

# NAB CHARITABLE GIVING INDEX

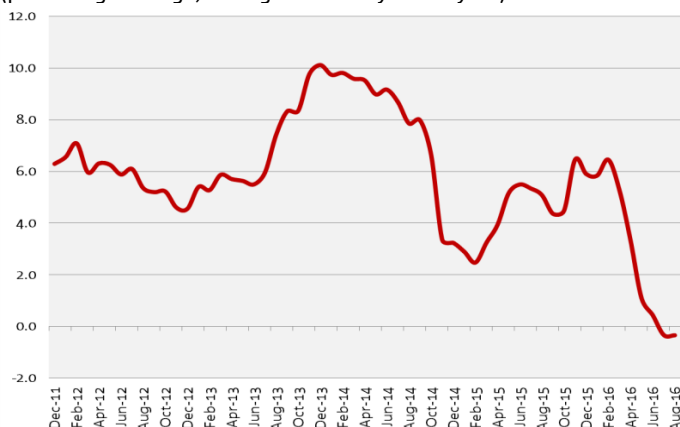
In-depth report: 12 months to August 2016



## NAB Group Economics

### GROWTH IN NAB CHARITABLE GIVING INDEX

(percentage change, rolling 12 month year on year)



■ Giving to charities in the 12 months to August 2016 decreased by 0.3%, down from 5.1% growth a year earlier. The tapering of charitable giving has been impacted by lower donations made to the Humanitarian Services sector. Right after the 2015 Nepal earthquake, the Australian public gave generously, which helped boost total humanitarian donations for the year. This one-off event created a significant spike in giving in April and May 2015. Other charitable giving sectors enjoyed positive rates of growth over the year (albeit still relatively weak).

The Australian economy has remained resilient throughout the last 12 months, however retail growth has weakened over the last 6 months. Furthermore, some states have experienced more transitional pains than others post the mining boom and charitable giving in these states have contracted at faster rates than the national average.

Overall, while Humanitarian Services is important in the slower rate of giving, a 'cautious consumer' is also likely playing a part.

- Alan Oster, Group Chief Economist, NAB

■ At NAB we recognise and support the vital role that the \$100 billion not-for-profit (NFP) sector plays in our society and our economy. The NAB Charitable Giving Index helps NFPs understand the bigger data picture around Australia's recent donation habits and informs their fundraising strategies.

A growing trend is the rise in charitable lotteries, particularly online. Reflecting its growth to second place in market share, we continue to report on charitable lotteries as a sector in its own right. We have also given an in-depth breakdown of data by state to help the for-purpose sector better understand their market.

Our dedicated Community Bankers work closely with a wide range of organisations to help them grasp opportunities and address any business challenges they may face. The NAB Charitable Giving Index is just one of a number of key initiatives by NAB to help NFP customers deliver their goals.

- Jodi Geddes, General Manager Corporate Responsibility, NAB

### CHARITY CATEGORIES

Categories	Examples of Charities Included
Animals & Environment	RSPCA; WWF Australia; Australian Conservation Foundation
Cancer	Cancer Council; The Movember Group; Peter MacCullum Cancer Centre
Community Service & Children/Family	The Salvation Army; St Vincent de Paul; The Smith Family; Brotherhood of St Laurence
Health & Disability	Diabetes Australia; Fred Hollows Foundation; Vision Australia; Guide Dogs Australia
Humanitarian Services	World Vision; Oxfam; Red Cross
Medical Research & Services	Heart Research Institute; Royal Flying Doctor Service
Charitable Lotteries	Boystown Lottery; Mater Prize Home; RSL Art Union
Other*	Everyday Hero, Go Fundraise, mycause.com.au

\*Other includes charity aggregators and other charities that do not fit into any of the categories above.

## KEY FINDINGS: NATIONAL

■ Over the last 12 months, NAB's Charitable Giving Index contracted by 0.3% (down from 5.1% increase in the year to August 2015).

■ The reason for the weaker 12 month average growth is in part due to larger than normal charitable giving recorded in April/May of 2015. The Nepal earthquake occurred at that time and the outpouring of charity has created a one-off spike in these months. That said, consumer spending patterns remained largely conservative. NAB's Consumer Behaviour Survey continues to show consumers cutting back on "non-essentials", particularly eating out, entertainment, major household items, and charitable donations (albeit less so than 12 months earlier).

■ The charitable giving index fell in most states – with VIC (1.2%) and SA (6.4%) the exceptions. WA had the most negative growth at -2.8% followed by QLD at -2.6%. NSW's growth was also negative at -0.8%.

■ The charitable giving index for metropolitan and regional areas remained close. Metropolitan areas declined by 0.4%, whereas regional areas declined by 0.2%.

■ Elder Australians continued to give more than younger generations, with those over the age of 65 giving the most, both in terms of dollars given and the rate of giving growth (2.0%). In contrast, growth in charitable donations made by 25 to 34 year olds were negative (-3.9%).

■ Humanitarian Services continued to dominate the market share with 33% of total donations, albeit the rates of growth have been falling in recent months. Charitable Lotteries (15%) is now the second largest sector followed by Health and Disability (12%). Community Services & Children/Family (11%), Cancer (9%), Animals & Environment (8%) and Other charities (7%) are the next most significant. Medical Research (5%) remains the sector with the smallest market share.

■ Average donation size remained the same for the 12 months leading to August 2015 and August 2016 at \$348 per donor. All charity sectors bar Humanitarian Services saw an increase in average donation size, led by Cancer (up 7.1% to \$152), Health & Disability (up 4.1% to \$172), Community Services (up 3.5% to \$253), Medical Research (up 2.8% to \$158) and Charitable Lotteries (up 2.1% to \$216). Average donations for the biggest sector - Humanitarian Services were down by 0.1% to \$434.

■ Average donation size decreased the most in WA (down \$8 to \$320) echoing the weaker economic environment in that state. Average donation size in QLD and VIC went down \$2 to \$307 and \$334 respectively. Charitable giving grew the most in SA (up \$11 to 356), ACT, NT & TAS (up \$9 to 377). NSW remains unchanged at \$386.

■ Bellevue Hill NSW (2023) was the most generous postcode in Australia for charitable giving, with an average donation of \$340 per capita. Hunters Hill NSW (2110) was next with \$319, followed by Middle Park VIC (3206) with \$318.

■ However, by share of income, Castlemaine VIC (3450) was the most generous, donating 0.36% of average income to charity. Next most generous on this measure were Sturt SA (5047) with donations of 0.35% of average income, Blaxland NSW (2774), Glenelg South SA (5045) with 0.34%, Fitzroy North VIC (3068) and O'Connor ACT (2602) with 0.33%.

## KEY NAB CHARITABLE GIVING STATISTICS

	Index (annual average)		% change annual	
	Aug 15	Aug 16	Aug 15	Aug 16
NAB Charitable Giving Index	147.0	146.5	5.1	-0.3
Animals and Environment	122.8	123.0	3.7	0.1
Cancer	300.3	300.7	0.7	0.1
Community Service + Children/Family	185.4	190.9	2.6	3.0
Medical Research	176.1	185.1	15.2	5.1
Health and Disability	188.7	195.8	1.8	3.8
Humanitarian Services	99.5	92.7	3.9	-6.8
Charitable Lotteries	176.5	187.4	7.3	6.1
Other	706.0	723.7	18.5	2.5

All data is non-seasonally-adjusted (nsa). Data is produced by Quantum and includes donations via credit card, direct debit, BPAY and EFTPOS. Direct transfers into charity bank accounts are not captured (e.g. bequests and cheque donations may not be captured). Nearly 600 charity brands are included in this analysis. Average donation sizes for postcode analysis are quoted as average donations per capita. Averages quoted in the national and state levels are average donations per donor.

*"Total donations by older age groups has seen higher growth than the other age groups"*

*Wade Tubman, Quantum*

## KEY FINDINGS: BY STATE

### NEW SOUTH WALES (NSW)

- Charitable giving for NSW declined by 0.8% in the 12 months to August 2016 (4.6% growth in 2015).
- Humanitarian Services had the biggest market share (35%); Medical Research (5%) the smallest.
- The average donations per donor remain unchanged from August 2015 at \$386 – still the highest of all states.
- Bellevue Hill (\$340) was the most charitable suburb for dollar giving; O'Connor (0.33%) by income ratio.

### QUEENSLAND (QLD)

- Charitable giving fell by 2.6% (5.5% in August 2015) – the 2<sup>nd</sup> highest within states with negative growth.
- Humanitarian Services and Charitable Lotteries have the biggest market share (26% each); Medical Research (5%) and Other (5%) charities the smallest.
- The average donation per donor fell to \$307 (\$309 in August 2015) and was lowest of all states.
- Yeronga (\$172) was the most charitable suburb for dollar giving; Coolangata (0.27%) by income.

### WESTERN AUSTRALIA (WA)

- Charitable giving shrunk by 2.8% (down from 4.9% growth in 2015) – the highest contraction of all states.
- Humanitarian Services remain biggest market sector in WA (34%); Medical Research (3%) the smallest.
- The average donation per donor fell to \$320 (\$322 in 2015).
- Claremont (\$216) was the most charitable suburb for dollar giving; South Fremantle (0.23%) by income.

