



include a charity week

Help the work live on.

9-15 September 2019

Post Event Report

Executive Summary

- This year **over 200** people attended IAC supporter events across Australia.
- Overall, the campaign delivered even higher reach than previous years
 - Digital activity reached more than **646,799** people
 - Media activity reached an approximate of **23,301,344** people
- 68% supporter engagement
- The report shows that income growth over the next 20 years is expected to be strong, but slower than we've seen over the last decade.
- Long-term growth in bequest numbers is expected to be higher than of late, driven by more deaths and a greater proportion of child-free deaths,
- By 2040, gifts in wills income will be **2.3 times higher** than today and the total number of bequests received will be **1.9 times higher** than today.

Include a Charity Week Events



Include a Charity Week 2019 brought Legacy Foresight's Development Director, **Meg Abdy**.

Meg has been analysing the legacy market since 1994 when she coordinated the first legacy forecasting project, now known as Legacy Monitor.

This year, we launched the first ever Australian Legacy Foresight report which revealed the results of the long-term outlook for the gifts in Wills sector over the next 20 years.

The findings were presented at a series of breakfast briefings across the country. Please see the next slide for the key findings

Legacy Foresight Report



Include a Charity Week 2019 brought in Legacy Foresight to analyse the recent trends in Australian gifts in wills giving and explore the long-term outlook for the sector over the next 20 years.

Key findings:

- We expect small declines in gifts in wills income of -0.1% in 2019 and -0.3% in 2020 as recent falls in house prices feed through to residual bequest values.
- Long-term growth in bequest numbers is expected to be higher than of late, driven by more deaths and a greater proportion of child-free deaths.
- Long-term growth in average values is expected to be lower than of late, due to slower expected growth in house prices and share prices.
- Overall, income growth over the next 20 years is expected to be strong, but slower than we've seen over the last decade.
- By 2040, **gifts in wills income will be 2.3 times higher** than today – this is in real terms after inflation, and reflects the purchasing power of charities – i.e. what they can do with the money they receive
- In comparison, the more mature British bequest sector is predicted to be 1.7 times higher by 2040
- By 2040, **the total number of bequests received will be 1.9 times higher** than today

Event numbers

State	Breakfast seminar	Workshop
QLD	38	18
NSW	110	70
VIC	70	49
SA	26	8
WA	22	9

Event photos



Our digital campaign

Reached more than **646,799** people
& more than **7,234** people
interacted with the campaign.

(interacted = click on search/display ad, watch more than 30/3 secs (YouTube/Facebook) of video, engage with social media post)

Digital Strategy

- 1. Prospecting (audience building)** - start by reaching the target audience and encouraging engagement with the campaign.
- 2. Remarketing** - Reach back out to those people who engaged with the landing page and video content to encourage them engage further and potential take an action (download, view, etc.).
- 3. List build for future engagement** – email opt-ins.
- 4. Test and iterate** – by taking stock of potential audience groups and messaging we can ensure that we are able to test and iterate based on results

