

A Lifetime of Memories and The Relationship with Gift in Wills

GIFTS IN WILLS TRACK

Karen Armstrong and Megan Maya

More Strategic



Gifts in Wills Track
Sponsored By:





They are with you for a lifetime.



Have donated to charity

CONFIRMED

77%
Confirmed
are much
more likely to
donate but
23% still don't

CONSIDER

71%
More likely to
be giving
and consider
a GIW

NEUTRAL

60%
A majority
still giving
but not yet
open to GIW

REJECT

49%
Less likely to
be giving, but
not entirely
charity
rejectors

Data Source	laC Public Research November 2022	Question	Have you made a donation of \$20 or more to a charity in the past 12 months?	Sample Size	1,569	Filter	55yrs+ All Australians
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16%

Confirmed and
Considerers
give over \$1,000

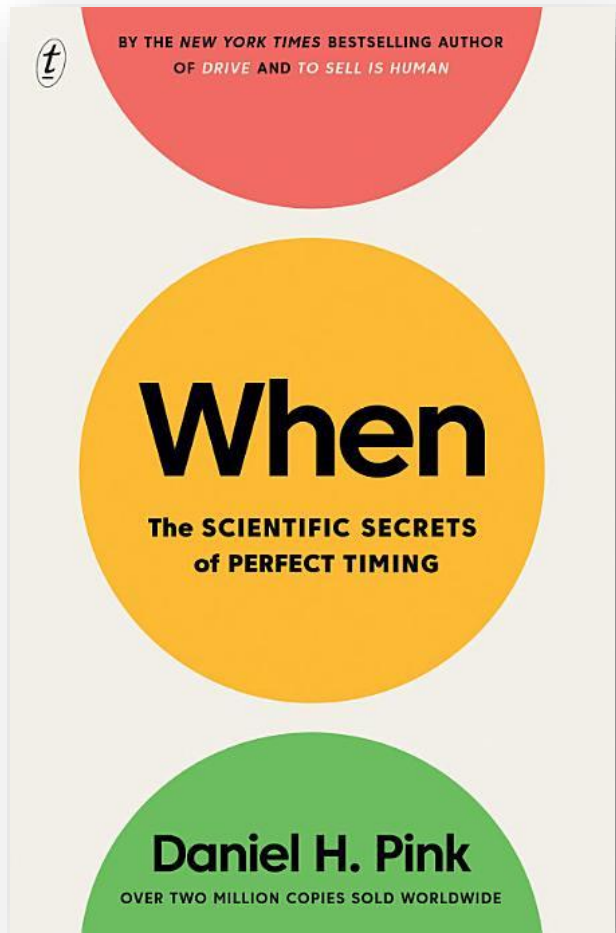
5%

Rejectors give
over \$1,000
(7% neutral)

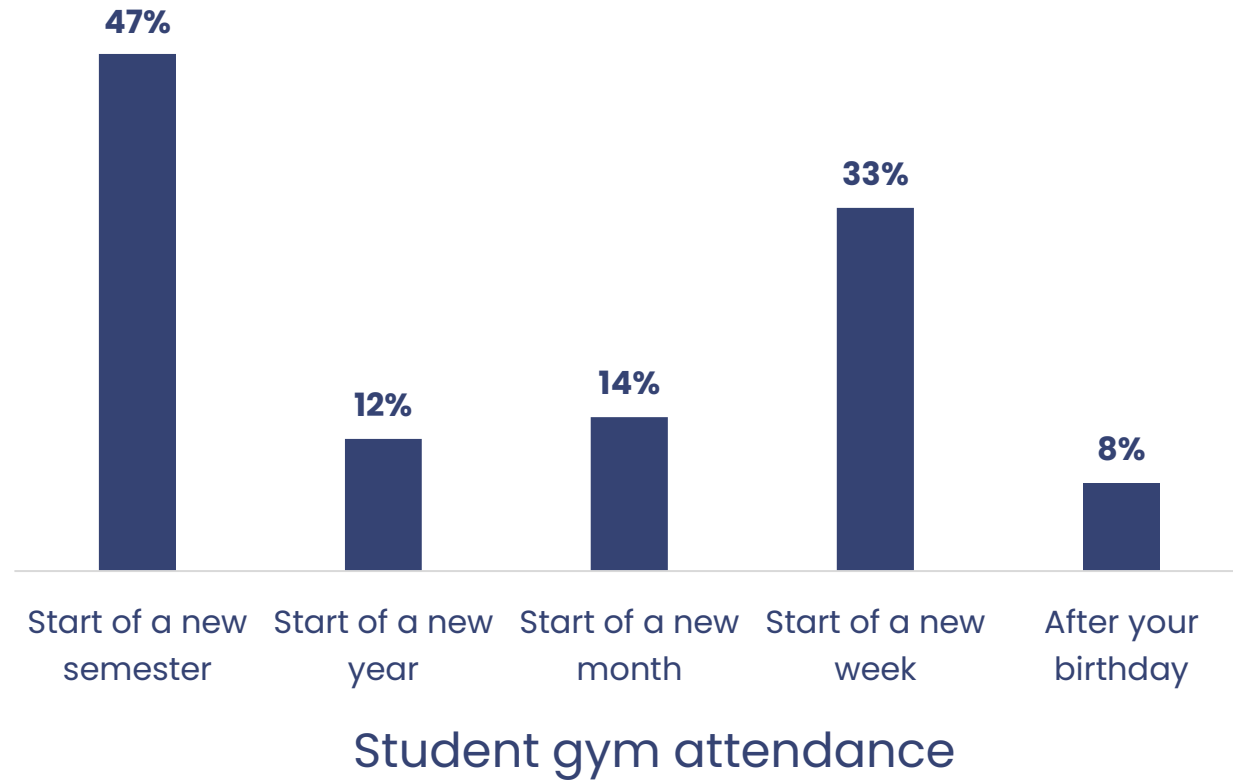


35 Major Life Changes

Bruce Feiler



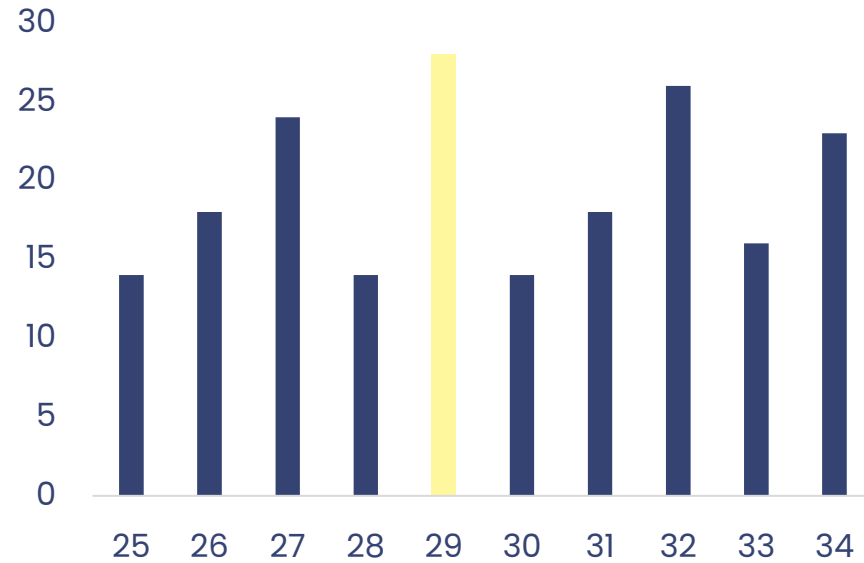
Timing is Everything



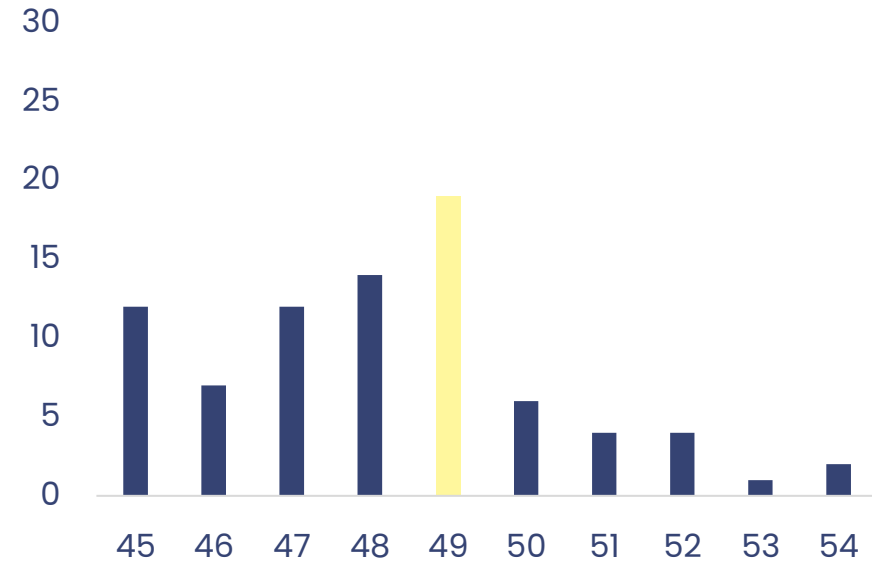


The Importance of 9

Number of first-time marathoners per 500 runners.

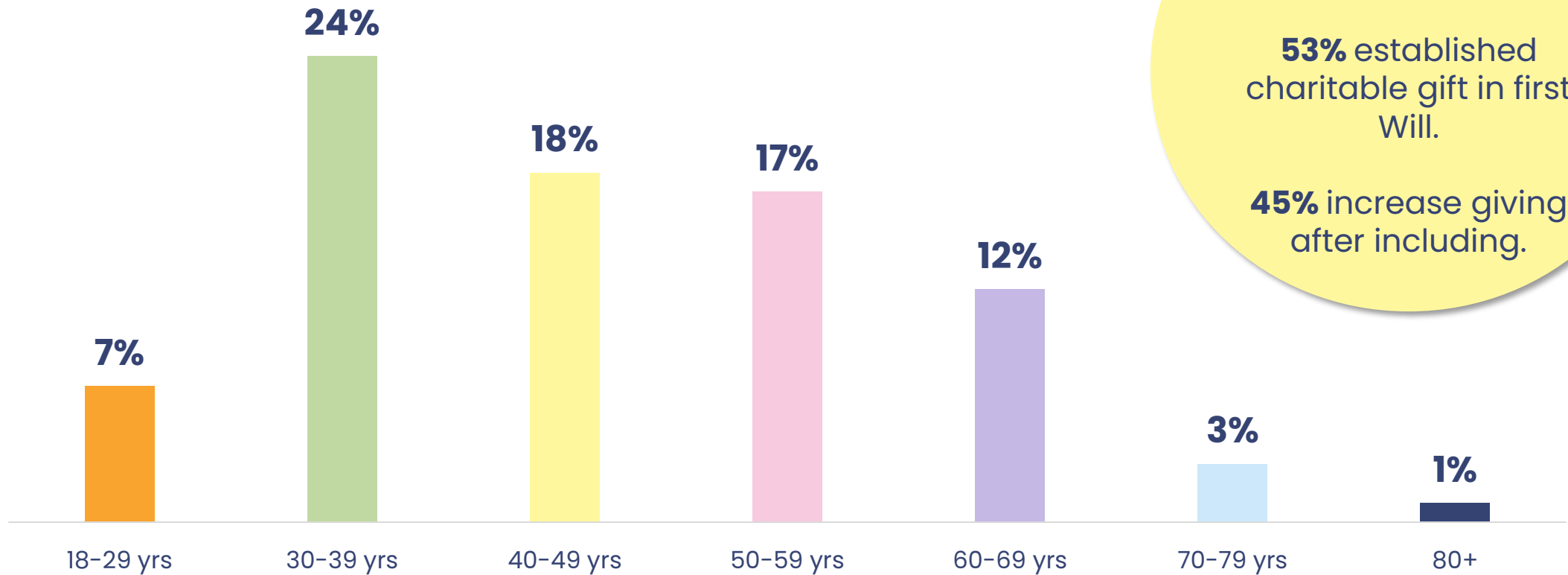


People are most likely to run their first marathon at age 29.



People are most likely to run their first marathon at age 49.

Age of Writing First Will

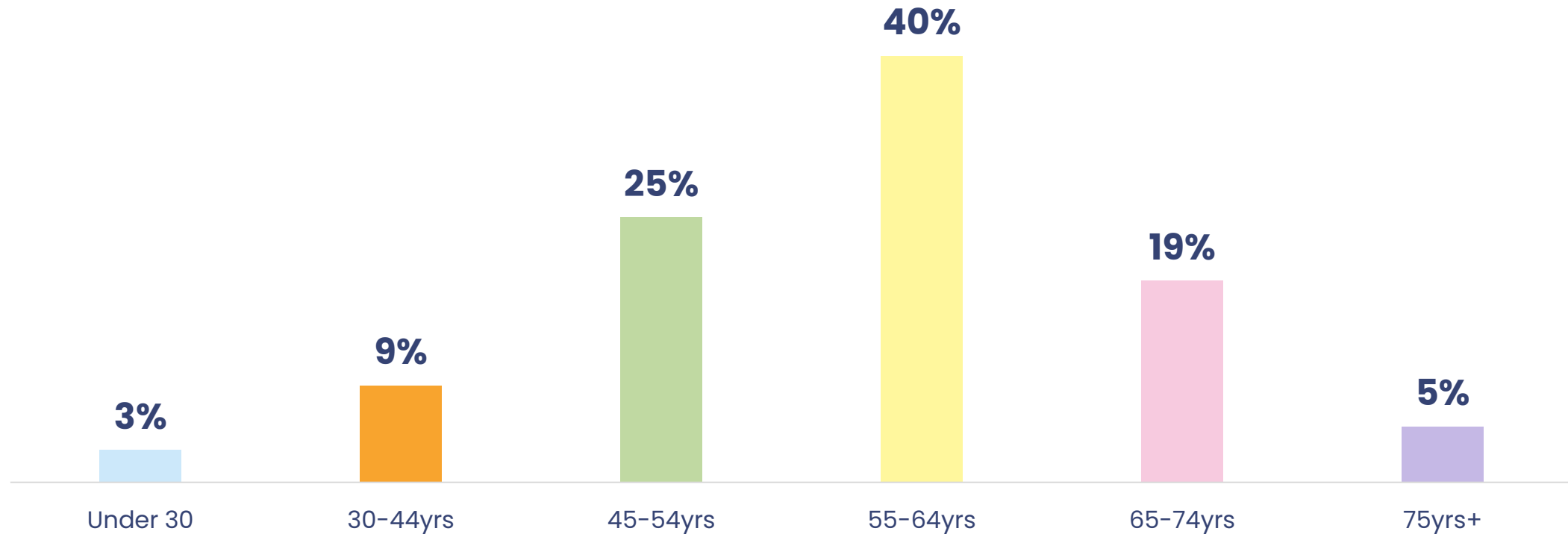


Average age
charitable gift = **53**
years

53% established
charitable gift in first
Will.

45% increase giving
after including.

