



Apteco

How does marketing automation increase your charity's legacy donations?



Charities rely on legacy giving for long-term success

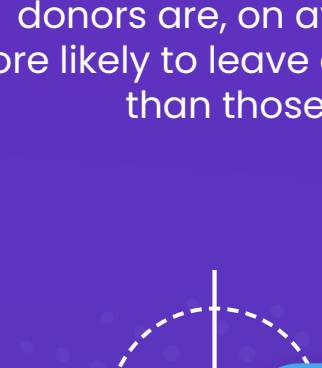


15%¹ to 20%² voluntary income received by charities comes from bequests

To put this into perspective...

It would take **44 years** and **1.75 million** more London Marathon runners to match the annual contribution generated by legacy donations.³

Why should fundraisers focus on securing legacy donations?



25¢ / \$1

1 Higher return on investment

It costs charities only **25 cents** on average to raise one 'planned giving' dollar.⁴

2 More legacy donors = more annual gifts

Depending on the type of non-profit they're supporting, legacy donors are, on average, **10%** more likely to leave annual gifts than those who don't.⁵



3 There's a huge untapped market

The UK has an ageing population. It's estimated that the legacy market will double in value by **2045**⁶, potentially reaching **£6 billion** by **2050**⁷.



What's holding them back?

Top 4 legacy fundraising challenges



1 Legacy fundraising is a slow, complex process

It can take years for charities to receive a donation.



2 Personal finances and death are sensitive subjects

Engage with potential donors the wrong way – and you risk losing their interest completely.



3 External factors can hinder success

In tougher economic times, people are more cautious about what happens to their money.



4 It's hard to predict who will become a legacy donor

This makes it hard for fundraisers to know who to reach out to in the first place.

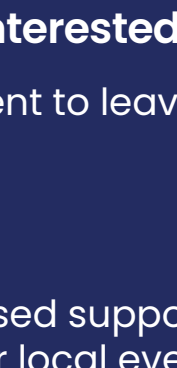
While some of these challenges are outside of your control, there is a solution within reach.

The key to success? Marketing automation

It can boost your charity's legacy donations by helping you:



Identify likely legacy donors based on past donor behaviour and characteristics



Tailor your communications to ensure higher chances of conversion



Automate and scale communication efforts

This enables you to easily send tailored messages to different donors, helping them navigate through their decision-making process.

What are the main stages of this journey?

1 Enquirer

What are they interested in? Engaging with your content or reaching out for more information.

How to engage:

- ✔ Promptly fulfil brochure requests with personalised content.
- ✔ Follow up with emails or direct mail, inviting questions.



2 Considerer

What are they interested in? Exploring more detailed or seeking will platform answers to their questions.

How to engage:

- ✔ Provide checklists and testimonials to address common questions and concerns.
- ✔ Customise content based on age and other demographics.



3 Intender

What are they interested in? Showing clear intent to leave a legacy donation.

How to engage:

- ✔ Offer personalised support through calls or local events
- ✔ Build trust by understanding their motivations.



4 Pledger

What are they interested in? Including your charity in their will.

How to engage:

- ✔ Maintain regular contact through calls and newsletters.
- ✔ Keep them updated on project progress and acknowledge their contributions.



Secure more legacy donations with Apteco Orbit

Get more done with intuitive, intelligent campaign tools designed to boost the effectiveness of your legacy fundraising.

With Apteco's end-to-end platform, you can:



Centralise donor data for actionable insights



Segment donors by age, projects, or lifetime value (LTV)



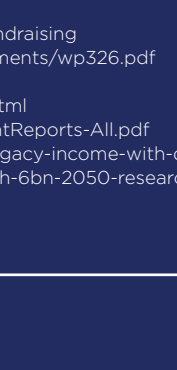
Pinpoint and engage potential donors with look-alike functionality



Save money by targeting the most responsive donors



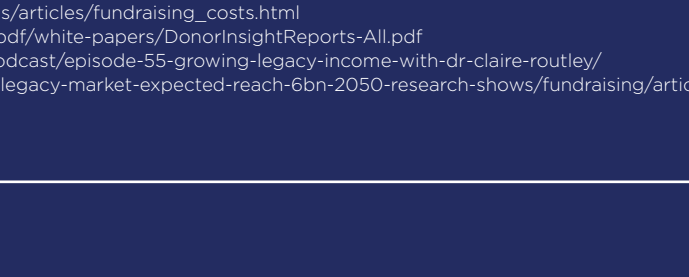
Streamline campaign planning, execution, and prioritisation



Increase accuracy and efficiency with automation



Focus on relationship building while our software handles the rest



Read our eGuide to learn more about how personalised marketing can help you attract and maintain relationships with legacy donors.

DOWNLOAD NOW

Sources

¹ <https://www.fundraisingregulator.org.uk/guidance/topics/legacy-fundraising>
² <https://www.bristol.ac.uk/media-library/sites/cmpo/migrated/documents/wp326.pdf>
³ <https://donorbox.org/nonprofit-blog/legacy-fundraising>
⁴ https://www.affinityresources.com/pages/articles/fundraising_costs.html
⁵ <https://www.statter.com/documents/pdf/white-papers/DonorInsightReports-All.pdf>
⁶ <https://brightspotfundraising.co.uk/podcast/episode-55-growing-legacy-income-with-dr-claire-routley/>
⁷ <https://www.thirdsector.co.uk/charity-legacy-market-expected-reach-6bn-2050-research-shows/fundraising/article/1848341>