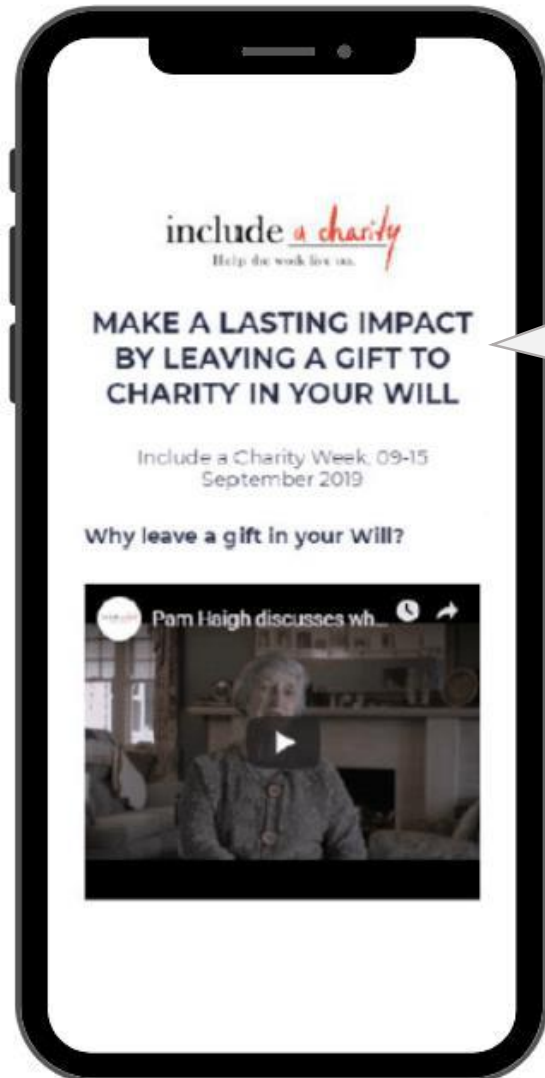
Digital Media Channels used

- **Facebook** - highly targeted ads, video and promoted posts to specific demographics, interests and behaviours.
- **YouTube** - to specific demographics, interests and behaviours – video promoted as a pre-roll (TrueView – charged per view when somebody watched at least 30 seconds of the clip).
- **Google Display Network**- to specific demographics, interests and behaviours
- **Paid Search** using Google Grant - targeted people searching directly for information relating to leaving a bequest.
- **Remarketing** - targeting all visitors of the website using:
 1. Facebook
 2. Google Display Network

Digital – Summary

Channel	Planned Investment	Actual Spend	Reach	Interactions	Clicks
Facebook	\$14,000	\$13,380.14	576,826	5,464 Like/share/comment	4,798
Facebook Remarketing	\$1,000	\$758.83	7,128	195 Like/share/comment	357
YouTube	\$2,000	\$42.34	4,411	923 views	21
Display Prospecting – banners	\$500	\$264.61	55,512	576 clicks	576
Display Remarketing	\$500	\$354.08	\$2,922	76 clicks	76
	\$18,000	\$14,800	646,799 people reached	7,234 people interacted	5,828

Digital – Landing Page Analysis



- Total 1,858 page views
- Majority of visits came from mobile devices (87%), tablet (9%), desktop (4%) – demonstrating the importance of mobile optimized websites
- Avg. time on page was 2min 02 seconds compared to site wide average of 1min 41secs – indicating good levels of engagement
- Most visits from paid media activity – Facebook (71%)

Summary of Learnings

- Google's Responsive Ad format automatically generates ads to match the "look and feel" of the hosting webpage, theoretically attracting more clicks. However, sometimes it can make the headline, the picture and the description feel unrelated - we need to ensure that all combinations have relevant messaging.
- Facebook provides excellent reach, although CPCs for the highly targeted groups are much higher than Google.
- The online will writing tool offer had low levels of conversion (handful of leads) - the better avenue for lead conversion is probably to use the downloadable kit AND then "upsell" people to the will writing service.
- Overall the campaign delivered even higher reach than previous years.

Advertising

Include a Charity's 30-second ad promoting gifts in Wills, ran across radio stations such as Light FM, Vision FM and Fine Music FM, which all reach regional and metropolitan Australia.

The ad was played various times throughout the day on each station from 5 – 14 September.

Our four-minute advertorial on Channel 9's Today Extra, created in 2018, with Helen Merrick and Paul Hancock played on 5, 6, 9, 11, 12, 13, 15 and 16 September. The segment also highlighted two bequestors from Include a Charity video (Stroke Foundation and Bush Heritage). Watch it [here](#)!

Media coverage summary

The 2019 Include a Charity PR campaign resulted in a good mix of overwhelmingly positive trade publication, print/online newspaper stories and radio interviews that reached our largest audience yet. In all, there were 107 placements if we consider some stories ran in print and online versions and in some cases, radio interviews were repeated on some community radio stations. Our TV segment ran on 45 stations across Australia eight days running.

