

# GENERATING LEGACIES ONLINE

Stage One of Bluefrog's research into charities' use of the web in legacy fundraising

User Experience and Getting In Touch



Research undertaken by Hugh Stockhill and Matt Parkes

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# EXECUTIVE SUMMARY

In the first of two reports, we examine the efficacy of the online legacy fundraising of the top 93 charities by voluntary income with legacy income detailed in CAF's *Charity Trends 2007*.

Through a series of objective measures, individual sites have been assessed and scored.

No organisation scores a maximum 20 points, and the winners come in at only 16 points. More than a third of the sites we reviewed score less than ten points.

Whilst there are many examples of good practice, there are more examples of poor practice. Our message to everyone is to add this aspect of legacy promotion to next year's plans, and to take the opportunity to maximise this area of their fundraising.

Among the findings that are detailed in the report, some deserve particular mention:

- Only 13% of charities give a single click-through to legacy pages from their homepage
- Only 18% of charities offer a large text option
- Only 22% of charities emphasise the option of leaving a residuary legacy
- Only 48% of charities had responded to our information request within a week

In the second report, we will review the materials we received after our request for further information, and the follow-up communications from these charities. This will be published in January and both stages of the research will be presented at a free legacy event in central London on the afternoon of Friday 1 February 2008, featuring a guest speaker and a discussion forum.

# INTRODUCTION

## Background

Legacies represent an average of 12% of voluntary income for the UK's major charities<sup>1</sup>, and sometimes more than 90%. Legacy fundraising is therefore arguably their single most important source of funds.

Traditionally, legacy promotion has focused on the mail and telephone, but with Baby Boomers shifting increasingly towards the web as their main source of information and primary purchasing channel, online legacy fundraising should be responding. Hitwise reported in May 2007 that the over-55s are close to becoming the largest age group online, accounting for 22% of website visits, compared with 23.5% for the 35-44 age group<sup>2</sup>. Similarly, Ofcom report that the over-50s account for 30% of total time spent online<sup>3</sup>.

Even the charity heartland and prime legacy audience of the pre-War generation is becoming increasingly active online. Figures for 2006 from payment association APACS showed that in the previous five years there was a 275% rise in online banking usage by people aged 65+, against an average growth of 174%<sup>4</sup>.

Clearly, legacy pages need to be easy to find and navigate, contain well-organised and accurate information and make it easy to obtain further information. Additionally, these pages will need to motivate the visitor into positive action: ultimately, leaving a legacy.

## Context

Some would argue that with older audiences, even Baby Boomers, the web does not represent a significant enough part of their media diet to merit investment for legacy promotion. However, several sources indicate this is inaccurate.

As reported at the ifc in Amsterdam in October 2007, one organisation recently surveyed its 65+ ABC1 donorbase and found that 86% regularly used the Internet and 95% regularly use their mobile<sup>5</sup>. This is still at odds with national statistics for this age group but reflects the truism that many organisations' donors are not representative.

Save the Children in New Zealand recently reported that the legacy section of the Save the Children NZ site is the 2nd most visited section – astonishing given that it is two clicks from the homepage<sup>6</sup>.

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1 NCVO Voluntary Sector Almanac

2 Hitwise, May 2007

3 Ofcom, August 2007

4 APACS, August 2007

5 360 Degree Fundraising workshop, Jason Potts and Mike Johnston, ifc 2007

6 Ibid.

## **Objectives**

In this context, the objective of the research is to rate the functional aspects of the legacy pages from the top 93 charities by voluntary income with legacy income detailed in CAF's *Charity Trends 2007*, that have legacy pages on their websites.

We put aside any subjective judgements – such as how dull or interesting the pages appeared – focusing, instead, on objective and measurable criteria, as detailed in the Methodology section.

## **Charities with no fundraising pages on their website**

It should be noted that several charities that receive large amounts of legacy income do not have fundraising pages on their websites, if they have websites at all, and were therefore excluded from this research. Most are religious charities such as large Dioceses. It must be asked whether it wouldn't be worth their while putting even the most basic information online, given the importance to them of this source of income.

# HEADLINE RESULTS

## Key findings

Of all the figures revealed in this study, some key facts leap out...

