

How to create marketing personas for your charity

Define your audiences and
magnify your impact



How to create marketing personas for your charity

1. What are they?
2. When should you use them?
3. How do you create your own?
4. Personas and your marketing mix
5. Next steps

1. What are marketing personas?

Digital learning for charities



What are personas?

A character used to represent a user or customer type

Personas embody your audience research in a way that can be used to build empathy with, and understanding of, customers and users.

They can also be used as the basis for marketing campaigns, segmentation, or website personalisation.

Persona 4: Active fundraiser



Summary:

Active Fundraisers are energetic, community-driven individuals who regularly participate in events like runs, challenges, or social campaigns, motivated by both personal achievement and making a tangible impact. They view charitable giving as a meaningful, social experience and feel proud to contribute. They expect transparency, recognition, and a sense of connection to the cause they support.

28% of users are Active Fundraisers

Motivations

- Make a direct, positive difference
- Connect with a like-minded, active community
- Achieve personal goals while supporting a cause

Who are they?

- Aged 25–45, typically younger professionals
- Employed full-time or self-employed
- Urban or suburban, often socially active

What are their challenges?

- They have limited time and energy
- Doubt over impact without clear communication
- We can reach them through high-quality, targeted campaigns

"I fundraise because..."

Why bother?

- To surface specific aspects of the user experience or supporter journey
- To give a clear understanding of user needs that are specific to a group
- To make output from audience research easy to digest
- To share and preserve knowledge about an audience
- As a checklist when making decisions

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1. Journey mapping

What does the fundraising journey look like for charity cheerleaders?

2. Content strategy

Who is reading this page and what do they need to know?

3. New starters

What does a typical fundraiser look like?

4. Segmentation

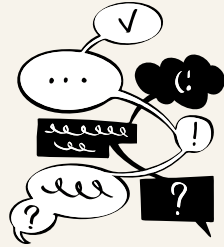
Which contacts need this helpful email?

Risks, obstacles and pitfalls



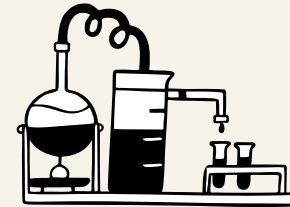
Struggling to consolidate research

- Bias towards the loudest or most visible qualitative insights
- Looking for what you expect to find



Inertia and static thinking

- Optimising your journeys and content for a single group prevents evolution
- Experienced stakeholders develop entrenched assumptions



Ornamental clutter

- Personas serve no practical purpose and don't influence decisions
- Institutional knowledge is not maintained and becomes unwieldy

2. How are personas used?

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When conducting a UX review

- Personas can be used to establish user characteristics or needs that you can apply alongside UX Dimensions
- You can use personas to create plausible scenarios with associated journeys and goals
- Use personas to put insights in context and assign potential business impact



When mapping the customer journey

- Personas are central to journey mapping, because they help define end goals and touchpoints
- As you identify emotional states and motivations, use rich personas to add context
- Explore touchpoints and channels that are relevant to

