

NAB CHARITABLE GIVING INDEX

In-depth report: 12 months to February 2016



Chart 1: Growth in NAB Charitable Giving Index (percentage change, year-on-year)

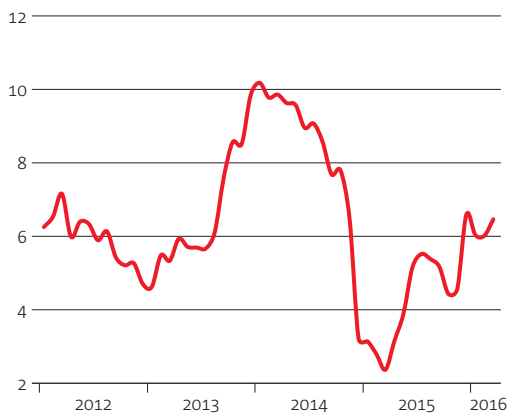


Table 1: Charity categories

Category	Examples of charities included
Animals & Environment	RSPCA; WWF Australia; Australian Conservation Foundation
Cancer	Cancer Council; The Movember Group; Peter MacCullum Cancer Centre
Community Services & 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*	yourtown Lottery; Mater Prize Home; RSL Art Union
Other*	Everyday Hero; Go Fundraise; mycause.com.au

*Charitable Lotteries has been extracted from the "Other" charities and will now feature as a standalone category.

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

■ Welcome to the latest edition of the NAB Charitable Giving Index.

Giving to charity increased by 6.5% over the year to February 2016, up from just 2.4% a year earlier. A resilient economy, solid employment growth, strong household consumption and lower levels of consumer anxiety helped support the charity sector and the ongoing generosity of Australians.

Despite the challenges facing some states as the economy rebalances post the mining boom, it was particularly heartening to see charitable giving grow in all states, led by Victoria and South Australia, and in all charity sectors.

Not only did the rate of donations growth accelerate, but those who donated gave more, with the average donation size up \$12 to \$348 per donor. Average donations increased in all states except WA, in metropolitan and regional areas and in all age groups except 15 to 24 year olds – a group facing major employment challenges, which may have impacted their ability to give.

In this edition, we also release for the first time detailed state data, including market share, average donation size and growth by charity sector – and it reveals some notable differences in charity behaviours across the states.

Alan Oster, Group Chief Economist, NAB

■ At NAB we recognise and respect the vital role that the not-for-profit (NFP) sector plays in the functioning of our economy and society. While it is pleasing to see the lift in charitable giving in the year to February 2016, demand for services from NFPs is increasing and funding pressure from overall revenue sources is on the rise.

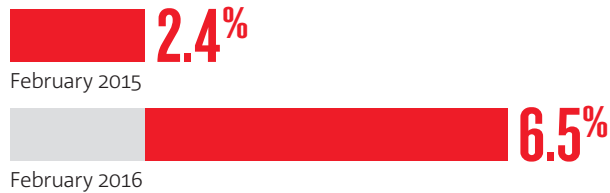
The lift in charitable giving bodes well for philanthropy as a NFP revenue source. We continue to work with the NFP sector and business to support not only philanthropic activity but also innovation, with the ultimate goal of diversifying revenue streams to build a vibrant and sustainable NFP sector for future generations.

The NAB Charitable Giving Index, which offers unique insights and data to help NFPs develop their philanthropic fundraising strategies, is one of a number of key initiatives by NAB to help deliver on this goal.

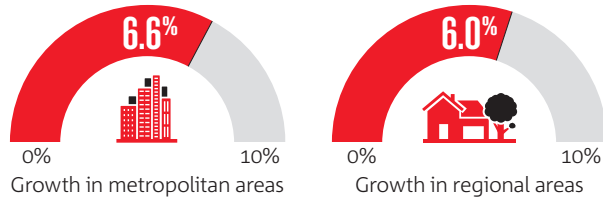
Jodi Geddes, General Manager of Corporate Responsibility, NAB