**87% of charities do not provide a single click-through from their homepage to their legacy pages and 32% of charities require three or more clicks to get from their homepage to their legacy pages**

With such short attention spans online, it is critical that legacy information can be easily accessed. Many websites we reviewed seemed to deliberately make the donor work hard to find this information.

**82% of charities do not offer a large text option on their website or legacy pages**

Given the older age profile of the majority of those considering leaving a legacy – Baby Boomers included – omitting this basic accessibility feature seems to be a fundamental error.

**41% of charities did not deliver the requested further information within 21 days**

It is of paramount importance that information is dispatched within 24 hours. After all, anyone making such a request is indicating their interest in giving a donation of significant proportions. It is shocking that so many charities responded as slowly as they did. Only 48% of charities delivered it with seven days.

**78% of charities do not emphasise the option of leaving a residuary legacy**

Given the tumbling volumes of residuary legacies we are seeing, and given that they are being spread more thinly, every opportunity should be taken to gently steer donors in this direction. With an average value of £35,000, compared to £3,800 for pecuniary legacies<sup>7</sup>, this is a tremendous missed opportunity.

**81% of charities do not make legacy information available via download**

Donors expect instant access to information online and are used to seeing the option to download a PDF. It would enhance the donor experience – and save money – to make this available.

**47% of charities do not provide an email request option for further information on their legacy pages**

The donor is online. They have email instantly available. Why make it difficult for them to get in touch? Of the 53% who did give an email address, only three quarters made it a link, meaning that the donor would either have to copy and paste it, or write it down.

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**20% of charities do not provide a telephone number on their legacy pages to call to request further information**

Particularly given the age profile of people visiting these pages, all efforts should be made to break down barriers. Not offering a telephone number seems like deliberately adding an obstacle.

**98% of charities do not offer a project visit to potential legators**

Admittedly, overseas development agencies will struggle here. But surely this would be a wonderful way for most charities to draw potential legators into a deeper relationship with the organisation? Charities who do this only see small numbers taking them up on the offer but report very high pledge rates as a result. Less than 10% of legacy pages we reviewed mentioned any sort of donor event (something even overseas development agencies could do).

**44% of charities do not provide full charity details for inclusion in a Will within their legacy pages**

Many people will visit legacy pages with the intention of getting these details, having already decided to add the charity to their Will. It is therefore a simple way of making their experience of interacting with the organisation as easy and professional as possible.

# METHODOLOGY

## Sample

The study is based solely on the top 93 charities by voluntary income with legacy income detailed in CAF's *Charity Trends 2007* that have legacy pages on their websites as detailed in *Charity Trends 2007*. We did not include more than 93 charities as we were already including charities with £21,000 legacy income and had reached number 170 by voluntary income.

Given that *Charity Trends* only details legacy income for organisations whose legacy income is shown separately in their annual accounts, there are some notable omissions in our research. If your organisation is one of them, do get in touch (details at the end) and we can run your website through the same process to see how you score.

## Criteria

A number of objective criteria have been chosen to rate the experience from the user perspective, including ease of use and accessibility to the information that may be required by a potential legator.

## Scoring

A simple points system was employed to rate each of the criteria, e.g. yes = 1 and no = 0. The scoring is unweighted, as we decided any weighting we introduced would have injected an unqualified bias into the results. The criteria and their point scores are listed below:

### Google <charity name> search rank

The charity name is used as the search term, on a web search. The scores are based on eye tracking research that shows that the percentage of natural search results viewed drops off sharply after the top three<sup>8</sup>. No charity came lower than 4th in the search ranking.

- 1st-3rd      2
- 4th            1

### Google <charity name> + 'legacy' search rank

The charity name + 'legacy' is used as the search term, on a web search:

- 1st            1
- 2nd+         0

### Google sponsored link when <charity name> was entered

Is there a sponsored link when searching for the charity name?

- Yes            1
- No             0

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<sup>8</sup> Enquiro Research study that led to the theory of the 'Golden Triangle' of search results

### Large text option

Is there an option to increase the text size to aid viewing?