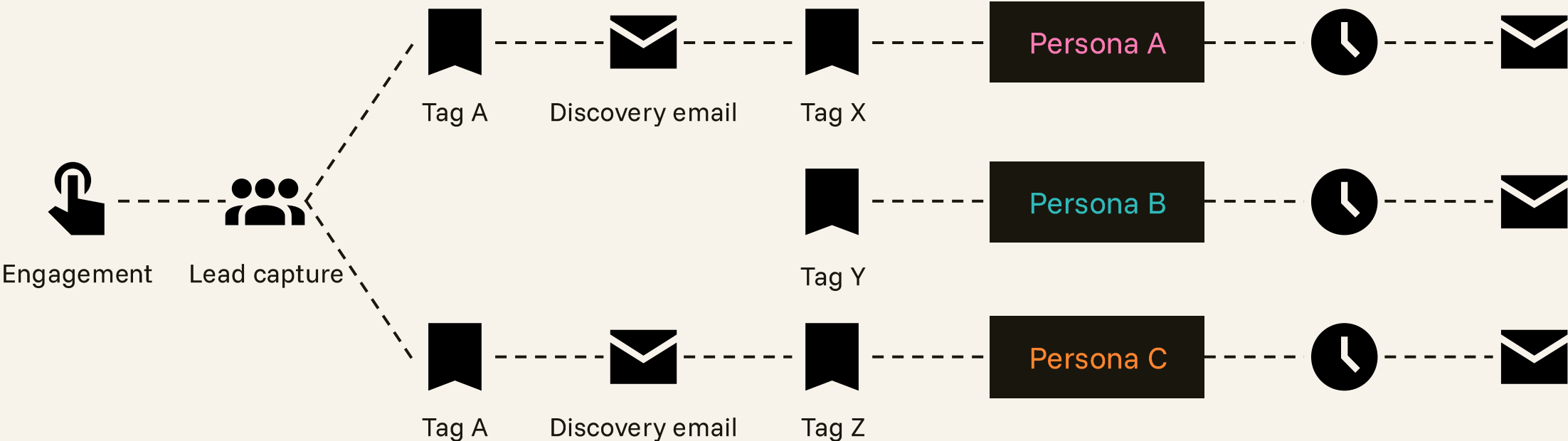
	Unaware	Aware	Research	Consideration	Selection	Transaction	Leadtime
Goals							
Needs							
Actions							
Touchpoints							
Moments of truth							

When creating CRM workflows

Personas are central to journey mapping, because they help define end goals and touchpoints

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When planning your marketing mix

Target high-value marketing segments with the right channels and platforms.

Use personas to create more accurate CLV numbers and focus on the most committed supporters

Google Ads	\$15,000	£12,000	25,000	1,500	5,000	£10.00
Facebook Ads	\$10,000	900,000	18,000	1,200	1,200	£8.33
Instagram Ads	\$8,000	£6,400	12,000	800	2,500	£10.00
Email Marketing	\$5,000	50,000	8,000	1,000	500	£5.00
Affiliate Marketing	\$7,000	£5,600	5,000	600	100	£11.67
SEO (Organic)	\$4,000	0	15,000	1,300	50	£3.08
SMS	\$3,000	0	5,000	400	600	£6.00
Push Notifications	\$2,500	0	4,000	300	400	£6.67
Google Display Ads	\$6,000	2,000,000	20,000	1,000	3,000	£6.00
Google Search Ads	\$12,000	1,500,000	30,000	1,800	4,000	£6.67
SMS	\$3,000	0	5,000	400	600	£6.67
Push Notifications	\$2,500	2,000	4,000	300	400	£6.67
Google Display Ads	\$6,000	2,000,000	20,000	1,000	3,000	£6.00
Google Search Ads	\$12,000	1,900,000	30,000	1,800	4,000	£6.67
Performance Max	\$14,000	0	11,200	2,100	6,000	£6.67
Total	\$86,500	£69,200	885,000	877,000	11,200	£6.18

3. How do you create your own?

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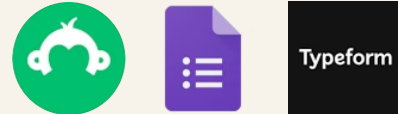


Quantitative research



Analytics Data

Where do people come from when they make a donation? What content do fundraisers look at?



Survey data

Analyse your survey data for obvious pattern



CRM Software

Are there natural cohorts within your customer database?



Email / chat

What kinds of questions do fundraisers ask? Do they prefer email or phoning?

Qualitative research



Existing segments

Build on the segments you use in marketing activities:

- Search and ad audiences
- Types of existing user



Survey data

Use a thematic analysis of survey responses to define user groups.



Stakeholder workshop

Extract what your customer-facing teams already know about your audiences.