When: Age first likely to include a gift in your Will



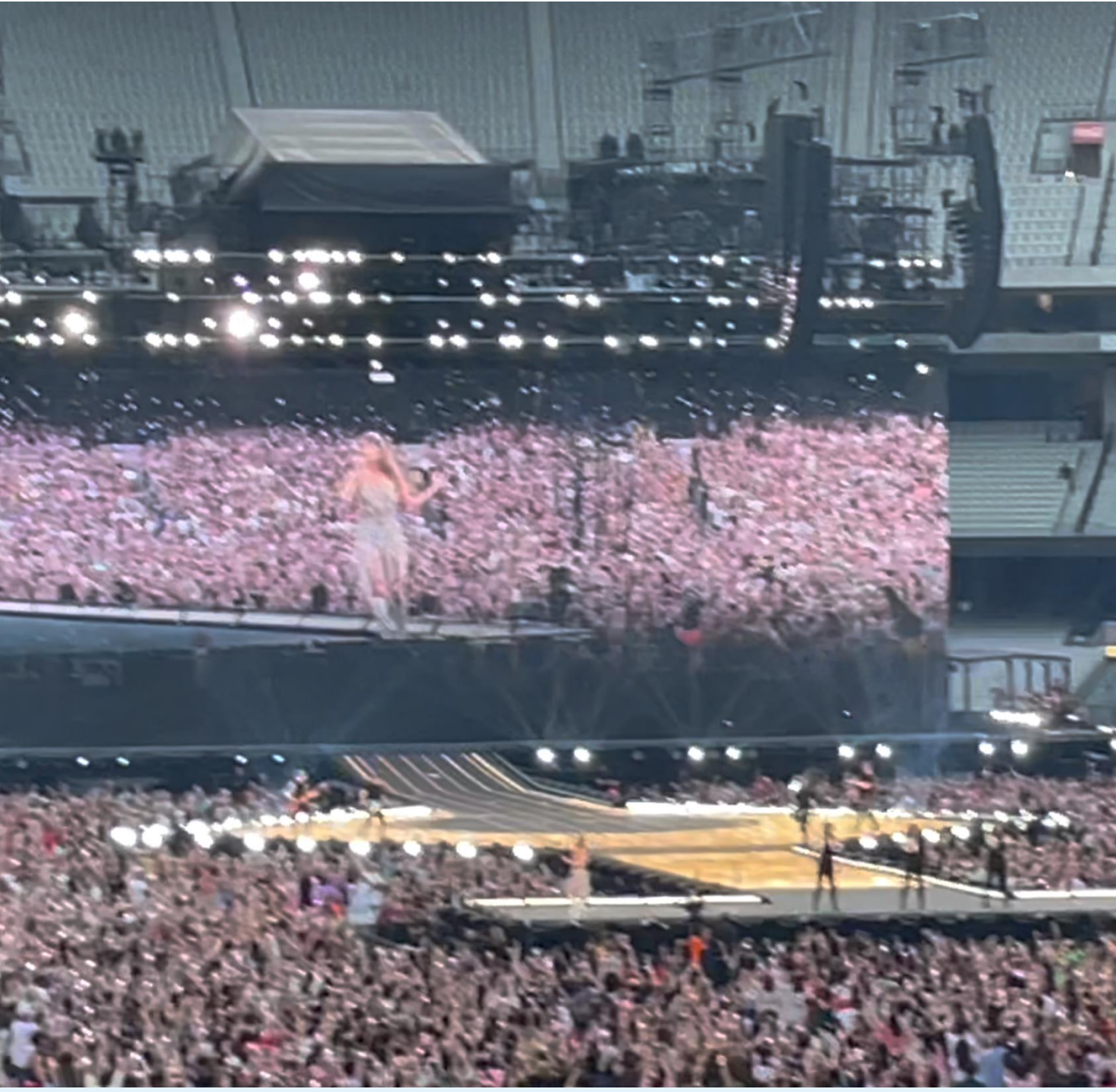
CONFERENCE

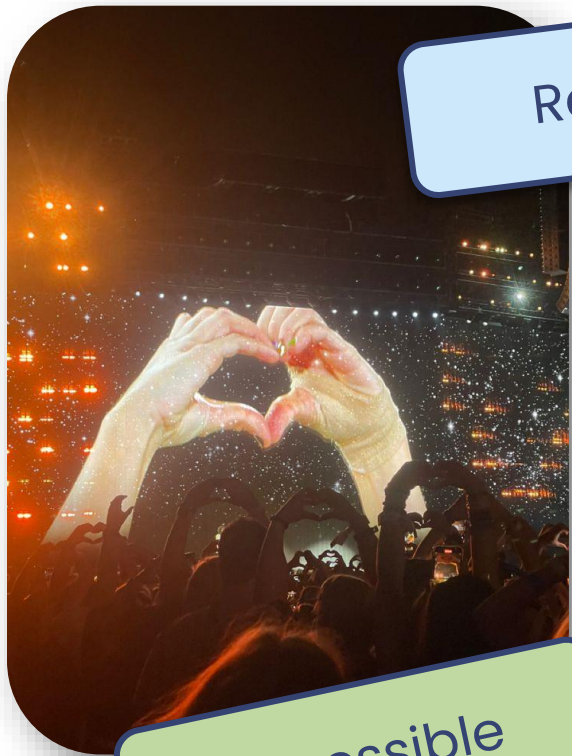
Data Source	IaC Public Research November 2022	Question	What age were you when you first included a charity/ies in your Will?	Sample Size	134	Filter	Confirmed
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A black and white photograph of Taylor Swift performing on stage. She is wearing a shimmering, sequined, backless dress with fringe details. She is holding a microphone to her mouth and looking towards the right. The background is dark and out of focus, showing some draped fabric.

The Taylor Swift Movement





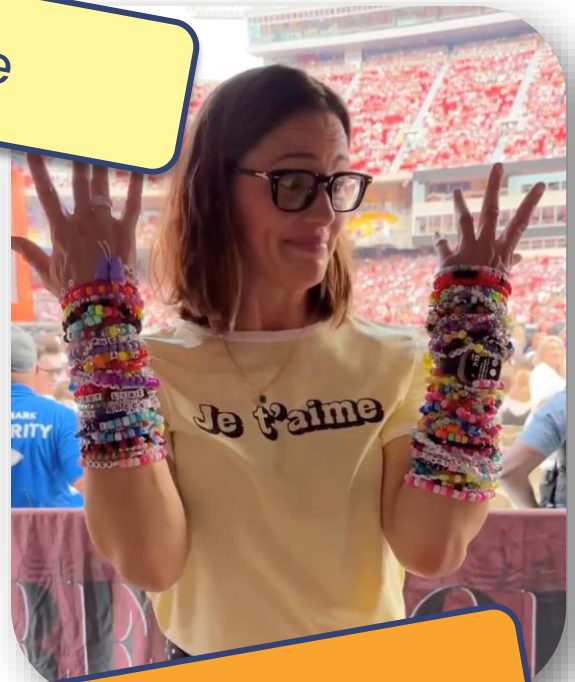
Relevant

Accessible



Influential

Tribe



Identity

“The real explanation must come from the heart and in the case of Taylor Swift, it's how she makes people feel.

Maybe you don't feel it yourself, but you can't deny that millions do.” – ABC



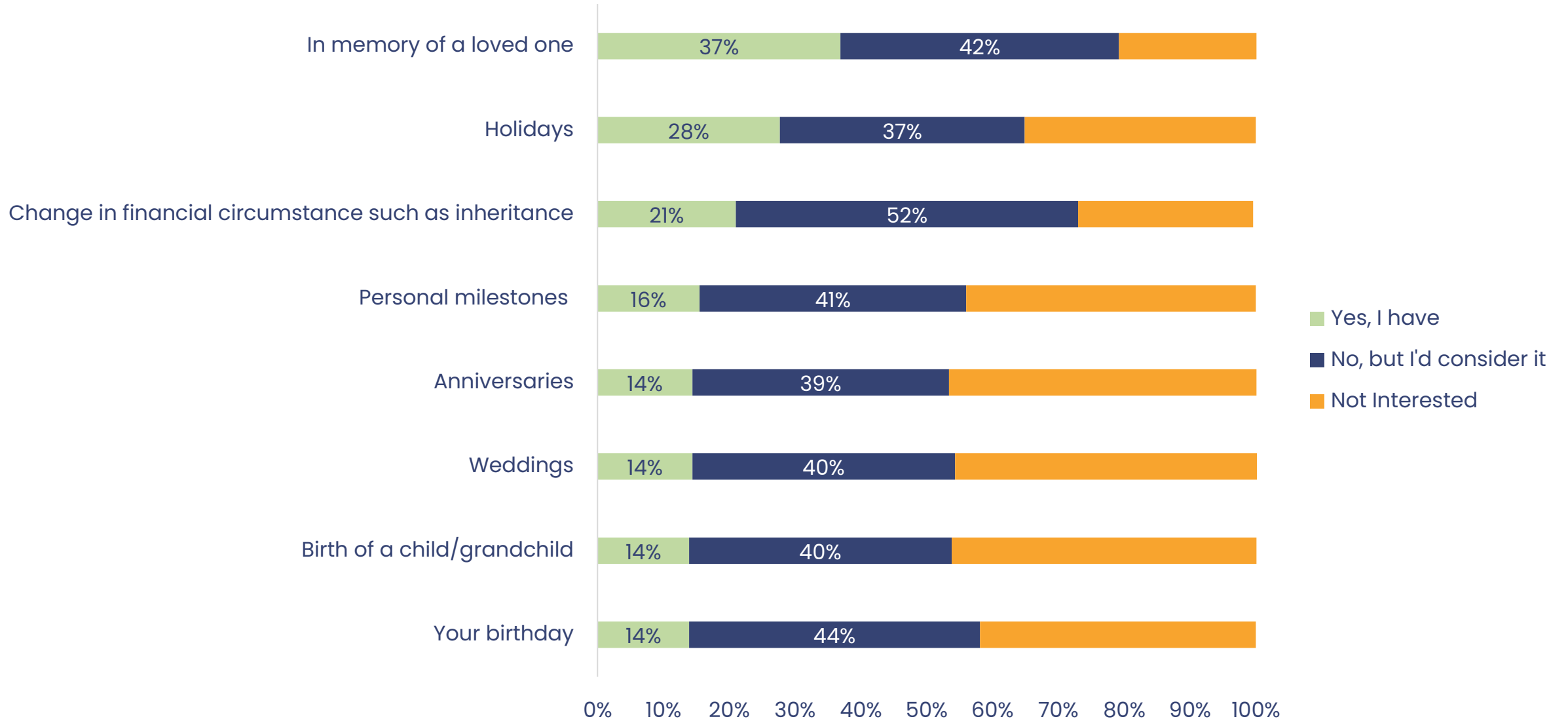
YOUR TURN



**'Introduce yourself:
What does Taylor tell us about
hooks to create memorable
experiences?'**



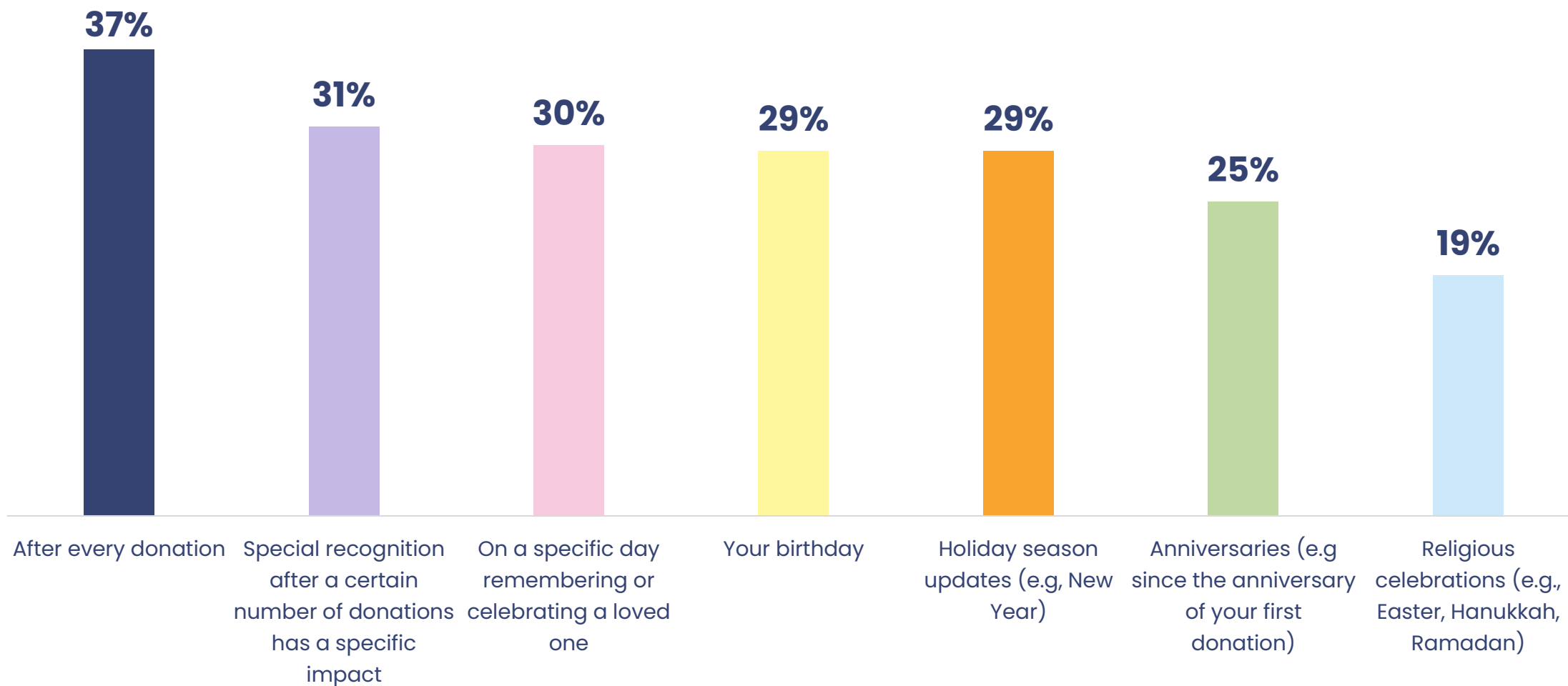
**Creating a lifetime
of memories &
charity connections**



CONFERENCE

Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives. Have you or would you consider supporting a charity for the following reasons:	Sample Size	1,008	Filter	N/A
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CONFERENCE

Data Source	More Strategic Public Research November 2023	Question	When it comes to hearing from charities you support, which of the following occasions or milestones would you appreciate receiving updates or hearing from them?	Sample Size	1,008	Filter	N/A
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A black and white photograph of a woman with glasses on her head holding a young child on a beach. The text "As we grow up ..." is overlaid in the center.

As we grow up ...



Birthdays



29%

People would like to hear from charities for their birthday.



21%

Have given to charity to celebrate their birthday.



44%

Would consider giving to charity to celebrate their birthday.



Recognise Your Birthday

All Ages

CONFIRMED

32%

CONSIDER

38%
vs Neutrals 23% and Rejectors 25%

Split by Age - Confirmed

55+
55yrs+

17%

<55
Under 55yrs

34%

Data Source	More Strategic Public Research November 2023	Question	When it comes to hearing from charities you support, which of the following occasions or milestones would you appreciate receiving updates or hearing from them?	Sample Size	1,008	Filter	Birthdays
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Fundraise For your Birthday

All Ages

CONFIRMED

CONSIDER

50%
More likely
than all other
groups

29%
vs 11% Neutral
vs 5%
Rejectors

Split by Age - Confirmed

55+
55yrs+

<55
Under 55yrs

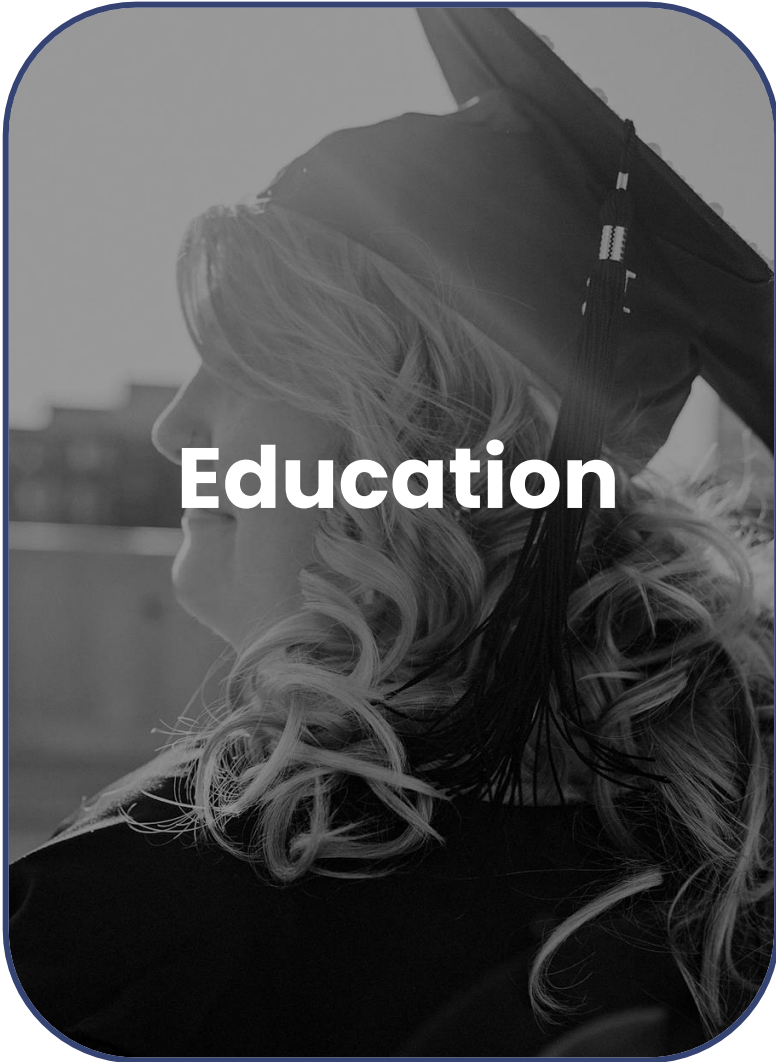
11%
vs 1%
Rejectors
55yrs

60%
More likely
than all other
groups

Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives: Birthdays	Sample Size	1,008	Filter	N/A
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**Life choices that build
your identity**



University Educated

Confirmed

CONFIRMED

CONSIDER

55+

55yrs+

<55

Under 55yrs

54%
Vs neutral
46% &
rejectors 42%

59%
Vs neutral
46% &
rejectors 42%

44%
vs 34%
Rejectors
55yrs

56%
More likely
than all
55yrs+.