- Yes 1
- No 0

### Number of clicks to legacy pages

The number of clicks from the charity homepage to get to the legacy pages.

- 1 3
- 2 2
- 3 1
- 4+ 0

### Charity details for Will listed on legacies pages

Is the wording for the supporter's Will (including registered name, registered address and registered charity number) available in the legacy pages?

- Yes 1
- No 0

### Information request via form on legacies pages

Is there a form to complete to request further information?

- Yes 1
- No 0

### Information request by email – address given on legacies pages

Is it possible to request further information by email? Note this did not discriminate between those sites that gave the email address as a link and those that simply displayed the address.

- Yes 1
- No 0

### Information request by telephone – number given on legacies pages

Is it possible to request further information via a telephone number displayed on the legacies pages?

- Yes 1
- No 0

### Downloadable legacy information such as PDFs

Is it possible to download further information, such as a PDF of the legacies information booklet?

- Yes 1
- No 0

### Offer of project visit

Is the supporter offered the chance to visit a project to see the work first-hand?

- Yes 1
- No 0

### **Testimonials**

Are testimonials from pledgers used to support the legacy message?

- Yes 1
- No 0

### **Achievements**

Are case studies or examples of the organisation's achievements used to support the legacy message?

- Yes 1
- No 0

### **Emphasis on residuary legacies**

Is emphasis placed on leaving a residuary legacy to the charity?

- Yes 1
- No 0

### **How long before further information arrived in the post?**

The number of days it took for the information we requested via the website to arrive. We used the easiest method available in each case, i.e. a form if possible, then an email address, then a phone number and then a postal address.

- 7 days or less 3
- 8-14 days 2
- 15-21 days 1
- 22 days or more 0

In the next section the charities have been ranked in descending order, according to their score.

# WINNERS & LOSERS

**Out of a possible total score of 20 points, the highest score was 16, with more than a third scoring no more than ten points.**

The first, second and third places, which incorporate the top 15 charities, are as follows:

1 = Guide Dogs for the Blind Association  
1 = Macmillan  
1 = NSPCC  
1 = UNICEF-UK  
2 = Action for Blind People  
2 = British Red Cross  
2 = Motor Neurone  
2 = RNLI  
3 = ActionAid  
3 = British Library  
3 = Jewish Care  
3 = National Trust  
3 = Oxfam  
3 = Shelter  
3 = Sight Savers International

Some well-known causes can be found languishing at the bottom of the table, including Great Ormond Street Hospital with five points, the MS Society with six points, and Age Concern England with seven.

Please feel free to contact Matt Parkes at [legacies@bluefroglondon.com](mailto:legacies@bluefroglondon.com) to receive detailed feedback on your website.

## Full ranking

Organisation	Score
Guide Dogs for the Blind Association	16
Macmillan Cancer Support	16
National Society for the Prevention of Cruelty to Children	16
UNICEF-UK	16
Action for Blind People	15
British Red Cross	15
Motor Neurone	15
Royal National Lifeboat Institution	15
ActionAid	14
British Library	14
Jewish Care	14
National Trust	14
Oxfam	14
Shelter	14
Sight Savers International	14
Alzheimers Society	13
Barnardo's	13
Diabetes UK	13
Medicins Sans Frontiers	13
NCH	13
Parkinsons Disease Society	13
Royal Air Force Benevolent Fund	13
Royal British Legion	13
Royal Society for the Protection of Birds	13
World Cancer Research Fund	13
Association for International Cancer Research	12
Catholic Agency for Overseas Development	12
Church of England Children's Society	12
Leukaemia Research Fund	12
People's Dispensary for Sick Animals	12
Redwings Horse Sanctuary	12
Sue Ryder Care	12
Breakthrough Breast Cancer	11
Brooke Hospital for Animals	11
Cats Protection	11
ChildLine	11
Christian Aid	11
Donkey Sanctuary	11
Royal Mencap Society	11
Scope	11
Scout Association	11
Water Aid	11
Woodland Trust	11
Battersea Dogs and Cats Home	10
Breast Cancer Care	10

