



ONE BILLION DOLLAR QUESTION – EXECUTIVE SUMMARY

This research was commissioned by Include a Charity (IAC) to examine Australians' willingness to leave a bequest to a charity in their Will. Currently only 7.5% of Australians leave a gift in their Will, but the IAC team believe that more would be willing to do so if their solicitors simply asked about leaving charitable bequests as part of the Will-writing process.

Preliminary work by creative agency Behaviour Change Partners resulted in the theory that if we were able to demonstrate that, contrary to most solicitors' current beliefs, a large number of their clients *do* wish to leave a gift in their Will to their favourite charity, this could encourage more solicitors to ask their clients about bequests during the Will-making process.

Evolve Research was commissioned to test this hypothesis with an exploratory question, as part of a national Omnibus survey. This confirmed 29% of respondents would like to be able to leave a charitable bequest in their Will to a charity important to them. To provide further insight to support IAC campaign activity, Evolve then conducted an online study in September 2017 with 1,099 Australians across Australia.

This research confirmed there is, indeed, a sizeable group of Australians who would like to leave a charitable bequest in their Will. Critically, however, the research also confirmed the majority of Australians *do not* mind if solicitors ask them about leaving charitable bequests in the Will-making process.

Key findings include:

- 25% of Australians would like to be able to leave something to a cause or a charity important to them when they go to make or next update their Will.
- 42% of Australians are undecided, presenting an opportunity for discussion, while one third of Australians said they do not wish to leave a charitable bequest.
- 65% say *it is okay* for solicitors to ask about charitable bequests during the Will-making process, presenting another opportunity for discussion. Only 23% said it was not okay and 11% were unsure.
- 18-24-year olds are the most likely to say they will leave a gift in their Will.

The research also confirmed one in two Australians currently have a Will and 41% made their Will with a solicitor's assistance. Of those surveyed with a current Will that was prepared with a solicitor, only 21% confirmed their solicitor asked them about leaving a charitable bequest.

*Research commissioned by Include a Charity and conducted by Evolve Research and Consulting Sept 2017, n=1,099.

www.includeacharity.com.au/askthequestion