AT A GLANCE

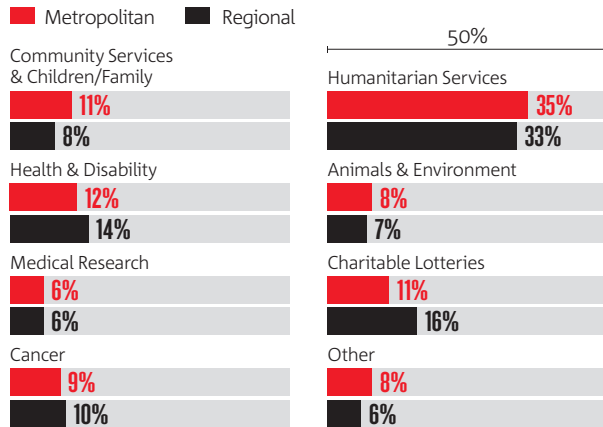
Growth in charitable giving (% change, annual)



Growth by location (February, year-on-year)

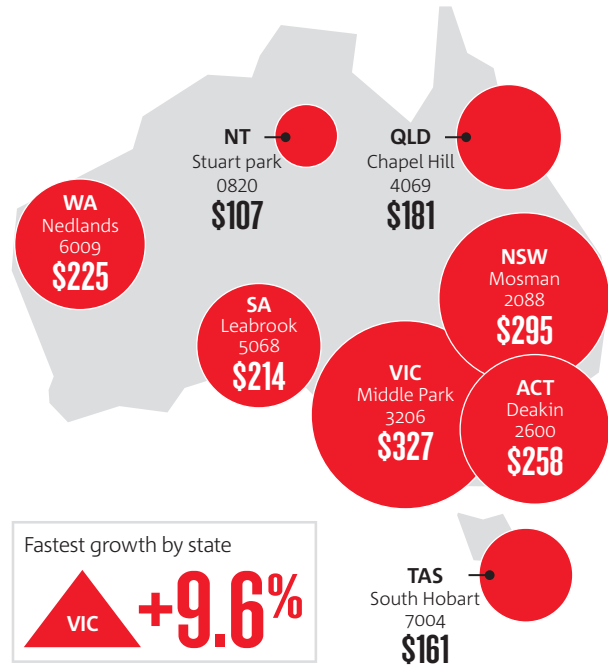


Market share of total charity donations by region



Top postcodes for charitable giving by state

(average donated per person)



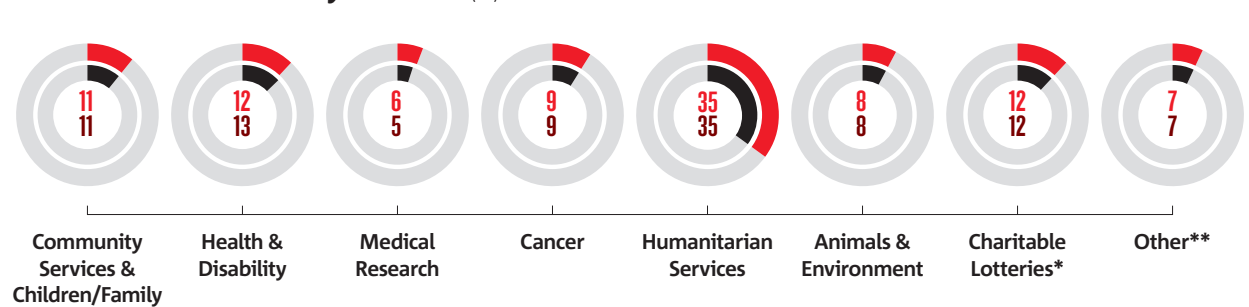
Fastest growth by state



Average annual donation size



Market share of total charity donations (%)



*Charitable Lotteries has been extracted from the "Other" charities and will now feature as a standalone category.
 **Other includes charity aggregators and other charities that do not fit into any of the categories above.

