



include a charity week

Help the work live on.

10-16 September 2018

Executive Summary

- This year 231 people attended IAC events across Australia
- Digital campaign video received 18, 852 views
- 74 media pieces across print, radio, online and TV in the lead up to and during the campaign
- 858 website clicks through display remarketing
- More than 95, 408 people interacted with the campaign

Include a Charity Week Events



Include a Charity Week 2018 brought in Dr Claire Routley where she drew on insights from practice and research to consider the most effective ways in bringing your organisation on board to support your gifts in Wills fundraising.

Event numbers

| State | Breakfast/Lunch seminar | Workshop |
|-------|-------------------------|----------|
| WA | 27 | 15 |
| SA | 14 | 10 |
| VIC | 68 | 45 |
| NSW | 68 | 51 |
| QLD | 27 | 14 |

Event photos - Perth



Event photos - Adelaide



Event photos - Melbourne



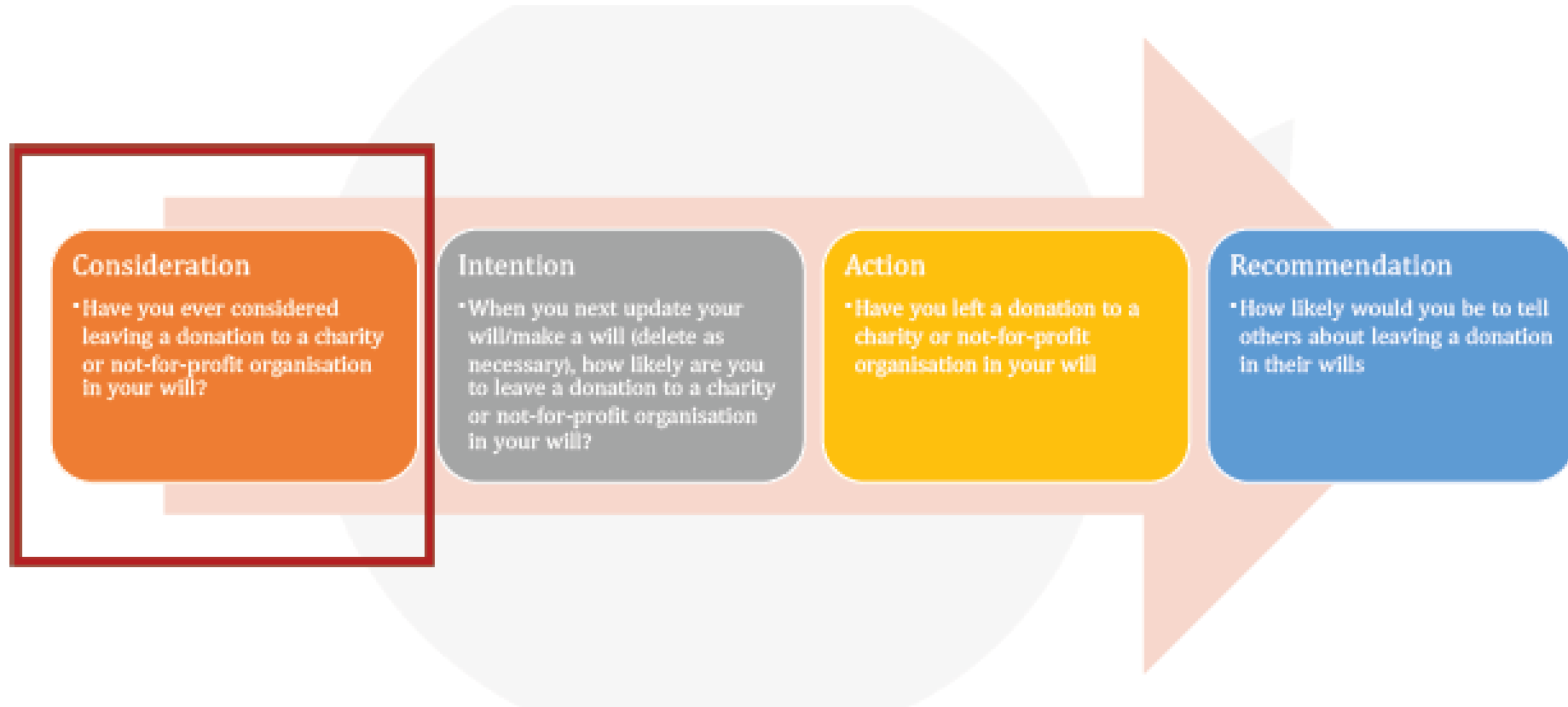
Event photos - Sydney



Event photos - Brisbane



Digital Campaign



Digital Campaign - Strategy

Prospecting (audience building)

- Start by reaching the target audience and encouraging engagement with the campaign.

Remarketing

- Reach back out to those people who engaged with the landing page and video content to encourage them to download further information about the research.

List build for future engagement

- Email opt-ins

Digital Campaign - Channels

Landing page

Aimed at people who are thinking of writing a will

YouTube

Video embedded in landing page

Facebook

Highly targeted ads, video and promotes posts

Paid Search

- Paid Google AdWords
- Existing Google Grant

Display Remarketing

Via the Google Display Network

Digital Campaign – Paid Ads

Please note: all paid activity, including Google Ads and Facebook ads, directed people to the following landing page -

<https://go.includeacharity.com.au/lp/iac2018/how-to-write-a-will>

Paid Google Ads activity included Search ads & Display ads

Paid Facebook Ads: Ran from 31 August – 19 September

Reach: 62,447

Impressions: 131,997

Unique Link Clicks: 1,181