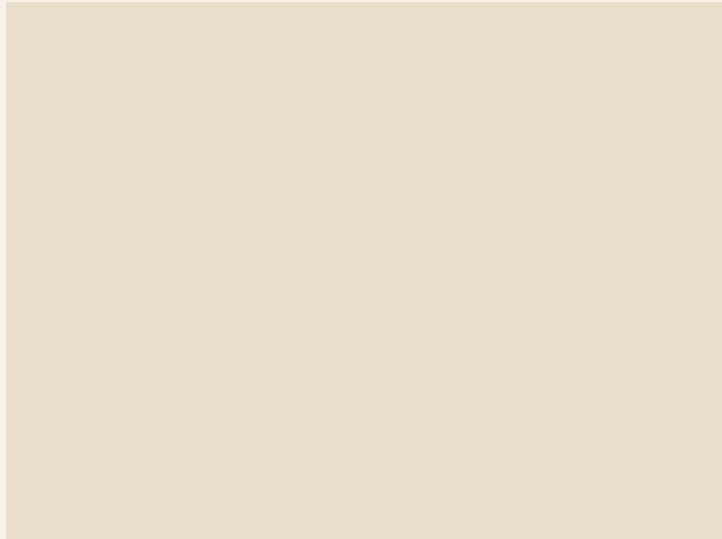
- Empathy mapping
- Journey mapping



Audience interviews

Speak directly to customers and validate your ideas about their motivations and influences directly.

Persona
Name



Summary:

% of visitors

% of contacts

Motivations

Behaviours

Who are they?

Communication touchpoints

What are their challenges?

Capacity to give



Persona

Charity Cheerleaders



Summary:

AMHA Cheerleaders love a challenge and are eager to get involved in fundraising events and activities. They have a very personal connection with the cause, but for most it's the feeling purpose and achievement that motivates them.

Cheerleaders make small donations themselves, because they feel they can contribute more through fundraising.

8% of visitors

42% of contacts

Motivations

- Personal connection to the charity
- Feeling of empowerment and pride
- Recognition from within AMHA community

Behaviours

- Planning their fundraising calendar
- Looking for new events to take part in
- Preparing for events and communicating their progress

Who are they?

- 32% aged 18-30, 39% aged 30-40
- 65% are female
- 74% live in rural areas or suburbs

Communication touchpoints

- Facebook, Instagram, Bluesky
- Prefer to communicate through email



What are their challenges?

- Time poor and relatively little disposable income. This is often due to having young families.
- Don't want to hassle their network or seem pushy

Capacity to give

- Over 80% make a regular donation but it is usually small
- No capacity to increase contributions

"I love getting involved in events – they're a real challenge, help me stay connected with my family, and give me a great way to help other people"

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4. Personas and your marketing mix

Digital learning for charities



Marketing mix modelling

MMM is a form of analysis that tells you how much each channel (TV, paid search, social, email, etc.) contributed and what would happen if you changed spend.

Either/or:

- Build a model yourself by combining time series data with GA4 reporting
- Work with an agency
- In regular reporting, marketing personas may add unhelpful noise. **BUT** personas can be an invaluable additional dimension for occasional strategic analysis. To make this possible, you need to tag each campaign to a persona.

Google Ads

- **Search Advertising*** - Text ads that appear on Google SERPs
- **Display** – Visual banners across affiliate network
- **Shopping** – product ads in search and shopping tab
- **Video** – Ads across Youtube and Display network
- **Local services** – Based on location in Maps and Search
- **Performance Max*** - Goal based campaigns across full Google inventory

Understanding your audience will tell you which type of campaign to use for a particular goal (building awareness, driving engagement or prompting action)

