep improving their digital strategies, communications and engagement.

Our hope in 2016 was for the research to act as a guide for charities that were building new websites or wanting to optimise their website donation page. In 2019, we hope for the same.

The organisations that supported this research

Special thanks to these organisations that opened up their Google Analytics Website Donation data to us:

Organisation	Research Category	Sector	Size
Anglicare		Disadvantage	
ASRC		Refugees	
Camp Quality		Cancer Charity	
Cure Brain Cancer		Cancer Charity	
Environment Vic		Conservation	
Fred Hollows		Health	
Good Shepherd		Women's Rights	
House with No Steps		Disability	
Jane Goodall Institute		Animal charity	
Launch Housing		Homelessness	
MSF		International Aid	
Peter Mac		Cancer Charity	
Surf Life Saving		Community Service	
Vision Australia		Disability	
Wayside Chapel		Homelessness	
White Ribbon		Women's Rights	
World Animal Protection		Animal charity	
WWF		Conservation	

Research Category		
	Environmental	4
	Health and Happiness	8
	Homelessness and Poverty	3
	Human Rights and Social Justice	3
TOTAL		18

Organisation Size		
	Small	3
	Medium	8
	Large	7
TOTAL		18

Research methodology

What's new?

Compiled a list of orgs that had updated their Website Donation Pages since 2016 – there were about 31¹.

What were the results?

Contacted all orgs to ask them to share their data from the Christmas Appeal period of 2015 and 2018². 18 agreed. To make a fair comparison, we looked at these data items:

- Donation conversion rate - CVR% [number of visitors to the page that completed a donation]
- Total donations # – Transactions completed
- Total Income \$ – revenue from website donations [via General page]
- Average Gift \$ - average donation [Income divided by Donations]
- Source that drove the donation – What channel generated the website donations? [Email, Search – Organic or Paid, Mobile/ SMS, Social Media, Website click]

Website donations

Made a \$20 donation to 60 orgs [45 Australian and 15 International] to analyse their donation experience across 49 points of criteria.

- Donations were made via the General Donation Form
- We approached the donations as a first time donor would
- In 2016, we only made a \$10 donation, and felt this may have excluded us from some follow up actions
- In 2019, we included an International analysis to understand how Australian donation experiences compare with more mature markets and other cultures



¹ Some were in the process of updating but it hadn't gone live in the appeal period

² 1st October to 31st December

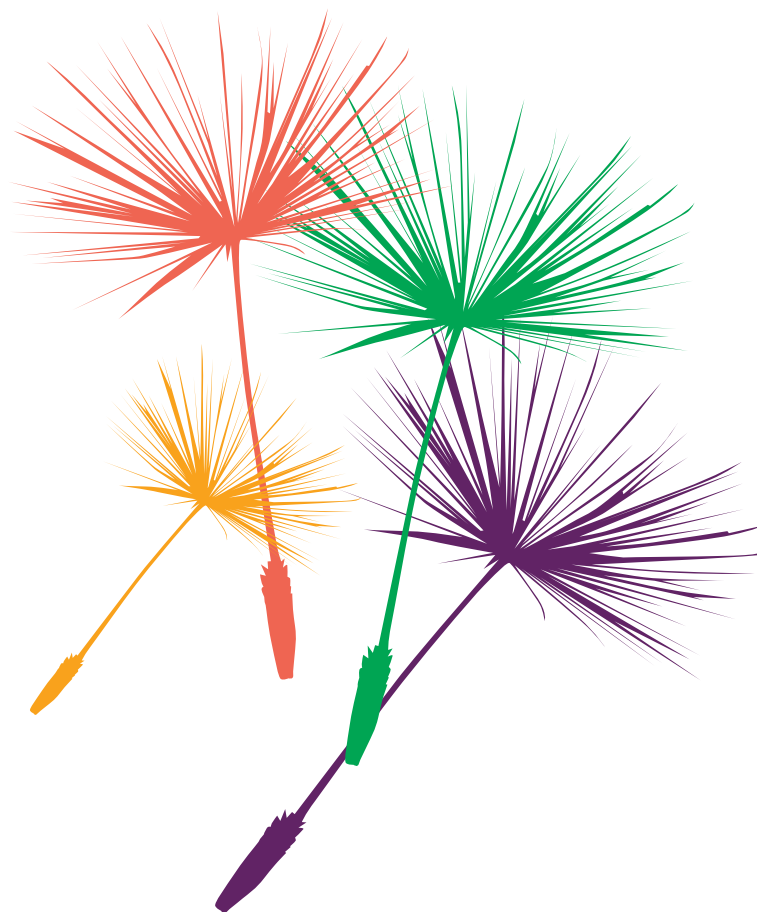
Cross-sector representation

Organisations were selected because:

- Top 11 orgs from 2016 research
- All orgs that had updated their website donation pages since 2016³
- All orgs whose data we had access to
- To provide a good cross-sector analysis of organisation type and size
 - Health & Happiness (includes medical research + mental health + sick kids)
 - Homelessness & Poverty (includes International Aid)
 - Environment (includes Animal charities)
 - Human Rights & Social Justice (includes Equality, Women's orgs etc)
- International orgs were chosen to have a fair direct comparison with an Australian org.

Benchmark and scorecard

The most important 11 criteria were pulled out and a score out of 100 was assigned to each orgs website donation experience.



³ Based on our research

2016 vs 2019 - “What’s changed?”

7 Key actions from 2016

In 2016 the Donation Pages Research gave organisations 7 things to do. How did you stack up?



Make it Fast

Yes – time to make a donation has halved



Use Visuals to tell your Story

Yes – imagery is emotional



Explain your Mission and Solution

Yes – there is more compelling content & dollar handles



Make it Secure

No – Less than 1/3 of charities give even simple visual cues for data security



Design a donor journey

No – most charities still don’t have a journey for their new one-off donors.