The Legacy Foresight research into gifts in wills trends in Australia was helpful in securing interviews and stories in The Australian and four Fairfax newspapers this year, which boosted our audience reach considerably. While there were less case study stories than previous years, those that were published were positive in tone with a good mix of charities represented.

Media coverage summary

Some radio interviews also did not eventuate due to presenter illness or unavailability of spokespeople when requested.

The repetition of the TV advertorial featuring Include a Charity's campaign director Helen Merrick on a national morning TV show (Channel 9's Today Extra) also helped us to reach a sizable Australian audience in the target demographic.

Please note, with limited media monitoring it is possible some stories have not been picked up, and we are still waiting on a couple to appear in Australian Lawyer's Weekly and the West End magazine (Brisbane).

Estimated audience reach: **23,301,344.**

Media - Print

1 May | Law Journal of Victoria (print and online): Published article by publicist on how lawyers can raise the charitable bequests question with clients and have an impact on charitable giving.

1 September | F&P (Aug/Sept print edition, online and e-news): Published media release information about the Legacy Foresight research and the Meg Abdy speaking tour for fundraisers in five cities.

1 September | Go 55s (spring print edition, online and e-news): Published media release information about Include a Charity Week and profile of Aruma bequestor, Michael Ross.

1 September | The Senior (six state editions and digital): Published media release information about Include a Charity Week and profile of Leukemia Foundation bequestor, Pam Ganly.

1 September | The Golden Oldie (print edition): Published media release information about Include a Charity Week and Sydney Children's Hospital Network bequestor, Betty Olsen.

2 September | Whitehorse Leader (print edition): Published profile of World Vision bequestor Andrew Stephenson and motivations for leaving a bequest.

4 September | Canberra Weekly (print edition): Published information from Include a Charity media release.

5 September | The Dubbo Photo News (print and online): Published media release information about Include a Charity Week and interviewed MS Ltd bequestor, Ken Collins.

Media - Print

7 September | The Australian (print and online edition): Interview with Meg Abdy and quotes from Helen Merrick. Used backgrounder story on World Vision bequestor, Gordon Lambert as well as media release information.

9 September | The West Australian (print and online): Published media release information about include a Charity and photo story with Heart Foundation bequestor, Judith Broadway. A second article in the same edition was a how-to story about including a charity in your will by WA spokesperson, Vicki Rasmussen.

9 September | Starts at 60 (online): Published first-person account from Marjorie Pettigrew, volunteer and bequestor to Cancer Council NSW about her great experiences with the charity and the support she's received.

10 September | Warringal and Drouin Gazette (print and online): Published media release information about Include a Charity Week and interviewed MS Ltd bequestor, Peter O'Reilly.

12 September (Pro Bono Australia (online): Published detailed article about Legacy Foresight research and interviewed Meg Abdy at Melbourne dinner event.

18 September | Newcastle Herald (print and online editions): Published story about two sisters who were leaving a portion of their mother's house proceeds to a local charity. Featured Include a Charity information.

21 September | Brisbane Times (online): Published story about Legacy Foresight research, interview with Helen Merrick and Greenpeace bequestor, Helen Fischer.

Media - Print

22 September | Sun-Herald (print and online): Published story about Legacy Foresight research, interview with Helen Merrick and Prince of Wales bequestor, John Carbery.

22 September | The Sunday Age (print and online): Published story about Legacy Foresight research, interview with Helen Merrick and Greenpeace bequestor, Helen Fischer.

22 September | WA Today (online): Published story about Legacy Foresight research, interview with Helen Merrick and Greenpeace bequestor, Helen Fischer.

1 October | F&P (print and online): Published story about Legacy Foresight research and baby boomer insights, written by Meg Abdy.