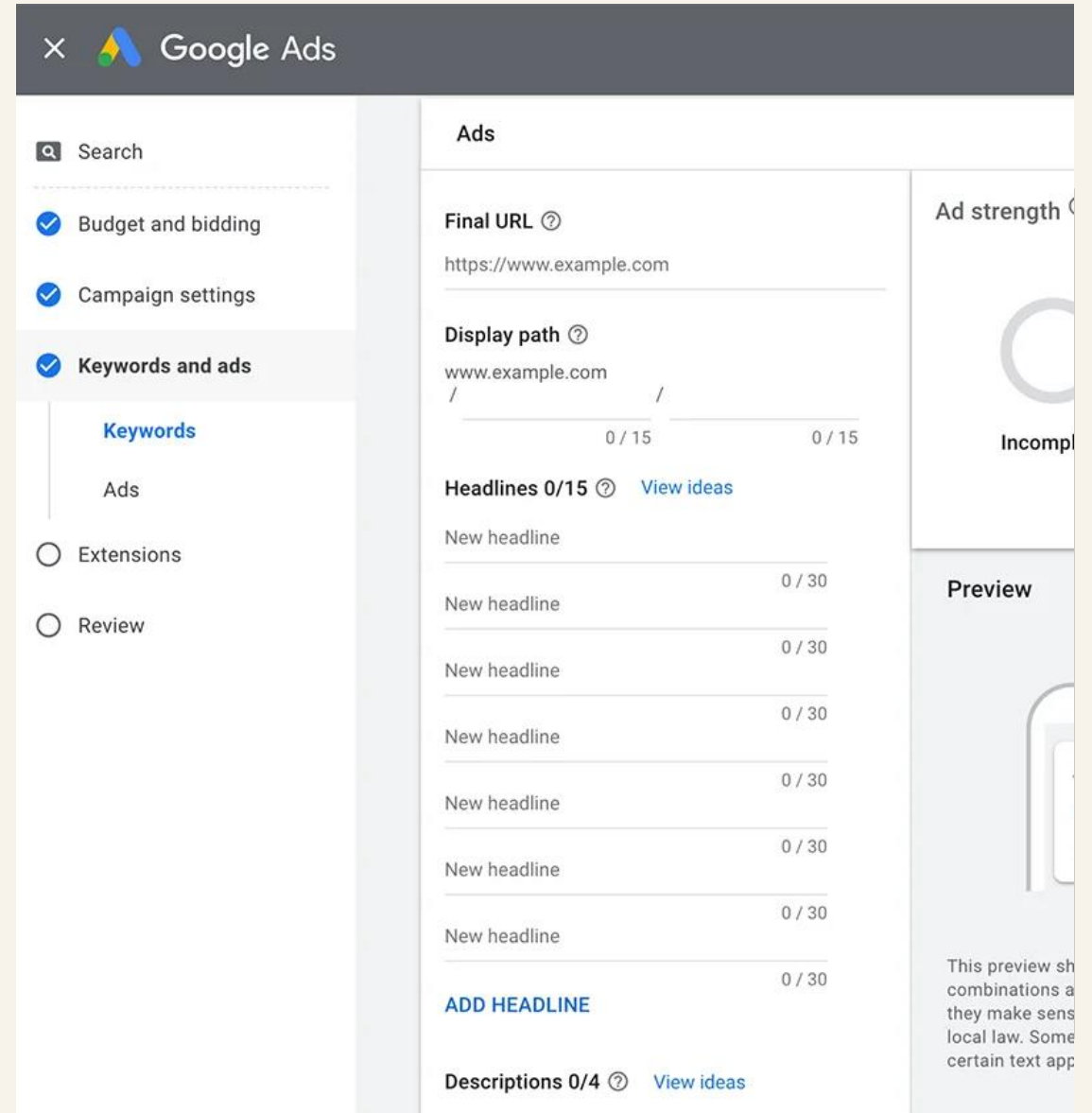


Google Ads

Search Advertising

These can be highly targeted for intent and scenario, so marketing personas are key.

- **Dynamic Search Ads** are automatically generated from your website's content, so you have less control over what a user sees. It's important to have personas in mind when setting up campaign parameters.
- **Responsive Search Ads** use a selection of headlines and descriptions. You supply the content, so you should consider personas when setting up parameters and when feeding in content.



The screenshot displays the Google Ads interface. On the left, a sidebar contains a search bar and a list of settings: 'Budget and bidding', 'Campaign settings', 'Keywords and ads' (selected), 'Extensions', and 'Review'. The 'Keywords and ads' section is further divided into 'Keywords', 'Ads', 'Extensions', and 'Review'. The main area is titled 'Ads' and shows the 'Final URL' as 'https://www.example.com' and the 'Display path' as 'www.example.com /'. Below this, there are sections for 'Headlines 0/15' and 'Descriptions 0/4', each with a 'View ideas' link. The 'Headlines' section lists several 'New headline' entries, each with a character count of '0 / 30'. An 'ADD HEADLINE' button is visible. On the right side, there is a 'Preview' section with a 'This preview shows combinations that they make sense under local law. Some certain text app' note.