Keep the Form Simple

Still too many form fields – but the improved User Experience makes it feel simple



Say Thank You Well

poor = Heart Foundation

Every charity says thank you – but not enough make the extra effort to delight and personalise

2019 – Still room for improvement

When looking at the data and the benchmark scores, a lot has improved in 3 years. But when looking at the key criteria and the top recommendations from the 2016 research, there hasn't been much of a shift on some of the more controversial areas – such as:

Form fields on the donation page



- The total number of fields we ask for and the fields we make mandatory
- Validating the data entered is correct

Giving donors more options to pay



- Apple Pay and After Pay are not present like they are in 65% of the rest of consumer online purchasing

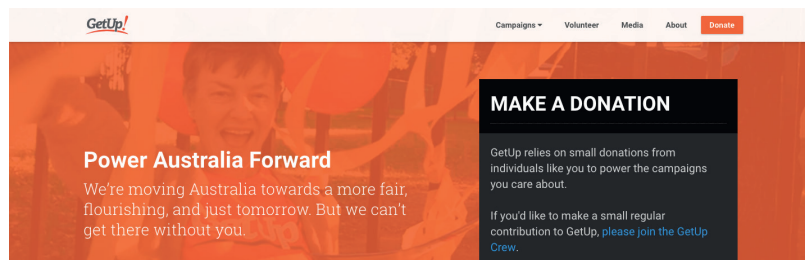
Privacy and Security



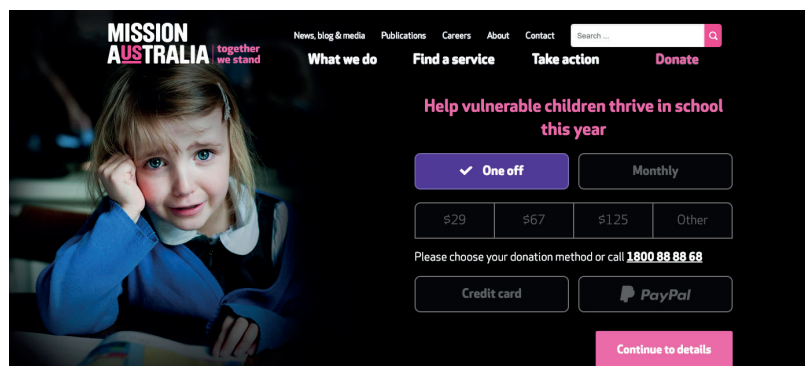
- For an industry that is quite data focused, with huge compliance requirements, we have dropped the ball in making our donors feel that their personal details and payment information is safe and secure.

What exactly have charities changed?

this is what we noticed about the orgs that have updated their donation page experience since the last research.



- A shift from one page to multi-step donation forms Bigger donation widgets, Bigger text, Bigger images Donation pages are prettier – but perhaps missing important elements like security
- More dollar descriptions
- Less “transaction” language



2019 Research Findings – Key Observations

Donations are faster

Not because orgs have made any significant changes, but because browsers save our details.

Conversion rates have dropped

Despite the donation process being faster (and therefore easier).

100% of orgs are now mobile optimised

Most donations (over 75%) are still via desktop, but mobile donations have grown since 2016.

Many more orgs now offer PayPal as a payment method

More than half for one-off website donations.

All charities ask for unnecessary information in their donation forms

Charities are still not donor centric when it comes to data capture (form fields).

Donation Page content is greatly improved

Particularly ‘Headlines’ and how orgs make ‘the ASK’, as well as the dollar handles.