Conversions (number of brochure downloads): 243

Conversion rate: 20.76% of click throughs

Media spend: \$6,208.38

Cost Per Conversion: \$25.55

Paid Google Search Ads: Ran from 10 - 15 September

- Ads targeted search traffic for Write A Will and Leave A Bequest related searches.
- The landing page was designed to engage the audience through the use of a lead magnet/a free downloadable brochure of how to write a will.
- To obtain a copy of the brochure people had to provide their contact details (name and email address).

The paid Search campaign generated the following results:

Clicks: 80

Click through rate: 3.78%

Conversions (number of brochure downloads): 18

Conversion rate: 22.5%

Media spend: \$745.36

Cost Per Conversion: \$41.41

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Paid Google Ads activity included Search ads & Display ads

Paid Google Display Ads: Remarketing Ads

- Display ads were used to remarket to all of Include A Charity's website visitors from 9th - 17th September.

Results from the remarketing campaign were:

- **Impressions:** 68,932
- **Clicks:** 842
- **Click through rate:** 1.22%
- **Conversions:** 7
- **Conversion rate:** 0.83%
- **Media spend:** \$572.48
- **Cost per conversion:** \$81.78

Remarketing to Fundraisers – FIA website users: 16 September

- **Impressions:** 5,040
- **Clicks:** 16
- **Click through rate:** 0.32%
- **Conversions:** 0
- **Conversion rate:** 0
- **Overall media spend:** \$25.89

Digital Campaign – Paid Ads

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<https://go.includeacharity.com.au/lp/iac2018/how-to-write-a-will>

Paid Google Ads activity included Search ads & Display ads

Paid Google Display Ads: Prospecting Ads

- Ads were run to prospect audiences (new audiences)
- There were three types of audiences that were targeted:
 - people who had been searching for keywords related to will writing and bequests
 - people who are in-market (actively searching) for retirement planning, home buying and estate planning
 - people aged 55+, with children, who were in the top 10% of income earners

Results from the three prospecting display ads:

Impressions: 3,370,136

Clicks: 12,611

Click through rate: 0.37%

Conversions (number of brochure downloads): 96

Conversion rate: 0.76%

Media spend: \$7,988.95

Cost per conversion: \$83.21

Digital Campaign - Summary

| Channel | Planned Investment | Actual Spend | Reach | Downloads |
|-------------------------------------|--------------------|-----------------|----------------------------------|------------|
| Google AdWords Paid Search | \$345 | \$746 | 80 clicks | 18 |
| Remarketing | \$470 | \$741 | 954 clicks | 7 |
| YouTube | \$5,800 | \$3,343 | 18,852 views | 1 |
| Facebook | \$5,400 | \$6,347 | 62,911 | 249 |
| Display Prospecting - banners | \$7,700 | \$7,989 | 12,611 clicks | 96 |
| | | | | |
| | \$19,015 | \$19,166 | 95,408 people reached | 371 |

Landing Page Analysis

<https://go.includeacharity.com.au/lp/iac2018/how-to-write-a-will>

Total 13,174 sessions to the landing page

- Most visits from paid media activity
- 380 people requested the will writing checklist
- Overall conversion rate for the page was 2.9%
- Some pockets of performance with Facebook traffic converting at more than 20%, whereas Google traffic converted at an average rate of 0.96%
- Majority of visits from mobile devices (70%), tablet (27%), desktop (3%) – demonstrating the importance of designing for mobile experience first
- Avg. time on page was 2min 26 seconds compared to site wide average of 1min 23 seconds – indicating good levels of engagement

The screenshot shows the landing page for 'include a charity' with the headline 'HOW TO WRITE A WILL'. The page features a navigation bar with the logo, a main heading, and a sub-heading 'Did you know that many people like you choose to leave some of their estate to a cause that they are passionate about?'. Below this is a 'Get Your Free Checklist' section with a photo of a diverse group of people and a list of bullet points: 'Who to talk to before you start writing', 'Important items to consider in your Will', 'Common mistakes to avoid', and 'How to make a lasting impact after you're gone'. A 'DOWNLOAD NOW' button is present. The next section, 'Charities need people like you!', includes a photo of a family and text explaining that the majority of money raised by Australian charities comes from the generosity of people like you. A timeline shows three steps: 'Charities rely on people like you', 'Make a positive impact on society', and 'Leave a legacy that lasts beyond your lifetime'. Below this is a form to 'Download your free Will writing information pack today' with fields for 'First name', 'Last name', and 'Email', and a 'DOWNLOAD NOW' button. The final section, '3 EASY STEPS TO INCLUDE A CHARITY', lists: 1. 'PREPARE YOUR WILL' (Engaging a professional is often the best way.), 2. 'INCLUDE A CHARITY' (We can help you find a charity to support.), and 3. 'CHOOSE TYPE OF GIFT' (There are 4 main types of gift to choose from.). A testimonial section titled 'Hear from some of our supporters:' features three quotes from Nancy Jagger (Stroke Foundation), Pam Haigh (Guide Dogs), and Annalie Holden.

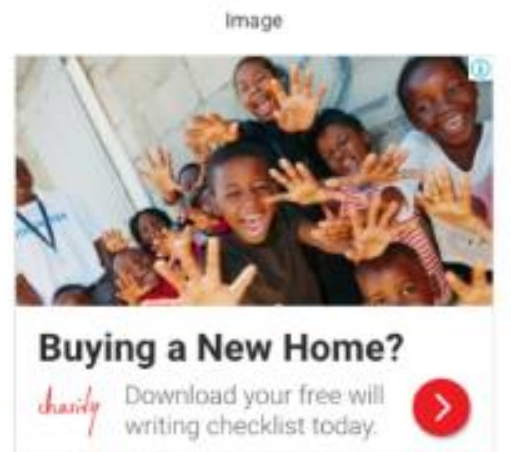
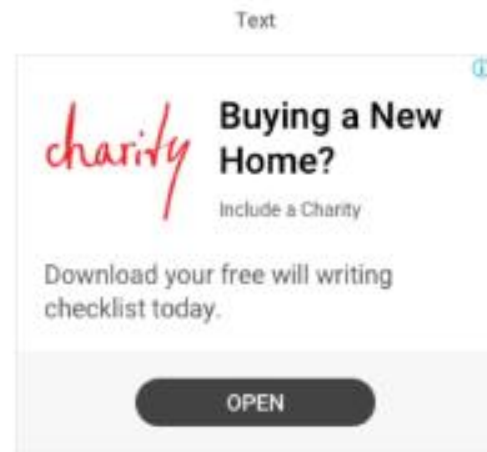
Display – Responsive Display Ad