Google Ads

Performance Max Campaigns

Google displays promotional content across different platforms using machine learning algorithms. You can direct it by adding “Assets” and “Audience Signals” that draw from your marketing personas.

Audience signals allow you to prompt Pmax campaigns to focus on specific in-market segments, life events and demographics.

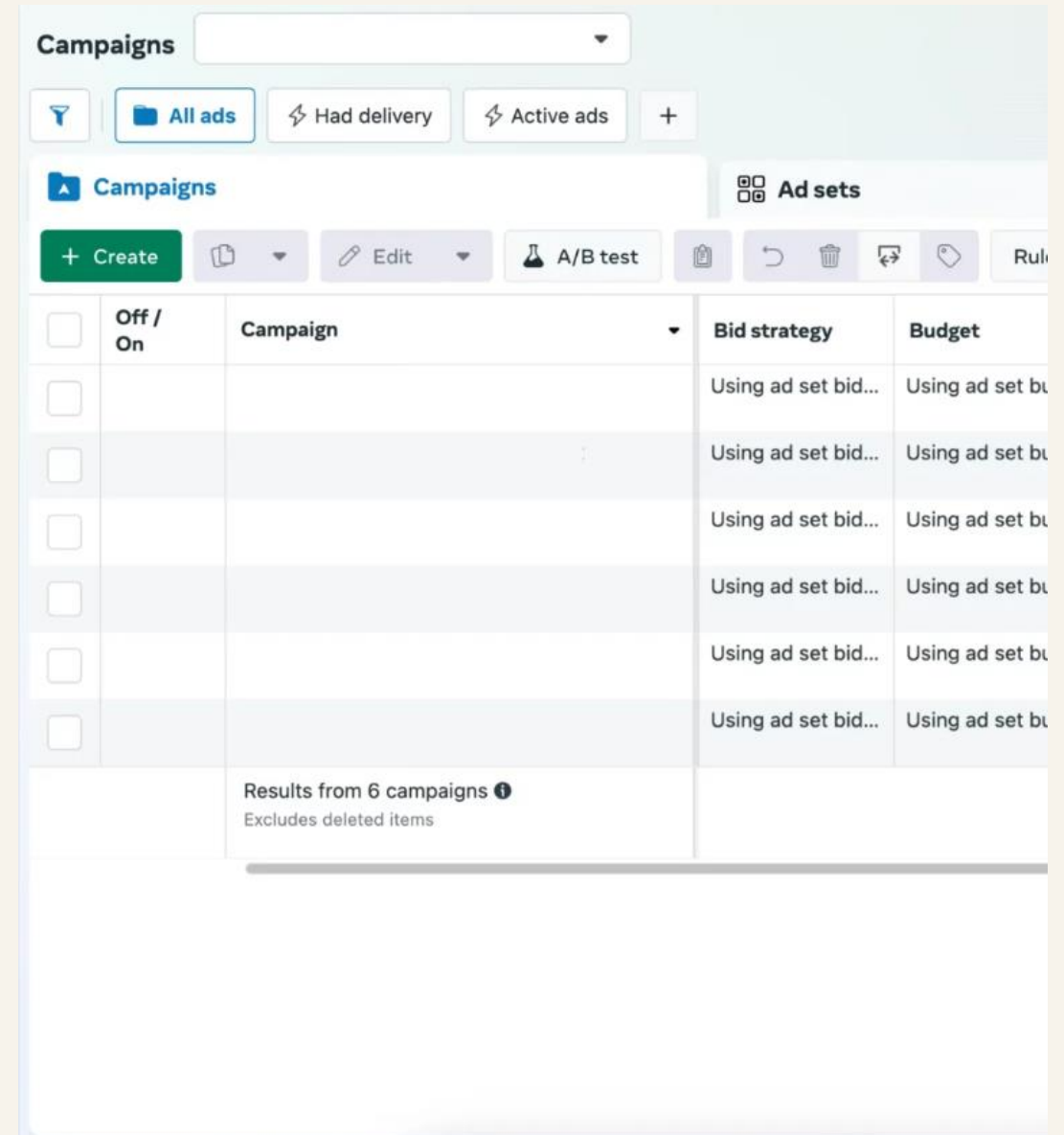
Note: To use Pmax campaigns effectively, you need to have a lot of conversions that help train the machine learning algorithm.