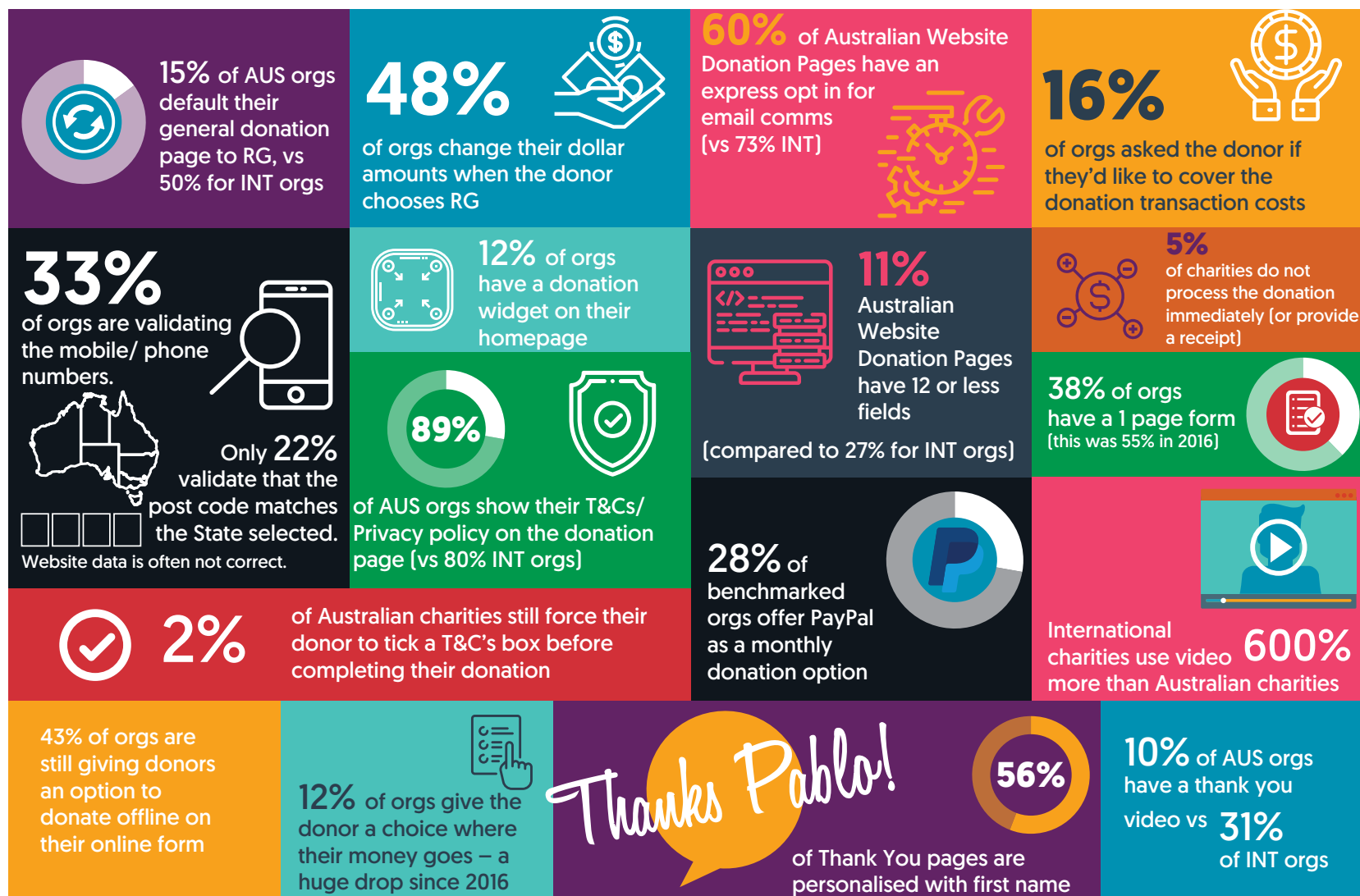
Security still needs to be improved

Australian charities need to make donors feel their data is safe.

One-off donations are still the focus for websites

The focus on RG in Australia is still not translating to websites.

2019 Donation pages research – interesting numbers



2019 - Scorecard top orgs

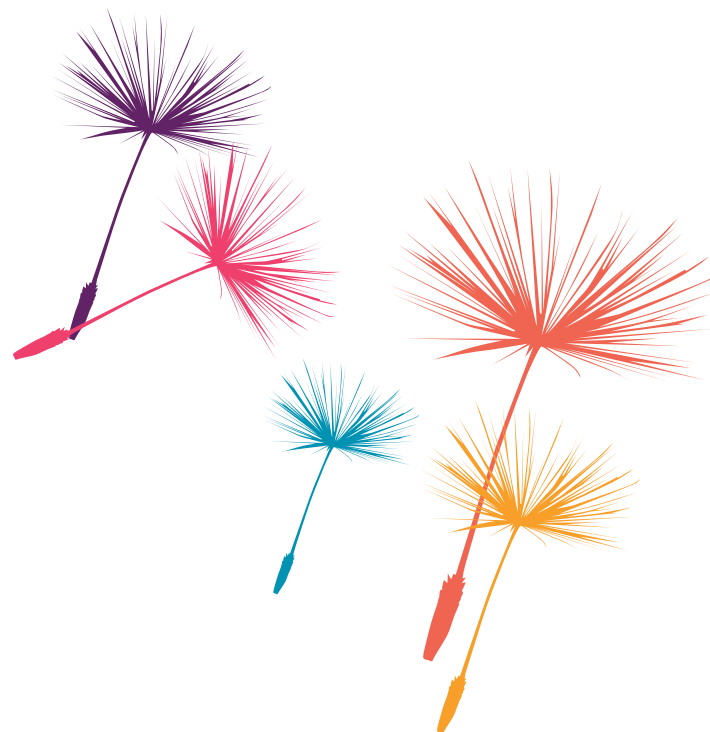
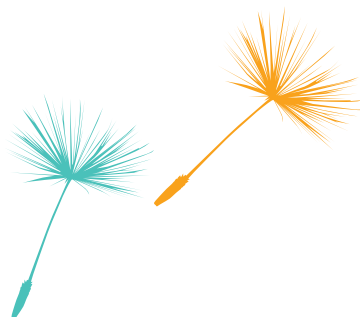
AUSTRALIAN Organisations	SECTOR	SIZE	2019 Score	2016 SCORE	
Top 9	Oz Harvest	 MEDIUM	100%	50%	
	ASRC	 MEDIUM	83%	NA	
	Act For Peace	 MEDIUM	83%	25%	
	World Animal Protection	 LARGE	83%	75%	
	OXFAM Australia	 LARGE	83%	67%	
	World Vision	 LARGE	83%	33%	
	Fred Hollows Foundation	 LARGE	83%	67%	
	Get Up!	 LARGE	83%	58%	
	Canteen	 LARGE	76%	58%	
11 orgs tied in 10th place	Vision Australia	 LARGE	72%	42%	
	Cancer Council NSW	 LARGE	72%	67%	
	Surf Life Saving	 LARGE	72%	50%	
	Unicef Australia	 LARGE	72%	50%	
	Launch Housing	 SMALL	72%	33%	
	WWF Australia	 LARGE	72%	50%	
	The Wilderness Society	 LARGE	72%	94%	
	RSPCA NSW	 LARGE	72%	50%	
	The Lost Dogs Home	 MEDIUM	72%	NA	
	UNHCR	 LARGE	72%	42%	
	Amnesty International	 LARGE	72%	83%	

2019 Scorecard – website donation pages

The scorecard tries to objectively compare Website Donation Pages across organisations, sectors and countries based on the top 11 points of criteria - which zoom in on A) the ease of the Donation Experience and B) how well the page explains the mission/ makes the ASK.

We have assessed only the experience of a NEW donor making a donation through the General Website Donation Page.

Please note that the “one page form” criteria has been removed from the scorecard in 2019.



International charities - Scorecard

International orgs Website Donation Pages were scored against the same criteria as Australian orgs. When we put comparable orgs next to each other, Australian orgs ranked higher.