- Creative/copy variations according to audience:

Estate planning

Vs

Home buyers

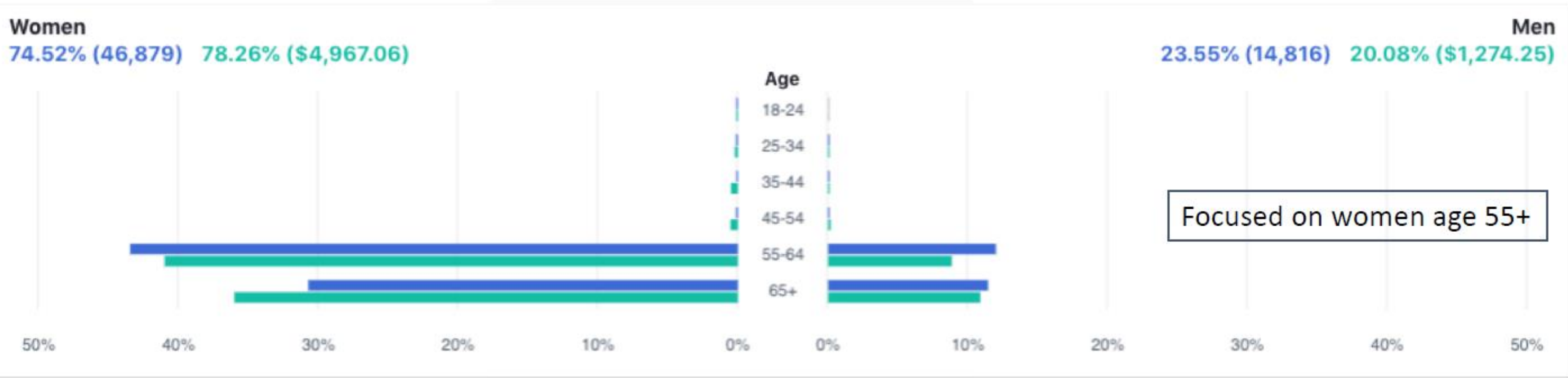


Display – Responsive Display Ad

- Responsive display ads mostly outperformed traditional display ads (sample below), however not always (below example saw click through rate of 1.09% whilst responsive equivalent was 0.56%)



Facebook - Demographics



Facebook – Ad Formats



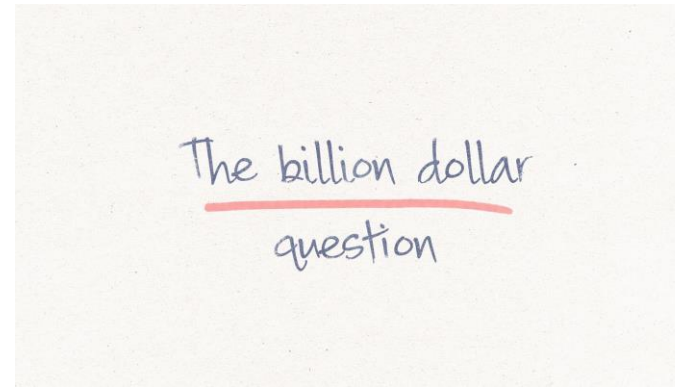
The screenshot shows a Facebook ad for 'include a charity'. At the top, it says 'include a charity' with a logo, followed by 'Include A Charity shared an offer.' and 'Sponsored'. The main text reads: 'Writing a Will doesn't have to be hard work. Let us guide you with this free, easy to use checklist, includes: - Who to talk to before you start writing - Important items to consider in your Will - Common... More'. Below the text is a photo of a diverse group of people smiling and waving their hands. At the bottom of the ad, it says '93 people got this offer', 'Free Will Writing Checklist', and 'Expired'. There is a 'VISIT WEBSITE' button. Below the ad, there are 25 likes, 11 comments, and 5 shares, along with 'Like', 'Comment', and 'Share' buttons.