### VICTORIA (VIC)

- Charitable giving grew by 1.2% (6.1% in 2015) – 2<sup>nd</sup> highest of all states.
- Humanitarian Services had the biggest market share (34%); Medical Research (6%) the smallest.
- The average donation per donor fell to \$334 (\$336 in 2015).
- Middle Park (\$318) was the most charitable suburb for dollar giving; Castlemaine (0.36%) by income.

### SOUTH AUSTRALIA (SA)

- Charitable giving grew 6.4% (3.6% in 2015) – the only state with faster comparable growth than last year.
- Humanitarian Services had the biggest market share (31%); Medical Research (5%) and Other (5%) the smallest.
- The average donation per donor rose to \$356 (\$345 in 2015).
- Torrens Park (\$225) was the most charitable suburb for dollar giving; Sturt (0.35%) by income.

### AUSTRALIAN CAPITAL TERRITORY, NORTHERN TERRITORY & TASMANIA (ACT, NT & TAS)

- Charitable giving fell by 0.3% (4.3% growth in 2015) – in line with the national average.
- Humanitarian Services had the biggest market share (40%); Medical Research (4%) the smallest.
- The average donation per donor rose to \$377 (\$368 in 2015).
- Deakin ACT (\$275), Larrakeyah NT (\$129) and South Hobart TAS (\$176) were the most generous suburbs for dollar giving; O'Connor ACT (0.33%), Larrakeyah NT (0.18%) and Howrah TAS (0.29%) the most generous by income.

*“Whilst giving across Australia has seen reduced growth in the last 12 months South Australia has seen an increase in growth, which has been led by Charitable Lotteries”*

*Wade Tubman, Quantum*

### Charitable giving fell in most states, except Victoria and South Australia

Charitable giving fell in most states, with the exception of SA (6.4%) and VIC (1.2%).

Indices for NSW (-0.8%), ACT, NT & TAS combined (-0.3%) also fell slightly.

Charitable giving in WA shrunk by over 2.8%, down from 4.9% growth a year earlier. Likewise in QLD, the charitable giving index fell by 2.6% as compared to 5.5% growth observed the year before. With the investment phase of the mining boom slowing sharply, states more reliant on this sector inevitably feel more pressure on wages and consumer confidence, factors which could impact donating behaviours.

### Charitable giving from metropolitan areas falling faster than regional areas

In terms of location, charitable giving contracted in both metropolitan and regional areas which fell by 0.4% and 0.2% respectively, down from 5.2% and 4.7% in the previous year to August 2015.

Charitable giving from metropolitan areas grew at a faster rate than regional areas back in April/May 2015. With less donations made to Humanitarian Services this year, the impact on metropolitan donation rate was more profound than regional areas.

### Charitable giving is lower than a year ago across all age groups with over-65s and 55 to 64 the only age groups with positive growth

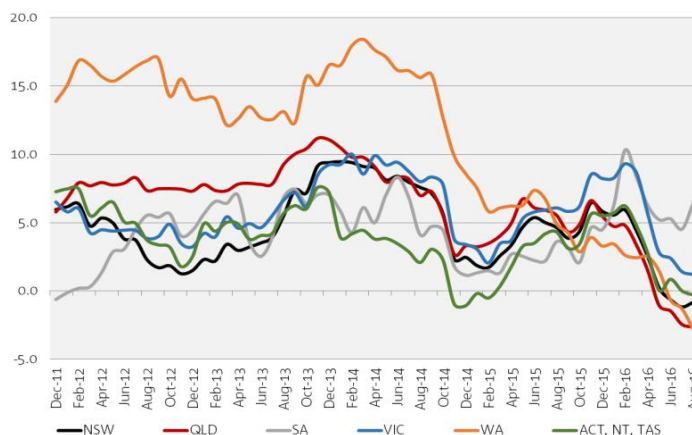
Age and giving continued to demonstrate a clear behavioural relationship as the only age groups with giving growth were over-65s (2%) and 55 to 64 (1.1%) while all other ages groups have shown negative charitable giving growth with 15 to 24 (-5.5%) cutting back most.

The most significant negative growth was observed in Humanitarian Services donations, with 15 to 25 year olds showing -14% growths as opposed to -4.8% less donations made to this sector by +65s.

Young people usually earn less than older people. They are also facing much greater employment challenges. Unemployment rates in this age group have remained elevated over the past year and significantly above the Australian average. Job uncertainty is likely to be a contributing factor to more cautious donation behaviours in this group. It also appears that younger people are more likely to react to a major event, while older people have more regular giving behaviours.

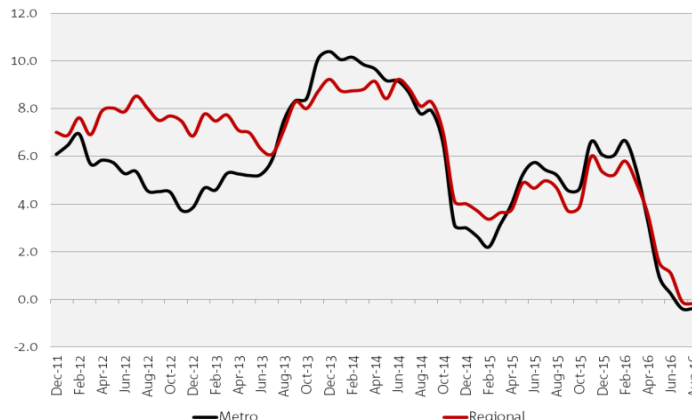
## GROWTH IN NAB CHARITABLE GIVING INDEX BY STATE

(percentage change, rolling 12 month year on year)



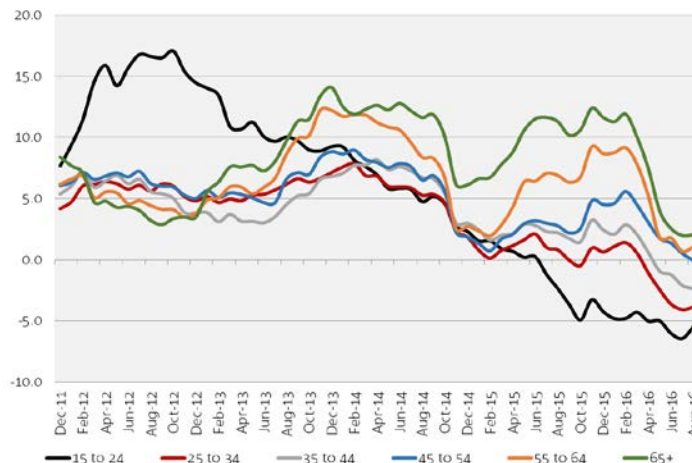
## GROWTH IN NAB CHARITABLE GIVING INDEX BY REGION

(percentage change, rolling 12 month year on year)



## GROWTH IN NAB CHARITABLE GIVING INDEX BY AGE

(percentage change, rolling 12 month year on year)



**All charity sectors enjoyed positive rates of growth over the year with the exception of Humanitarian Services. Some did grow more than others, with Medical Research and Charitable Lotteries experiencing the fastest growth in donations while Animals & Environment and Cancer were the slowest**

With the exception of Humanitarian Services, all other charity categories have experienced growth in giving over the year to August 2016. Reasons for the decline in humanitarian donations are well explained above.