Digital learning for charities

The screenshot displays the Google Ads audience targeting interface. On the left, there are three main sections: 'Custom segments', 'Your data', and 'Interests & detailed demographics'. The 'Custom segments' section is active, showing a dropdown menu with 'Search' and 'Browse' options. Under 'Browse', there are two options: 'Competitors' and 'Keywords', both with unchecked checkboxes. Below this, the 'Demographics' section is visible, titled 'People with the following demographics'. It includes several filter categories: 'Gender' with checkboxes for 'Female', 'Male', and 'Unknown' (all checked); 'Age' with dropdowns for '35' and '65+' and a checked 'Unknown' checkbox; 'Parental status' with checkboxes for 'Parent', 'Not a parent', and 'Unknown' (all checked); and 'Household income' with dropdowns for 'Top 10%' and 'Lower 50%' and a checked 'Unknown' checkbox. There is also an 'Additional demographics' link with an upward arrow.

Meta advertising

- Define each persona as a separate audience in Meta using a mix of interests, behaviours, and your first-party data (e.g. past donors, email subscribers, or website visitors).
- Build dedicated ad sets for each persona and tailor the creative to their specific motivation
- Align your campaign objective and conversion event with the persona's intent, pushing high-intent users toward donations and lower-intent users toward softer actions like signups or video views.



5. Next steps

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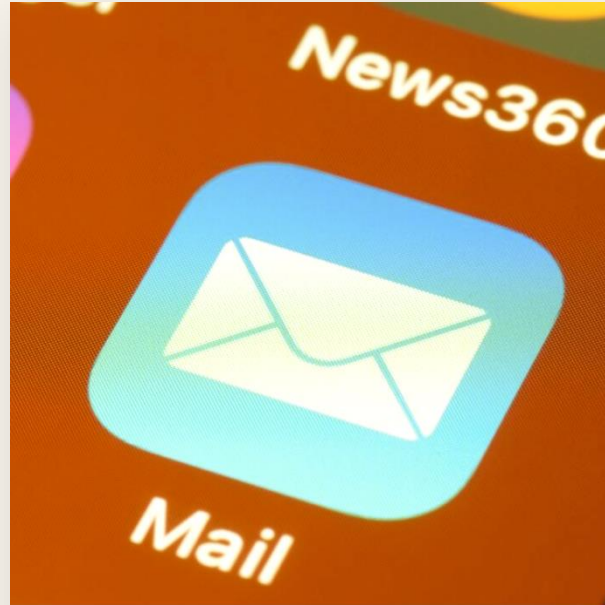




▶ Video

Google Analytics 4 (GA4) – Acquisition reports (video)

Data & Analytics | Foundation



📘 Articles / Guides

Tips on segmenting your email database

Digital Marketing | Foundation

charity wise. Guided Pathways Resources Events Membership Charity Jobs MY ACCOUNT

Guided Pathway | Fundraising & Comms

How to boost your donation page so more people hit 'donate'

Given the pivotal role your donation page plays in influencing user behaviour and its prominent position on your website, prioritising its optimisation for donation is crucial.

Positioned between your main pages and the donation funnel, the donation page frequently serves as a landing page for campaigns. It often marks the first point before visitors enter the donation funnel, presenting them with choices on how and how much to contribute.

Backed by numerous tests, we've compiled a list of six essential elements that your donation page must incorporate to ensure it meets the fundamental requirements for donor engagement. Follow these simple steps and learn the six elements every donation page should include.

STEP 1
Introduction – The six elements every donation page should include

This brief guide serves as an introduction to the six key elements you should include on your donation page. It covers the essentials to get you started, with more detailed guidance provided in Step 2.

START STEP 1

STEP 2
In detail – The six elements every donation page should include

Watch this recorded training session with Tim Richards, as he shows how you can boost the performance of your donation page.

This session will guide you through six key elements that every donation page should include.

START STEP 2

**charity
wise**

Thank you.