KEY FINDINGS: NATIONAL

- The rate of growth in charitable giving increased over the year to February 2016, with NAB’s Charitable Giving Index up 6.5% (from only 2.4% in the year to February 2015).
- A resilient economy, an improvement in employment growth, strong household consumption and lower levels of consumer anxiety supported more positive charity spending behaviours in the past year.
- Charitable giving grew in all states – and at faster rates than in the previous year – except in WA. Growth was fastest in VIC (9.6%) and SA (9.1%) and slowest in WA (2.5%).
- Giving grew in metropolitan (6.6%) and regional (6%) areas, was fastest for over-65s (12%) and accelerated in all other age groups, except for 15 to 24 year olds where it contracted 4.5%.
- By category, Medical Research (17.2%) outperformed, supported by exceptional growth in VIC (37.2%) and SA (34%). Cancer experienced the biggest turnaround, growing 5.1% and reversing a 6% decline last year. Growth was slowest for Animals & Environment (1.6%), albeit stronger than in 2015, and was slower than in 2015 for Charitable Lotteries (3.5%) and Other charities (11.2%).
- Humanitarian Services continued to dominate market share for charitable giving with 35% of total donations, followed by Health and Disability and Charitable Lotteries (12% each), Community Services & Children/Family (11%), Cancer (9%), Animals & Environment (8%) and Other charities (7%). Medical Research (6%) had the smallest market share.
- Average donation size increased \$12 (or 3.5%) to \$348 per donor and was higher in all charity sectors led by Medical Research (up 11.4% to \$161), Cancer (up 10.7% to \$149) and Health & Disability (up 6.4% to \$166). Average donation size was biggest – by some margin – for Humanitarian Services (\$435) and smallest for Other charities (\$124).

- Average donation size increased in all states except WA (down \$2 to \$320). NSW had the highest average donation (\$386), but donation size increased most in SA (up \$21 or 6.2% to \$358) and was lowest in QLD (\$309). By region, donation size increased in metropolitan (up \$12 to \$359) and regional (up \$11 to \$317) areas and in all age groups except 15 to 24 year olds.
- Middle Park (3206) was the most generous postcode in Australia for charitable giving, with an average donation of \$327 per person. Mosman (2088) was next with \$295, followed by Hunters Hill (2110) with \$279, Toorak (3142) with \$267 and Deakin (2600) with \$258.
- By share of income, Castlemaine (3450) was the most generous, donating 0.36% of average income to charity. Next most generous on this measure were Blaxland (2774) with donations of 0.35% of average income, Fitzroy North (3068) with 0.33%, and Brunswick East (3057), O’Connor (2602) and Sturt (5047) with 0.32%.

Table 2: Key NAB Charitable Giving Statistics

	Index (annual average)		% change (annual)	
	Feb-15	Feb-16	Feb-15	Feb-16
NAB Charitable Giving Index	140.1	149.2	2.4	6.5
Animals & Environment	120.5	122.5	1.7	1.6
Cancer	285.6	300.2	-6.0	5.1
Community Services/Children & Family	173.3	185.6	-1.4	7.1
Medical Research	182.3	213.7	9.8	17.2
Health & Disability	191.3	201.0	0.5	5.1
Humanitarian Services	92.9	99.1	-0.8	6.7
Charitable Lotteries	168.1	174.0	13.4	3.5
Other	657.3	730.7	19.5	11.2

“The large portion of donations being directed towards Humanitarian charities is evidence that these causes continue to resonate the most with Australians, who have also responded generously to emergency relief appeals over the past year (such as the Nepal Earthquake and Cyclone Pam appeals).”

Tony Davis, Quantum

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.

KEY FINDINGS: BY STATE

New South Wales (NSW)

- Charitable giving grew 6.3% (1.2% in 2015), in line with the Australian average.
- Humanitarian Services had the biggest market share (37%); Medical Research (5%) the smallest.
- The average donation per donor rose to \$386 (\$369 in 2015) – the highest of all states.
- Mosman (\$295) was the most charitable suburb for dollar giving; Blaxland (0.35%) by income.

Victoria (VIC)

- Charitable giving grew 9.6% (2.1% in 2015) – fastest of all states.
- Humanitarian Services had the biggest market share (35%); Medical Services (6%) the smallest.
- The average donation per donor rose to \$335 (\$325 in 2015).
- Middle Park (\$327) was the most charitable suburb for dollar giving; Castlemaine (0.36%) by income.

Queensland (QLD)

- Charitable giving grew 4.7% (3.4% in 2015) – below the Australian average.
- Humanitarian Services had the biggest market share (28%); Medical Research (5%) and Other (5%) charities the smallest.
- The average donation per donor rose to \$309 (\$298 in 2015) and was lowest of all states.
- Chapel Hill (\$181) was the most charitable suburb for dollar giving; Maleny (0.28%) by income.