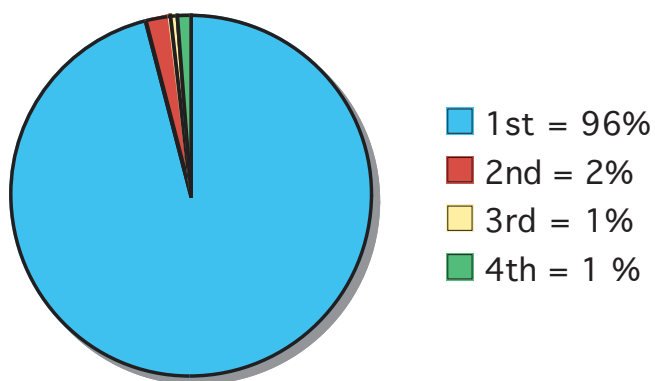
<b>Organisation</b>	<b>Score</b>
British and Foreign Bible Society	10
CLIC Sargeant	10
Crisis	10
Help the Aged	10
Norwood	10
Practical Action	10
Royal National Institute for Deaf People	10
Royal National Institute for the Blind	10
Royal Society for the Prevention of Cruelty to Animals	10
Royal Star and Garter Home	10
Samaritans	10
Stroke Association	10
World Emergency Relief	10
WWF UK	10
Arthritis Research Campaign	9
Blue Cross	9
British Heart Foundation	9
Cancer Research UK	9
Civil Service Benevolent Fund	9
Erskine	9
National Trust for Scotland	9
Salvation Army Trust	9
Save The Children (UK)	9
St Dunstan's	9
Tearfund	9
Victoria and Albert Museum	9
Amnesty International	8
Dogs Trust	8
EveryChild	8
Grand Charity	8
Marie Curie Cancer Care	8
National Deaf Children's Society	8
St John Ambulance	8
Variety Club	8
Age Concern England	7
Birmingham Royal Ballet	7
BMS World Mission	7
Cystic Fibrosis Trust	7
JNF Charitable Trust	7
Sense	7
St Christopher's Hospice	7
Christie Hospital Charitable Fund	6
Leonard Cheshire Foundation	6
Multiple Sclerosis Society	6
Scottish Society for the Prevention of Cruelty to Animals	6
Great Ormond Street Hospital Children's Charity	5
Royal Marsden Hospital Charity	5
Oxford Radcliffe Hospitals Charitable Trust	4

# DETAILED RESULTS

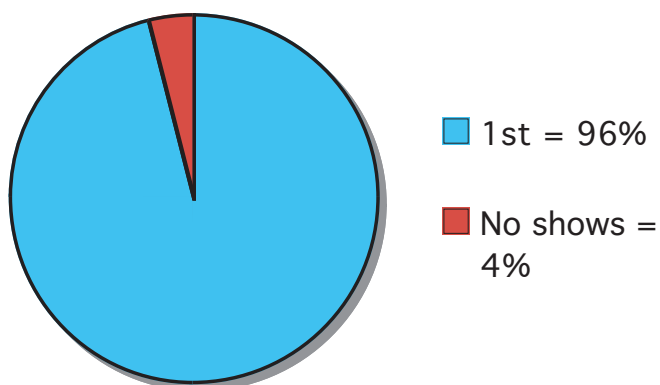
## Results, question by question

The following pie charts show the results for each of the criteria for these top 93 charities by voluntary income with legacy income detailed in CAF's Charity Trends 2007 that have legacy pages on their websites.