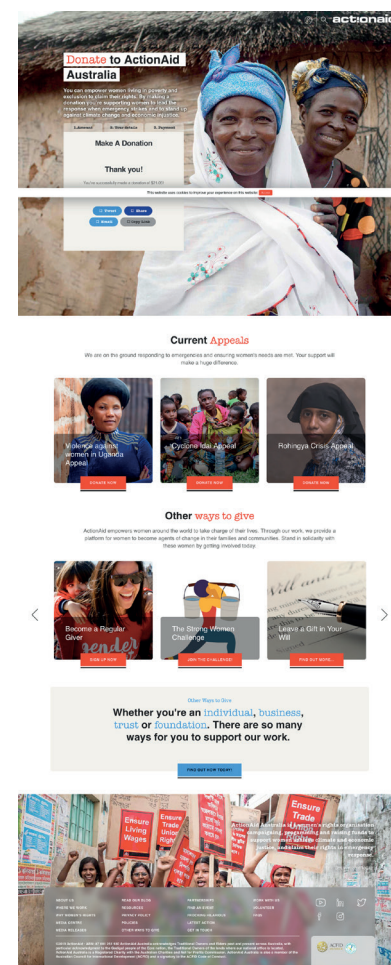
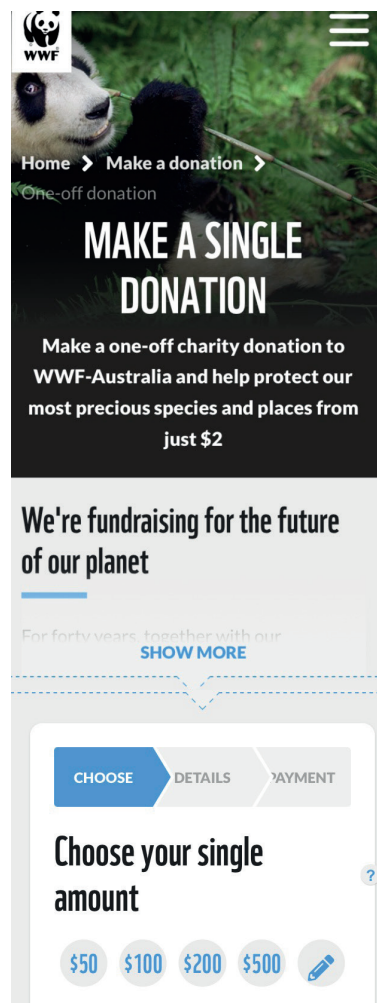
Direct Comparison of Australian Orgs vs International Equivalent Orgs				
 AUS Organisations	2019 Benchmark SCORE	SECTOR	2019 Benchmark SCORE	INT Organisation 
Oz Harvest	100%		45%	2nd Harvest Japan (Foodbank)
UNICEF Australia	72%		90%	UNICEF Argentina
ASRC	83%		41%	Human Rights Watch
OXFAM Australia	83%		52%	OXFAM Canada
RSPCA NSW	72%		72%	RSPCA UK
Cancer Council NSW	72%		72%	Cancer Research UK
Amnesty International Australia	72%		55%	A21
HSI	62%		69%	Soi Dog Thailand
Environment Victoria	62%		52%	David Suzuki Foundation
Mission Australia	62%		41%	YUM - Indonesia (Yayasan Usaha Mulia)
National Breast Cancer Foundation	62%		31%	National Breast Cancer Foundation USA
Child Fund	52%		62% / 52%	Save The Children - Mexico/ Indonesia
MSF Australia	41%		52%	MSF USA
AUSTRALIAN CHARITIES WIN!				

Donating to charity websites in 2019

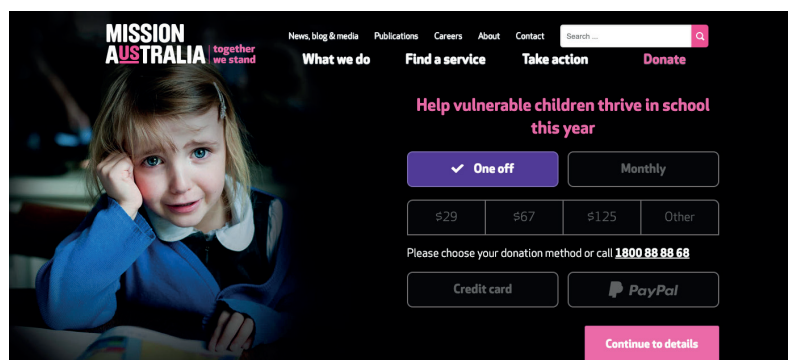
We are very happy to report that there has been some significant increases in the Scorecard. In 2019, an organisation has to reach of **score of 83% to make it into the top ranking organisations** (it was 67% in 2016).

In 2019, every Australian organisation that we made an online donation to, was **mobile optimised**.

On average **donation speeds have halved**. While some orgs have invested in their donor's online experience, the increase in speed is mostly due to browsers now storing our personal information.

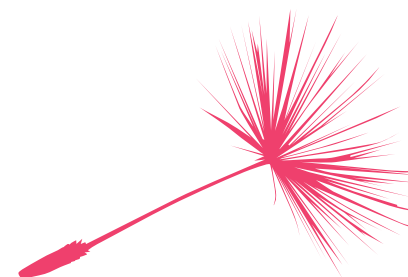
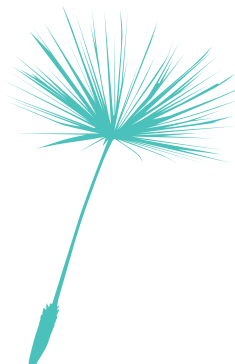
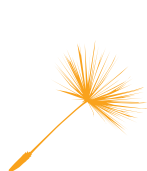
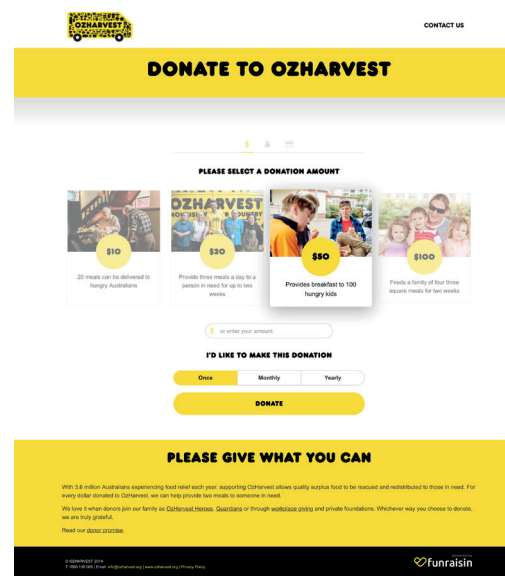


Donation Widgets (to start the donation process) are now found on the homepage of 12% of organisations benchmarked. This is still too low, but its double the 2016 results.



More organisations are giving their donors **more payment options**. **PayPal** is now offered as a payment method for one-off donations for 55% of organisations, and 27% for RG. There has also been a slight increase in offering Direct Debit.

Content is much improved. Orgs as a whole are doing a much better job at explaining their mission with the supporter and the “ASK” is clearer – via headlines, dollar handles, images. But video is still under-used in the donation experience overall.