3 October | Third Sector (online): Published article about Legacy Foresight research and baby boomer insights. Quotes from Helen and Meg were provided by the in-house publicist.

9 October | Australian Lawyers Weekly (online): Produced an article noting many lawyers don't ask clients about bequests. Story featured Include a Charity research and an interview Jennifer Maher, a Melbourne lawyer who is an Include a Charity advocate and a legal professional who asks the charitable bequest question of clients.

Media - Radio

28 August | Eastside Radio Sydney (Drive with Holly Williams): Live, five-minute interview with Helen Merrick on Include a Charity Week and key statistics.

2 September | Blue Mountains Radio (Breakfast with Ron Green): Live, 10-minute interview with Helen Merrick on Include a Charity Week, key statistics, challenges to wills and research.

2, 4, 6, 9, 11 and 13 September | SWR 99FM Sydney (Brekky with Bosco): Eight-minute pre-recorded interview with Helen Merrick broadcast six times during before and during Include a Charity Week. Topics included the generosity of Australians, the disconnect with death, getting solicitors to ask the question and the charities involved.

3 September | 2RRR Sydney (Breakfast with Shona and Hugh): Live 10-minute interview with Helen Merrick on Include a Charity Week, new research, generosity of Australians, disconnect with death and if can you leave a bequest to your pet.

3 September | Curtin-FM, Perth (Afternoons with Jenny Seaton): Live, 20-minute interview with Vicki Rasmussen on Include a Charity Week, tips for including a charity in your will, talk-back queries.

4 September | 1WAY-FM, Canberra (Drive with Cay Merritt): Live, 15-minute interview with Helen Merrick on Include a Charity Week, generosity of Australians, where you can leave a gift and particular charities that do great work.

5 September | 2CC (Talking Canberra – Drive with Rod Henshaw): Live, seven-minute interview with Helen Merrick on Include a Charity Week, generosity of Australians, disconnect with death and will challenges.

Media - Radio

6 September | 2RDJ Sydney (Drive with Neil Lithgow): Pre-taped, 20-minute interview with Helen Merrick and estates lawyer Robert Monahan on will writing, will challenges, myths, asking the question and Include a Charity Week. This interview ran on the Friday drive program and was broadcast twice on the breakfast program during the week.

7 September | 2MCE Bathurst (Breakfast with Tim Williams): Live, seven-minute interview on the need for a will, generosity of Australians, charities involved and Include a Charity Week.

7 September | Joy-FM Melbourne (Saturday Magazine): Live, 12-minute interview with Ross Anderson on generosity of Australians, the need for wills, why gifts in wills are important to a charity's work, the significance of bequests to RSCPA and Joy Radio, and Include a Charity Week information.

12 September | ABC Pilbara (Mornings with Jordan Fritz): Live, five-minute interview with Vicki Rasmussen on Include a Charity Week, myths around bequesting, and things to get right when you consider a charity in your will.

13 September | ABC Kimberley (Mornings with Edwin Cowlshaw): Live, seven-minute interview with Vicki Rasmussen on Include a Charity Week, what it is, the aims, statistics on generosity and what to consider when including a charity in your will.

22 October | ABC Gippsland (Mornings with Amber Irving-Guthrie): Live, seven minute interview with Ross Anderson on Include a Charity, its aims and how people can leave bequests and how much can be left. Followed an interview with a local lawyer about family blowouts and contesting of wills.

IAC Supporter Engagement

We had an amazing amount of engagement from our supporters this year! Many took to social media to promote the week.

Some shared bequestor videos telling their story and their reasons behind leaving a gift in their Will!

