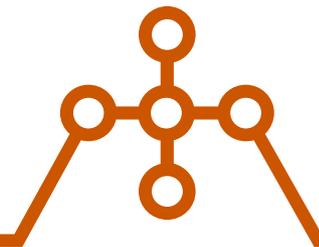




# Uncovering the Invisible Legator

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The Invisible Legator project set out to investigate the many charity legacies which apparently arrive out of the blue; whether from known supporters who had not disclosed their gift, or from people who cannot be traced on charities' databases.

Anecdotal evidence has long suggested that around half of all charitable bequests are from people with no obvious connection to the charity concerned, and this startling statistic was confirmed in Legacy Foresight's 2016 Legacy Marketing Benchmarks study.

Hard data from 16 large charities' legacy databases showed that only 14% of bequests came from supporters who had expressed an interest in leaving a legacy, whether as pledgers (11%) or prospects (3%). 35% of gifts came from people who were recognised supporters of the charity concerned but revealed no legacy interest while they were alive. Just over half (52%) were from people who were apparently completely 'unknown' to their charity and yet had in fact included them in their will.

*Clearly, despite their invisibility, these donors felt a strong connection to the cause. But who were they? Why did they leave a legacy? And how - if at all - did they want to be communicated with? This was the starting point for our research.*

Of course, fundraisers work hard to understand what drove their generous legators to leave a gift; by talking to next of kin, searching for past interactions with the supporter and surfing the web. But the results are often frustratingly inconclusive.

Rather than second-guess the motivations of deceased supporters, the Invisible Legator project focused on *living* people who have written charitable wills, probing their thoughts and feelings about the charities they have included in those wills

The Invisible Legator project aimed to measure, profile and understand the motivations driving four types of legacy gift:

**Disclosed legacy gifts** – which have been made known to the charity

**Undisclosed legacy gifts** – from known, current supporters who have not told the charity

**Unrecognised legacy gifts** – from those who consider themselves supporters but are not recognised as such by the charity (i.e. not on any current databases)

**Unknown legacy gifts** – from those who have never had any relationship or contact, even though they respect the charity and/or feel an emotional connection

Our research was in two phases. The first phase identified, quantified and profiled the four legacy donation groups, using a large scale online omnibus survey. The survey questioned 1,021 legacy donors, who had included a total of 2,039 charitable bequests in their wills. The second phase explored the four legacy groups in more detail, using focus groups and depth interviews.

## Ten key lessons from the research

The survey research, focus groups and donor interviews provided hard evidence on the size, characteristics and motivations of the four legacy gift groups. The key lessons outlined here have confirmed what many experienced fundraisers have long suspected; thus bringing fresh clarity and direction to their legacy marketing approaches.

### 1. We now have a much clearer understanding of the four legacy groups

**Disclosed** legacy gifts (22%) come from involved current supporters who often feel proud about their bequest

**Undisclosed** legacy gifts (47%) come from current supporters who are less 'hands-on' but remarkably similar in their profile to the current supporters who have disclosed a legacy. They mainly have a different *attitude* to disclosure

**Unrecognised** legacy gifts (28%) often come from former service users (or their relatives /friends) who have lost contact with their charity. Their lack of regular contact does not automatically mean they feel less strongly about their legacy

**Unknown** legacy gifts (4%) are highly likely to come from childless people who feel that charities need or deserve their money more than their relatives. They often have no direct relationship, but the charity they support has long formed a backdrop to their lives.

### 2. While the legacy groups vary, the reasons for choosing a charity do not

All legacy donors want their charity to have positive *impact*, all have *empathy* with the cause and all *trust* 'their' charity to use their gift well.

### 3. Disclosure is linked to regular and engaged relationships

Those disclosing their bequest have the most regular and frequent connections – 91% are in current contact with their charity. They are also highly involved – they are the most likely to restrict their gift and to have researched the charity beforehand. Disclosed legacy donors feel particularly strongly about their charity and are more likely to be aware of, or engaged with, what the charity is doing.

#### **4. Disclosed legacy donors have more touchpoints and chances to tell**

Just under half of the disclosed legacy donors we surveyed had been approached on the subject – the rest chose to tell the charity spontaneously, often during uncontrived and emotionally-driven conversations, which are probably not picked up via official systems.

#### **5. Some highly engaged ‘pledgers’ welcome dialogue**

Building relationships with them can help in many ways – for example giving money *now*, volunteering, public speaking – not just legacies. Treated well, these people are fantastic ambassadors for your cause.

#### **6. ... but many legacy donors regard ‘stewardship’ with bemusement and suspicion**

They see it as a waste of funds, or a ploy to ask for more. Most people we spoke to did not want to be regarded differently by their charity, nor did they want it to spend money on unnecessary communication or treatment. Those who had been thanked for their gift did not complain, but the general feeling was that charitable money should not be wasted.

#### **7. You cannot expect to uncover all your legacy donors**

There are good reasons why many legacy donors remain invisible. What is very clear from this research is that those disclosing legacies are the exception rather than the rule. The default position is not to tell the charity. This means that your ‘pledgers’ are in many respects unusual and far from representative of the wider legacy donor base.

#### **8. Truly unknown donors are a small group**

Our quantitative research suggests that just 4% of the gifts in living people’s wills are from people who have *never* had contact or a relationship with your charity. However, although this group is small in numbers terms, they may be relatively significant in value terms, as they are far more likely to be childless and/or leave residual bequests.

#### **9. Legacy gifts arise from a myriad of interactions**

Inspiring legacy giving is the responsibility of everyone connected to the organisation: frontline staff, community fundraisers and volunteers are (at least!) as important as the central fundraising team.

#### **10. Trust is fundamental to legacy giving – a given in the eyes of the donor**

Few of the people we spoke to felt they would expel a charity from their will, unless it did something very wrong on a public or personal level. But over time circumstances change and allegiances shift. The stronger the reputation, the greater the reason for keeping your charity in the will, even if regular contact drops away. So, to remain top of mind, your charity’s impact and empathy needs to be continually reinforced and refreshed.

The project was funded by a consortium of 34 leading charities.  
We are grateful to our clients for letting us share these  
top-line findings more widely.

**Legacy Foresight – [www.legacyforesight.co.uk](http://www.legacyforesight.co.uk)**  
**Britain's foremost analysts of the legacy and in-memory sectors**