A smiling man in a dark t-shirt stands in a cornfield under a blue sky. The t-shirt has a red logo that says "ACT FOR PEACE" and "COMMUNITY". In the top left corner, there is a white box with the text "ACT FOR PEACE" and "CONFRONTING INJUSTICE TOGETHER THROUGH THE COURTS". In the top right corner, there are social media icons for Facebook and Twitter.

However, orgs are still not donor centric. The average number of **form fields** you are asking your donors to complete is still way too high at 17, with 14 of them mandatory.

Despite a huge industry shakeup since the 2016 research was released, organisations are still not doing enough to make their donor's feel that their **data is safe and secure**.

[illegible]

Donation pages research 2019

6 things you need to do



Make it EASY for your donor to give to you

i.e. Donation Widgets + correct keyboards + error messages



Tell your donor WHY they should give to you, today

Show them what impact they will make



Keep the form SIMPLE

Don't ask for unnecessary data – i.e. title, phone, name on card



Make your donor's feel SECURE

– i.e. padlocks on donate button and visual cues near payment area



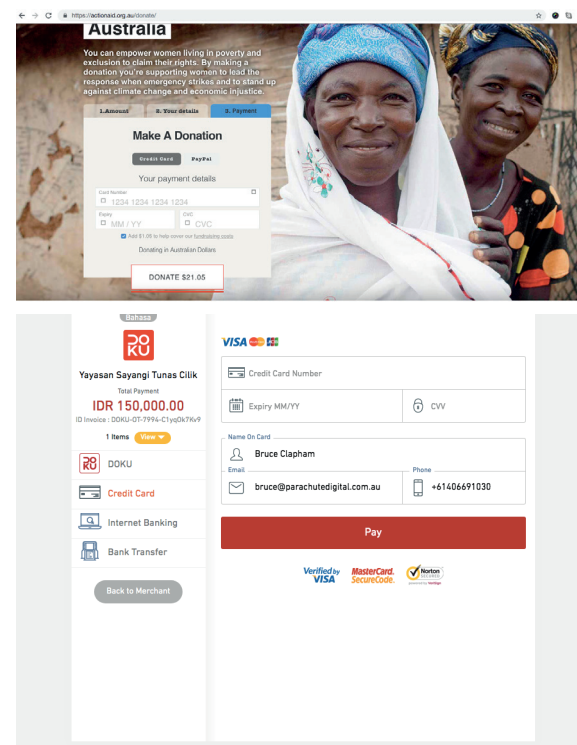
PERSONALISE the experience for your donor

– i.e. Thank you page + email



NURTURE your one-off donors into loyal supporters

Bring them into your community through stories.



Australian website donation pages

we're so pleased to see many organisations making it a priority to improve the donation experience on their websites. It has resulted in a lift in donations across the charity sector.

The Donor (User) Experience

Donation pages look better – not so ugly and clunky. They're all mobile responsive now. It takes much less time to make a donation. On their General Website Donation Pages, Australian charities are doing a better job at explaining their cause and why they need a donate, and how the donor's money will be spent.

But we're not quite donor centric yet. There's still much more about the organisation than there is about the donor. There's still way too many fields of information we require from our donors (as in, they're mandatory). And we don't do the simple act of personalising the thank you experience for the donor.

And on mobile, it feels a bit more like a box has been ticked. Yes, all Australian charities that we donated to did have a mobile responsive donation page BUT the details are missing. Things like using a numeric keypad for donors to enter their mobile number, credit card number and post code. Or for the email field, having the keyboard that has the @ key on the first tab. These are simple things to do, they just need to be briefed to your web developers to do.

Donation Conversion Rates

General Website Donation Pages had higher conversion rates than Appeal pages.

Across the 18 orgs who shared their analytics data, the average Appeal donation conversion rate was 31% (from visitor to the page). Whereas the donation conversion rate for General Donation Pages was 26%.



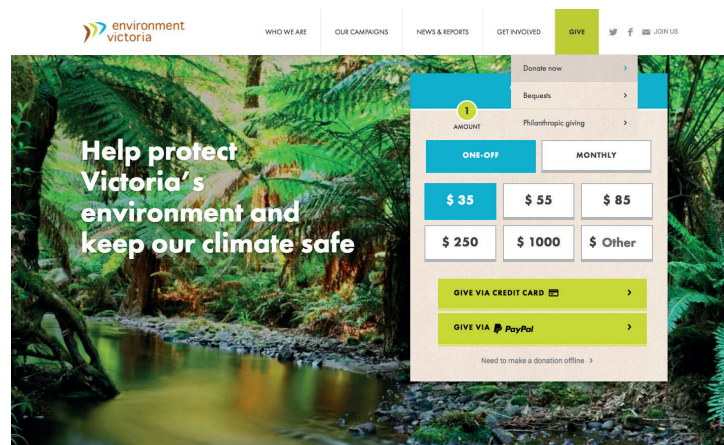


Environment Victoria

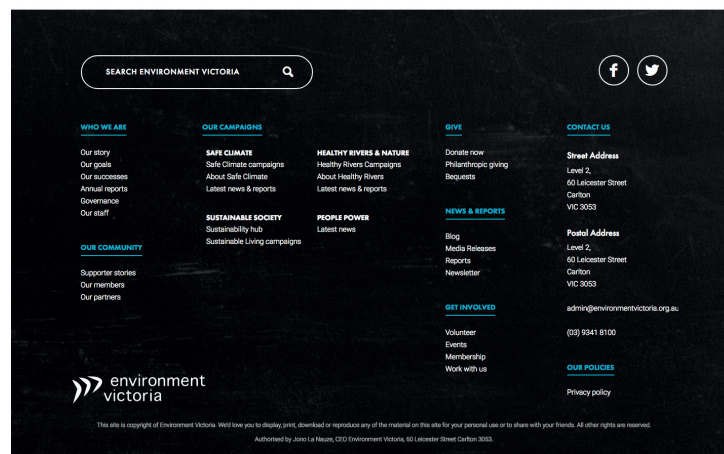
We saw some orgs, like Environment Victoria, that had a smaller volume of visitors to their donation pages, with super high donation conversion rates (over 65%). Whereas Australian organisations that were driving much larger volumes to their Appeal pages (such as WWF, ASRC and MSF) had donation conversion rates between 9% and 22%.