Data Source	More Strategic Public Research	Question	What is the highest level of education you have attained?	Sample Size	3,050	Filter	N/A
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Politics

GIWs

Confirmed



CONFIRMED



CONSIDER

55+

55yrs+

<55

Under 55yrs

42%
Right vs 23%
Neutral vs 25%
Rejectors

42%
Right vs 23%
Neutral vs 25%
Rejectors

30%
Left leaning
vs 20% right

48%
Right leaning
vs 13% left

Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives: Personal Milestones	Sample Size	1,008	Filter	N/A
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Personal Milestones – Graduation, Retirement



AGE

Skew to younger Audiences
 26% under 30
 vs 18%
 30-54
 7% 55-74
 1% 75+



GENDER

No Difference



CHILDREN

No Difference



VALUE

Skew high value
 20% for \$500+
 13% for \$200 under

Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives: Personal Milestones	Sample Size	1,008	Filter	N/A
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Personal Milestones – Graduation, Retirement

All Ages

Confirmed

CONFIRMED

CONSIDER

55+

55yrs+

<55

Under 55yrs

32%
Vs 9% Neutral
vs 6% Rejectors

24%
Vs 9% Neutral
vs 6% Rejectors

13%
vs 2% Rejectors
55yrs

37%
More likely than all other groups

Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives: Personal Milestones	Sample Size	1,008	Filter	N/A
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A black and white photograph capturing a religious ceremony. In the foreground, a woman in a white, long-sleeved, lace-trimmed blouse and a white sash tied at the waist has her hands pressed together in a prayer gesture above her head. Her eyes are closed, and her expression is one of intense devotion. Behind her, several other individuals, also in white, are seen in similar prayer poses, though they are slightly out of focus. The background is filled with the soft, out-of-focus light of trees and foliage, suggesting an outdoor setting. The word "Religion" is printed in a large, bold, white sans-serif font across the center of the image, partially overlapping the woman's torso and the background.

Religion



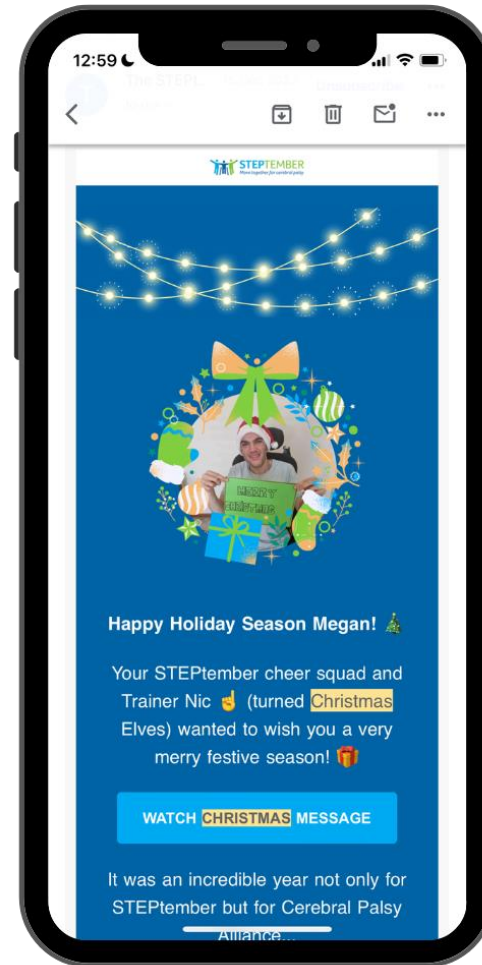
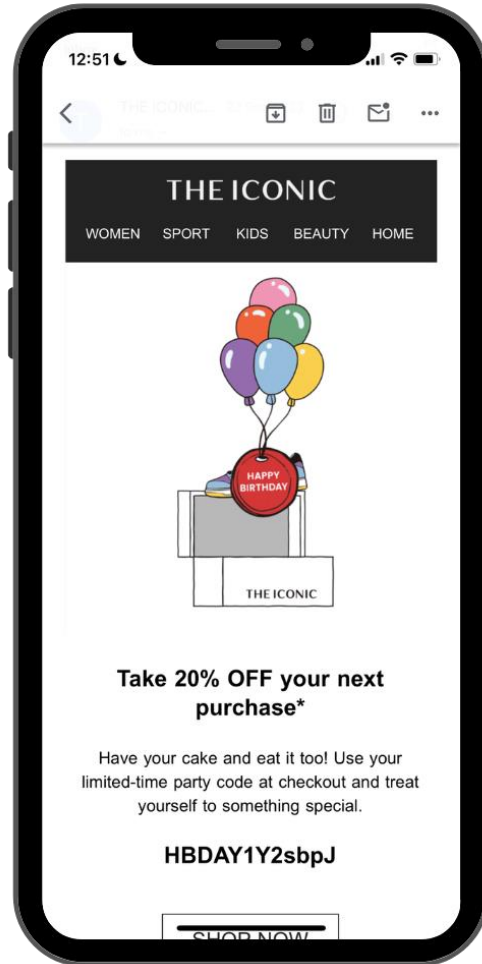
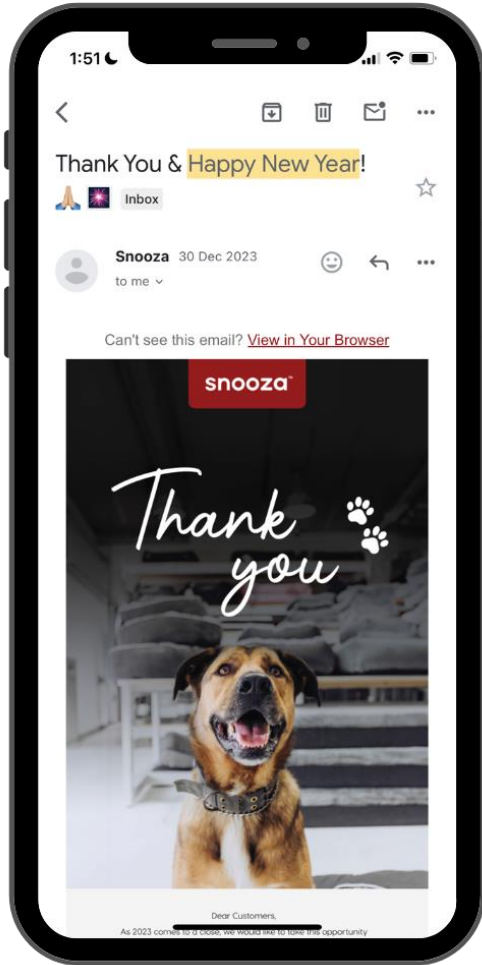
19%

People would like to hear from charities for religious celebrations. i.e Xmas, Ramadan, Hanukkah



29%

But more would like to hear from you for general holiday season updates i.e New Year.





Holidays – Xmas, Easter, Hannukah, Ramadan

ALL AGES


CONFIRMED


CONSIDER

45%
Vs 24%
Neutral vs
18% Rejectors

37%
Vs 24%
Neutral vs
18% Rejectors

Confirmed

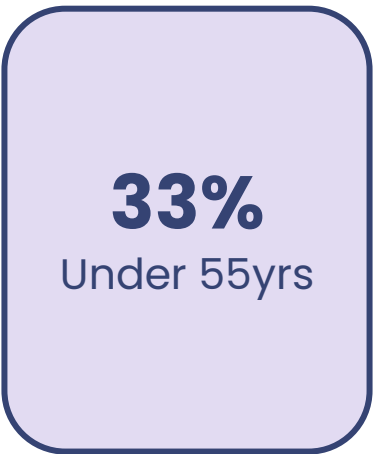
55+
55yrs+

<55
Under 55yrs

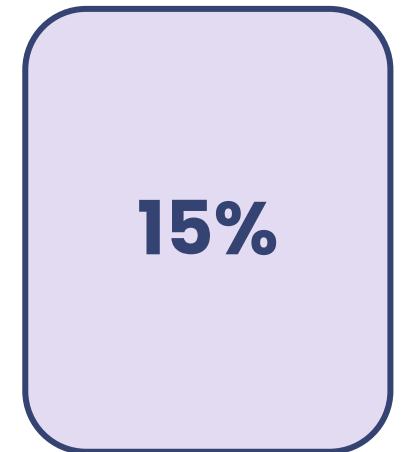
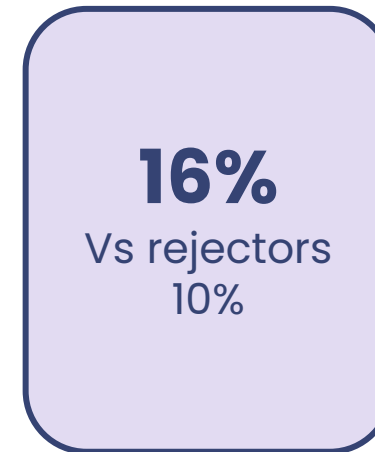
17%

52%
More likely
than all other
groups

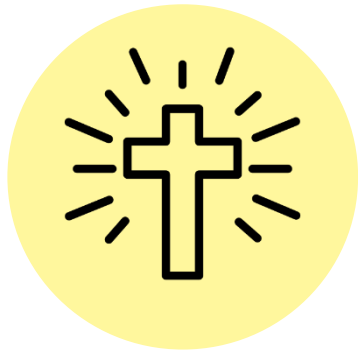
Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives: Holidays	Sample Size	1,008	Filter	N/A
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Data Source	More Strategic Public Research	Question	People give money to charities for many different reasons. We would love to know what giving does for you?	Sample Size	2,040	Filter	N/A
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Data Source	More Strategic Public Research	Question	Generally, what do you achieve through your donations?	Sample Size	3,000	Filter	N/A
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CHRISTIAN

Lent: 40-day period of fasting and prayer in the lead up to Easter.

Christmas: Time of giving and generosity e.g. food drives and toy collections.



ISLAM

Zakat: Give a proportion of one's wealth to those in need.

Eid al-Fitr: Marks the end of Ramadan and is a time of celebration and giving.



JEWISH

Yom Kippur: Holiest day, of fasting, prayer and repentance.

Purim: Joyous holiday commemorating the salvation of Jewish people.



Marriage & Divorce



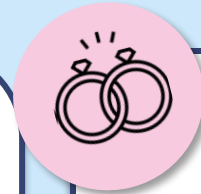
14%

People have given to charity to celebrate their wedding



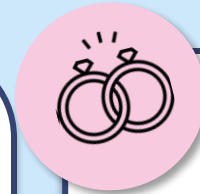
14%

For anniversaries



40%

Would consider to celebrate their wedding



39%

Their anniversary



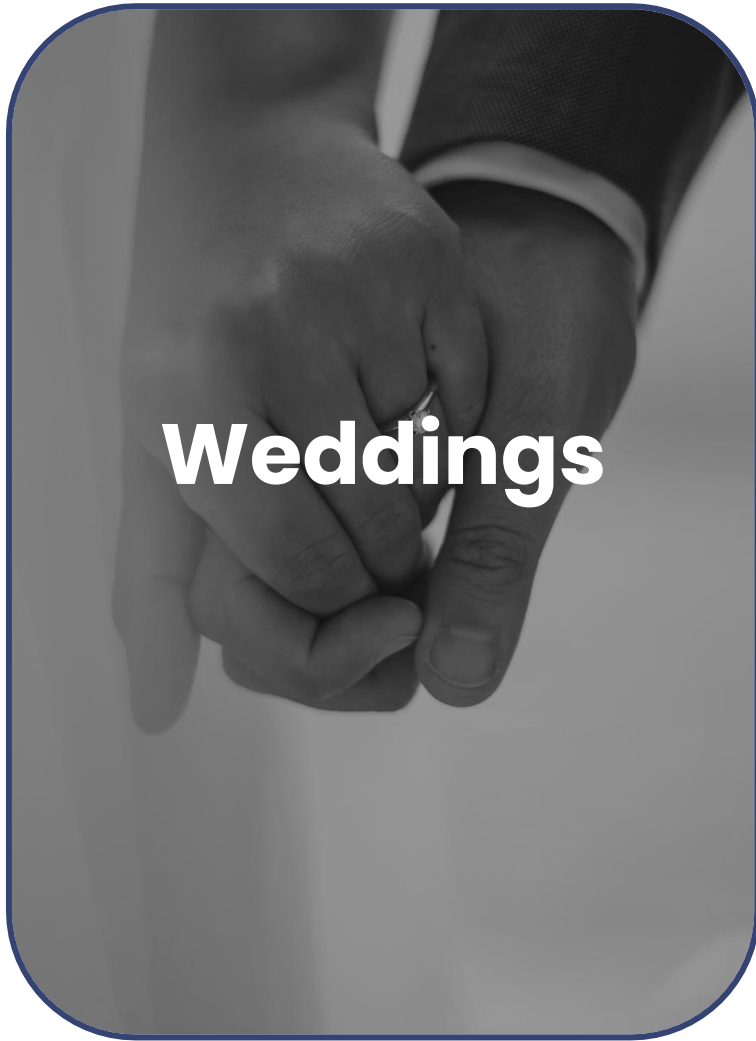
10%

state a marriage as the reason for updating their Will.



5%

state a divorce as the reason for updating their Will.



ALL AGES

Confirmed

CONFIRMED

CONSIDER

55+

55yrs+

<55

Under 55yrs

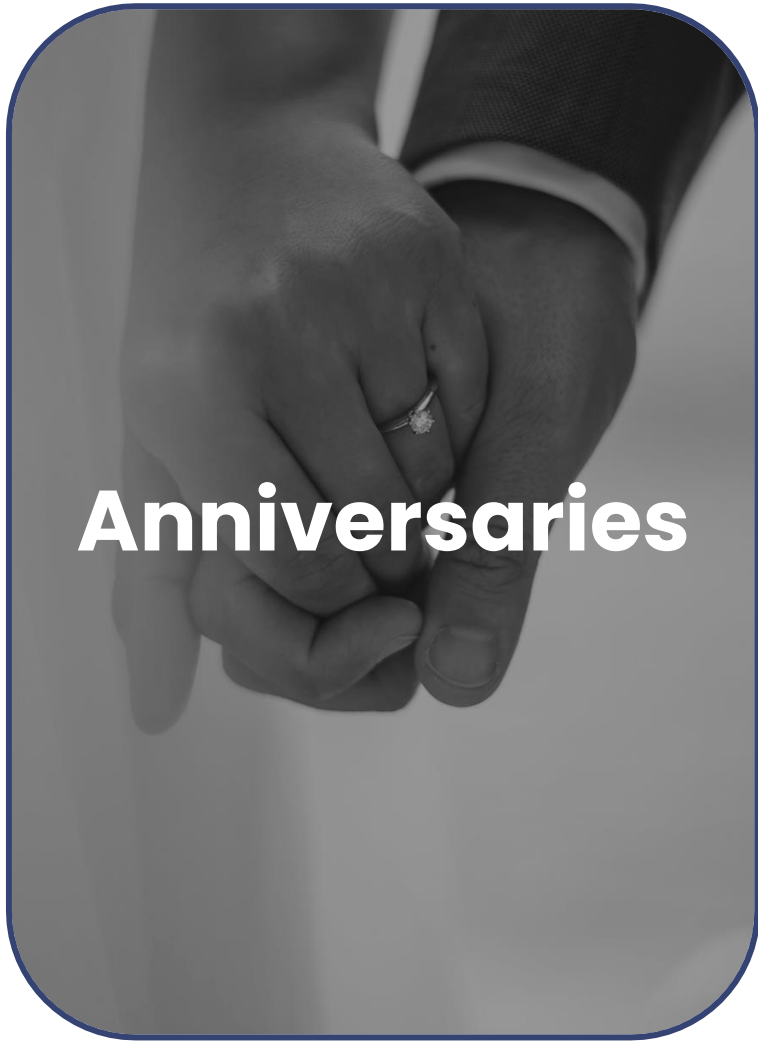
30%
Higher than all
Vs neutrals
11%

15%
vs 5%
Rejectors

8%

36%
More likely
than all other
groups

Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives: Weddings	Sample Size	1,008	Filter	N/A
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Anniversaries

ALL AGES

CONFIRMED

38%
Vs all groups

CONSIDER

15%
Vs 8% Neutral
vs 3% Rejectors

Confirmed

55+

55yrs+

9%
vs 1% 55+ Rejectors

<55

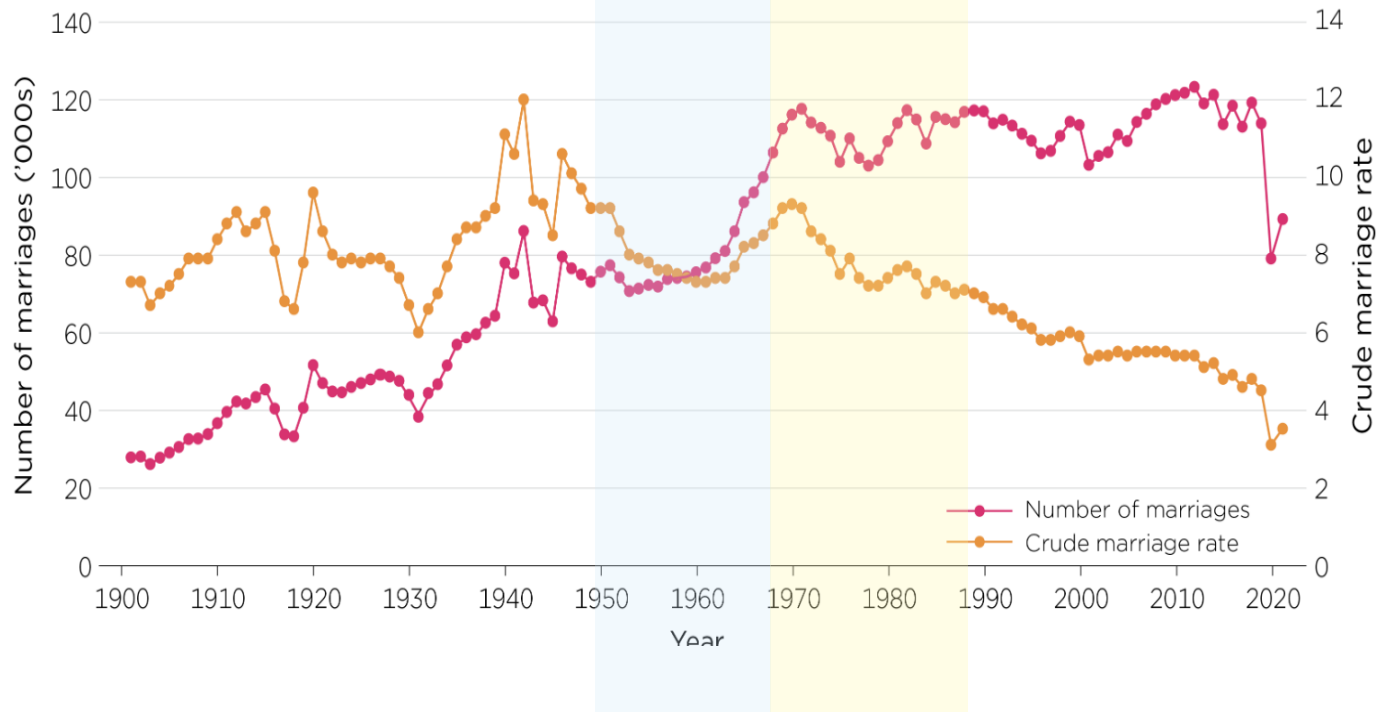
Under 55yrs

45%
More likely than all other groups

Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives: Weddings	Sample Size	1,008	Filter	N/A
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Rate of Marriage