The Smith Family
13,081 followers
1mo

This #IncludeACharity Week please consider leaving us a gift in your Will. Your legacy can change the lives of Australian children in need. Find out more: <http://bit.ly/ZQ8dxsu>
[Include A Charity AUS Fundraising Institute Australia](#)


#IACWeek2019 #createbetterfutures

Vision Australia
September 15 at 6:23 PM · 🌐

Ian and Elaine's medical and nursing backgrounds brought them into contact with many people who are blind or have low vision. These experiences motivated them to do something, both now and in the future. During Include A Charity week, find out how you can do the same: www.visionaustralia.org/wills

Mater Foundation
865 followers
1mo

Meet the Moreton family. Through their experience and because of the exceptional care they received at Mater Mothers' Neonatal Critical Care Unit, they have decided to leave a gift in Will to Mater. It's Include a Charity Week (9-13 September), a time to celebrate the impact that leaving a gift in Will to charity has on improving the lives of others. Thank you to the Moreton family for your special gift and to other Mater supporters who have chosen to do the same. Find out more about the Moreton family <https://mater.li/2kBQV4Q> #Mater #IACWeek2019 #GiftsinWill



Stroke Foundation
September 11 at 2:00 PM · 🌐

It's Include a Charity Week – how would you like to be remembered? Some of our supporters choose to remember the Stroke Foundation in their final wishes as a way of honouring loved ones affected by stroke. It's what motivated Nancy Jagger from Belmont, Victoria to leave a gift to the Stroke Foundation in her Will. Listen to Nancy talk about leaving a lasting legacy. <http://bit.ly/2kB2HfP> #includeacharity #giftsinwills



IAC Supporter Engagement


Some shared bequestor stories!

Guide Dogs SA.NT
September 11 at 4:41 PM · 🌐

This week is Include A Charity Week, when we celebrate the wonderful contribution of people who have left a gift in their Will to charity.

Meet Kate, a dedicated and passionate volunteer and bequestor for Guide Dogs. Kate's passion for improving the quality of life for people with vision impairment runs in the family: "I can remember learning Braille with my Grandpa when I was little, after he suffered sudden vision loss."

To ensure that her passion for helping people with vi... [See More](#)




MS Research Australia
September 10 · 🌐

George was diagnosed with MS over 20 years ago and is living with Secondary Progressive MS today. By leaving a gift in his Will to MS Research Australia, George hopes to accelerate research into finding a cure.

He says: "It's not something everyone talks about, but it should be. Leaving a gift in your Will is planning for the future. It would be lovely to find the cure in my lifetime but if it isn't found, then let's hope it happens in somebody else's lifetime."

You could also help us accelerate research targeting prevention, better treatments and a cure for MS... and it doesn't have to cost a thing today. Remembering MS Research Australia in your Will, when the time is right, is simple. Visit our website for more info: msra.org.au/ways-to-donate/bequest

#RealMSResearch #includeacharity #ACWeek2019 #LegacyForesight #giftsinwills Include A Charity



Peter MacCallum Cancer Foundation
September 9 · 🌐

Mary is one of our most special supporters and has included a gift to Peter Mac in her Will. As part of #IncludeACharityWeek, she wanted to share her story with you.

"For 40 years I had my life, my career in San Francisco, and then one day in 2009 I noticed a lump on my leg, which ended up being lymphoma. I underwent treatment in the States, but after four years I decided to retire and ended up returning home to beautiful Melbourne," she says.

Back in Melbourne, Mary was refe... [See More](#)



IAC Supporter Engagement

Some printed posters to put around their office!



