



In-Memory Insight | December 2019

# Exploring the links between in-memory and legacy giving



LegacyForesight

In-Memory Insight is an ongoing programme to map, measure and research in-memory giving and fundraising. We work closely with a learning circle of leading charities who agree to pool their budgets, experiences and data to help build evidence and insight.

We know that the desire to honour a loved one who has died - be that a family member, close friend or colleague - underlies many types of charity support. The act of giving in memory can be helpful to the bereaved as well as the charity; providing focus or diversion, giving something positive to think about, and encouraging mutual support between family and friends. The motivation to give is intimately connected to the deceased, and charities must always respect this when communicating with in-memory donors.

In 2018/19 our research aimed to explore the links between in-memory and legacy giving. Our approach was extensive - including a literature review, supporter interviews, two successive donor surveys and analysis of charity benchmarking data - furnishing In-Memory Insight consortium members with fresh insights and practical actions.

This research proves how important in-memory motives are when it comes to legacy giving. We hope that this evidence will help make the case for greater, more thoughtful investment in in-memory fundraising throughout the sector. We are grateful to our learning circle members for agreeing to share this information more widely.

## **The scale of in-memory motivated legacy giving**

Our research included two online surveys on legacy and in-memory giving patterns, covering a total of 4,000 adults. From these surveys we found that:

- A high proportion of legacy donors (2 in 5) had at least one in-memory gift in their will
- Three quarters of all in-memory legacies were to health charities; double the percentage for all legacies
- In-memory legacies were more likely to be pecuniary than all legacies (70% vs 61%) - possibly because these donors were also more likely to have children
- Most legacies had been left in memory of partners, parents and in-laws, although friends had also been remembered
- 3 out of 5 in-memory legacies had been preceded by in-memory support of a charity. Donations had often been made at or after a funeral - some were of substantial value.

## How in-memory legacy donors feel about their gift

Our focus groups and depth interviews showed that legacies which are clearly understood and identified as being 'in memory of someone' effectively trump those that have no real connection to a loved one. Once made, legacies of this kind might be joined by others, or diluted in value, but they are very unlikely to be removed (barring a major misdemeanour on the charity's part!)

Most in-memory pledgers do not consider the legacy charity to be 'theirs' – they do not think of themselves 'owning' the relationship (although in practical terms they do). Exceptions *can* occur when the next of kin develops a close bond with the charity before their loved one dies.

Pledgers tend to see their in-memory legacy as being something 'for the whole family', or 'for all those who might be affected'.

In-memory legacies are inherently strong. But they are strengthened further when their meaning is seen to encompass more than one individual – or when the donor feels they have taken on ownership of the relationship.

## Mapping the in-memory legacy journey

In the latest round of performance benchmarking we collected extra charity data on the 'in-memory journey' – aiming to compile hard evidence on the correlation between known in-memory supporters and subsequent legacy gifts. 22 of our Learning Circle members were able to supply data on this important topic.

We found that supporters with a known in-memory connection were three times more likely to pledge a legacy to the charity – and twice as likely to be legacy prospects – than standard regular donors, giving via direct debit or standing order.

We also found that legators who had a known in-memory connection to the charity left bequests of significantly higher value. The average value of a residual legacy from a known in-memory supporter was two thirds higher than one from a supporter with no known in-memory connection. For cash gifts, former in-memory supporters gave double the amount.<sup>1</sup>

**If there is one stand-out message in this report, it's this: we know that an in-memory motivated gift can bring great benefits, both to a donor and to the charity, including focus and a therapeutic outlet for grief; a new reason to get in touch and the inspiration for continued engagement. But there is also now hard evidence to show that an in-memory relationship with a charity may also lay the foundation for a legacy gift.**

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<sup>1</sup> While we can't say for sure that these are all 'in-memory legacies', we know that in every case the legator at one point had a relationship with the charity based on remembrance.

## More about In-Memory Insight

In-Memory Insight explores the size, shape and scope of in-memory giving in the UK. The programme aims to collect objective evidence and insight on in-memory giving, in order to build the case for investment, inform fundraising strategies and help manage relationships with supporters.

The In-Memory Insight programme is funded by a Learning Circle of leading British charities who agree to pool their budgets, experiences and data to help build our collective knowledge. We operate a rolling research programme, with each year building on the one before.

We define in-memory as “any type of charitable giving or fundraising commemorating the life of someone special”. A range of in-memory motivated activities are covered in our research, including gifts at funerals, direct in-memory donations both one-off and regular, the setting up of ‘Tribute Funds’, the purchase of commemorative objects such as benches and trees, participation in fundraising events such as marathons and bike rides, and legacies made in honour of a loved one.

The programme sets out to explore:

- What motivates in-memory donors to give to charity – and how does it make them feel?
- What do in-memory donors need, expect – and experience – from the charities they support?
- How many/much In-memory gifts are being given? Through which channels?
- What is the current status of in-memory fundraising in the UK?
- What can we learn from good practice examples – both here and overseas?

To answer these questions, we use a variety of research techniques including focus groups and depth interviews, omnibus surveys, good practice case studies, the analysis of performance data from Learning Circle members and interactive member workshops.

For more information on In-Memory Insight contact Caroline Waters:

[c.waters@legacyforesight.co.uk](mailto:c.waters@legacyforesight.co.uk)

## Time to book a Health-Check?

Have you reached a pivotal point with your in-memory fundraising? Are you wondering how to pinpoint exactly where you should be focusing attention and investment?

An In-Memory Health Check from Legacy Foresight could give you the confidence to move onwards and upwards with a sound base of evidence unique to your organisation.

To talk to us informally about your charity's needs, please contact Kate Jenkinson, Head of In-Memory Consultancy: [k.jenkinson@legacyforesight.co.uk](mailto:k.jenkinson@legacyforesight.co.uk)