Figure 1: Number of marriages registered and crude marriage rate, 1901-2021



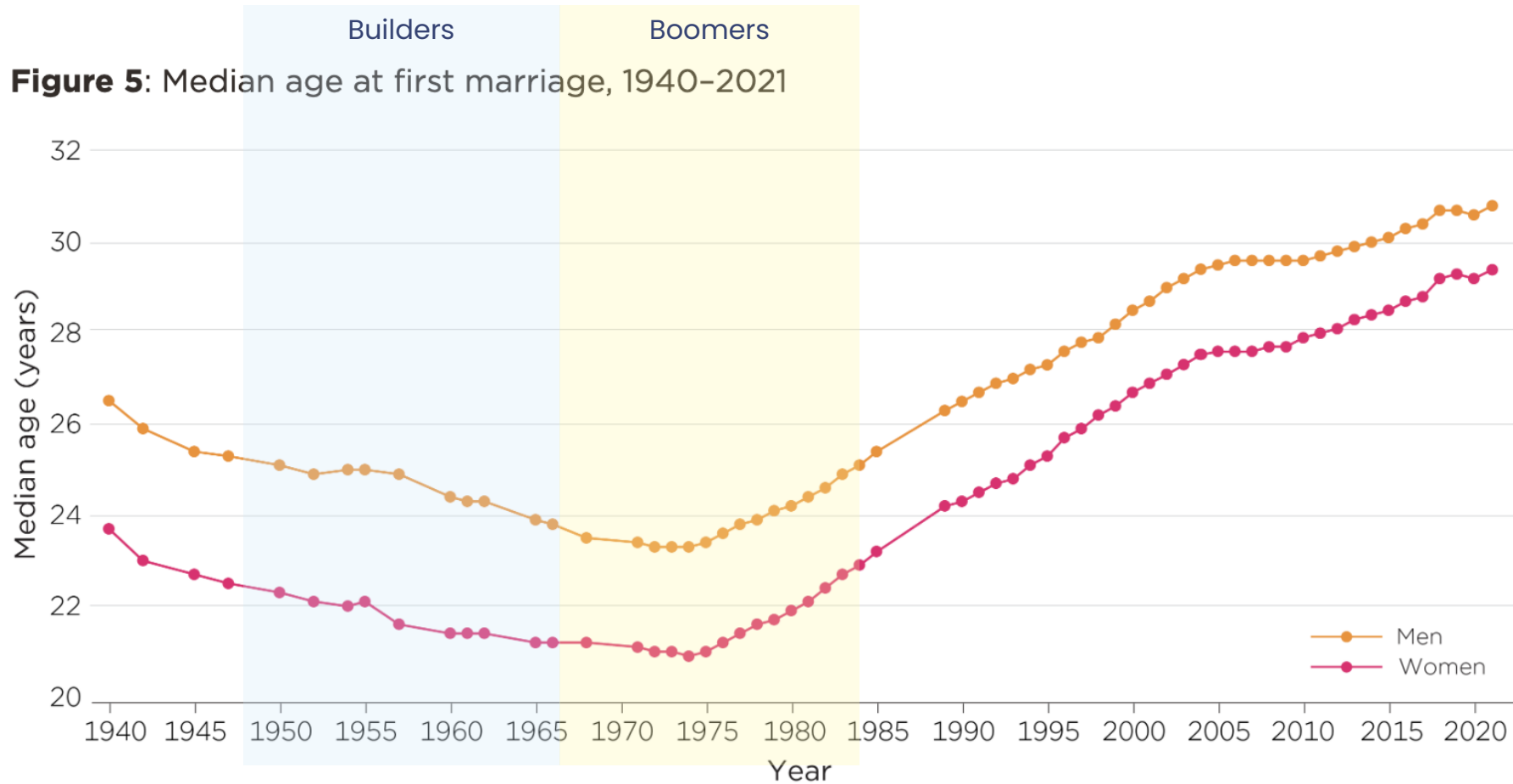
Our population has almost doubled since 1970



But number of people married is reasonably flat – 100-120k

Age of marriage:

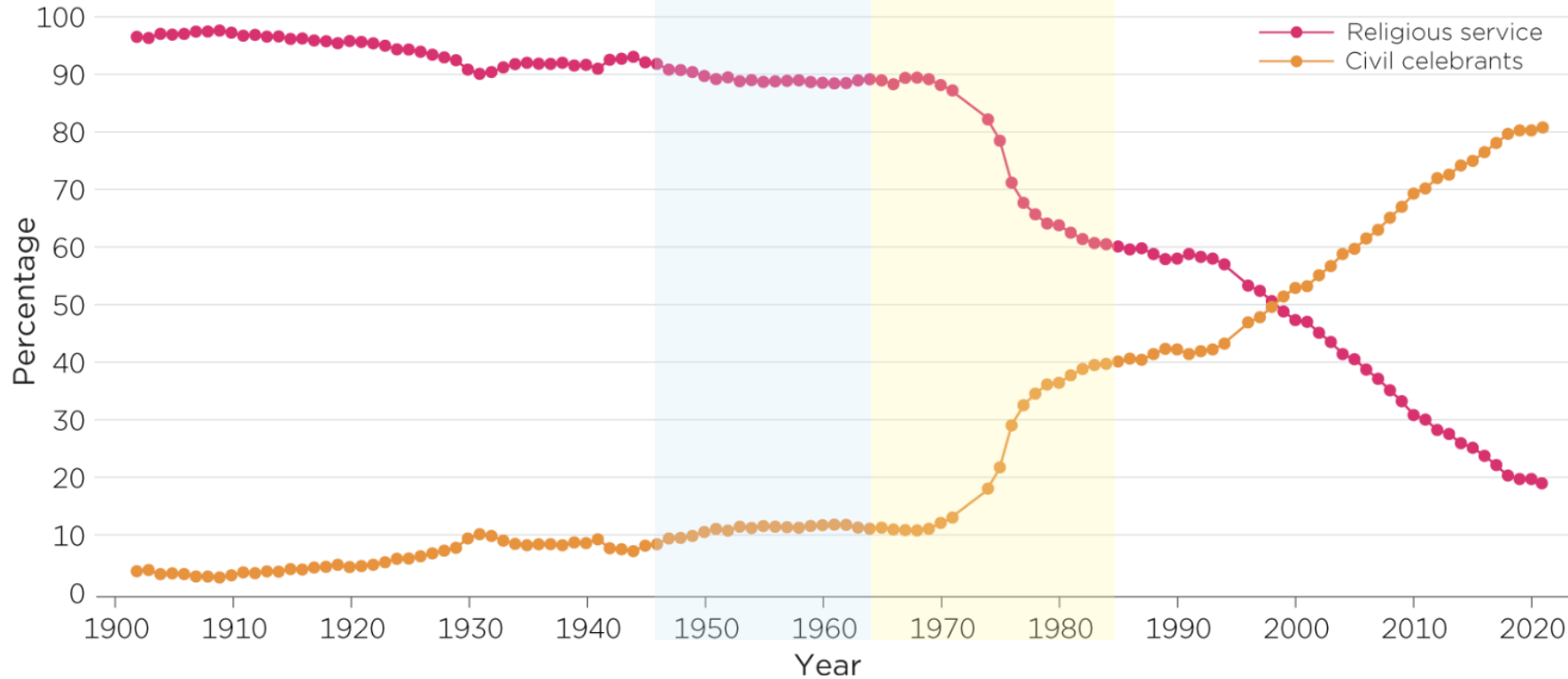
Figure 5: Median age at first marriage, 1940-2021



Average age increased for men and women

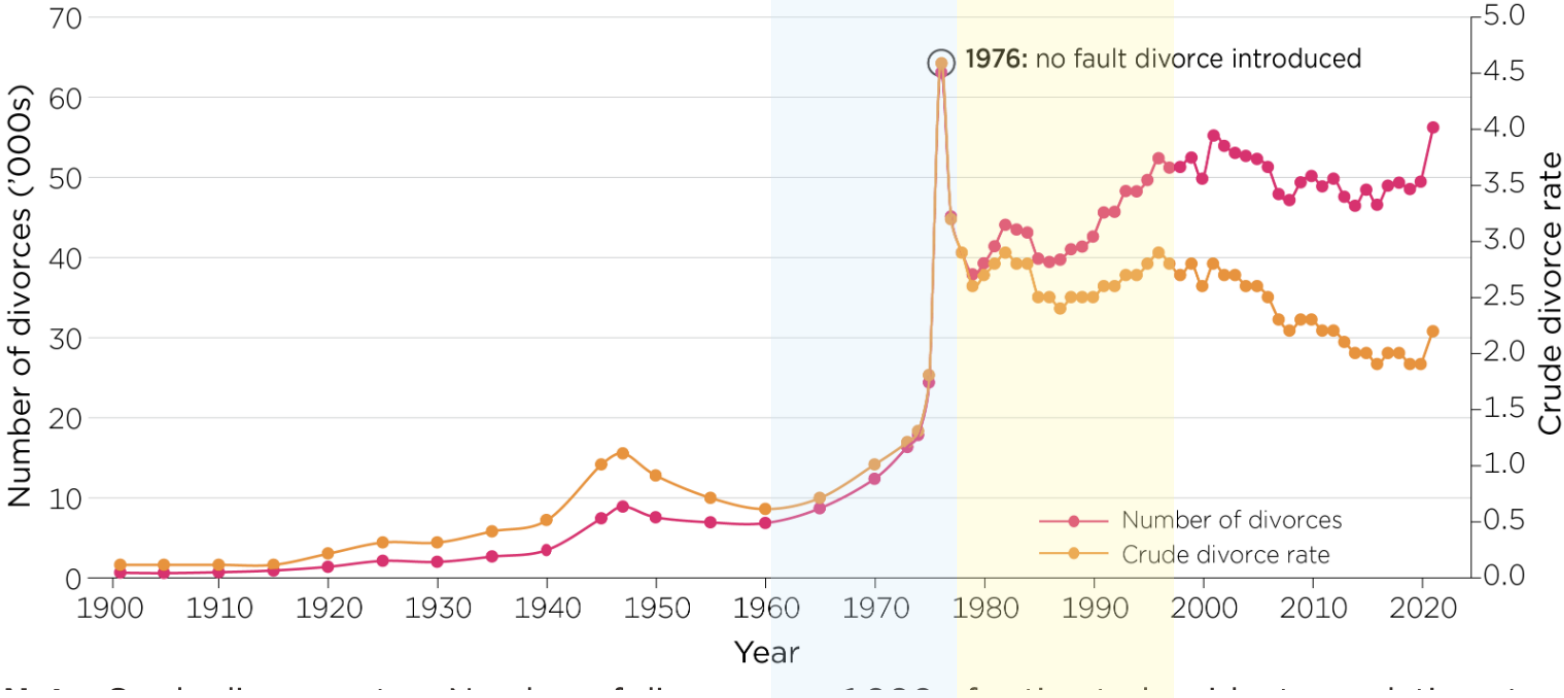
Marriage : Religion vs Celebrants

Figure 6: Marriages by celebrants and religious service, 1902-2021



Divorce rate:

Figure 1: Number of divorces and crude divorce rate, 1901–2021



It's the Boomer generation that saw the upward shift in divorce rates

Similarly the age of divorce has been upward trend



Living Longer



More Retirement Years to Fund



Rising Cost of Living



Earning Later



More Debt



Greater Cost of Housing

A black and white photograph of a newborn baby crying. The baby's face is the central focus, with its mouth wide open in a cry. The baby is wrapped in a light-colored, textured blanket. The background is a dark, horizontally striped fabric. The word "Births" is overlaid in the center of the image in a bold, white, sans-serif font.

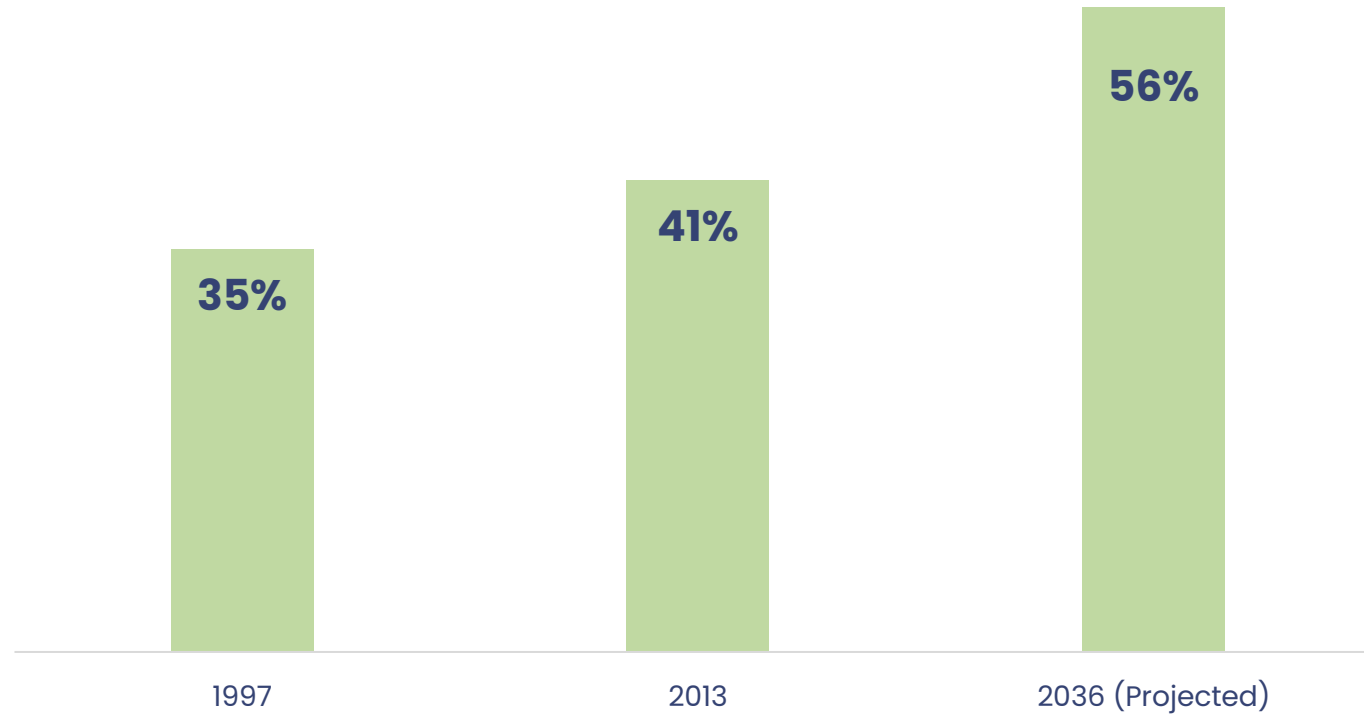
Births



6%

state a birth of child/grandchild as the reason for making/last updating their Will.

The Number of Families without Children is Increasing:





34%

Had no children.

42% / 50%

Confirmed - no children/55+.

45%

Considerers - no children.