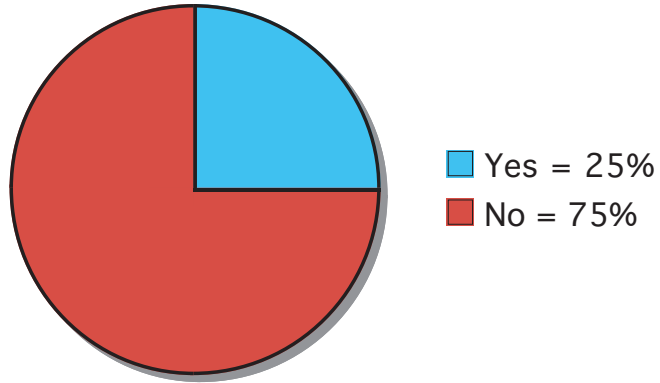
### Google <charity name> search rank



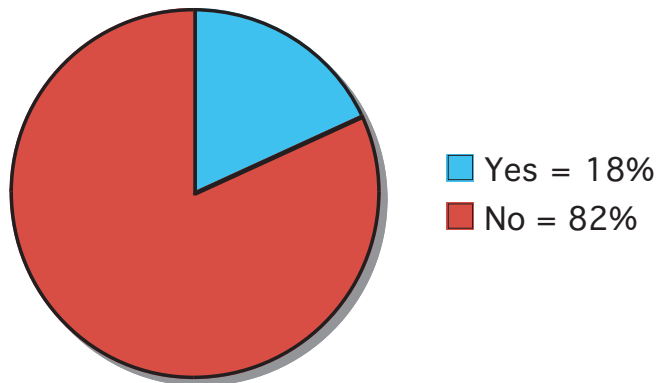
### Google <charity name> + 'legacy' search rank



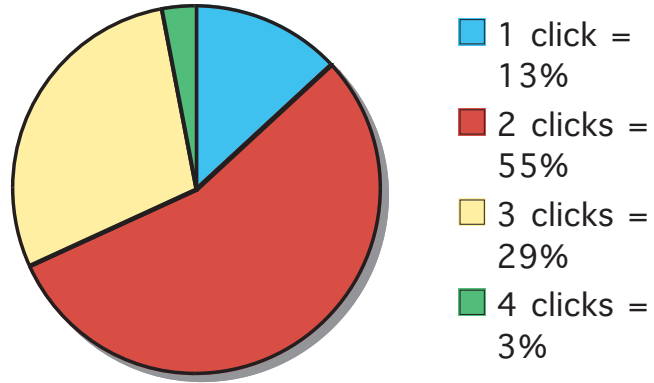
### Google sponsored link when <charity name> was entered



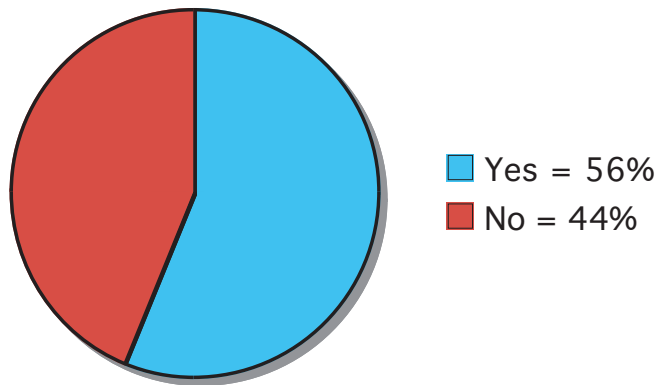
### Large text option



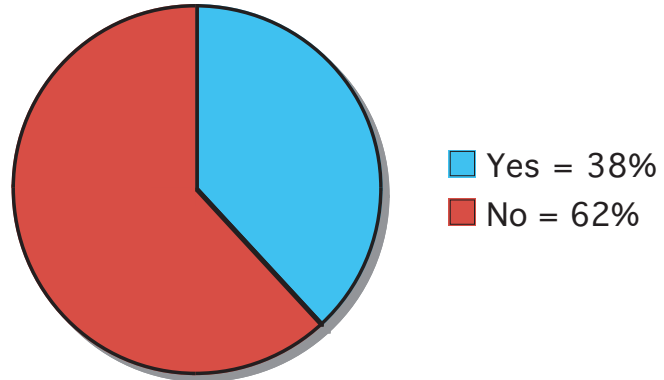
### Number of clicks to legacy pages



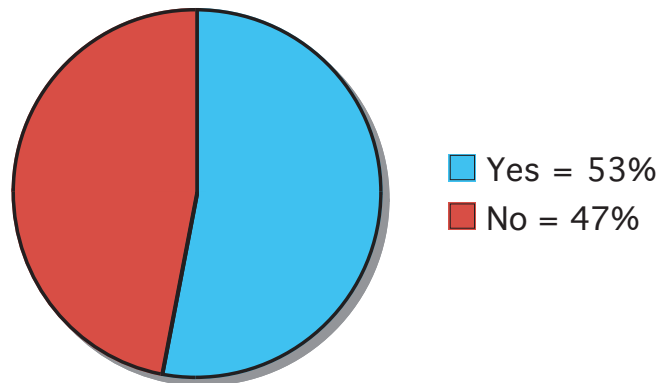
### Charity details for Will listed on legacies pages