- Tested short vs long ad copy & images
 - Short vs long results were virtually identical
 - Results for image testing inconclusive although user feedback suggests we need to use a “mix” of images in next campaign

- Tested Facebook's new “offer” ad format, which outperformed standard ad format - \$21CPL vs \$29CPL

Legal Campaign

- Campaign video reached 132 views



Key findings include:

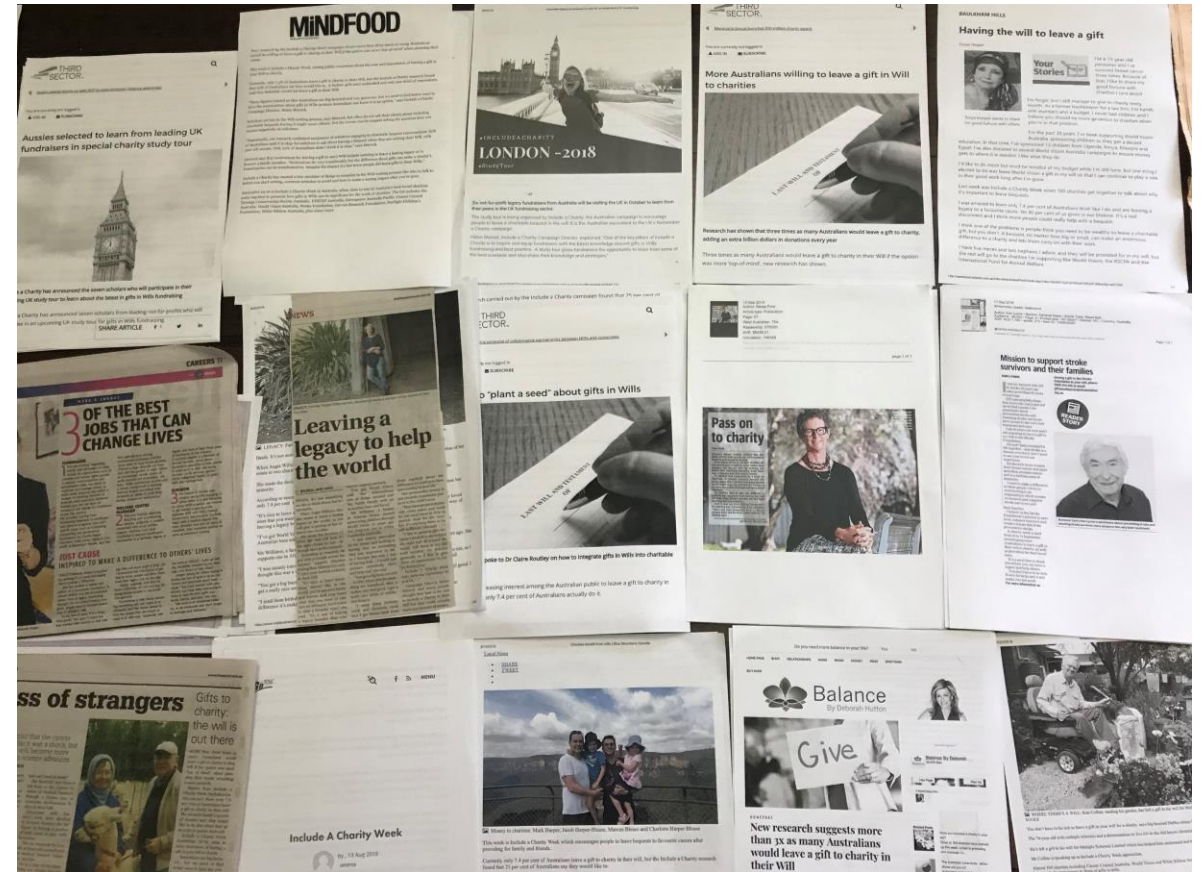
- 25% of Australians would like to be able to leave something to a cause or a charity important to them when they go to make or next update their will.
- 42% of Australians are undecided, presenting an opportunity for discussion, while one third of Australians said they do not wish to leave a charitable bequest.
- 65% say *it is okay* for solicitors to ask about charitable bequests during the Will-making process, presenting another opportunity for discussion. Only 23% said it was not okay and 11% were unsure.
- 18-24 year olds are most likely to say they will leave a gift in their Will.
- The research also confirmed one in two Australians currently have a will & 41% made their will with a solicitor's assistance.
 - Of those surveyed with a current Will that was prepared with a solicitor, only 21% confirmed their solicitor asked them about leaving a charitable bequest