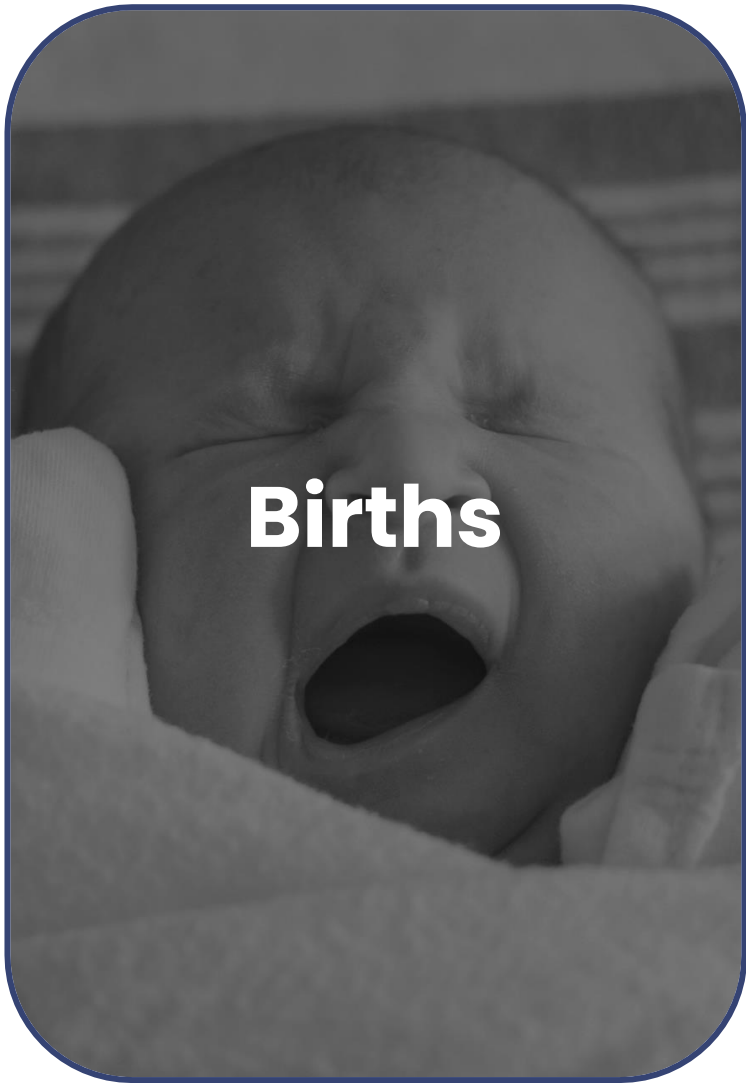
14%

Have given to charity to celebrate the birth of a child or grandchild.



44%

Would consider giving to charity to celebrate the birth of a child or grandchild.



ALL AGES

Confirmed


CONFIRMED


CONSIDER

55+
55yrs+

<55
Under 55yrs

31%
Vs all groups

17%
Vs 11% Neutral
vs 4%
Rejectors

9%

36%
More likely
than all other
groups

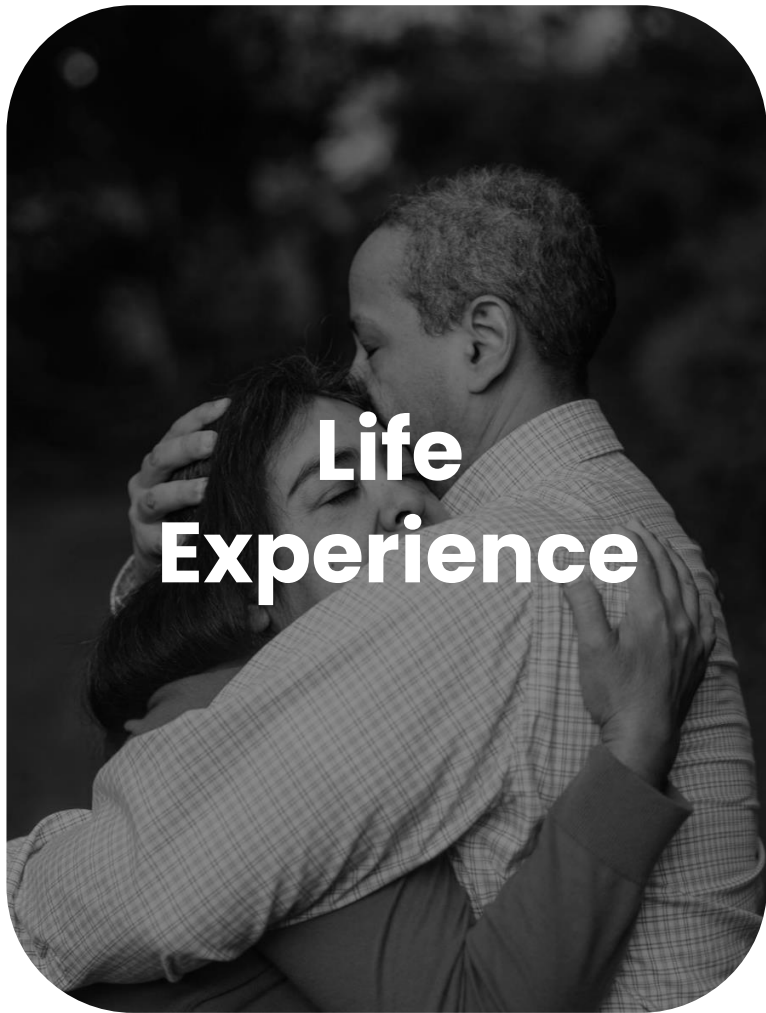
Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives: Birth of Child/Grandchild	Sample Size	1,008	Filter	N/A
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Life Experiences

Public	Bequestor
1. Children's Charities	1. Animal Charities
2. Health and Medical Research	2. Children's Charities
3. Animal Charities	3. Australian Welfare Charities
4. Australian Welfare Charities	4. Health and Medical Research
5. Mental Health Organisations	5. Aged Care Services

Data Source	More Strategic Public Research	Question	Which sorts of organisations do you most like to support with donations? Please select up to 3 that you most frequently support.	Sample Size	3000	Filter	Public vs Bequestors
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ALL AGES

CONFIRMED

CONFIRMED

CONFIRMED

CONFIRMED

18%
Aged Care Services (vs all)

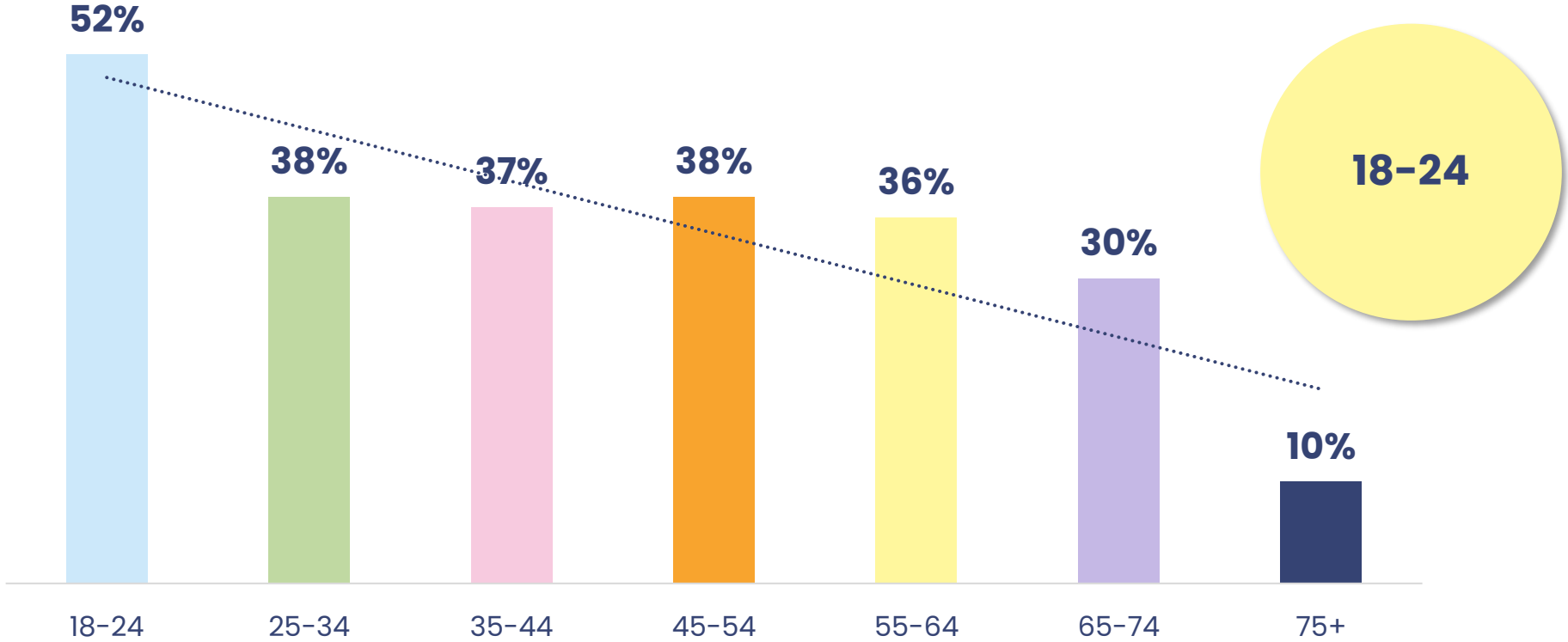
23%
Animal Charities vs neutrals & rejectors 15%

15%
Australian Welfare (vs rejectors 8%)

6%
Human Rights (vs rejectors 1%)

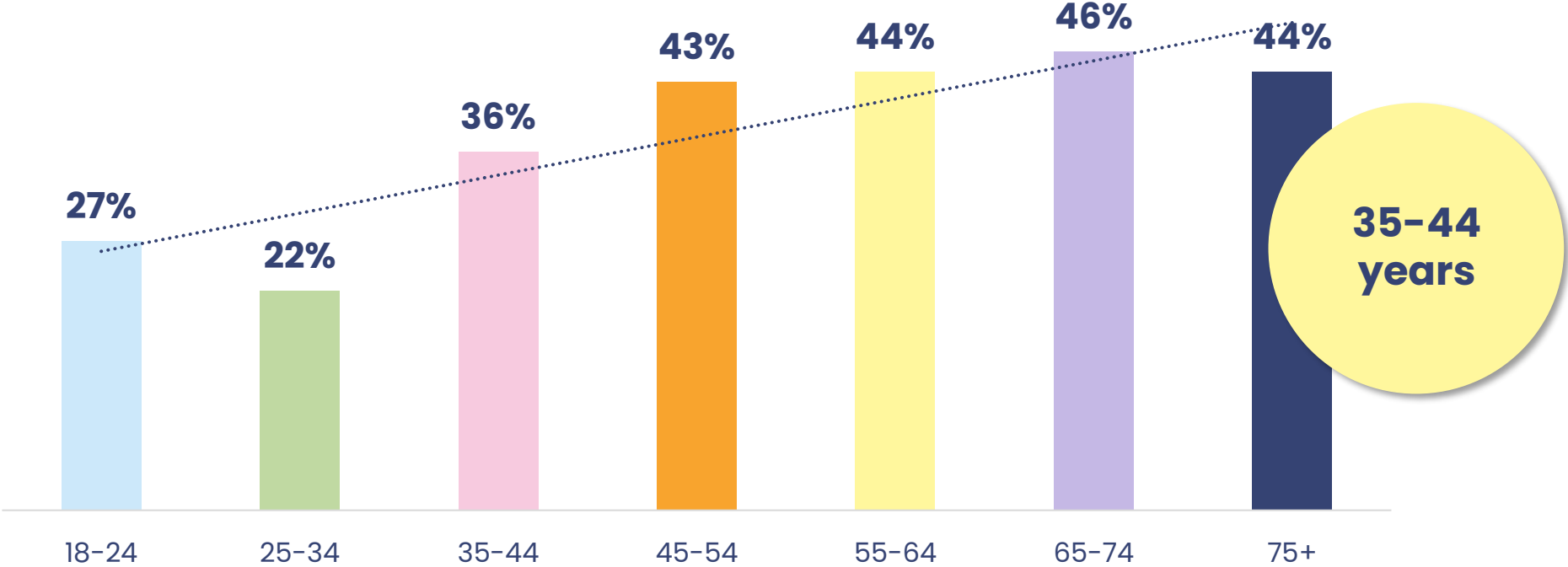
Data Source	More Strategic Public Research November 2023	Question	Which sorts of organisations do you most like to support with donations? Please select up to 3 that you most frequently support.	Sample Size	1,008	Filter	N/A
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Mental Health



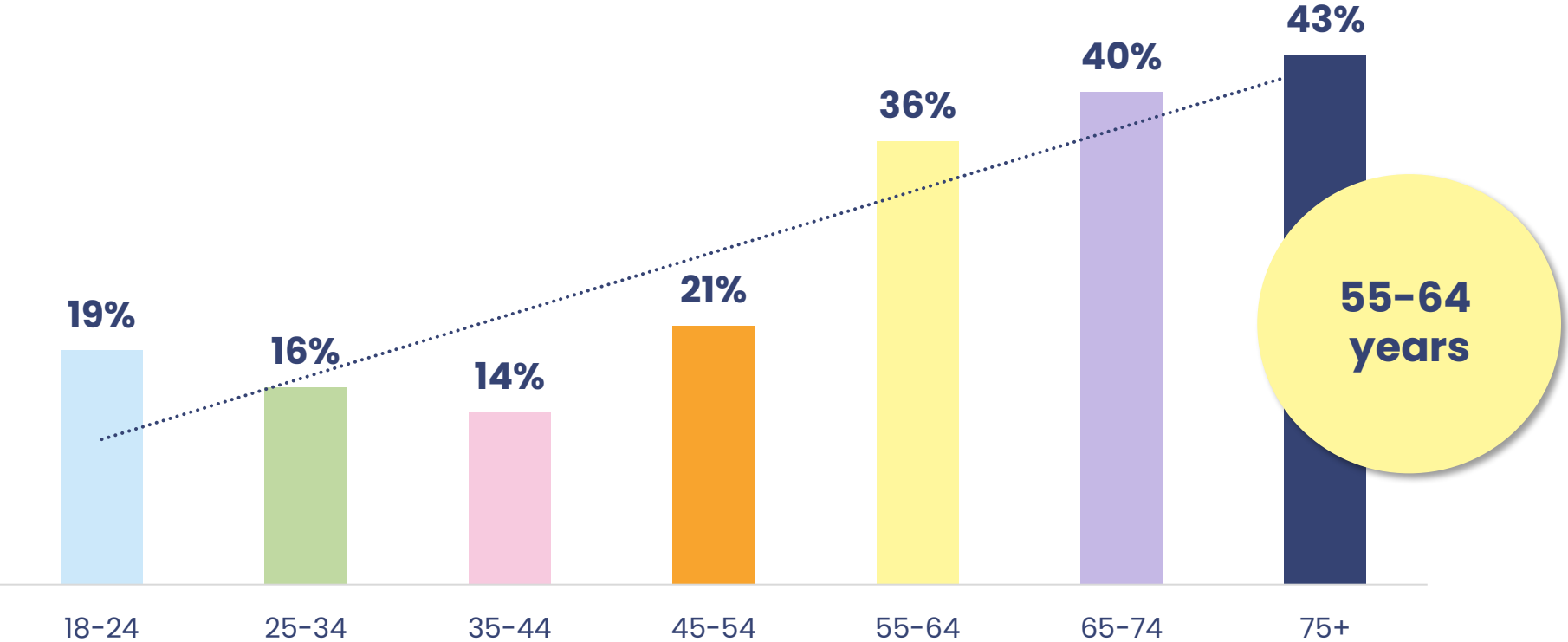
Data Source	More Strategic Public Research and IAC	Question	Do you, a family member or a friend have or have had any of the following health conditions or personal experiences?	Sample Size	3,000	Filter	Mental Health
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Cancer



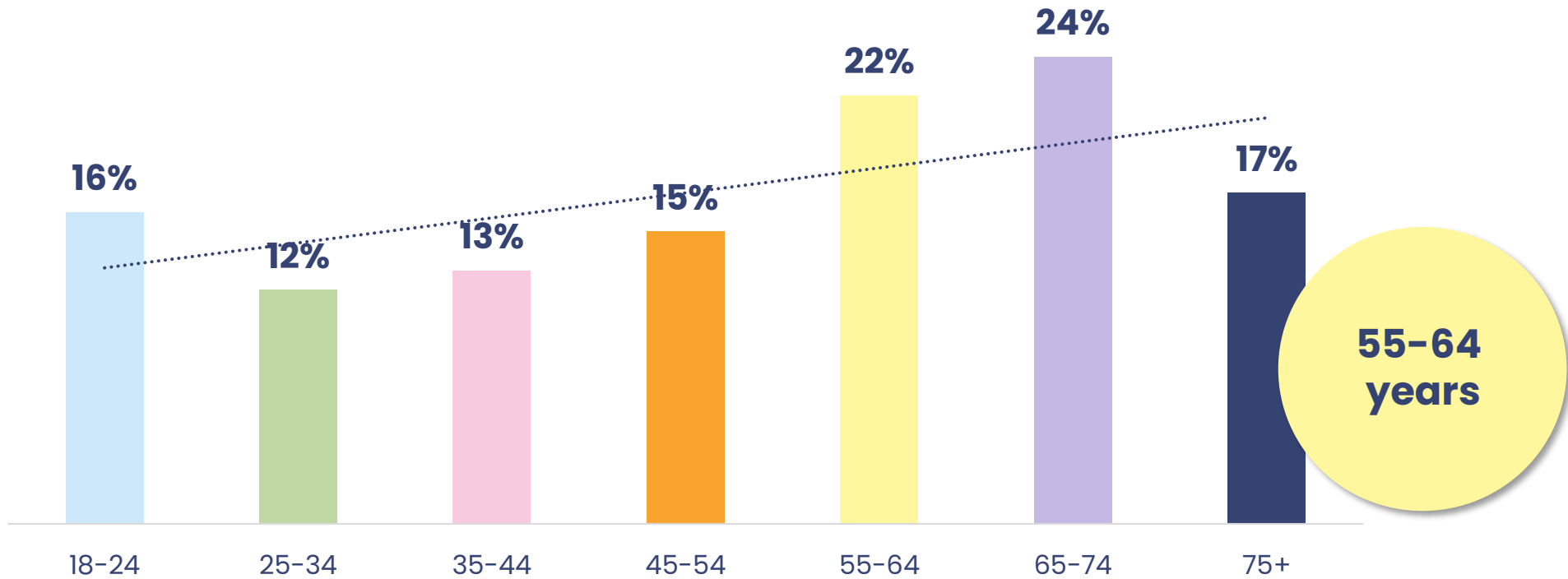
Data Source	More Strategic Public Research and IAC	Question	Do you, a family member or a friend have or have had any of the following health conditions or personal experiences?	Sample Size	3,000	Filter	Cancer
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Heart Disease



Data Source	More Strategic Public Research and IAC	Question	Do you, a family member or a friend have or have had any of the following health conditions or personal experiences?	Sample Size	3,000	Filter	Heart Disease
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Dementia/Alzheimer's



Data Source	More Strategic Public Research and IAC	Question	Do you, a family member or a friend have or have had any of the following health conditions or personal experiences?	Sample Size	3,000	Filter	Dementia/ Alzheimer's
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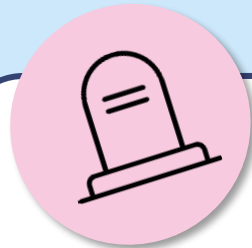
A black and white photograph of several lit tealight candles on a dark surface. The candles are arranged in a scattered pattern, with some in the foreground and others in the background. The flames are bright and slightly blurred, creating a soft, atmospheric glow. The text "Loss of a loved one" is overlaid in the center of the image in a bold, white, sans-serif font.