South Australia (SA)

- Charitable giving grew 9.1% (1.4% in 2015) – a new state high.
- Humanitarian Services had the biggest market share (33%); Charitable Lotteries (6%) and Other (6%) the smallest.
- The average donation per donor rose to \$358 (\$337 in 2015).
- Leabrook (\$214) was the most charitable suburb for dollar giving; Sturt (0.32%) by income.

Western Australia (WA)

- Charitable giving slowed to 2.5% (5.9% in 2015) – the slowest of all states.
- Humanitarian Services had the biggest market share (37%); Medical Services (4%) the smallest.
- The average donation per donor fell to \$320 (\$322 in 2015).
- Nedlands (\$225) was the most charitable suburb for dollar giving; South Fremantle (0.23%) by income.

Australian Capital Territory, Northern Territory & Tasmania (ACT, NT & TAS)

- Charitable giving grew 6.3% (–0.4% in 2015) – broadly in line with the Australian average.
- Humanitarian Services had the biggest market share (42%); Medical Services (4%) the smallest.
- The average donation per donor rose to \$372 (\$355 in 2015).
- Deakin ACT (\$258), Stuart park NT (\$107) and South Hobart TAS (\$161) were the most generous suburbs for dollar giving; O'Connor ACT (0.32%), Nightcliff NT (0.16%) and Howrah TAS (0.28%) the most generous by income.

Charitable giving growth has accelerated

The rate of growth in charitable giving in Australia increased over the year to February 2016, with NAB’s Charitable Giving Index rising by 6.5% (up from only 2.4% over the year to February 2015).

Economy is providing support, with consumer anxiety falling

The economic environment looks to have provided some solid support for the charity sector, with recent GDP growth figures providing reassurance that the Australian economy has remained resilient against an uncertain global backdrop and weak commodity prices.

Moreover, household consumption has been strong, possibly a reflection of the sustained improvement in employment growth over 2015. Consumption was also supported by a notable decline in the household savings ratio – which dipped to its lowest level since the GFC – and provided some offset to slow growth in household income.

NAB’s Consumer Behaviour Surveys also suggest that consumer anxiety has been falling steadily in recent quarters. Significantly, consumer stress relating to cost of living pressures, while still elevated, has fallen for four consecutive quarters and remains below long-term average levels.

And positively influencing the charitable spending behaviours of Australian consumers

With overall anxiety levels easing, consumers appear to have responded positively in their charitable spending behaviours. Chart 4 indicates that fewer consumers have been cutting back on their charity spending over the past year.

Of course, consumer anxiety levels and spending behaviours vary across states. But the latest NAB Consumer Behaviour Survey also shows that consumer anxiety is now below long-term average levels in states except WA, and that fewer consumers are also cutting back charity spending in all states except Tasmania.

With this in mind, it was heartening to see charitable giving grow in all states over the year to February 2016, and at faster rates than in the previous year in all states except WA (see pages 11–20 for details on individual states).

“Australians continue to be increasingly giving towards charities, with more Australians donating, and a higher amount being donated per year on average.”

Tony Davis, Quantum

Chart 2: Growth in NAB Charitable Giving Index (percentage change, year-on-year)

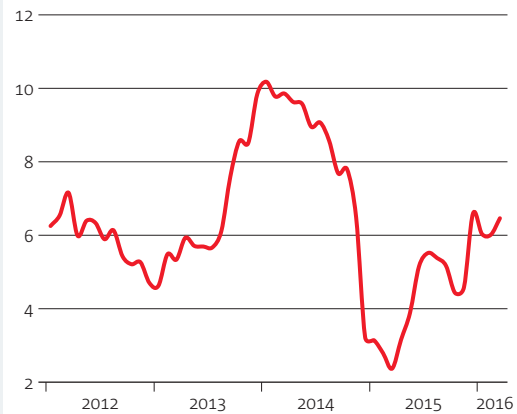


Chart 3: NAB Consumer Anxiety Index (score out of 100 where 0 = ‘nil’ anxiety and 100 = ‘extreme’ anxiety)