Peter Mac (smaller volume) and Fred Hollows' (large volume) General Donation Pages had the highest conversion rates – at 80% and 41% respectively.

Sounds pretty good, right? But the thing is, the donation page conversion rates have gone DOWN since 2015.



Your privacy is really important to you and also to us. When you make a donation we'll keep you updated about our campaigns, let you know how you can take part and offer other ways you can help. You can unsubscribe at any time – check out our [privacy policy here](#).



More Supporters?

Australian charities have done an excellent job at driving more people to their websites and donation pages. We are growing the industry and our supporters – but are we just growing our list, rather than our support?

Growth in 3 years: 2015 - 2018

There has been a notable improvement in the online donation experience since 2015. Average metrics across the board have grown by 49% - mostly driven by the average gift.

What's concerning is the decline of the conversion rate. So, while it's important to lift all 3 key metrics (TRAFFIC, AVERAGE GIFT and CONVERSION RATE), the Conversion Rate has the biggest impact.

1 October - 31 December

Actual Change - Australian 3 Year Change	Australian Benchmark 2015	2018 Change in all 3 areas*
General Donation Page Visitors	4,000	5,000
Conversion rate to Gift %	30%	26%
Donations Made	1200	1300
Average Gift \$	\$118.00	\$162.00
Donation Income \$	\$141,600.00	\$210,600.00
Growth %	0%	49%

* The last column in this table shows the growth state of Australian charities online giving overall. This table will look different for each individual organisation.

Many orgs are driving MORE PEOPLE (traffic) to their Donation Pages – but perhaps the quality or commitment of those supporters isn't as high?



Industry sector analysis



Homelessness & Poverty

Anglicare had the highest average gift by almost double the next tier orgs [\$350+].

This is interesting because the Homelessness & Poverty sector, as a whole, had the lowest HIGH dollar amounts on their donation pages. About \$114 BELOW the mean.

Anglicare is a religious organisation – which are known to have higher value donors in general. But converse to this was that we found more religious organisations in the Homelessness & Poverty sector than any others.



Health & Happiness

The Health & Happiness charities in general had more one-page donation pages, but more form fields to fill in. The Health and Happiness sector were the best at personalising the Thank You page for their donors. This sector definitely had the highest average gift – over \$200 for orgs like MSF, Cure Brain Cancer Foundation and Peter Mac. Whereas Environment Victoria, White Ribbon and the ASRC hovered between \$150-\$175 average gift on their General Donation Page.



Environment

The Environment sector in particular had a much larger focus on donor engagement, retention and communications. The Environment sector was twice as likely as the Human Rights sector to give donors other ways to get involved, to have an express tick box opt in for their newsletters and send more emails in general. The Environment sector also had the highest instance of allowing their donors to give via PayPal.



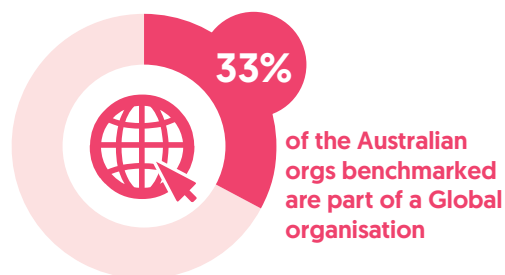
Human Rights

The Human Rights sector had the highest dollar asks (particularly for position #1) and were more likely to default to an RG ask on their General Donation Page than other sectors. The Human Rights sector also gave their donors an immediate option to give, with more donation widgets on their homepage. Across all organisations benchmarked, the Human Rights sector were giving their supporters the best mobile experience.

International organisation's website donation pages observations

In Australia, we can become very insular and it's important to not just benchmark ourselves against each other, but also against organisations from other countries and cultures.

The issues we tackle are global



- Most of the International orgs benchmarked have a direct comparison charity in Australia [e.g. Cancer Council NSW with Cancer Research UK, Environment Victoria with David Suzuki Foundation, RSPCA with SPCA UK etc.]

We are more similar, than different

- In general, the donation experiences across different countries and sectors were quite similar
- Everyone is using credit card as the primary donation method
- Almost everyone is mobile responsive [with 1 exception Japan foodbank]
- Everyone is asking for too much information from their first time donors

What can International Organisations teach Australian charities?

- International orgs are more concerned about giving their donors a good user experience:
 - Less steps to complete a donation
 - Use video much more
 - Asking for fewer pieces of data from their donors
 - Have better mobile experiences/ right keyboards
 - Give better error messages
- International orgs are better at compliance:
 - An express opt in for email more often
 - More concerned with their donors feeling safe and secure
- International orgs give their donors more payment options [direct deposit for cash]
- International orgs are more comfortable asking for larger amounts online

In which areas are Australian orgs leading?

- Donation processed automatically. Many orgs didn't provide the tax receipt in the thank you email, and it wasn't just non-western countries. Save the Children Mexico and Indonesia, as well as Cancer Research UK
- We offer our donors the choice of PayPal more often
- We're better at explaining how the donation will be used [dollar handles]

3 years on – 2016 vs 2019

“Growth & the way forward”

Donation eCommerce Data

In the 3 years since the first version of this research was released, we have witnessed more organisations including fundraising requirements into their new website designs.

- We've seen more organisations A/B testing their donation pages.
- The donation data shows us that more organisations are tracking the source and channel that drive their donations in Analytics
- More organisations are investing in retention than they were in 2015/16
- There is more investment [budget] and resources [headcount] in digital

30+ Australian Organisations have optimised their Donation Form

From our knowledge of the industry, we've been able to identify more than 30 organisations that have invested in a new Website Donation Page since the first iteration of this research was released in 2016.

We contacted all of them (plus a few others) and asked them if they would share the results for how these new and improved donor experiences had translated into dollars.

18 Organisations shared their Website Donation data with us

We were granted access to the Google Analytics eCommerce data for each of these orgs.

In an effort to compare apples with apples, we looked at the Christmas Appeal period of 1 October to 31 December across all organisations.