Loss of a loved one



5%

Death of a beneficiary or executor as the reason for updating their Will.



37%

Have given in memory of a loved one.



2%

In memory of my parents who were helped/loved this charity
Vs **37%** To express my personal support for the cause



33%

Confirmed - I remember my parents frequently giving to charity
- Agree / strongly agree
Vs consider - 24%
Rejectors - 13%

In Memory Fundraising

ALL AGES



CONFIRMED

31%
Vs all groups



CONSIDER

17%
Vs 11% Neutral
vs 4% Rejectors

Confirmed

55+

55yrs+

9%

<55

Under 55yrs

36%
More likely
than all other
groups

Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives: In Memory	Sample Size	1,008	Filter	N/A
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Building Trust

Empathy fosters trust and rapport between fundraisers and supporters, laying the foundation for meaningful engagement.



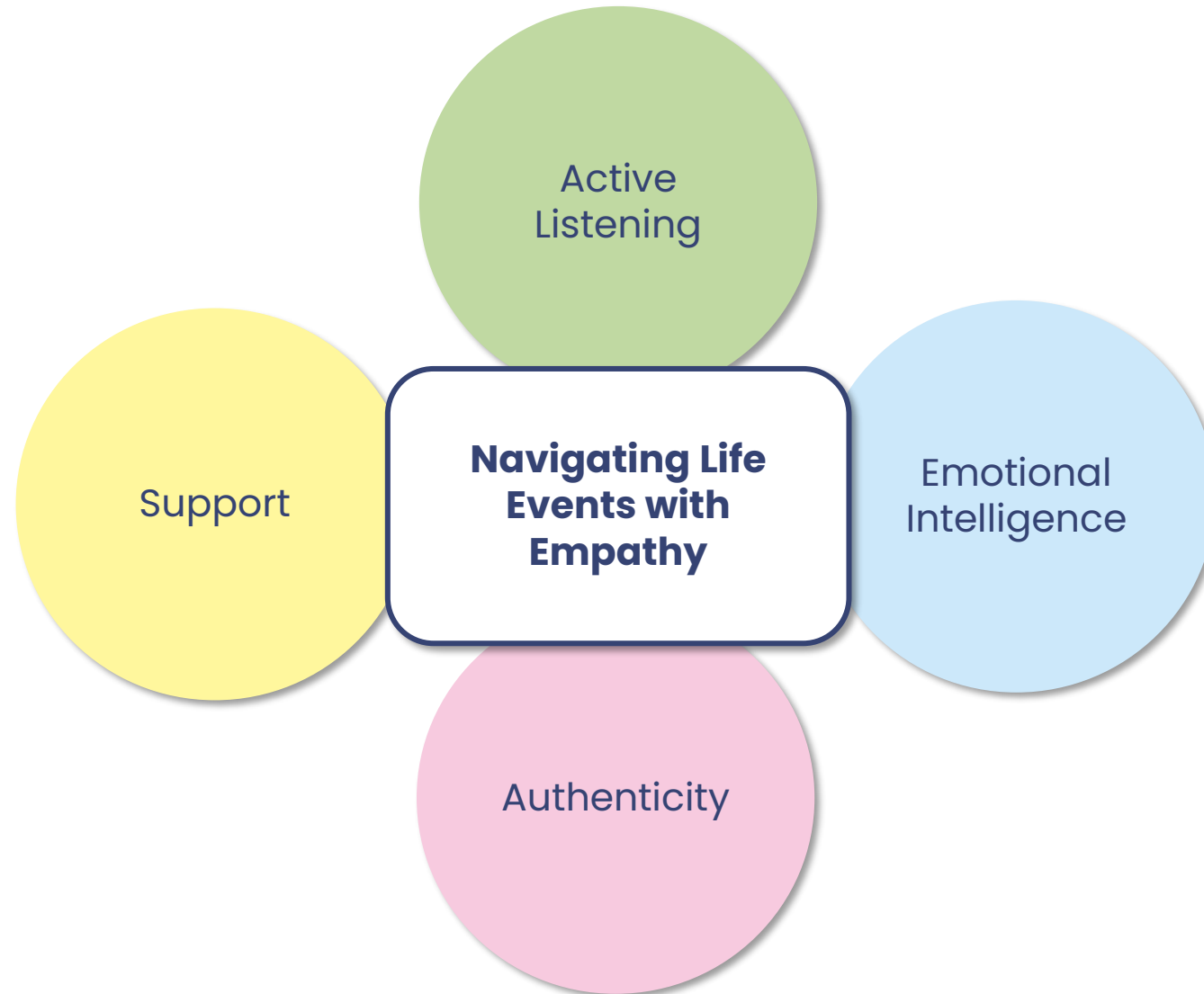
Understanding Needs

Empathetic listening allows fundraisers to understand the unique needs, values, and motivations of supporters.



Enable Giving

By demonstrating empathy, fundraisers empower supporters to contribute to causes that resonate with their personal experiences and beliefs.



Canteen Australia · 2 March 2022 · 🌐

From all of us here at Canteen we wanted to extend our thoughts to those affected by the floods in Queensland and New South Wales. Our hearts are broken for those that have lost loved ones, their homes and their livelihoods. ❤️

We've had a few members of this group ask about how we want them to do the challenge whilst dealing with the floods, and as much as we appreciate your dedication to the 5km a Day challenge, our priority is your safety and wellbeing.

So feel free to do your KMs when it's safe to do so, or you can just start your challenge at a later date if that works better for you. Also, we've got an incredible group of people here, and I bet we have some challengers in this group who will be willing to do a few extra KMs for you! 🏃 So please don't put yourself in any dangerous situation in ensuring you do your daily movement.

If there is anything we can do to support you please reach out. We're thinking of you, stay safe. 🍏

👍❤️ Laura Francis-Forman, Sky Aline and 101 others · 16 comments

👍 Like 💬 Comment 📄 Send

Thank you for accepting me. My mother sadly lost her battle with lung cancer in 2020. My 2 kids and I took care of my mum and were with her every day. Thanks to the support of Canteen my kids have been with other children who are also going through the similar journey. They also received counselling and support. So this cause is really close to my heart ❤️ I am also proud to say my daughter is also now a young leader to help others who need support and someone to talk to that understand what they are going through.

👍❤️🙏 26 · 1 comment

👍 Like 💬 Comment 📄 Send

Most recent ▾

Canteen Australia ·
Welcome to the team **Kristy**! We're so sorry to hear about your Mum but we're so thankful to hear that Canteen's services were helpful for your kids 🍏 Your daughter is fantastic, as are you. Thank you for joining us!

1 y Like Reply

Such a cause close to my heart. I am dealing with my own cancer journey, diagnosed at 37. I also lost my little brother in 2018 at the age of 29 to this horrific disease. I feel proud to be apart of this and will use it as a part of my prep for the [Great Ocean Road Running Festival](#) where my family and friends run/walk in memory of my brother. And raising money for Canteen of course for young ones in need 🍏💜

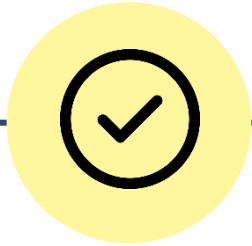
👍❤️🙏 Sarah Rossiter and 34 others · 1 comment

👍 Like 💬 Comment 📄 Send

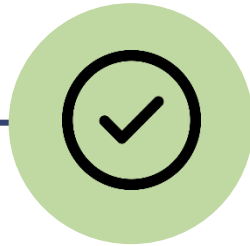
Most recent ▾

Canteen Australia ·
Thank you so much for sharing your story with us @ **Natasha**. 🍏 We are so sorry to hear about your brother and also your own battle with cancer. Make sure to look after yourself Natasha, and thank you for supporting Canteen and helping us to make sure that no young person faces cancer alone - you're amazing. 🍏

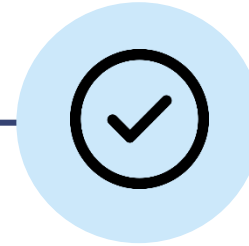
2 y Like Reply



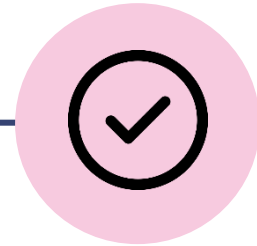
**Practice
Active
Listening
Techniques**



**Empathy-
Building
Exercises**



**Role Playing
Scenarios**



**Continuous
Training and
Coaching**



YOUR TURN



Talk about a time when you found yourself in a situation as an 'Accidental Counsellor'

A black and white photograph showing several hands holding stacks of US dollar bills. The bills are fanned out, and the focus is on the texture and details of the currency. The background is dark and out of focus. Overlaid on the center of the image is the text "Wealth, Work & Inheritance" in a bold, white, sans-serif font.

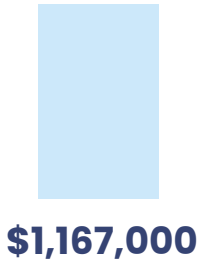
Wealth, Work & Inheritance

Net Wealth

BUILDERS



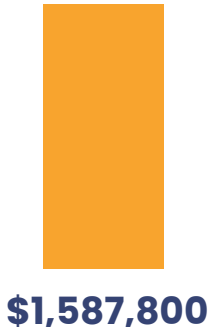
1920 - 1945



THE BABY BOOMERS



1945 - 1960



X



1960 - 1985



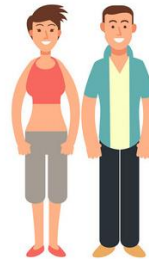
Y



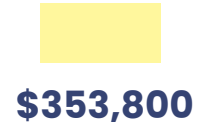
1985 - 1995



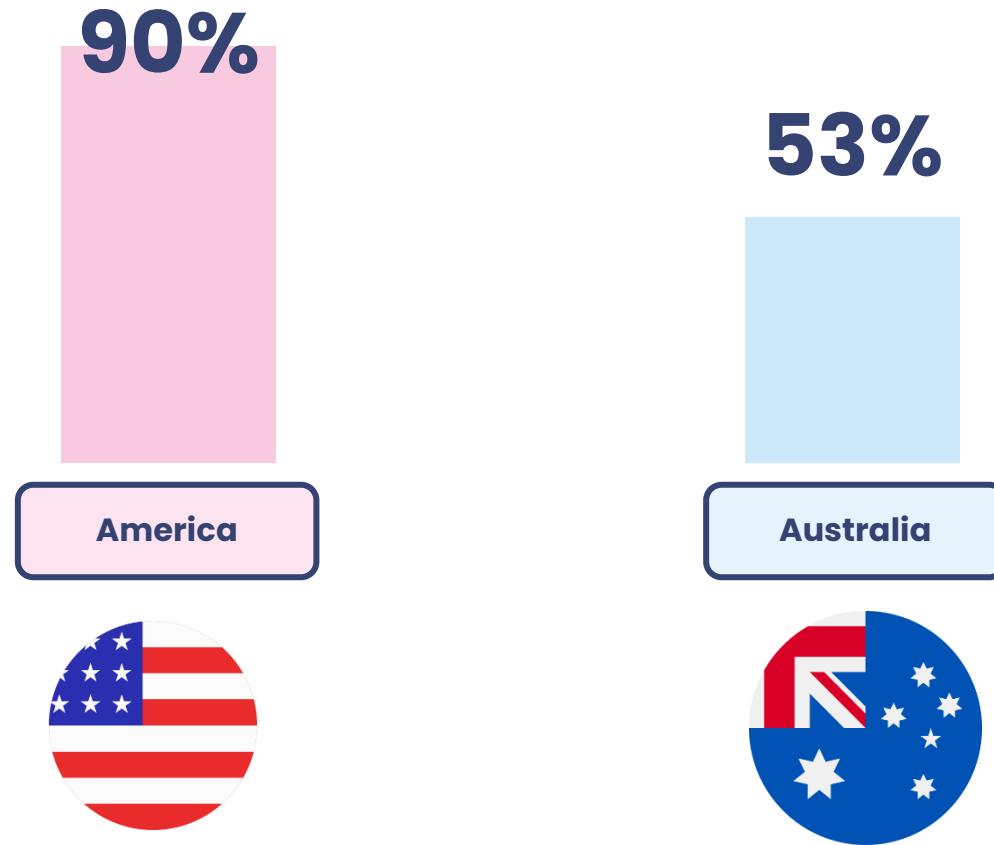
Z



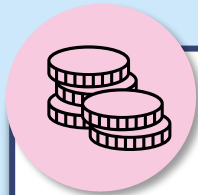
1995 - 2005



The Wealthy:
Earning over \$1m recorded charitable gift

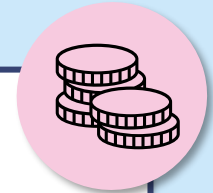


**\$3.5 trillion of intergenerational
wealth transfer** in Australia in the
next 20 years.



21%

Have given with a change in financial circumstance – inheritance, windfall.



52%

Would consider it – the highest potential.



14%

state a change in assets as the reason for updating their Will.



5%

Change in beneficiaries circumstances as the reason for updating their Will.



Inheritance or financial windfall

All Ages

CONFIRMED

38%
Vs all groups

CONSIDER

28%
Vs 20%
Neutral vs 8%
Rejectors

Confirmed

55+

55yrs+

20%
vs 7%
Rejectors

<55

Under 55yrs

43%
More likely
than all other
groups

Data Source	More Strategic Public Research November 2023	Question	People often give to charities during life events and occasions to celebrate, remember, or mark significant moments in their lives: Inheritance	Sample Size	1,008	Filter	N/A
--------------------	----------------------------------------------	-----------------	-------------------------------------------------------------------------------------------------------------------------------------------------	--------------------	-------	---------------	-----

A black and white photograph showing two hands cupped together, holding a small pile of coins. A small, torn piece of paper is tucked into the coins, with the words "GIVING CHANGE" written on it in a simple, hand-drawn font. The background is dark and out of focus, suggesting an outdoor setting with some foliage.