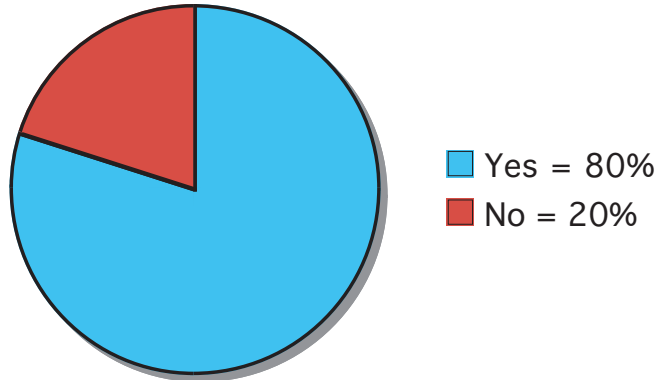
### Information request via form on legacies pages



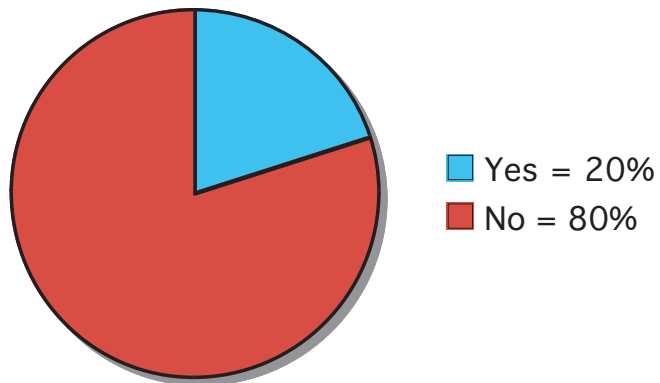
### Information request by email – address given on legacies pages



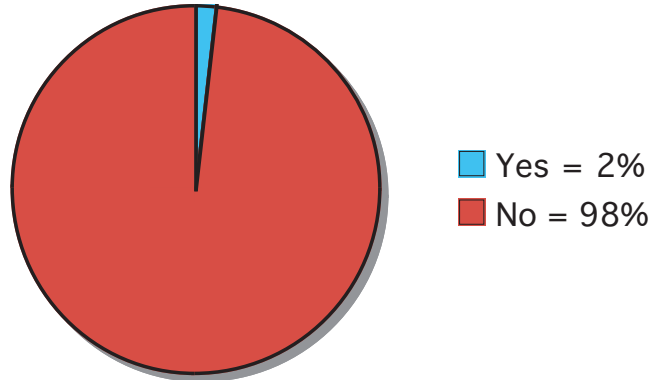
### Information request by telephone – number given on legacies pages



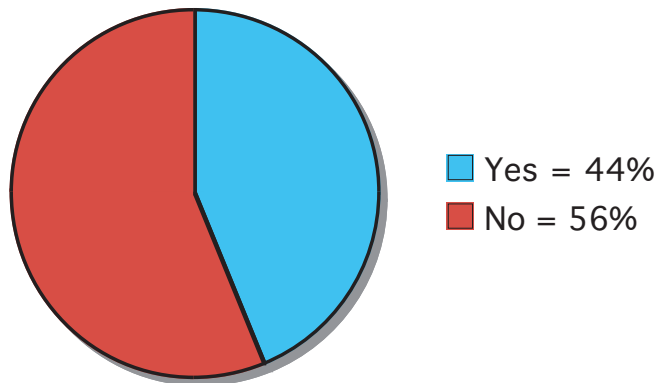
### Downloadable legacy information such as PDFs