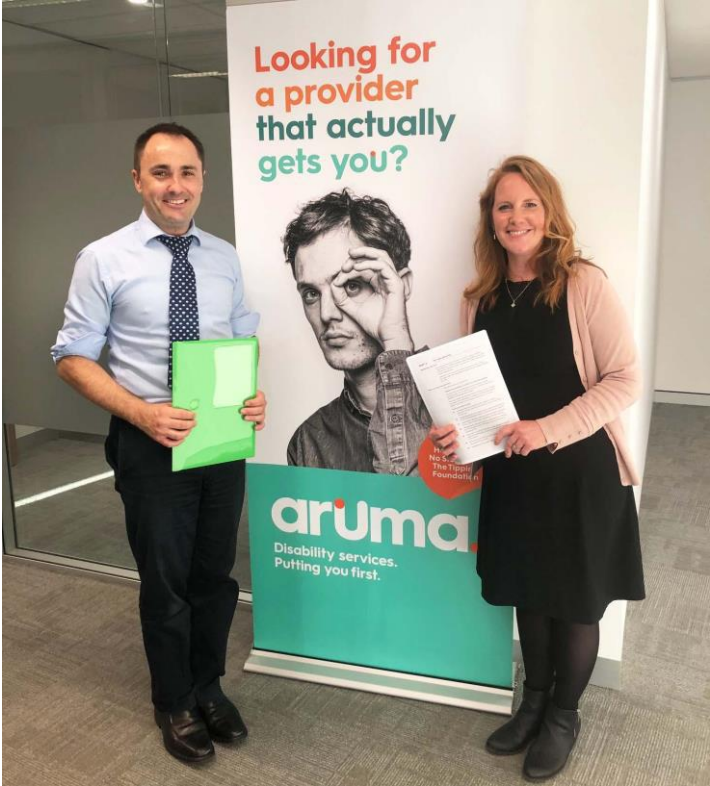
RSPCA Victoria



Cabrini Foundation

IAC Supporter Engagement

Some had gifts in Wills days!



Aruma



Salvation Army

IAC Supporter Engagement

Plenty promoted the week and the importance of leaving a legacy!

scia Spinal Cord Injuries Australia
September 9 · 🌐

Spinal Cord Injuries Australia is a proud supporter of Include a Charity Week which runs from 9 – 15 September, 2019.

We've teamed up with almost 90 of Australia's best-known charities to raise awareness around the importance of gifts in Wills and making this something that everyone can think about doing.

Much of our work has been made possible thanks to the generosity of the people who have remembered SCIA in their Will.

Click the link to read more about it.



Diocese of Parramatta
September 9 · 🌐

During Include A Charity Week (9 to 15 September), Australians are asked to consider the impact they can make in their community by including a gift in their Will to causes close to their hearts.

As Christian stewards, we are called to receive God's gifts gratefully; share them generously; and return them with increase.

After providing for your loved ones, will you consider a gift in Will to your parish, Parramatta Catholic Foundation or our vital Catholic ministries? #IACWeek2019 #giftsinwills #bequests

For more information, visit www.yourcatholicfoundation.org.au/giftsinwills



ChildFund Australia
2,065 followers
1d

Your legacy can give vulnerable children a childhood for generations to come.

You can support ChildFund Australia with a gift in your Will, and create a better future.

A photograph of three young children of diverse backgrounds smiling and hugging each other.

The difference you can make...
childfund.org.au

MS Research Australia
928 followers
1mo

Did you know that 87% of people will give to charity in their lifetime, yet only 7.4% continue to leave a gift in their Will? It's not widely known but these gifts are so important in continuing our work well into the future. ...see more



Zoos Victoria
September 11 · 🌐

Did you know this week is National 'Include A Charity Week'? It's a week designed to encourage conversations about something that is often awkward to discuss: your Will.

As a not-for-profit organisation, we rely on the support of our wonderful donors and members to fight wildlife extinction together. So this week, please consider the kind of legacy you might want to leave. Join our CEO Dr Jenny Gray and become a member of our Future Hands Fellowship to continue fighting for wildlife for years to come. More info: <http://bit.ly/31dpWwo>



Australia for UNHCR
5,418 followers
1mo

It's **Include A Charity AUS** Week. This time is dedicated to encouraging more people to leave gifts to charities in their Will. Leaving a legacy in your will for **Australia for UNHCR** will have a lasting impact and allow your support of refugees to live on.

To learn more, visit <http://ow.ly/JRKY50w21kF>



68%
engagement

Now onto 2020!

We hope to see you next year!

**Include a Charity Week 2020
will be 7-13 September.**