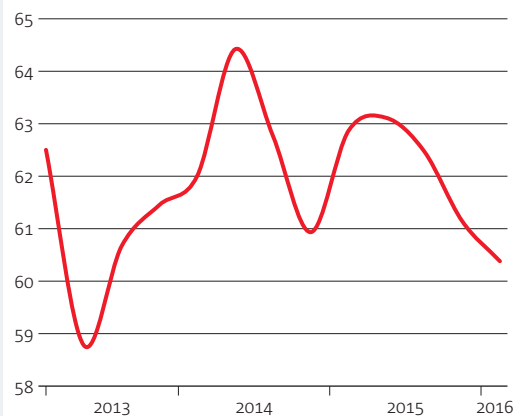


Chart 4: Changes in charitable spending behaviours (net balance)

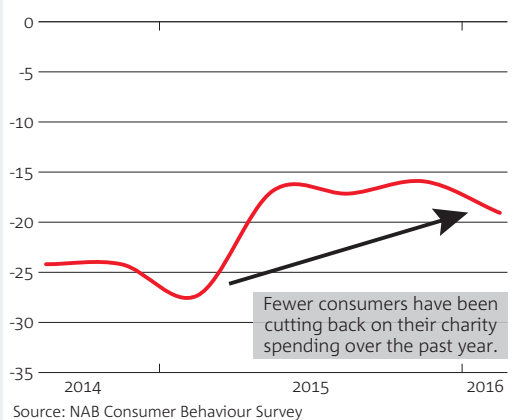


Chart 5: Growth in Charitable Giving Index by state (percentage change, year-on-year)

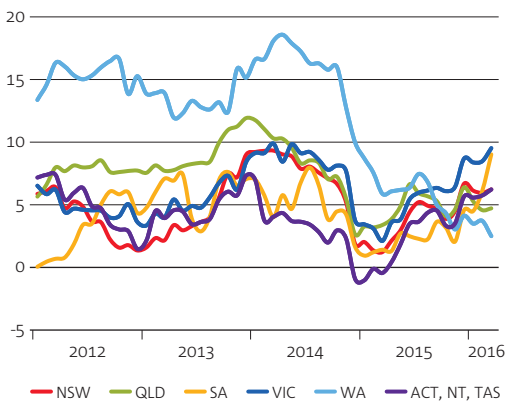


Chart 6: Growth in Charitable Giving Index by region (percentage change, year-on-year)

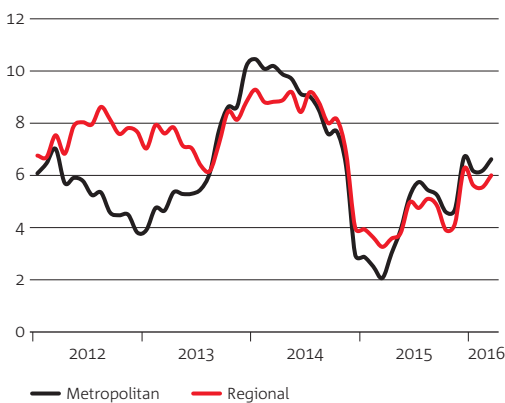
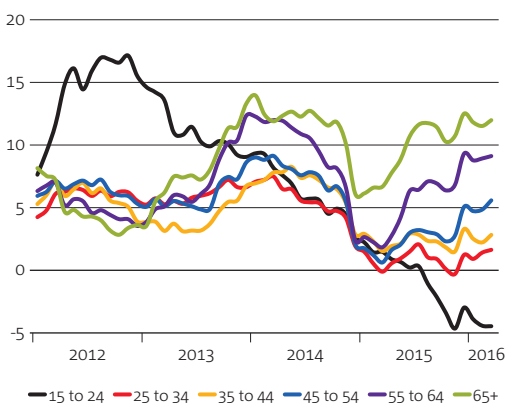


Chart 7: Growth in Charitable Giving Index by age (percentage change, year-on-year)



Charitable giving grew in all states, led by Victoria and South Australia

Charitable giving grew in all states, with the fastest rates of growth recorded in Victoria (9.6%) and – despite some economic difficulties – South Australia (9.1%). In both states, growth was significantly faster than in the previous year (2.1% and 1.4% respectively).

NSW (6.3%), the ACT, NT & Tasmania combined (6.3%) and Queensland (4.7%) were the next strongest performers, with growth also faster than year-earlier levels.