We reviewed the general website donations for this Christmas period in 2015 [same time that the first research was conducted]. We then compared them to the same Christmas period for 2018.

Top orgs by Donation Data

Organisations that Invest in Digital, GROW Digital Income					
	Environment Victoria	Medicines Sans Frontiers	WWF Australia	Fred Hollows	Anglicare
Generic Donation Page					
2018 Traffic UP	✓	✓	✓	✓	✗
2018 Donations UP	✓	✓	✓	✓	✗
2018 Conversion Rate % UP	✗	✓	✗	✓	✓
2018 Average Gift \$ UP	✓	✗	✓	✓	✓
2018 Revenue \$ UP	✗	✓	✓	✓	✓

These 5 orgs that have invested digital – with skills and budget – were consistently the ones that saw growth in the key metric areas of donations, average gift \$ and conversion rate.

But the big surprise and concern, given the investment in resources and better user experiences, is that only 2 orgs – MSF and Fred Hollows – have had growth in their donation page conversion rate.

What were we looking for?

Across all orgs that shared their data we wanted to know – had digital income gone up? How did average gifts compare? What industry/ sector insights could we glean? And for the orgs who had optimised their website donation experience, what had “improving” the experience for donors translated into?

4 Key Metrics that drive Revenue

The key metrics we were gathering and comparing were:

1. Visitors to the orgs general donation page
2. Number of donations
3. This told us the page to donation conversion rate
4. The average gift

The reason we captured these specific 4 key metrics is because they provide the biggest opportunity for growth.

The conversion rate from visitor to donor and the average gift are the 3 elements that impact an organisations online revenue more than any others.

Moving forward from 2018 – were organisations to aim for a 20% growth on each of their current key metrics, the opportunity could look like this.

1 October - 31 December

Potential Income Growth	Australian Benchmark 2018	Conversion Growth 20%	Traffic + CVR Growth 20%	Growth in all 3 areas 20%
General Donation Page Visitors	5,000	5,000	6,250	6,250
Conversion rate to Gift %	20%	20%	20%	20%
Donations Made	1000	1250	1563	1563
Average Gift \$	\$125.00	\$125.00	\$125.00	\$156.25
Donation Income \$	\$125,000	\$156,250	\$195,313	\$244,141
Growth %	0%	25%	56%	95%

The Website Donation Data told us that...

The orgs that were growing and improving were those who had made a strategic decision to invest in Digital – from a resource point of view, from a budget point of view and from a cultural/operational point of view.

The growth is not exclusive to large and global orgs, but definitely correlates with orgs who chose to make digital a strategic priority.

How we've grown

We benchmarked our 3 key metrics of traffic, conversion rate and average gift in 2015 and 2018. We were surprised however to see that despite two of the 3 key metrics having GROWN in 2018, the net result was less income overall (see table below).

Actual Change - Australian 3 Year Change	1 October - 31 December			2018 Change in all 3 areas
	Australian Benchmark 2015	2018 Conversion DECLINE 13%	2018 Traffic GROWTH 25% + CVR DECLINE	
General Donation Page Visitors	4,000	4,000	5,000	5,000
Conversion rate to Gift [%]	30	26	26	26
Donations Made	1200	1040	1300	1300
Average Gift [\$]	118.00	118.00	118.00	162.00
Donation Income [\$]	141,600.00	122,720.00	153,400.00	210,600.00
Growth %	0%	-13%	8%	49%

Google Analytics eCommerce Data confirmed:

- Revenue is UP significantly in 2018
- Organisations are getting far more supporters to their website donation pages than they were in 2015 BUT
- Conversion rates on General donation pages are mostly LOWER in 2018 [5 percentage points]
Perhaps because the more people you send, its normal for quality to decline?
Or perhaps the community are giving less now than they used to?
- Appeal donation page conversion rates are UP slightly in 2018 [only 1 percentage point]
- Average gifts have gone UP on General donation pages – but DOWN on Appeal pages. Overall, average gifts have gone up by \$44 or 37%

The increase in people visiting website donation pages (traffic) combined with an increase in average gifts is why revenue has increased.

Australian orgs now need to focus on testing and optimising their donation pages to improve the conversion rate to unlock the next phase of income growth.