Media Summary

Overall, this year's campaign was a solid mix of comprehensive trade stories - positive mainstream newspaper/online stories as well as radio interviews that potentially reached one of our largest audiences yet.

The addition of the study tour gave us more to talk about in the trade media this year. The inclusion of a TV advertorial on a popular morning show also helped us to reach a sizable Australian audience in the target demographic.

Overall approximate audience reach:
6, 441, 053



Media - Radio

28 August | ABC 702 Sydney (breakfast) – Interview with Helen Merrick as part of a discussion about Aretha Franklin dying intestate

5 September | 2SM (Talk Tonight) – Live 15 minute interview with Helen Merrick on Include a Charity Week campaign & research

7 & 11 September | SWR 99FM (NSW – Sydney & Eastern Suburbs) – Pre-record with Helen Merrick on brekky with Bosco

7 September | Curtin FM Radio WA (afternoons) – Live interview with Vicki Rasmussen on the afternoon's program with Jenny Seaton

7 September | Eastside Radio (NSW – Sydney & Eastern Suburbs) - Live interview with Helen Merrick on the drive show with Gemma Purves

8 September | 2MCE Radio Bathurst, NSW (breakfast) – Live seven minute interview with Helen Merrick on Tim Williams' breakfast program

8 September | Blue Mountains Radio, NSW (Mountain Insights) – Pre-recorded six minute interview with Helen Merrick

10 September | ABC Newcastle, NSW (mornings) – Live five minute interview with Helen Merrick on the start of Include a Charity Week

11 September | Outback Radio (mornings) - Pre-recorded five-minute interview with Helen Merrick on research and Include a Charity Week.

12 September | 1WAY FM Canberra (drive) – Live 10 minute interview with Helen Merrick on research & 2018 Include a Charity Week

12 September | ABC Riverina (breakfast) – Live interview with Ross Anderson on Include a Charity Week

13 September | ABC Great Southern WA (mornings) – Live 10 minute interview with Vicki Rasmussen on Include a Charity Week