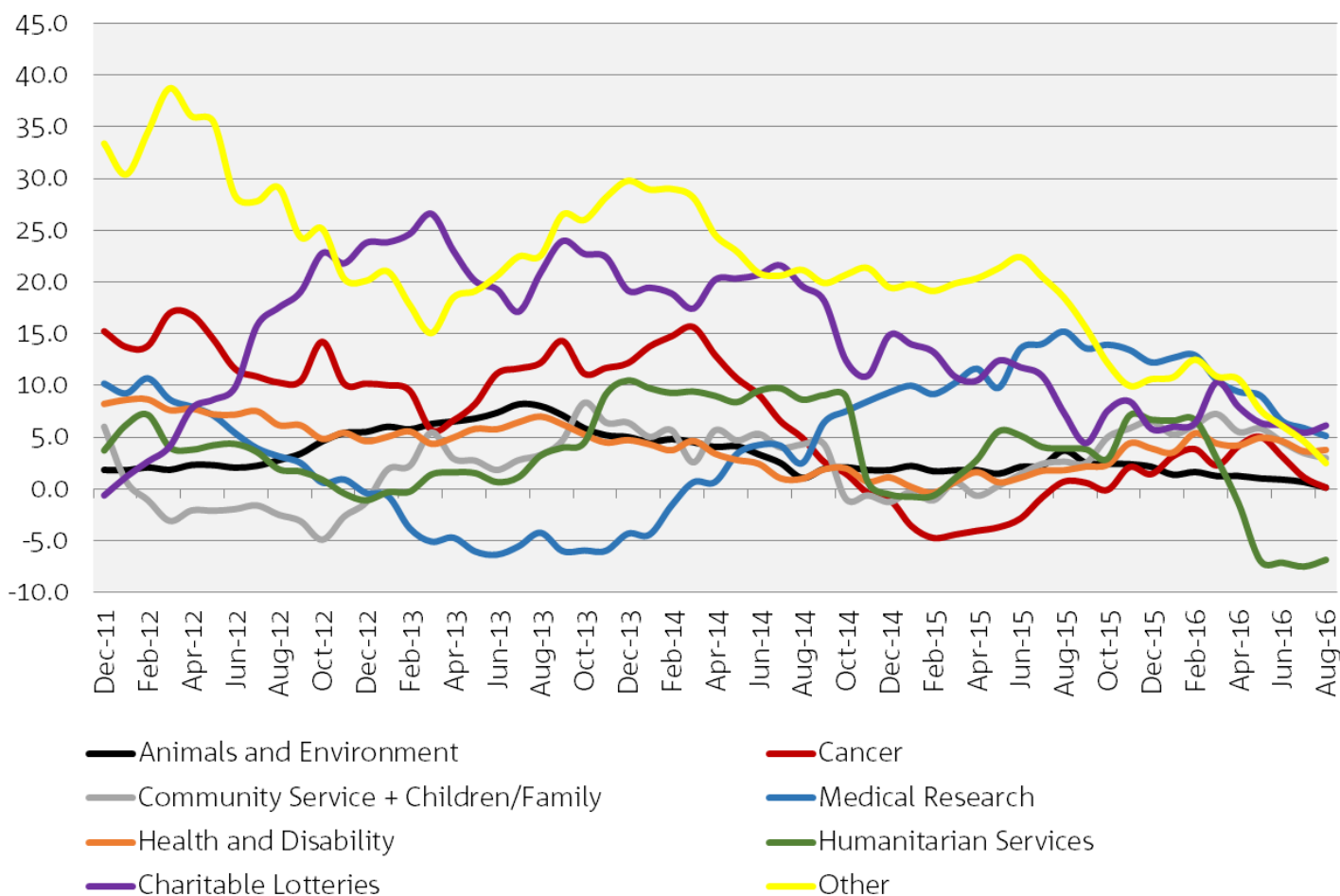
The sectors with the fastest growth are Charitable Lotteries (6.1%) and Medical Research (5.1%). Increased online and social media presence played a large part in the growth of these sectors. Viral campaigns like the “Ice-bucket challenge” generated a lot of social media buzz which may have contributed to increased donations. Likewise, online based charitable lotteries have become more prevalent, which could have contributed to increased giving to Charitable Lotteries.

Giving was reported as growing for Cancer charities in the last report; since then, growth has been tapering off. Current growth for Cancer charities is down to 0.1%, well down from 3.9% growth reported in February. Eastern states (QLD, NSW, VIC) have all shown decline in Cancer giving while Western states (WA, SA) have grown.

Growth was also weak for Animals & Environment charities which only grew by 0.1%. This is down from 3.7% growth observed in August 2015. Almost no increase in giving was observed in metro areas for this sector while a 0.6% growth was seen in regional areas.

**GROWTH IN NAB CHARITABLE GIVING INDEX BY CATEGORY**

(percentage change, rolling 12 month year on year)



## Humanitarian Services still the largest charity sector, thus any decrease in giving for this sector puts downwards pressure on the overall giving index

Market share by charity categories remained broadly unchanged across all categories over the year to August 2016 from 2015.

Humanitarian Services continued to dominate the overall market share of charitable giving with 33% (-2% from August 2015) of total donations.

Charitable Lotteries held the second biggest share with 15%, followed by Health & Disability (12%), Community Services & Children/Family (11%), Cancer (9%), Animals & Environment (8%) and Other charities (7%). Medical Research (5%) remains the smallest sector by market share.

## Charitable Lotteries attract a much bigger share of donations in regional areas, while Community Service & Children/Family attracted more in metropolitan areas

Regional areas gave a much bigger share of their total donations to Charitable Lotteries (18% versus 13%); while those in metropolitan areas gave more to Community Services & Children/Family charities (12% versus 9%).

Allocations were broadly similar across all other charity categories.

## Over-65s donate a much bigger share to Health & Disability, Medical Research and Community charities, but 15 to 24 year olds give most to Animals & Environment

Differences in the allocation of charity spending were much more apparent by age group.

Humanitarian Services charities continued to attract the lion's share of donations in all age groups, but this ranged from around 35% for 15 to 44 year olds to just 29% for over-65s.

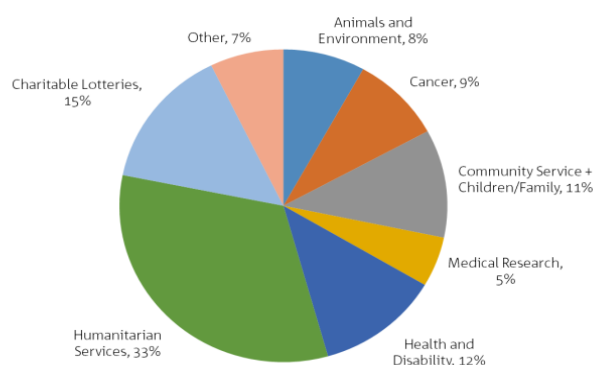
Over-65s tend to allocate more of their charity donations to Health & Disability (17%), Medical Research (7%) and Community charities (13%) than other age groups.

In contrast, 15 to 24 year olds allocated a much larger share to Animals & Environment charities (14%); 25 to 34 year olds gave the biggest share to Cancer (13%).

Charitable Lotteries seem to be favoured more by those in the older ages groups, with 45 to 54 (15%), 55 to 65 (18%) and over-65s (15%) allocating more relative to younger generations.

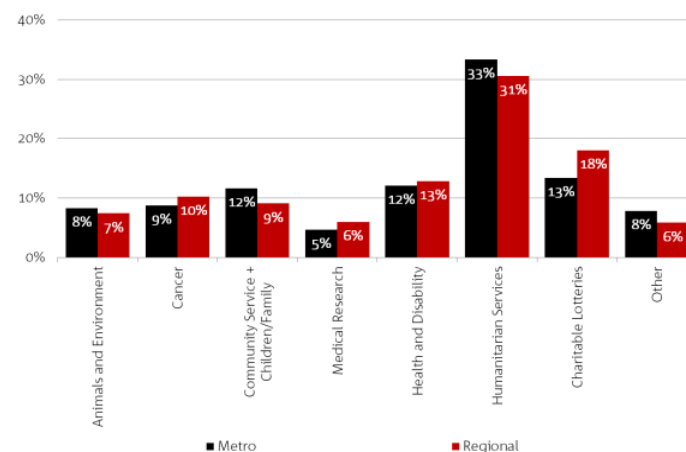
## MARKET SHARE OF TOTAL CHARITY DONATIONS

(12 months to August 2016)



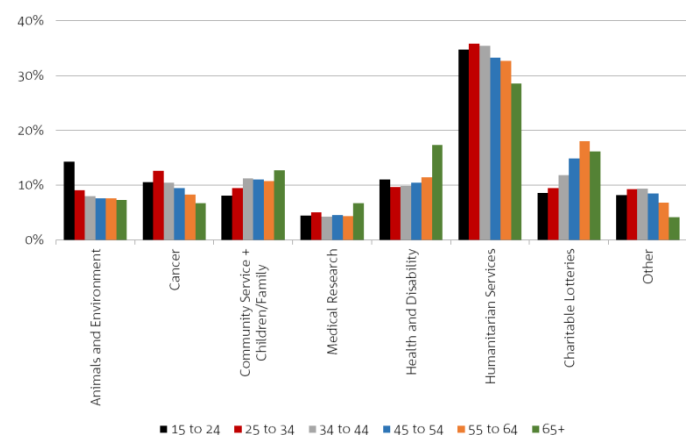
## MARKET SHARE OF TOTAL CHARITY DONATIONS BY REGION

(12 months to August 2016)



## MARKET SHARE OF TOTAL CHARITY DONATIONS BY AGE

(12 months to August 2016)



**The average annual donations per donor for all charities remained the same as last year at \$348, with higher average donations recorded in all charity sectors except Humanitarian Services**

Overall average donation size has remained the same as last year at \$348 per donor. Average donation sizes however did increase for all charity sectors except Humanitarian Services. Cancer charities saw the highest growth with 7.1% increase to \$152. Health and Disability was next with 4.1% growth to \$172. Humanitarian Services (\$433) still remain as the sector with the largest average donation size while Other charities (\$127) remain the smallest in terms of average donation size.

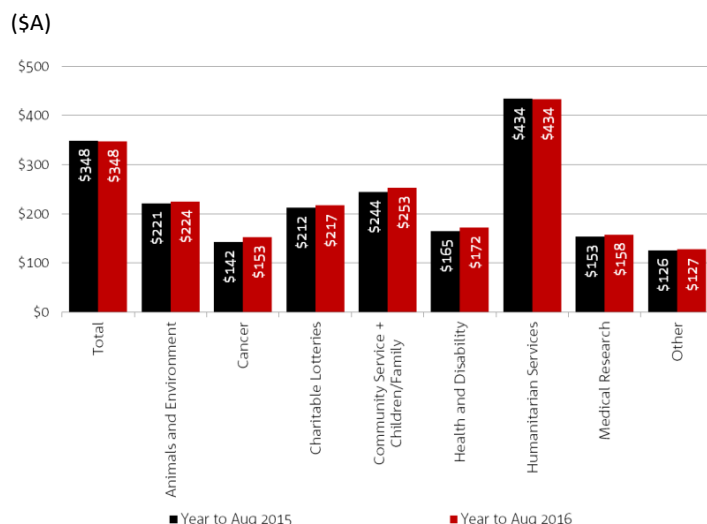
**Average donation size increased by most in SA. Still highest in NSW and still lowest in QLD**

Average donation size increased the most in SA (up \$11 to \$356) followed by ACT, NT & TAS (up \$9 to \$377). NSW saw flat average donation growth while WA (fell \$8 to \$320), QLD (fell \$2 to \$307) and VIC (fell \$2 to \$334) have shown decreases in average donations. Donors in NSW had the highest average donations (\$386) and average donation size was lowest in QLD (\$307). For further breakdowns of categories by states please see pages 9-15.