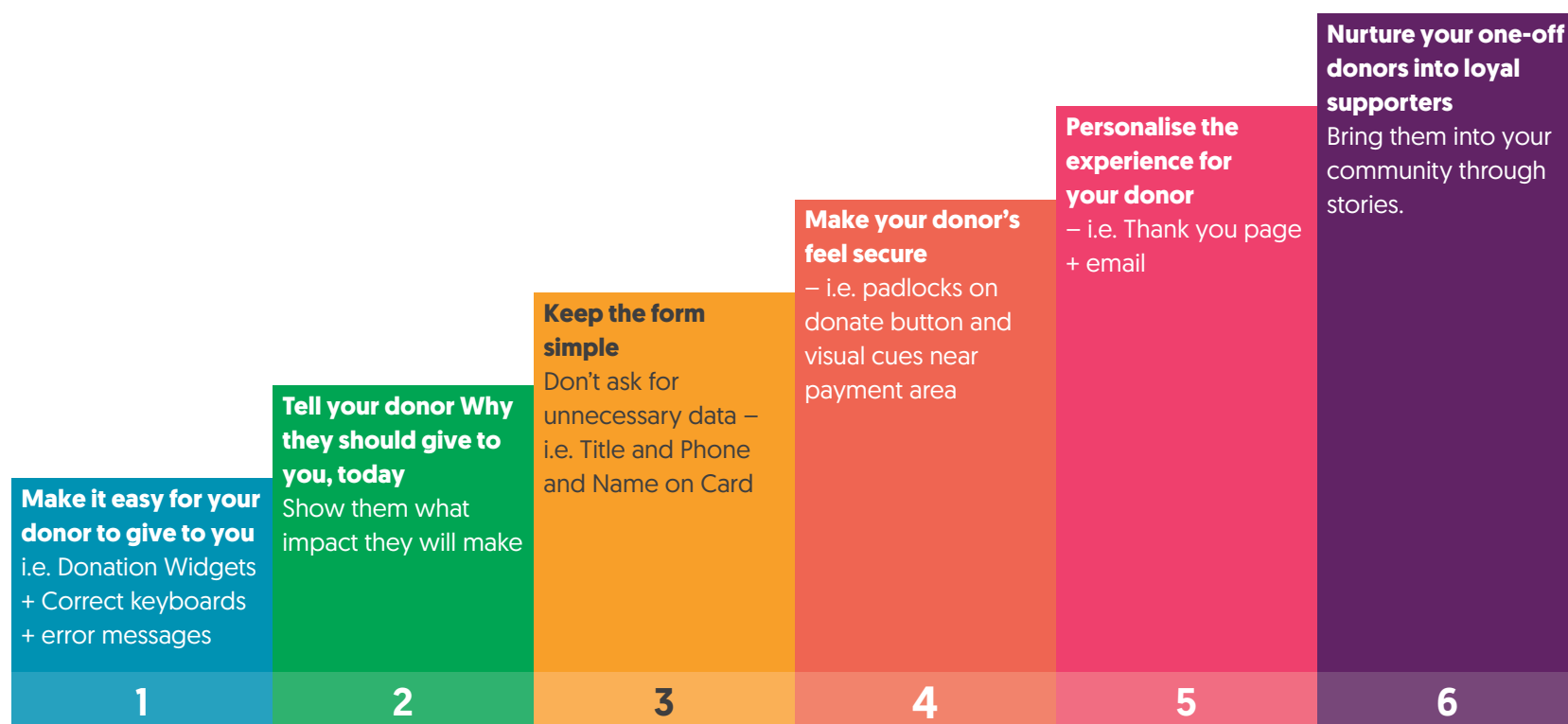
In conclusion

We've come a long way in 3 years...

- Faster, more optimised, more payment options, give a better donation experience
- Savvier across digital platforms and acquiring digital audiences
- Better at showing our need and telling our stories

... **but we're not quite done yet.**

In 2019, the recommendations show we're mostly repeating ourselves.



Didn't make the cut?

At Parachute Digital, we're renowned for going a bit overboard imparting more knowledge than was asked for. So there's a bunch of tantalising tidbits and insights that didn't make the cut for this report.

If you want to learn more about the juicy details, drop us a line at ask.us@parachutedigital.com.au and we can answer any additional questions.

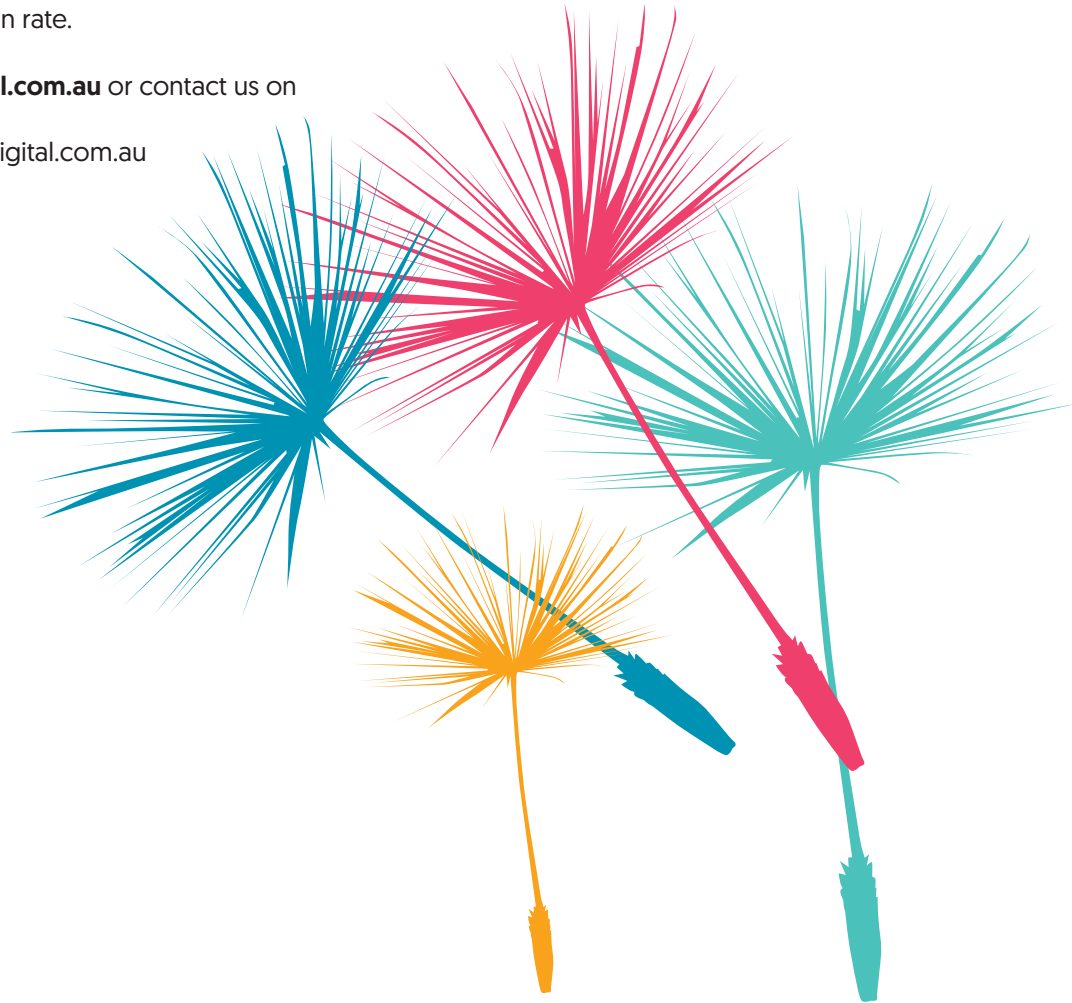


About Parachute Digital

Parachute Digital works exclusively with not-for-profit organisations to give their supporters and donors a great experience online and to raise more money through digital channels. We can help you improve your donation page conversion rate.

Find out more at **www.ParachuteDigital.com.au** or contact us on

02 9188 4493 or via ask.us@parachutedigital.com.au





Parachute Digital

Guiding you through the digital landscape