Giving during one's lifetime

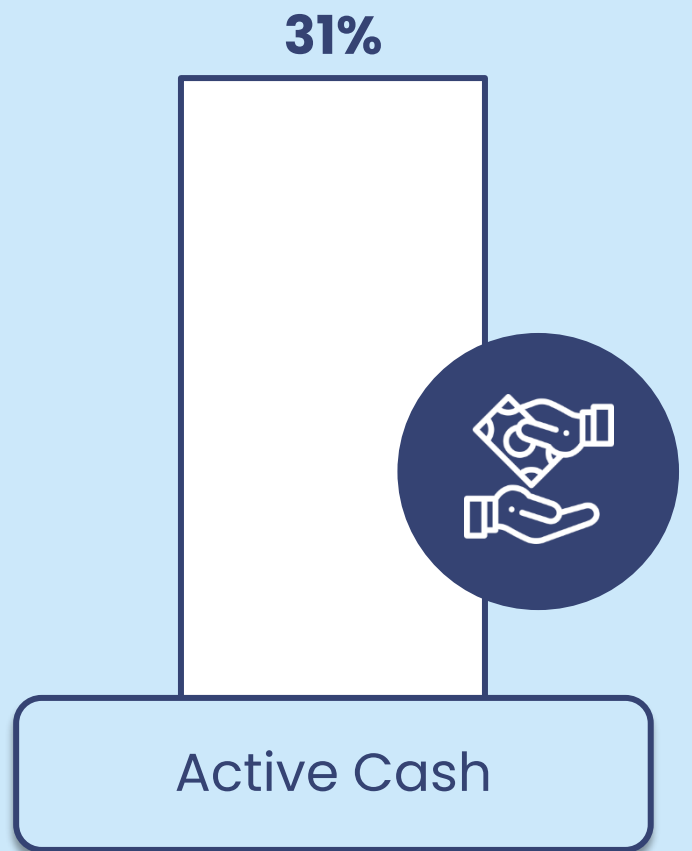
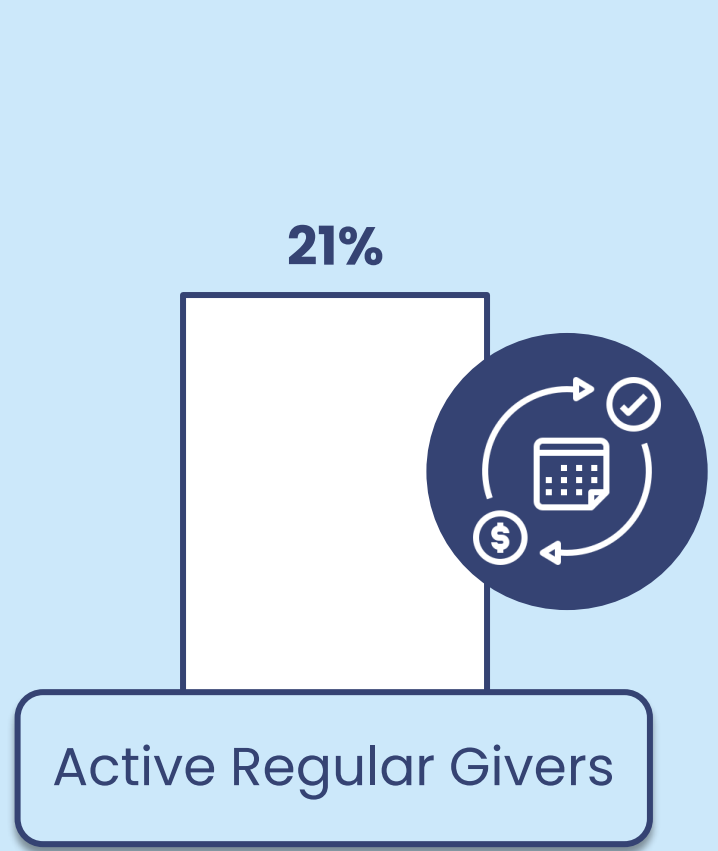
41%

Active in Last
Two Years

28

MONTHS

Average Time
Since Last Gift

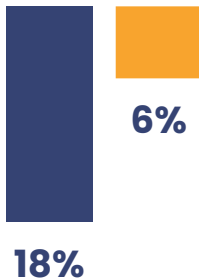


Generations x Active Supporters

BUILDERS



1920 - 1945



THE BABY BOOMERS



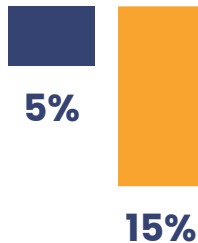
1945 - 1960



X



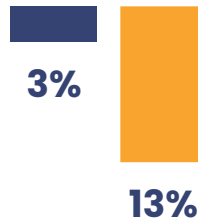
1960 - 1985



Y



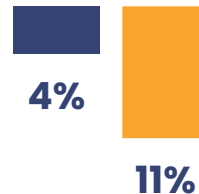
1985 - 1995



Z



1995 - 2005



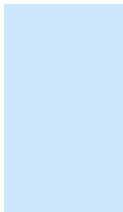
■ Active Cash ■ Active RG

Generations x 12 Month Giving

BUILDERS



1920 - 1945



\$379

THE BABY BOOMERS



1945 - 1960



\$423

X



1960 - 1985



\$367

Y



1985 - 1995



\$287

Z



1995 - 2005



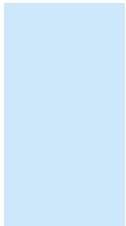
\$201

Generations x LTV (average)

BUILDERS



1920 - 1945



\$1,340

THE BABY BOOMERS



1945 - 1960



\$1,625

X



1960 - 1985



\$1,143

Y



1985 - 1995



\$654

Z



1995 - 2005



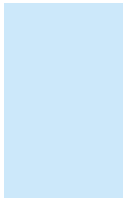
\$293

Generations x LTV (median)

BUILDERS



1920 - 1945



\$235

THE BABY BOOMERS



1945 - 1960



\$375

X



1960 - 1985



\$305

Y



1985 - 1995

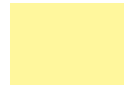


\$306

Z



1995 - 2005



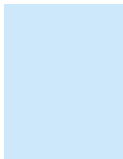
\$100

Generations x LTV/Years Giving

BUILDERS



1920 - 1945



\$189

THE BABY BOOMERS



1945 - 1960



\$303

X



1960 - 1985



\$326

Y



1985 - 1995



\$215

Z



1995 - 2005



\$258



23%

After every donation.



19%

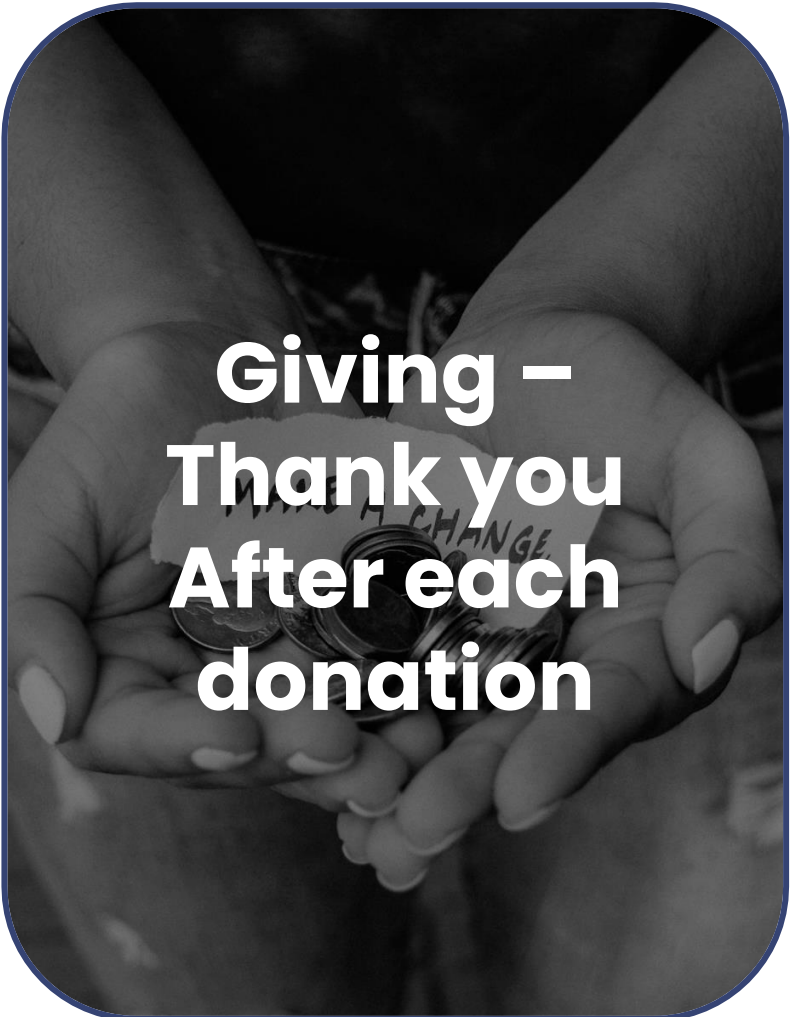
Special recognition after a certain number of donations has a specific impact.



3%

Inclusion or revision of a charitable gift.
For confirmed bequestors this doubles to

7% And triples for confirmed 55yrs+ **9%**



**Giving –
Thank you
After each
donation**

All Ages

Considerers

CONFIRMED

CONSIDER

55+

55yrs+

<55

Under 55yrs

31%

48%
Vs 31%
confirmed

38%

49%
More likely
confirmed
under 55
(30%)

Data Source	More Strategic Public Research November 2023	Question	When it comes to hearing from charities you support, which of the following occasions or milestones would you appreciate receiving updates or hearing from them?	Sample Size	1,008	Filter	N/A
--------------------	----------------------------------------------	-----------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------	-------	---------------	-----



All Ages

Considerers

CONFIRMED

CONSIDER

55+

55yrs+

<55

Under 55yrs

37%

31%

17%

40%
More than double 55+

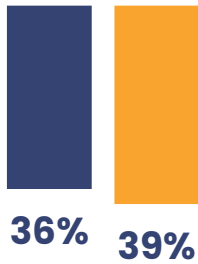
Data Source	More Strategic Public Research November 2023	Question	When it comes to hearing from charities you support, which of the following occasions or milestones would you appreciate receiving updates or hearing from them?	Sample Size	1,008	Filter	N/A
--------------------	----------------------------------------------	-----------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------	-------	---------------	-----

Generations x eDM Engagement

BUILDERS



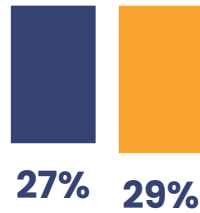
1920 - 1945



THE BABY BOOMERS



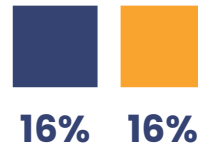
1945 - 1960



X



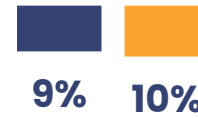
1960 - 1985



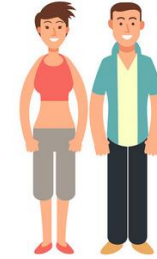
Y



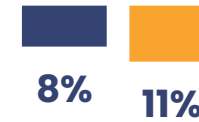
1985 - 1995



Z



1995 - 2005



■ Opened Any ■ Clicked Any

Data Source	More Impact Supporter View	Question		Sample Size		Filter	
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Retirement

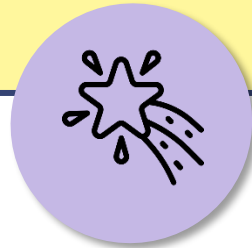


8%

state retirement as the reason for updating their Will.