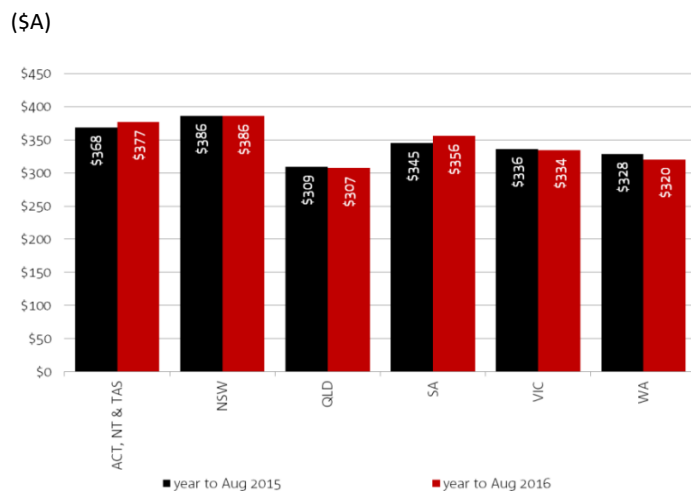
**Average donations down by \$1 to \$359 in metro and up \$1 in regional to \$316**

By region, average donations were down in metropolitan areas (down \$1 to \$359) and up in regional areas (up \$1 to \$316). Average donations were bigger in metropolitan areas compared to regional areas in all categories except Cancer and Charitable Lotteries. Overall, metropolitan donations were \$43 (13%) higher than regional areas, slightly down from the \$45 (14%) difference reported a year ago.

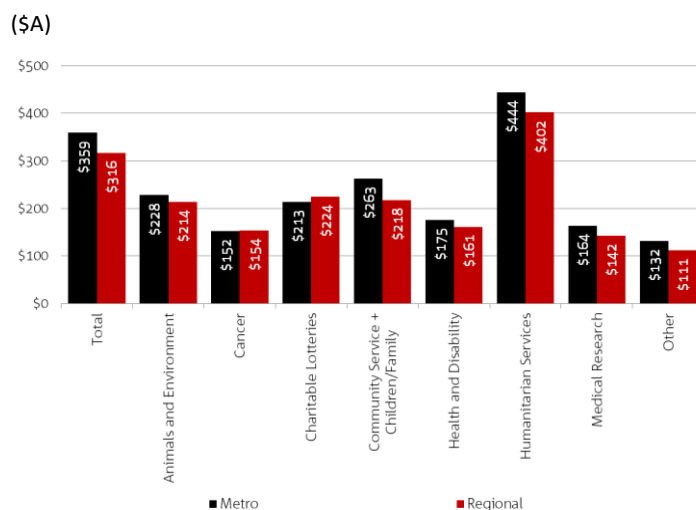
**AVERAGE ANNUAL DONATIONS PER DONOR**



**AVERAGE DONATION PER DONOR BY STATE**



**AVERAGE ANNUAL DONATIONS PER DONOR BY REGION**



### Average donation size typically increases with age in all charity categories

Average donation size tended to increase along with the age of the donor. Over the year to August 2016, total average donations ranged upwards from \$135 for 15 to 24 year olds to \$452 for over-65s. Comparing to last year, donation sizes fell slightly across all age groups with the exception of 55 to 64s.

### Bellevue Hill (2023) in NSW is the most generous postcode in Australia over the last year with an average donation of \$340 per capita.

Bellevue Hill (2023) has taken the mantle of the most generous postcode in Australia for charitable giving over the year to August 2016 with an average donation of \$340 per capita.

Hunters Hill (2110) was the next most generous postcode, donating \$319 per capita, followed by Middle Park (3206) with \$318, Mosman (2088) with \$291 and Deakin (2600) with \$275.

Not surprisingly, the 20 most generous postcodes are mostly in high-income areas. Indeed, the latest data from the Australian Taxation Office indicates an average taxable income of around \$125,000 in this group – more than double the national average of \$58,700.

O'Connor (2602) with an average income of \$68,500 and Fitzroy North (3068) with an average of \$73,350 were the notable exceptions in this group.

### Castlemaine (3450) in Victoria is the most generous when giving is expressed as a percentage of income, donating on average 0.36% of taxable income

A different picture of generosity continues to emerge when average donations are expressed as a percentage of the average taxable income for the postcode.

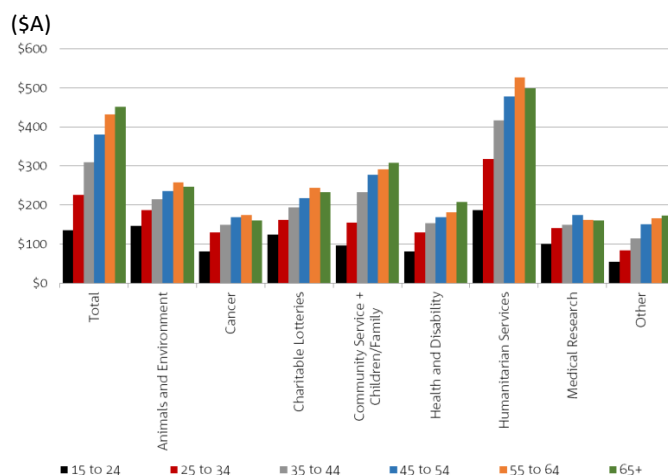
In this instance, Castlemaine (3450), with an average income of just \$42,650, is ranked as the most generous postcode in Australia, donating 0.36% of average income to charity.

Next most generous were Blaxland (2774) with average donations of 0.35% of income, Sturt (5047) with 0.35%, Blaxland (2774) with 0.34% and Glenelg South (5045) with 0.34%, Fitzroy North (3068) with 0.33%, and O'Connor (2602) with 0.33% falling just behind.

It is also notable that the 20 most generous postcodes by percentage of income donated, had an average taxable income of just under \$65,000.

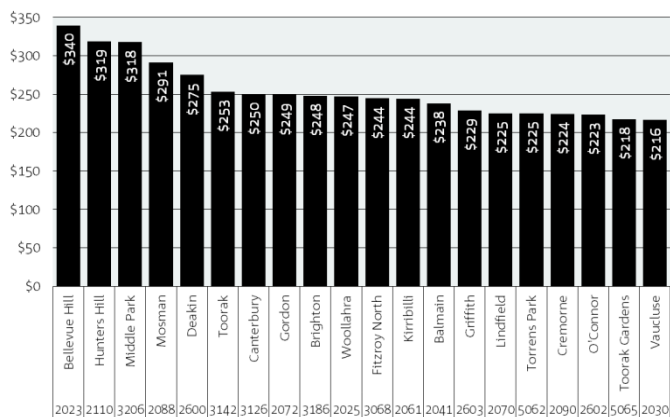
More detailed postcode rankings by state are provided on the following pages.

## AVERAGE ANNUAL DONATIONS PER DONOR BY AGE GROUP



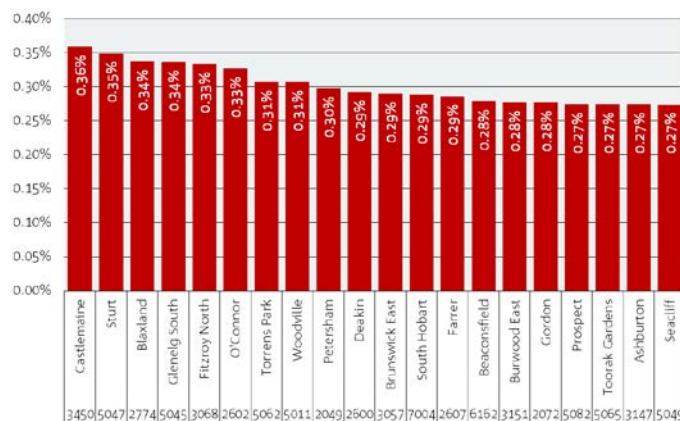
## TOP POST CODES FOR CHRITABLE GIVING: AUSTRALIA

(average donations per population, 12 months to Aug 2016)



## TOP POST CODES FOR CHRITABLE GIVING: AUSTRALIA

(as a % of income, 12 months to Aug 2016)

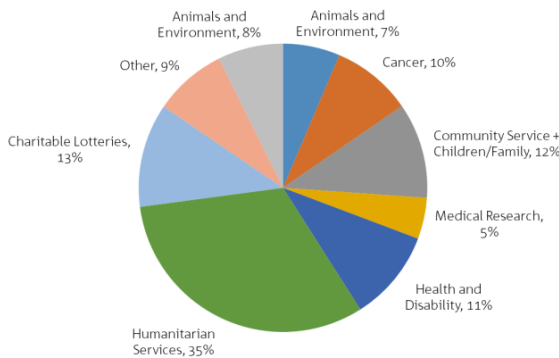




# NEW SOUTH WALES (NSW)

## MARKET SHARE OF DONATIONS, NSW

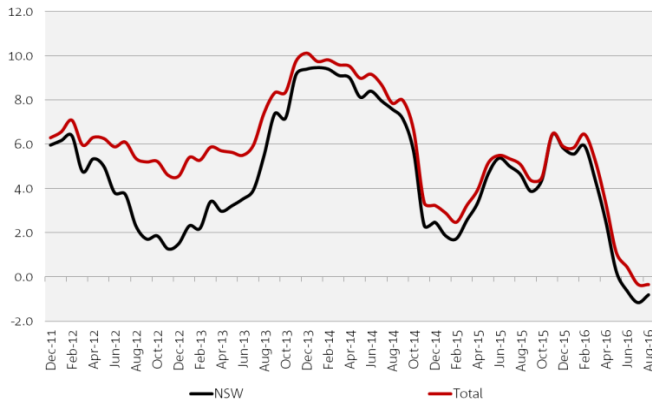
(12 months to August 2016)



Humanitarian Services charities attracted the biggest share of charitable giving (35%) in NSW, while Medical Research charities attracted the least (5%).

## GROWTH IN INDEX, NSW VS TOTAL

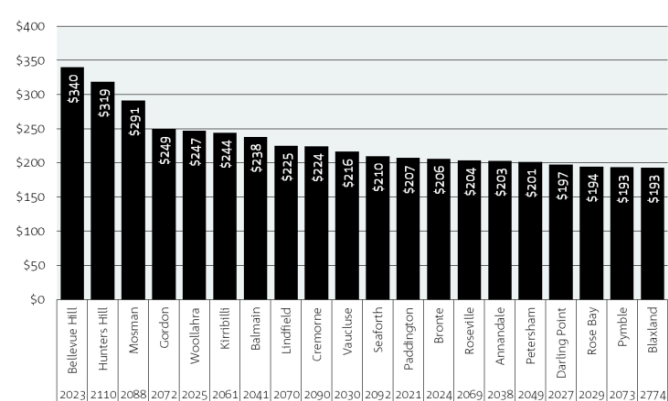
(percentage change, rolling 12 month year-on-year)



Charitable giving in NSW shrunk by 0.8% in the year to August 2016 (4.6% growth a year ago), slight more contraction than the national average.

## TOP 20 POSTCODES, NSW

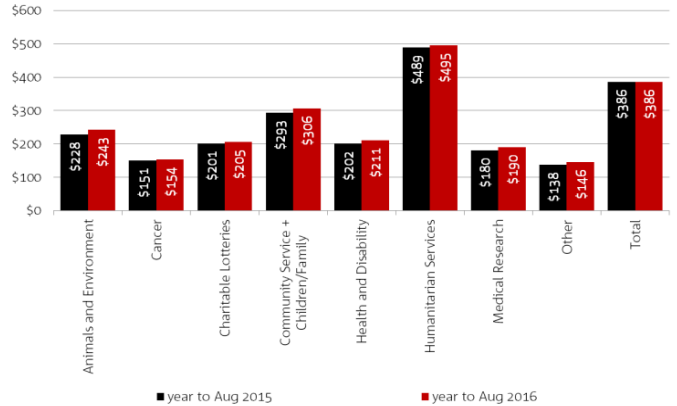
(average donations per population, 12 months to August 2016)



Bellevue Hill (\$340) and Hunters Hill (\$319) tops the state and the country for being the most charitable suburbs in dollar giving.

## AVERAGE DONATION PER DONOR, NSW

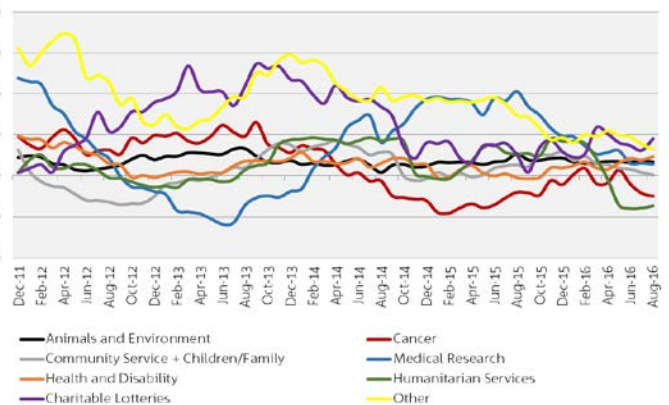
(\$A)



Average donation per donor remained same at \$386 in the year to August 2016. Average donation size increased for all charity sectors\*.

## GROWTH BY CATEGORY, NSW

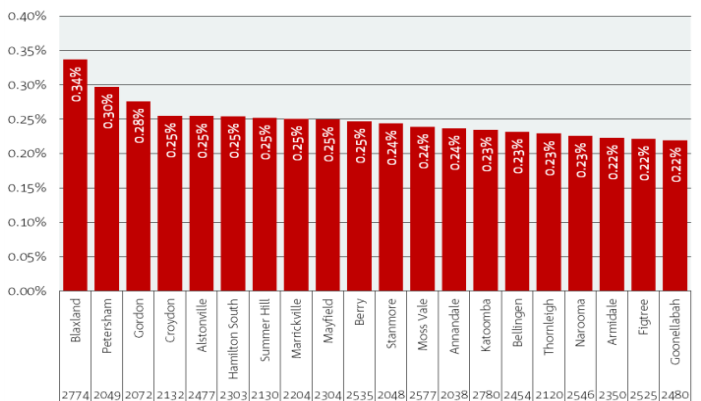
(percentage change, rolling 12 month year-on-year)



Giving increased in all charity categories except for Humanitarian Services (-7.3%) and Cancer charities (-5%). Highest growth was in Charitable Lotteries (9%).

## TOP 20 POSTCODES, NSW

(as a % of income, 12 months to August 2016)



While the suburbs of Blaxland and Petersham gave the most as a share of their incomes (0.34% and 0.30% respectively).

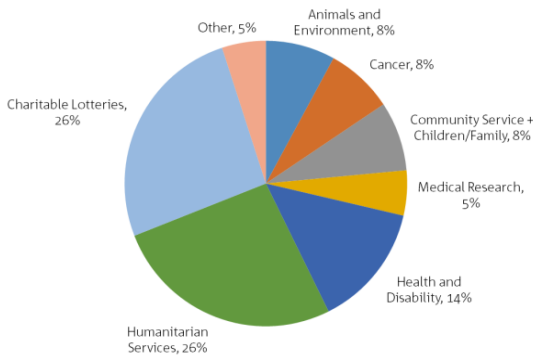
\* The Total columns represent weighted average donation size; therefore despite all sectors posting increases in average donations, the reduction in the largest sector (Humanitarian Services) have impacted the overall total average.



# QUEENSLAND (QLD)

## MARKET SHARE OF DONATIONS, QLD

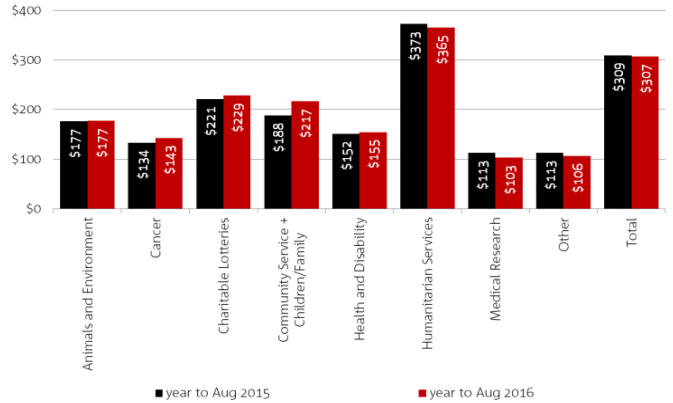
(12 months to August 2016)



Humanitarian Services charities attracted the biggest share of charitable giving (26%) in QLD, while Medical Research (5%) and Other (5%) charities attracted the least.

## AVERAGE DONATION PER DONOR, QLD

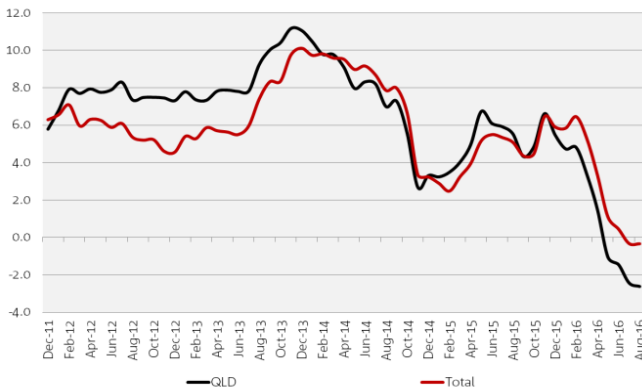
(\$A)



Average donation per donor fell to \$307 in the year to August 2016 (\$309 in August 2015), with donation sizes higher in all charity sectors except Humanitarian Services, Medical Research and Other.

## GROWTH IN INDEX, QLD VS TOTAL

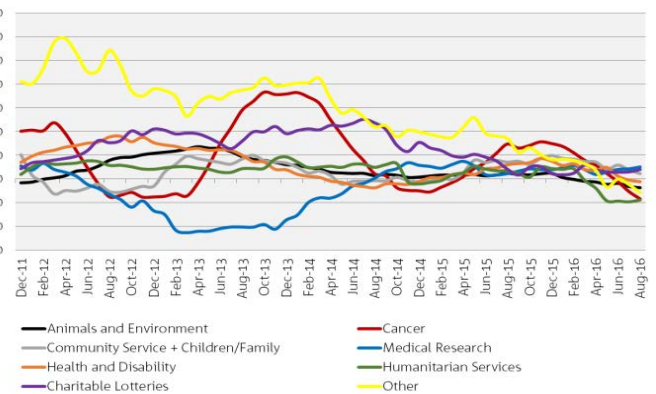
(percentage change, rolling 12 month year-on-year)



Charitable giving in QLD decreased by 2.6% in the year to August 2016 (5.5% growth a year ago) - posting the second highest rate of negative growth in Australia.

## GROWTH BY CATEGORY, QLD

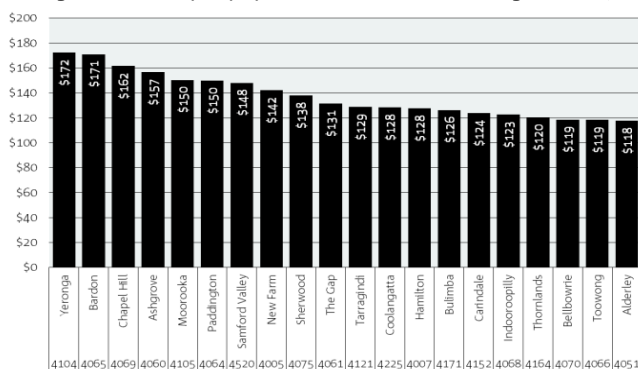
(percentage change, rolling 12 month year-on-year)



Giving fell in Humanitarian Services (-8.4%) and Cancer (8.4%) but grew in Medical Research (5%) and Charitable Lotteries (3.9%).

## TOP 20 POSTCODES, QLD

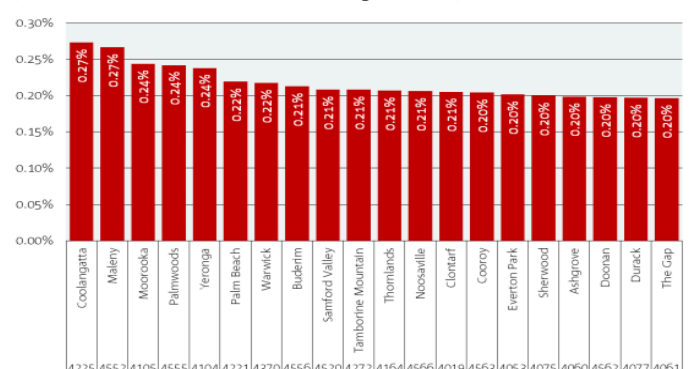
(average donations per population, 12 months to August 2016)



Yeronga with an average donation of \$172 per person and Bardon (\$171) were the most charitable suburbs in QLD for dollar giving.

## TOP 20 POSTCODES, QLD

(as a % of income, 12 months to August 2016)

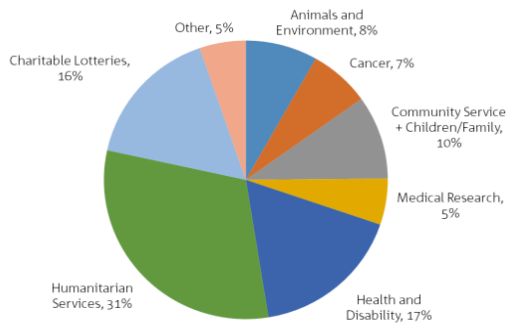


While the suburbs of Coolangatta and Maleny gave the most as a share of their incomes (~0.27%).

# SOUTH AUSTRALIA (SA)

## MARKET SHARE OF DONATIONS, SA

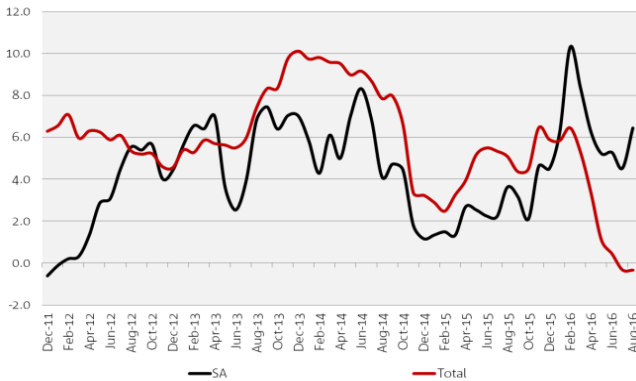
(12 months to August 2016)



Humanitarian Services charities attracted the biggest share of charitable giving (31%) in South Australia, while Medical Research (5%) and Other (5%) charities attracted the least.

## GROWTH IN INDEX, SA VS TOTAL

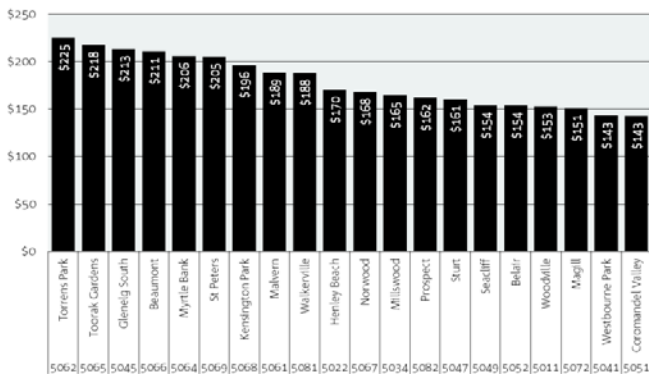
(percentage change, rolling 12 month year-on-year)



Charitable giving in South Australia grew 6.4% in the year to August 2016 (3.6% a year ago) – The state with the highest growth and only state with more growth than last year.

## TOP 20 POSTCODES, SA

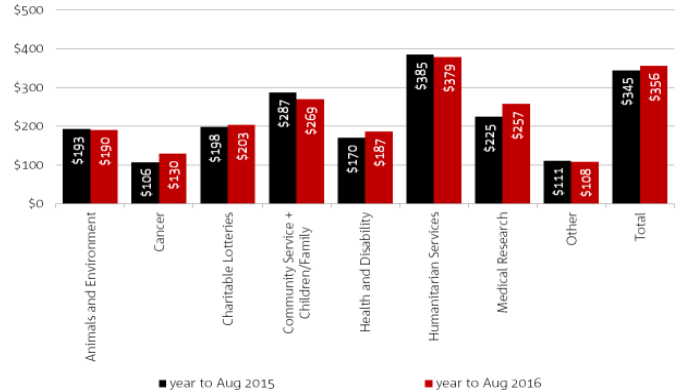
(average donations per population, 12 months to August 2016)



Torrens Park with an average donation of \$225 per person and Toorak Gardens (\$216) were the most charitable suburbs in South Australia for dollar giving.

## AVERAGE DONATION PER DONOR, SA

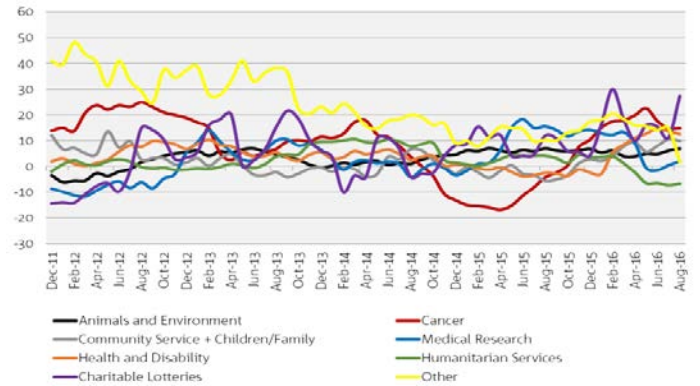
(\$)



Average donation per donor rose to \$356 in the year to August 2016 (\$345 in 2015), with donations higher in all charity sectors except Community Service & Children/Family, Animals & Environment and Other.

## GROWTH BY CATEGORY, SA

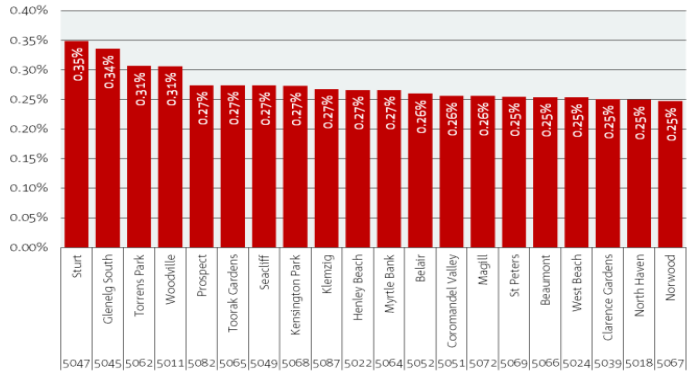
(percentage change, rolling 12 month year-on-year)



Giving increased in all categories except Humanitarian Services (-6.7%), growth is led by Charitable Lotteries (27.4%), Cancer (14.8%) and Health and Disabilities (12.5%).

## TOP 20 POSTCODES, SA

(as a % of income, 12 months to August 2016)

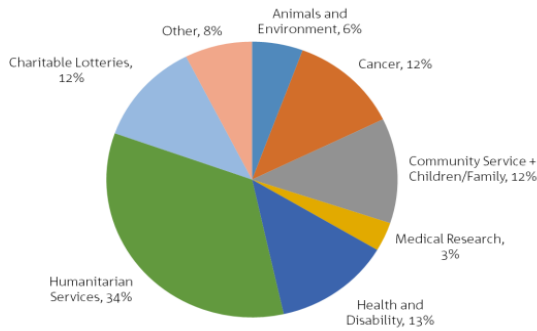


While the suburbs of Sturt and Glenelg South gave the most as a share of their incomes (0.35%, 0.34% respectively).

# WESTERN AUSTRALIA (WA)

## MARKET SHARE OF DONATIONS, WA

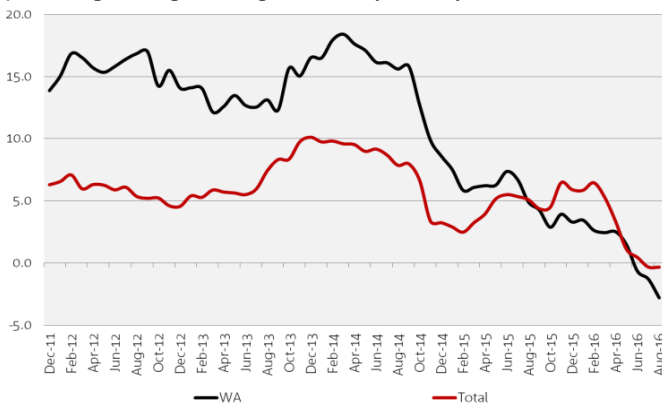
(12 months to August 2016)



Humanitarian Services charities attracted the biggest share of charitable giving (34%) in WA, while Medical Research (3%) charities attracted the least.

## GROWTH IN INDEX, WA VS TOTAL

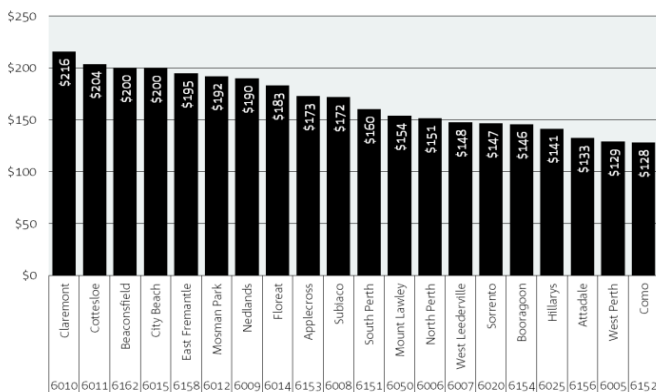
(percentage change, rolling 12 month year-on-year)



Charitable giving in WA shrunk by to 2.8% in the year to August 2016 (4.9% growth a year ago) – the highest rate of decline in the giving index out of all Australian states.

## TOP 20 POSTCODES, WA

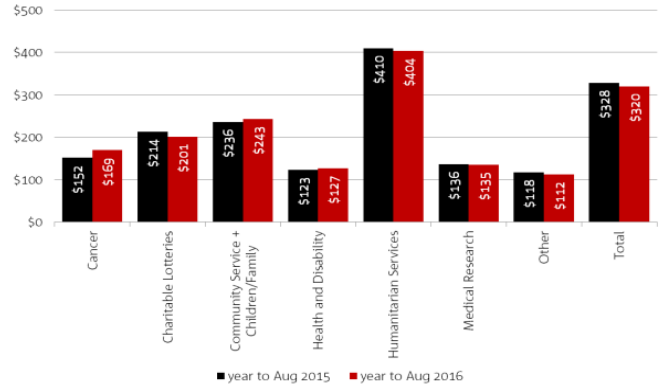
(average donations per population, 12 months to August 2016)



Claremont with an average donation of \$216 per person and Cottesloe (\$204) were the most charitable suburbs in WA for dollar giving.

## AVERAGE DONATION PER DONOR, WA

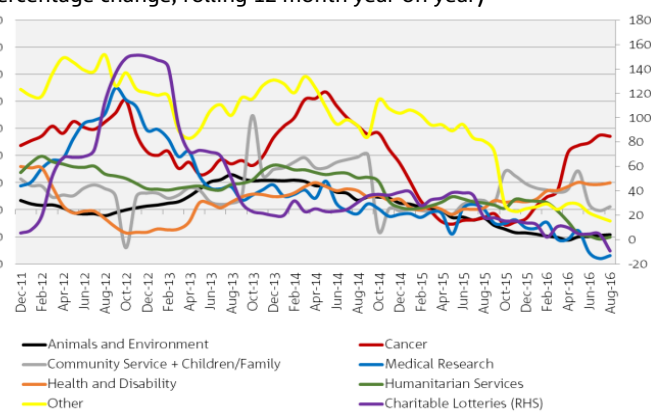
(\$A)



Average donation per donor fell to \$320 in the year to August 2016 (\$328 in 2015), with donations lower in all Humanitarian Services and Charitable Lotteries.

## GROWTH BY CATEGORY, WA

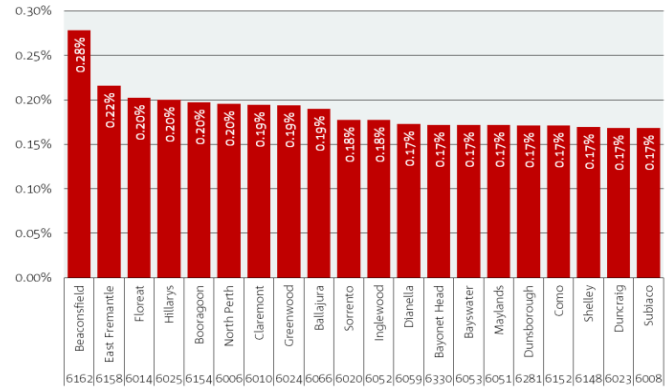
(percentage change, rolling 12 month year-on-year)



Consequently, donations across all sectors in WA fell with the notable exception of Cancer charities which grew at a remarkable rate of 27.1%.

## TOP 20 POSTCODES, WA

(as a % of income, 12 months to August 2016)

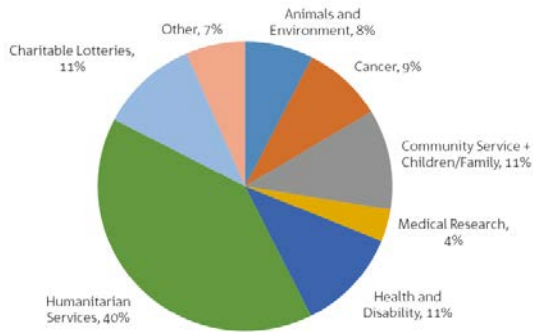


While the suburb of Beaconsfield (0.28%) ranked number 1 in terms of % giving, East Fremantle (0.23%), Floreat (0.20%) Hillarys (0.20%) were the next highest.

# AUSTRALIAN CAPITAL TERRITORY, NORTHERN TERRITORY & TASMANIA (ACT, NT & TAS)

## MARKET SHARE OF DONATIONS, ACT, NT & TAS

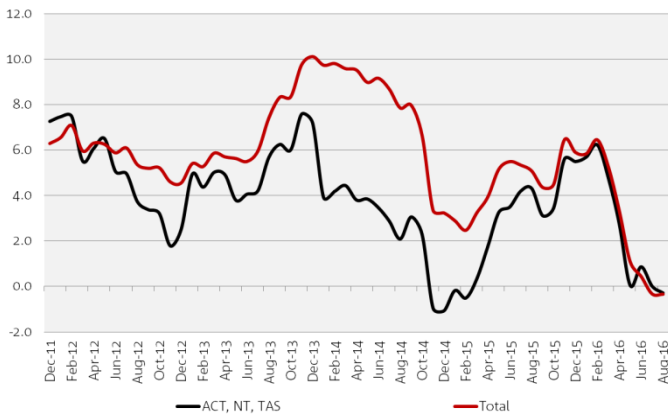
(12 months to August 2016)



Humanitarian Services charities attracted the biggest share of charitable giving (40%) in the ACT, NT & TAS, while Medical Research (4%) charities attracted the least.