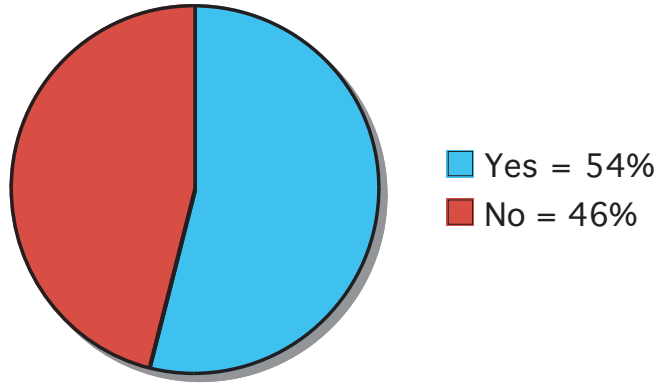
### Offer of project visit



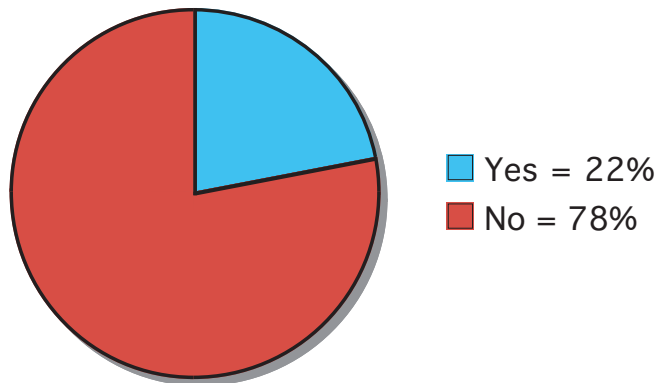
### Testimonials used



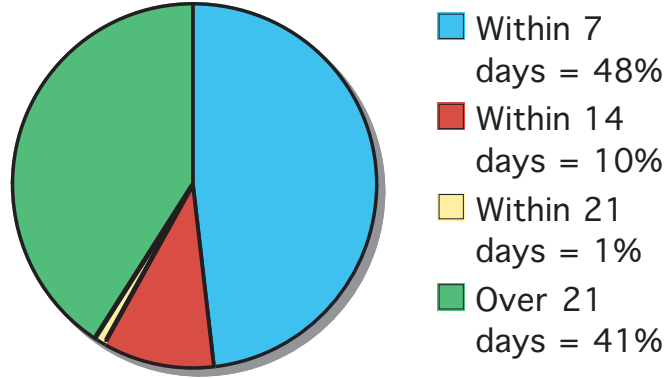
### Illustrations of achievements



### Emphasis on residuary legacies



### How long before further information arrived in the post



# CONCLUSIONS

Each of these charities can take some simple steps to improve their legacy fundraising online. Even the top fifteen are four points adrift.

In one simple step, any supporter – even one previously unknown to an organisation – can become an instant Major Donor by leaving a legacy. It is therefore incumbent upon fundraisers (among whom we count their supporter services colleagues) to elevate this form of support to its proper place.

There is much room for improvement. As with much online fundraising, legacy pages seem to be an afterthought. At best they are brochureware and at worst they are non-existent. It is clearly an area in need of attention.

# NEXT STEPS

## **Stage Two**

Although nearly half of the charities we included in this study have yet to pay our potential Major Donor the courtesy of sending the information they requested, we anticipate that most will.

This will lead to a second stage of the research. We are analysing the materials and follow-up communications of each and will be publishing a Stage Two report, revealing our findings.

## **FREE legacy event in 2008**

We plan to unveil the combined results from research stages One and Two in a free legacy fundraising event. There will be a guest speaker and a forum for discussion. It will be held on the **afternoon of Friday 1 February 2008** in central London.

We will be publicising this event shortly, and sending invites, but anyone who'd like to register interest can email us at **legacies@bluefroglondon.com** and we will ensure they are invited.

# CONTACT US

It would be a little unreasonable of us to make such bold statements about the state of legacy fundraising if we did not feel qualified to help our clients promote legacies in the optimum way.

We do, and we have the experience and resources to help you develop and deliver a legacies strategy to suit your organisation.

To find out more, contact Matt Parkes: [legacies@bluefroglondon.com](mailto:legacies@bluefroglondon.com).

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