14 September | Phoenix Radio QLD (mornings) – Live 6 minute interview with Helen Merrick on Include a Charity Week

Media - Print

- 1 September | F&P (Aug/Sept 2018 print edition)** – Published article from Claire Routley on using stores in legacy giving.
- 1 September | Go 55s (spring 2018 print edition)** – Published entire media release about Include a Charity Week as well as stock photos of active seniors.
- 7 September | Illawarra Mercury (print edition)** – Information from Include a Charity release. Garvan also had case study published.
- 7 September | Newcastle Herald (print edition)** – Information from Include a Charity release. Published beside Garvan case study.
- 8 September | Daily Liberal (print edition)** – Published story about MS Ltd bequestor Ken Collins and information from the Include a Charity media release.
- 8 September | The Advertiser, South Australia** – Profile of UNICEF legacy fundraiser Melanie Verges and information about FIA education courses.
- 10 September | The West Australian x 2 articles in the same edition (Your Money section)** – Published a photo story of a Bush Heritage bequestor and an editorial by Helen Merrick.
- 12 September | Blue Mountains Gazette (print edition)** – Published a photo story of bequestor/Donor Republic co-owner Marcus Blease and his family.
- 14 September | Maitland Mercury (print edition)** – Profile of World Vision Australia bequestor Angie Williams and featured information from Include a Charity media release
- 17 September | The Senior (spring 2018 print edition)** – Published a portion of the media release in their live!section along with the Garvan Institute case study.
- 17 September | Whitehorse Leader** – Editorial by Stroke Foundation bequestor Ken Lyons that mentions Include a Charity Week is on
- 17 September | The Courier-Mail** – Published profile on Melanie Verges as a legacy fundraising manager on information on FIA courses.
- 19 September | Coast City Weekly** – Published first-person story by World Vision bequestor Di Roennfeldt with mention that Include a Charity encourages bequests

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Media - Online

25 June | Fundraising.co.uk (online) – Published entire announcement of UK Study Tour.

26 June | F&P (online & e-news) – Published entire announcement of UK Study Tour with a photo of Helen Merrick.

29 June | Third Sector (online & e-news) – Published entire announcement of UK Study Tour with iconic London photo.

10 July | Go55s (online) – Published media release about IAC research on their website.

2 August | Third Sector (online & e-news) – Published media release about the UK scholarship recipients with iconic London photo.

2 August | F&P (online & e-news) – Published update about the scholarship recipients in the original announcement story.

2 August | Fundraising.co.uk (online) – Published update about the scholarship recipients in the original announcement story.

13 August | Go55s (e-news) – Published story about Marelle Thornton as bequestor to Cerebral Palsy Alliance.

19 August | Pro Bono Australia (online) – Profile of Helen Merrick as a changemaker with the discussion of Include a Charity.

27 August | F&P (website & e-news) – Published entire media release about IAC Week research.

28 August | Third Sector (online & e-news) – Published media release about IAC Week research.

7 September | Illawarra Mercury (online edition) – Information from Include a Charity release. Garvan also had case study published.

7 September | Daily Liberal (online edition) – Published story about MS Ltd bequestor Ken Collins and information from the Include a Charity media release.

10 September | Blue Mountains Gazette (online) – Published a photo story of bequestor/Donor Republic co-owner Marcus Blease and his family.

Media - Online

- 12 September | MiNDFOOD (website)** – Published entire media release about the research and IAC Week on their website in their Community section.
- 12 September | F&P (e-news)** – Published information about IAC research as published earlier on their website.
- 13 September | Third Sector (online & e-news)** – Interview with Dr Claire Routley on how to integrate gifts in wills into organisations.
- 13 September | Maitland Mercury (online edition)** – Profile of World Vision Australia bequestor Angie Williams and info from Include a Charity release.
- 15 September | Balance (website & e-news)** – Published the entire Include a Charity media release about research.
- 24 September | The Land** – Repeat of Maitland Mercury story about Angie Williams as described above.
- 27 September | Central Coast Advocate** – Profile of World Vision Australia bequestor Barbara Jools with statistics from IAC.

Media - Television

- 10 – 13 & 19 September | Channel 9 (Today Extra)** – Broadcast four minute advertorial interview with Helen Merrick & Paul Hancock on Include a Charity Week. 15 stations across the country.

Total media articles:

74

Approximate audience reach:

6,441,053

Supporter Engagement

Of 100 supporters, 74 engaged during Include a Charity Week, either by attending our events, posting on social media or through other mediums suggested in our handbook

= 74% supporter engagement

Until next year...

Thank you for all your hard work and involvement in ensuring that Include a Charity Week 2018 was a success!

We hope to see you in 2019 for Include a Charity 2019, which will be held from **9 – 13 September**.