In contrast, charitable giving in WA slowed to 2.5%, down from 5.9% a year earlier and a peak of around 18% during early 2014, as the mining investment boom started to slow. This has exerted significant downward pressure on the labour market, wages and consumer confidence, and also looks to have impacted on donations behaviour.

Charitable giving from metropolitan areas outpacing growth in regional areas

In terms of location, charitable giving has accelerated in both metropolitan and regional areas to 6.6% and 6.0% respectively. This was up from 2.1% and 3.3% in the previous year to February 2015. Charitable giving from metropolitan areas has now been outpacing that from rural areas since April 2015.

These results correspond with NAB’s Consumer Behaviour research, which suggests more consumers living in regional areas are showing a greater inclination to cut back on charitable donations than those living in capital cities.

Over-65s leading growth in charitable giving, with donations also growing in all other age groups except 15 to 24 year olds

A clear relationship has emerged between donor age and the rate of growth in charitable giving. Growth was strongest for over-65s (12%) and was significantly faster than year-earlier levels (6.7%). It also accelerated in all other age groups except for the youngest Australians (15 to 24), where it contracted 4.5% after growing 1.5% in the previous year.

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.

All charity sectors enjoyed positive rates of growth over the year, but some more than others. Medical Research and Other charities experienced the fastest growth in donations and Animals & Environment the slowest

Nearly all charity categories experienced faster growth in giving over the year to February 2016, with the exceptions of Charitable Lotteries and Other charities.

That said, Other charities remained one of the fastest growing sectors overall, enjoying an increase of more than 11% over the year. In contrast, giving to Charitable Lotteries slowed to 3.5%, after having grown by over 13% in the previous year.

Overall, charitable giving grew fastest in the Medical Research sector, which reported a 17.2% increase in giving over the year to February 2016 (9.8% in the previous year). This was led by exceptionally rapid donations growth to this sector in both Victoria (37.2%) and South Australia (34%).

The biggest turnaround in giving growth was seen in Cancer charities, where growth accelerated to 5.1%, reversing a 6% decline in the year to February 2015 when it lagged all other sectors. This improvement was led by a notable turnaround in South Australia (where giving to Cancer charities grew by almost 18% after falling by 15.5% in the previous year) and in Queensland (11.4%), which offset a 1.2% contraction in Victoria.

Donations growth was weakest for Animals & Environment charities, with giving up just 1.6% (broadly unchanged from the previous year), as modest growth in most states was offset by a 9.7% contraction in charitable giving to this sector in WA and a 0.2% fall in Queensland.

Chart 8: Growth in Charitable Giving Index by category (percentage change, year-on-year)