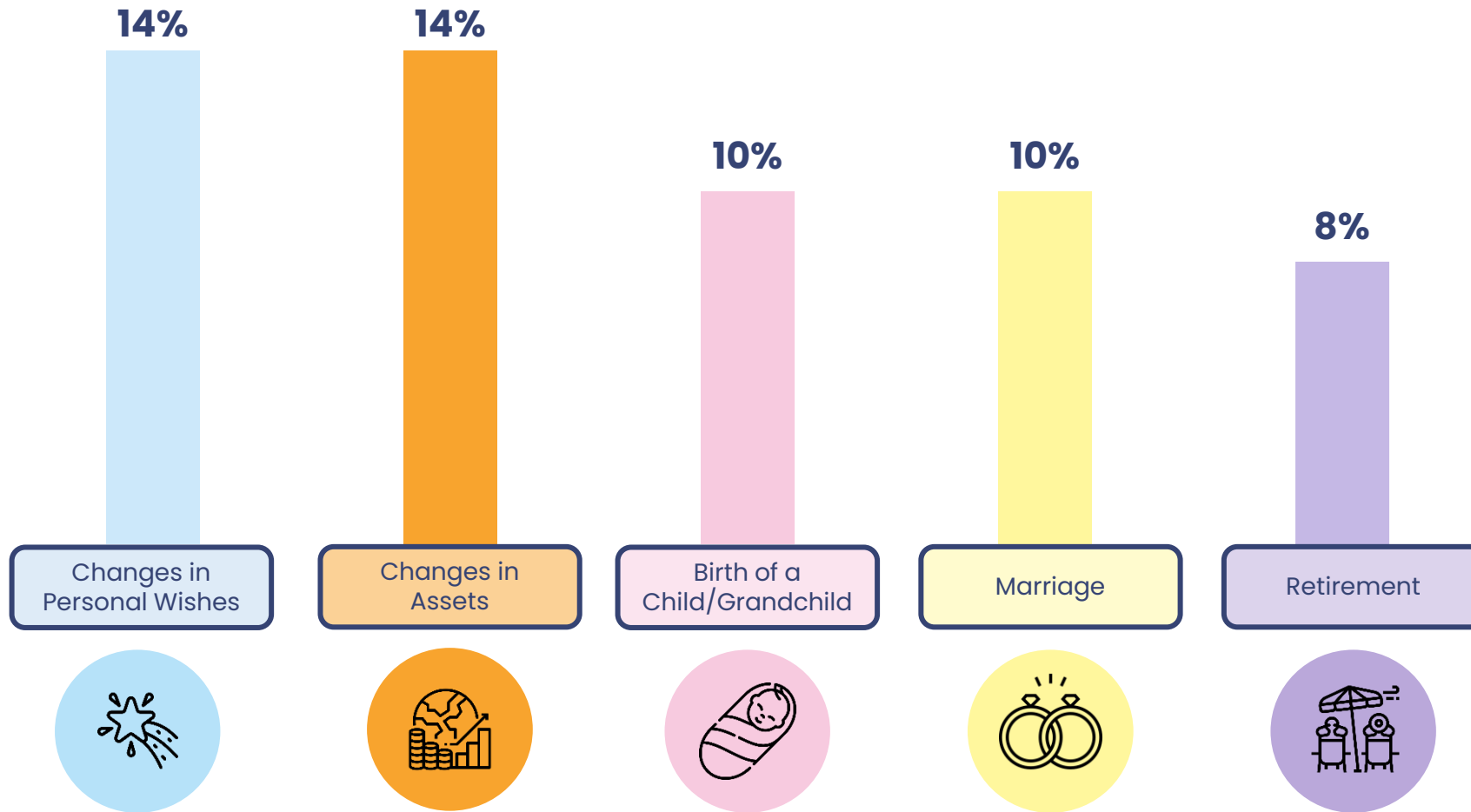


Preparing for death



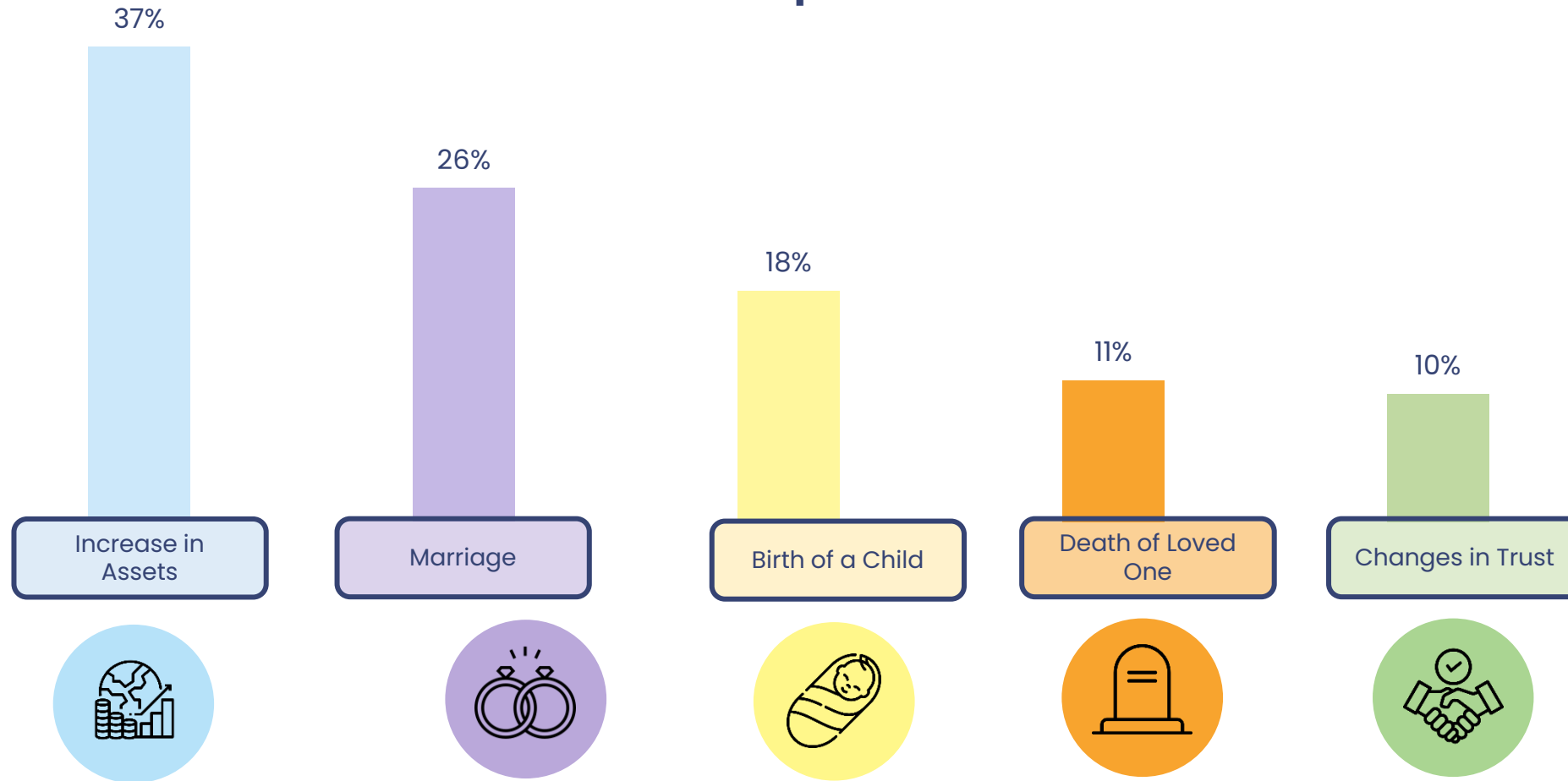
14%

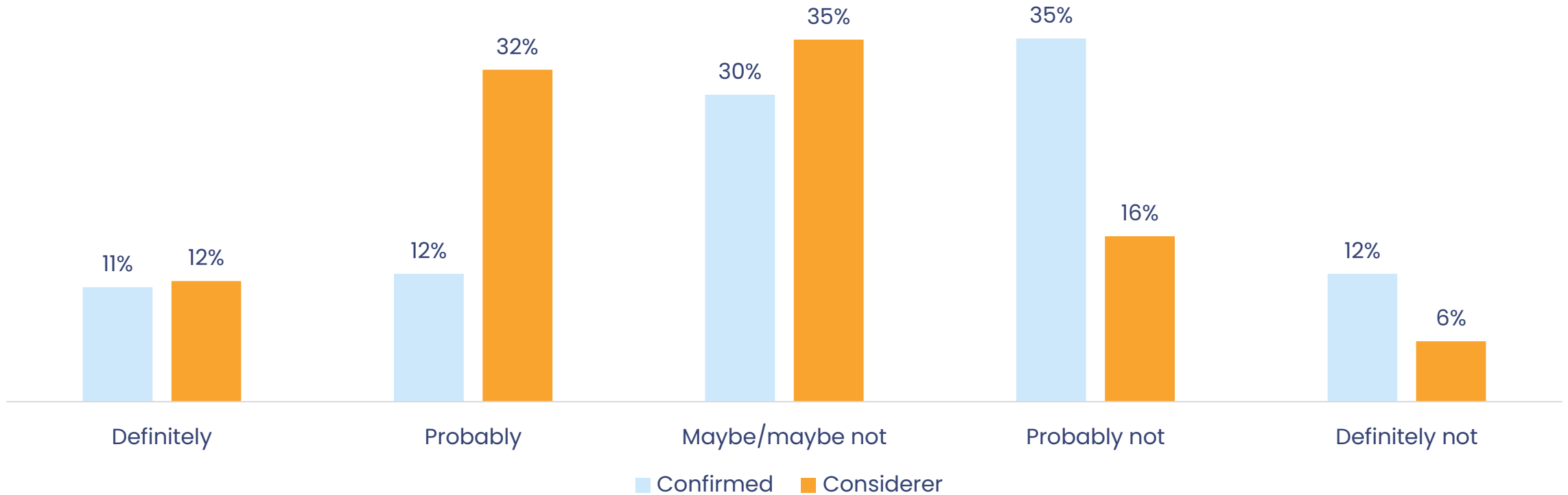
Change in personal wishes as the reason for updating their Will.



Data Source		Question	What was the reason for last updating your Will?	Sample Size	859	Filter	N/A
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What Life Event Prompted You To Write a Will:





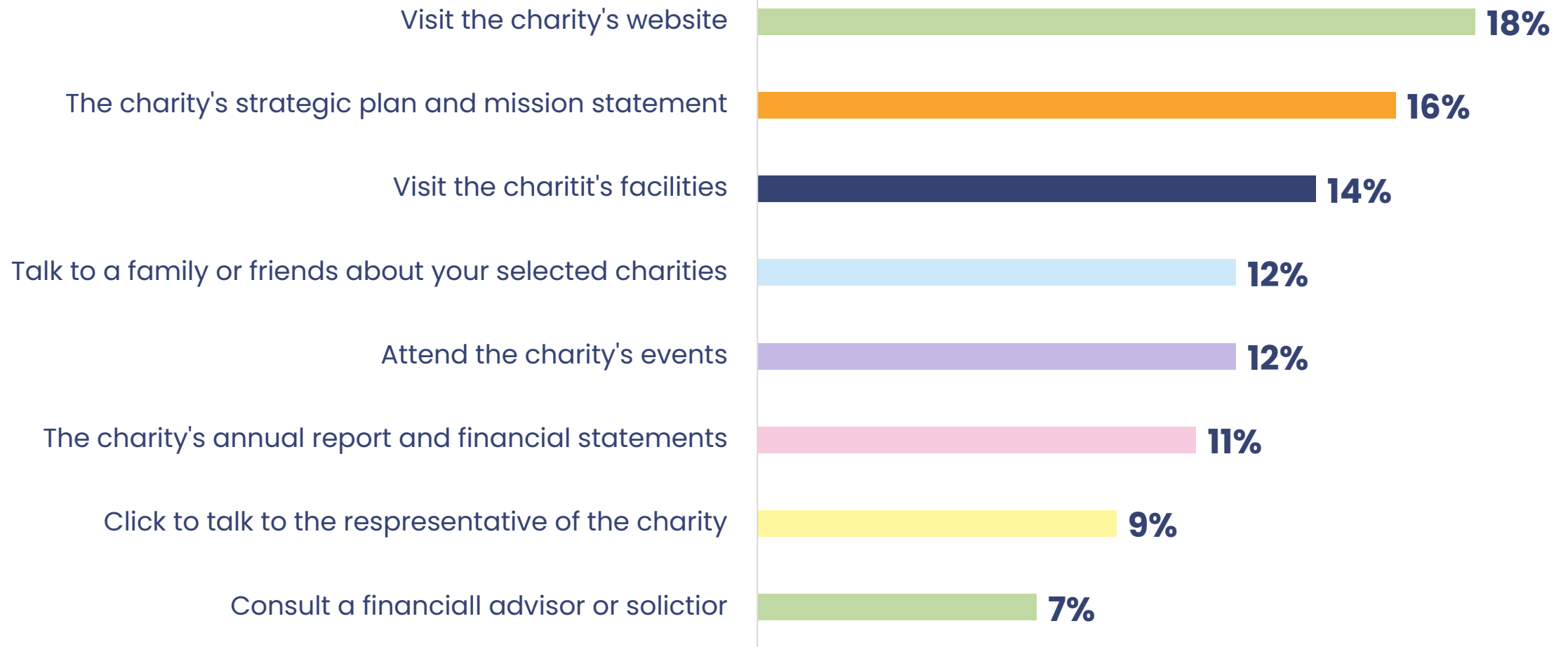
Telling charities is quite a polarising position which is likely driving our continued high % of unknown bequestors. This % unlikely to shift until the attitude shifts. Considerers may be the most likely to influence.



CONFERENCE

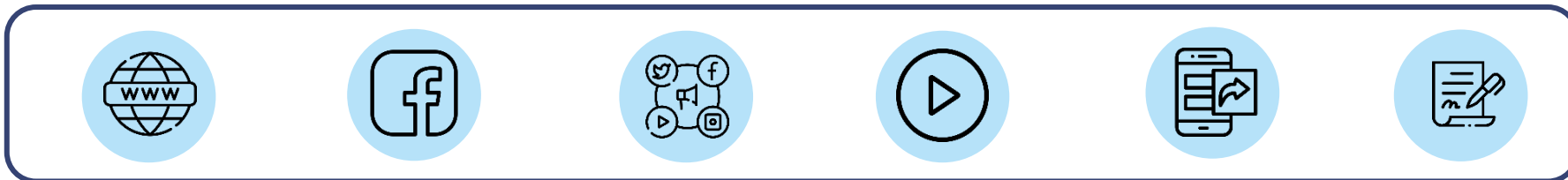
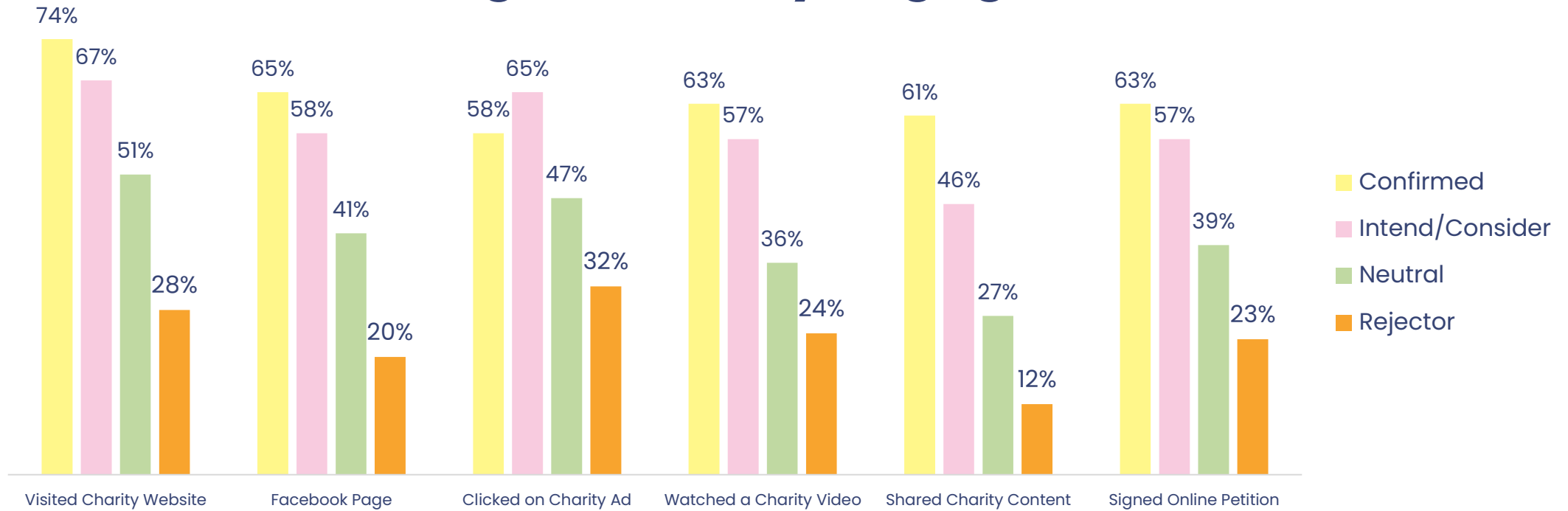
Data Source	IAC Research 2022	Question	Will you inform the charity of a gift in your Will?	Sample Size	1,521	Filter	
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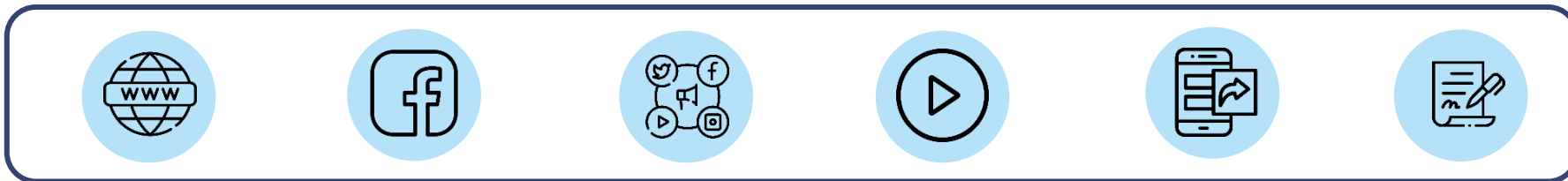
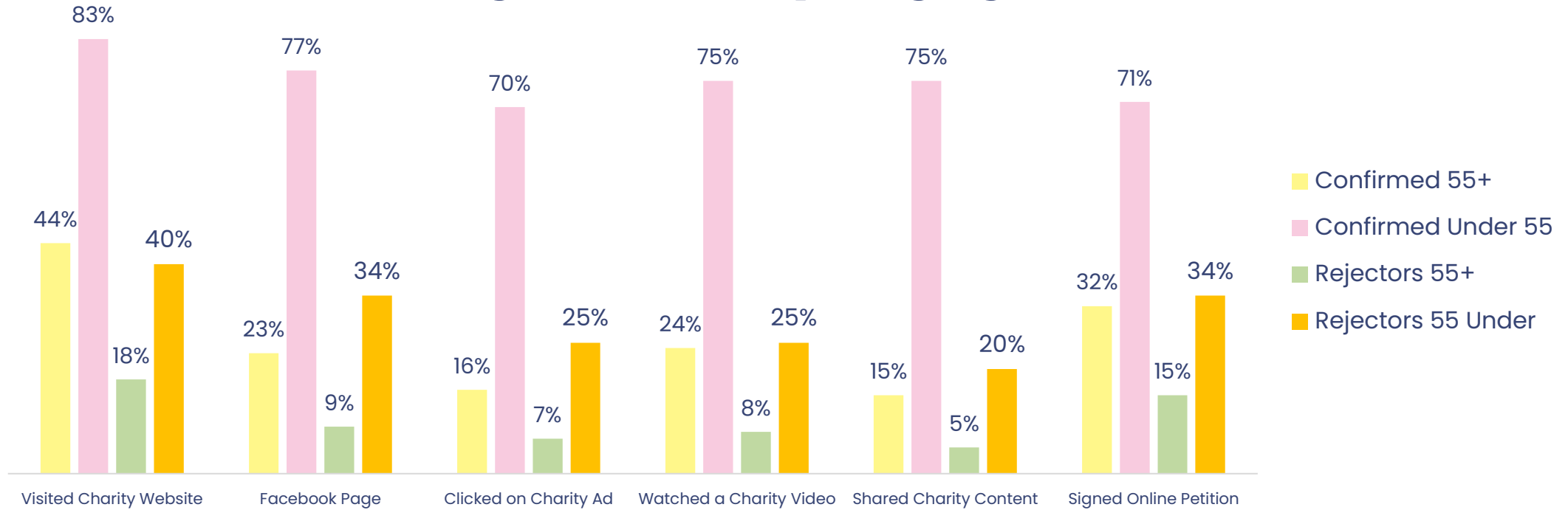
Data Source	More Strategic Public Research	Question	What type of research or information did/would you seek when making a decision about what charity you would like to include in your Will?	Sample Size	399	Filter	N/A
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Digital Charity Engagement



Data Source	More Strategic Public Research	Question	Thinking about your digital or online behaviour, in the past 3 months have you...	Sample Size	3,000	Filter	N/A
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Digital Charity Engagement



Data Source	More Strategic Public Research	Question	Thinking about your digital or online behaviour, in the past 3 months have you...	Sample Size	3,000	Filter	N/A
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Your words.
In pen + ink.

START WRITING

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Connections at Scale.



Delight your donors with personalized video

Bonjoro lets you send personal thank-you videos to increase giving & boost donor retention

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Send 50 videos free, no credit card required



"I sent one video to past supporters of our camp, and got an extra \$3000 donation that night. I paid for several years Bonjoro subscription in the first 5 minutes!"

Tim McElravy - Camp Director, Lake Wenatchee YMCA Camp





Focus for the Future



Bequestors are increasingly becoming your highly engaged fanatics.



Life experiences and stages are important emotional connectors to your charity.



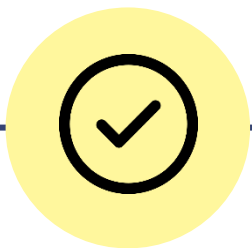
Bequestors are still giving to the sector, but they might be spreading their love around so you won't see them as active.



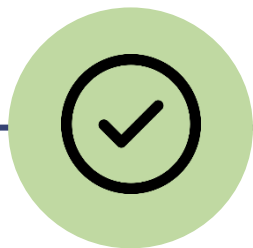
Confirmed bequestor, especially under 55yrs are a good opportunity to deepen commitment and grow giving.



Key moments – In memory, holidays and windfalls – create engagement opportunities.



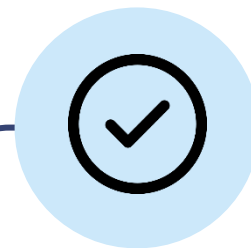
**50 – 64yrs
capture first Will
and charity
included**



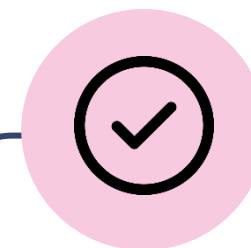
**Adjust strategies
for under 55yrs to
be highly
engaging**



**Thank frequently
and recognise
milestones/
impact**



**Put a GIW lens on
all your
engagement
communications**



**Treat as fanatics
and build
opportunities to
show-case your
charity**

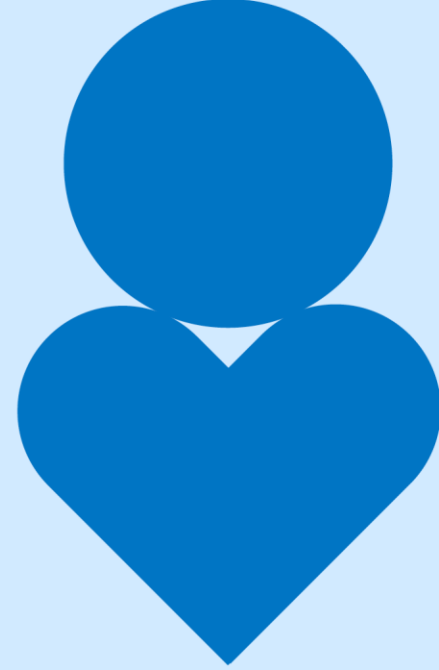


YOUR TURN



With all of this in mind how might you adjust your stewardship of gifts in Wills supporters?

**FIA
Conference**
2024



Thank you



Gifts in Wills Track
Sponsored By:

