

Legacy Potential Premier League Table 2019-2020



A growing legacy market creates opportunity for all...

...All you need is insight.

More charities are receiving legacies and more people are open to the idea of leaving a legacy – it's good news.

As baby boomers get older - the richest generation ever, we have a once in a lifetime moment for every charity to seize their legacy opportunity.

Many are already doing so; legacy media spend has increased significantly over the last few years and charities like Help for Heroes (which didn't even exist 12 years ago) have grown their legacy income to over £10million per year.

Our unique and bespoke charity level insight is the fuel that lies behind our league table - a simple representation that gives you a sense of your current legacy potential.

It supports you in building your legacy proposition, tells you who else your supporters are considering leaving a legacy to and identifies why your supporters would and wouldn't leave a legacy to you. Using it enables you to maximise your legacy opportunity and realise your full legacy potential.



Methodology

Total study now 15,000 supporters

In this year's research we interviewed over 5000 charity supporters aged 50+, taking the total to a massive 15,000 supporters. Our research from 2018-2019 has allowed us to track charity performance across the year.

The Legacy Premier League 2019-2020 table ranks charities on the propensity of their supporters to leave a gift in their will to them. These are outlined below:

- **Ranking** - Ranking based on legacy consideration (inc. last years where applicable).
- **Legacy Consideration** - Indexed legacy consideration amount in relation to others.
- **Legacy % Change** - Indicates how an individual charity's consideration has changed.
- **Legacy Rejection** - Frequency that supporters reject the charity for legacy giving.
- **Motivations Score** - Average score of 15 motivations to legacy giving.
- **Barriers Score** - Average score of 15 barriers to legacy giving.
- **Scale of Support** - The number of supporters a charity has. This now includes those who give to or buy from charity shops.

The index scores for each metric are relative to the charities in the table. This means that they are snapshots in time and should not be compared to the 2018-2019 Legacy Potential Premier League. If you would like to find out how you performed compared to last year please get in contact with fastmap or Freestyle Marketing. One exception to the above is 'Legacy % Change', which shows whether the actual percentage consideration for an individual charity has increased.

Due to the vast amount of interest of the Legacy Potential Premier League 2018-2019, we decided to extend the rankings and the qualifying criteria. This means that more charities are included in the table than last year and other charities who may have been excluded before are now included.



Legacy Potential Premier League 2019 - 2020						
fastmap		freestylemarketing				
the marketeer's reference point						
Ranking	Charity Name	Legacy Consideration	Legacy % Change	Motivations Score	Barriers Score	Scale of Support
1	(1) Cats Protection	150	↑	108	112	54
2	The Donkey Sanctuary	130	↑	104	99	46
3	(2) Battersea Dogs & Cats Home	127	↑	108	102	48
4	(3) Dogs Trust	126	→	103	100	42
5	Blue Cross	124	↑	103	90	35
6	Breast Cancer Now	115	↑	113	90	39
7	(5) Cancer Research UK	112	↓	108	94	316
8	(4) RSPCA	112	→	115	96	119
9	Alzheimer's Research UK	111	↑	103	101	53
10	PDSA	109	↓	112	97	72
11	(11) Prostate Cancer UK	108	↑	114	100	44
12	(10) Help for Heroes	106	↓	92	91	124
13	WWF	106	↑	98	102	52
14	(6) RNLI	106	↓	92	101	117
15	Diabetes UK	106	↑	123	94	43
16	(7) Macmillan Cancer Support	105	↓	113	98	239
17	(13) Alzheimer's Society	105	↑	106	93	101
18	(17) Guide Dogs for the Blind	104	↑	95	104	93
19	(8) NSPCC	96	↓	97	87	71
20	Save the Children	90	→	96	96	66
21	Mind	89	↑	107	105	54
22	(19) Marie Curie	87	↑	110	93	135
23	(20) Great Ormond Street Hospital	87	↓	101	91	52
24	(18) Hospice (any)	87	→	97	98	140
25	(16) British Heart Foundation	86	↓	92	93	242
26	Barnardo's	83	↑	81	97	55
27	Salvation Army	82	↓	89	99	89
28	Age UK	76	→	92	86	143
29	British Red Cross	64	↓	86	86	84
30	(12) Royal British Legion	58	↓	80	95	136

The Results

What changed this year?

When we look at this year's league table, we see similarities at the top, reinforcing what we saw last year, with Cats Protection maintaining its position as "number 1" and other animal charities taking up the top 5 spots.

There are other specific charities that are notable, we see CRUK, RSPCA, Macmillan and RNLI drop in their individual ranking, whilst WWF, Diabetes UK and Blue Cross, amongst others are new entrants into the top 20.

But it's the changes behind these numbers that are the most important.

Overall, our data shows legacy consideration has risen by 4% since last year. More of the public are open to the idea of leaving a legacy to a charity and of course this is a good thing, but it has a significant implication. It means that even to maintain your position in the league table you need your legacy consideration to increase. Charities whose consideration has remained relatively consistent (such as RSPCA) might see themselves decrease in ranking as their surrounding competition becomes stronger.

It's also worth reflecting on what legacy consideration means – it's only identifying what proportion of your supporters are willing to consider leaving you a legacy. Legacy fundraising's role is to inspire your supporters to do it!

Looking at scale of support we see that CRUK, Macmillan and BHF have a sizeable gap in popularity compared to any other cause. This year, we opened up our sampling criteria to include those who give to or buy from charity shops. This is likely the reason for this.



Fixtures



How many supporters will leave more than one gift in their will?

Supporters of multiple charitable causes might be considering a legacy to more than one charity. The importance of this is that this will be a determining factor of the proportional amount of legacy-income from a gift.

Just being good isn't enough. Not if you're losing to your closest competitors again and again

Legacies are competitive. This means that the likelihood that your legacy income is being transferred to your competitors is high. To circumvent this, you need to investigate what the strengths of your competitors are to understand why your supporters would leave a legacy to them, rather than you.

Fixtures demonstrate the competitive nature of legacy fundraising

By looking at people who support multiple charities, we can analyse the likelihood that people would only leave to one charity.

The results demonstrate that only considering yourself in your fundraising strategy may lead to a large proportion of supporters leaving to your competitors.



If you would like to know more about where your charity stands in comparison to your competition, visit www.fastmap.com or get in touch with David Cole, Managing Director, fastmap on +44 (0) 20 7242 702 or david.cole@fastmap.com or Allan Freeman, Director, Freestyle Marketing on 07957 344734 or allan@freestlyemarketing.co.uk.



39%

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4%



Save the Children®

Alzheimer's Research
UK

Vs.

Save the Children

	Help those that I care about	
	Help people locally	
	We're not doing enough	
	Rather leave to my family and friends	
	Haven't been asked	

Description: Looking at those who support both Alzheimer's Research UK and Save the Children, 39% of people would only consider Alzheimer's Research. 4% would only consider Save the Children and the rest (57%) would consider both. Green indicates where a charity is outperforming the other charity for motivations or barriers to leaving a legacy.

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Dogs Trust

14%

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2%



Blue Cross

Vs.

	Always in the news	
	They really need my gift	
	Inheritance tax benefits	
	Need large legacies	
	Unwise charity spending	

Description: Looking at those who support both Dogs Trust and Blue Cross, 14% of people would only consider Dogs Trust. 2% would only consider Blue Cross and the rest (86%) would consider both. Green indicates where a charity is outperforming the other charity for motivations or barriers to leaving a legacy.

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68%

–

4%



Macmillan Cancer
Support

Vs.

WWF

	Helped me in the past / are helping me now	
	Help those that I care about	
	Help people locally	
	I haven't thought about it	
	Legacy achievements	

Description: Looking at those who support both Macmillan Cancer Support and WWF, 68% of people would only consider Macmillan Cancer Support. 4% would only consider WWF and the rest (28%) would consider both. Green indicates where a charity is outperforming the other charity for motivations or barriers to leaving a legacy.

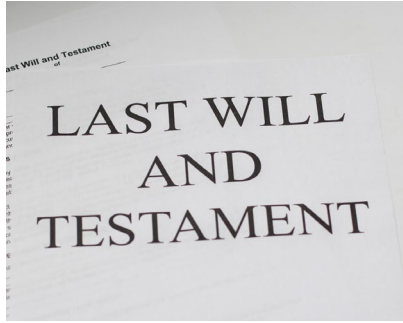
Research Modules

Module 1: Residuary Giving



Every charity wants to keep nudging up the proportion of residuary legacies. Understanding your supporter's willingness to leave a residuary to you and what percentage they feel your charity should get compared to other causes, together with the motivations and barriers to do so, will help you focus on how and where to "dial-up" the residuary focus.

Module 2: Will Writing



In-depth analysis looking at different segments shows you the opportunity amongst your supporters. Who has written a will? Is it up to date? How would they like to create it? How many bequests are made? How often are they changing it?

In addition, exploring free will services allows you to gauge consumer understanding and their impact on legacy giving amongst your supporters.

Module 3: Communication Priorities



Exploring the relationship between trust, commitment, loyalty and legacy giving and the impact of these on the likelihood to a legacy gift delivers real insight which can be used to develop more effective supporter journeys.

Also, as part of the dialogue, what information do supporters want, how do they want it delivered, and what can be done to influence more people to leave a legacy gift?

Module 4: Competitive Analysis



Benchmarking against your competition shows how your legacy consideration is changing compared to the market and the motivations and barriers to leaving a legacy to your cause. Who are your legacy competitors? Who else are your supporters considering leaving a legacy to? How many are you competing with? Why wouldn't your supporters leave a legacy to you? Knowledge that you can actively use to grow your market from your existing supporter base.

Module 5: Legacy TV



Legacy spend on television is changing and growing dramatically, so we showed each of the 5,000 people we interviewed one TV ad. We measure the effectiveness of the ad across a series of emotional and response-based metrics. Would it call them to action? How does it make them feel? Do they recall the brand? How do these metrics compare to the other ads shown? Invaluable information for anyone currently using TV but also great for those who are thinking about it and want to get buy in internally or ensure their approach is "best in class".

Our recent research cycle in we explored a number of different **areas** of legacy giving. This has allowed us to break down a large scale research study into different modules. To find out more about the different research modules that we offer, please click on this link to get in contact: <https://www.fastmap.com/contact-us/>

About us



Legacy services

TARGETING / UCS

RESIDUARY GIVING

BARRIERS & MOTIVATIONS

WILL WRITING

PROPOSITION / CREATIVE TESTING

INTERNATIONAL

David Cole,
Managing Director, fastmap
www.fastmap.com
020 7242 702
david.cole@fastmap.com



HOW WE CAN HELP YOU



BESPOKE PROJECTS



AGENCY INTERMEDIARY



LEGACY FUNDRAISING



INTERIM MANAGEMENT

Allan Freeman,
Director, Freestyle Marketing
www.freestylemarketing.co.uk
07957 344734
allan@freestylemarketing.co.uk