## GROWTH IN INDEX, ACT, NT & TAS VS TOTAL

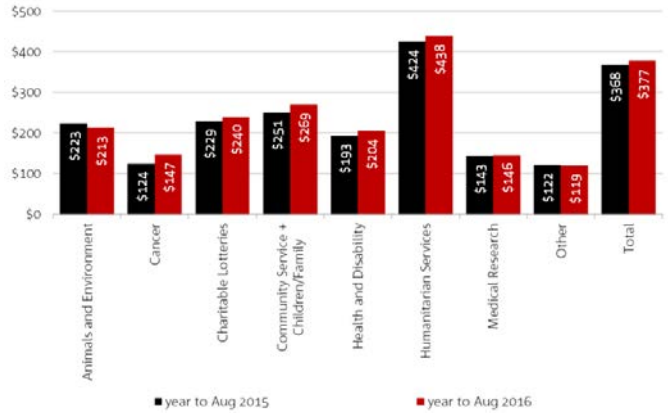
(percentage change, rolling 12 month year-on-year)



Charitable giving in the ACT, NT & TAS fell by 0.3% in the year to August 2016 (4.3% growth a year ago) – falling by the same rate as Australian as a whole.

## AVERAGE DONATION PER DONOR, ACT, NT & TAS

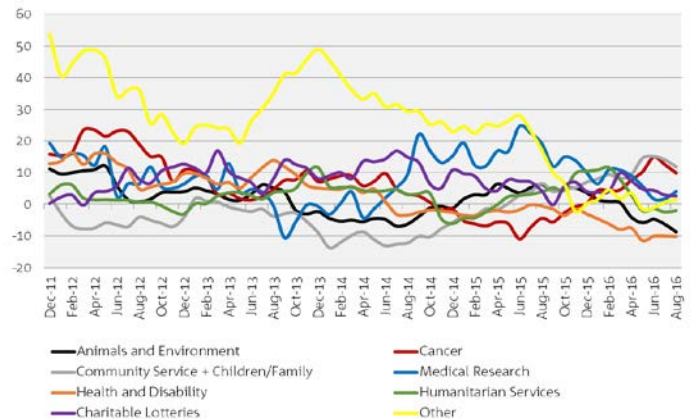
(\$A)



Average donation size has risen to \$377 (\$368 in 2015), with donations higher in all sectors except Animals & Environment and Other.

## GROWTH BY CATEGORY, ACT, NT & TAS

(percentage change, rolling 12 month year-on-year)

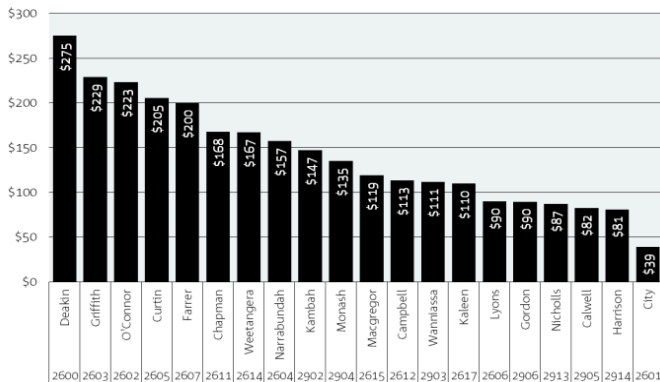


Giving increased in Cancer, Community Service & Children/Family, Medical Research, Charitable Lotteries; Declined in Animals & Environment, Health & Disability and Humanitarian Services.

# AUSTRALIAN CAPITAL TERRITORY, NORTHERN TERRITORY & TASMANIA (ACT, NT & TAS)

## TOP 20 POSTCODES, ACT

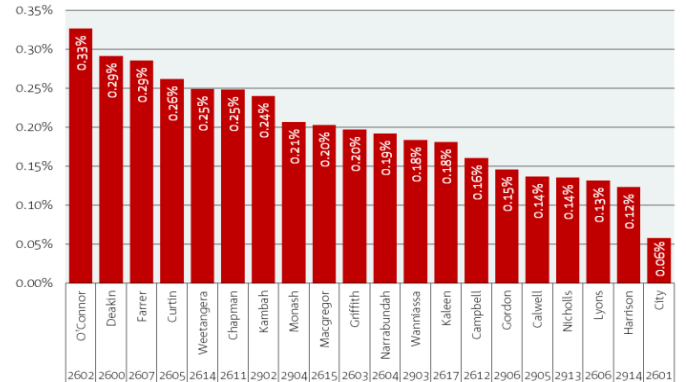
(average donations per population, 12 months to August 2016)



Deakin with an average donation of \$275 per person and Griffith (\$229) were the most charitable suburbs in the ACT for dollar giving.

## TOP 20 POSTCODES, ACT

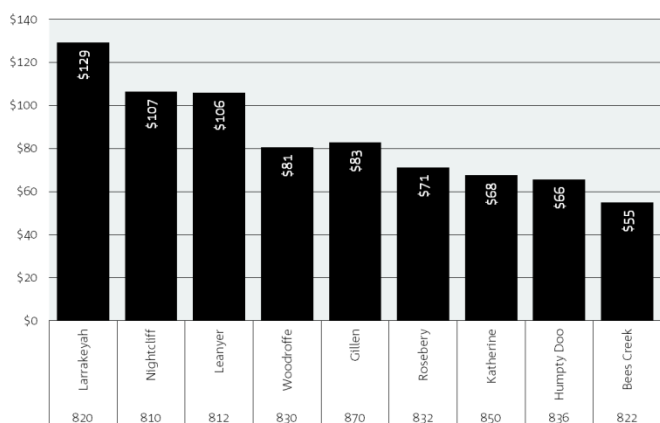
(as a % of income, 12 months to August 2016)



While the suburbs of O'Connor and Farrer gave most as a share of their incomes (0.33% and 0.29% respectively).

## TOP 20 POSTCODES, NT

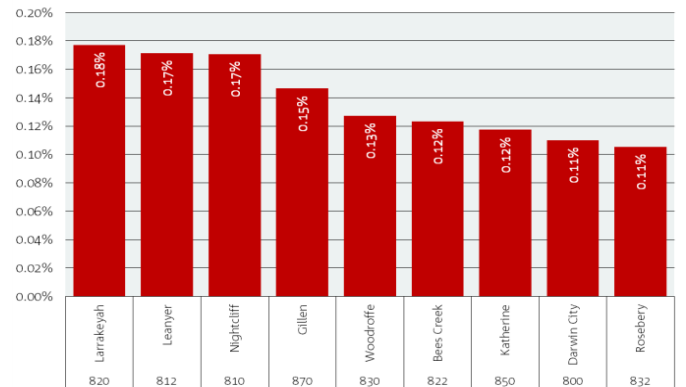
(average donations per population, 12 months to August 2016)



Larrakeyah with an average donation of \$129 per person and Nightcliff (\$99) were the most charitable suburbs in the NT for dollar giving.

## TOP 20 POSTCODES, NT

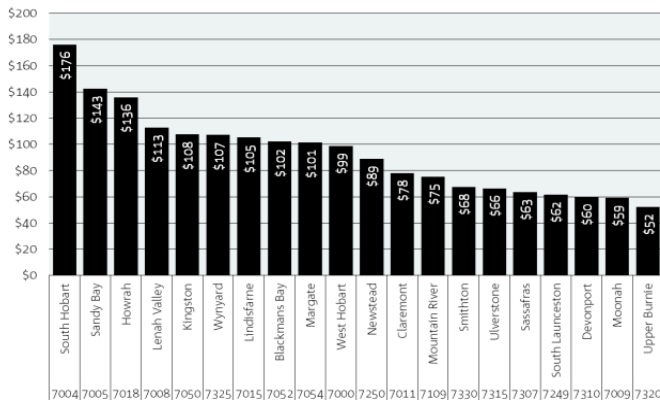
(as a % of income, 12 months to August 2016)



While the suburbs of Larrakeyah, Leanyer and Nightcliff gave most as a share of their incomes (0.18%, 0.17% and 0.17% respectively).

## TOP 20 POSTCODES, TAS

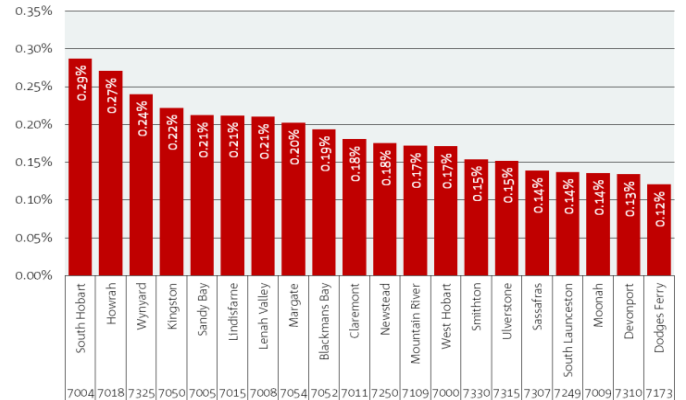
(average donations per population, 12 months to August 2016)



South Hobart with an average donation of \$176 per person and Sandy Bay (\$143) were the most charitable suburbs in TAS for dollar giving.

## TOP 20 POSTCODES, TAS

(as a % of income, 12 months to August 2016)



While the suburbs of South Hobart and Howrah gave the most as a share of their incomes (0.29% and 0.27% respectively).

To discuss this report in more detail, please speak with your NAB Relationship Manager, email [community@nab.com.au](mailto:community@nab.com.au), or contact:

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