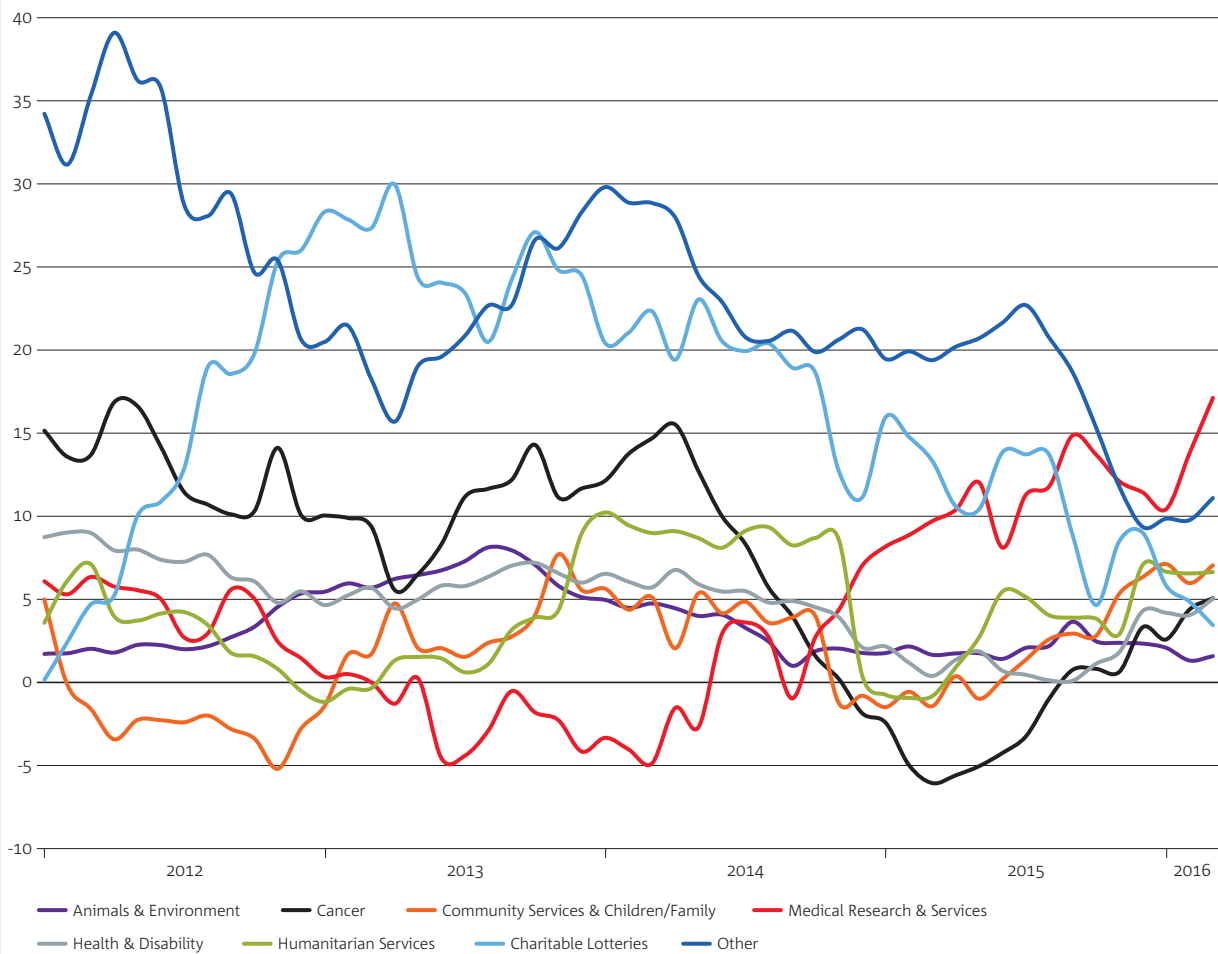
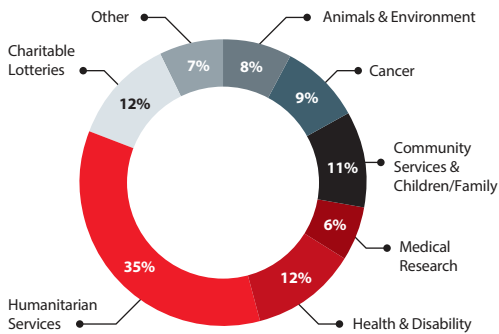


Chart 9: Market share of total charity donations (12 months to February 2016)



Humanitarian Services charities continue to enjoy the lion’s share of total donations

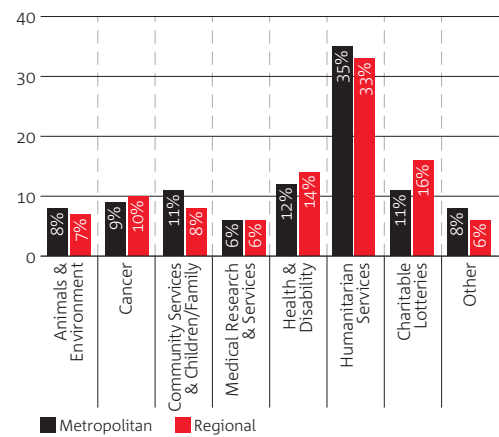
Market share by charity category was broadly unchanged across all categories over the year to February 2016.

Humanitarian Services continued to dominate overall market share for charitable giving with 35% of total donations.

Health & Disability and Charitable Lotteries held the second biggest share with 12% each, followed by Community Services & Children/Family (11%), Cancer (9%), Animals & Environment (8%) and Other charities (7%).

Humanitarian Services also attracted the biggest share of donations in metropolitan (35%) and regional (33%) areas.

Chart 10: Market share of total charity donations by region (12 months to February 2016)



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

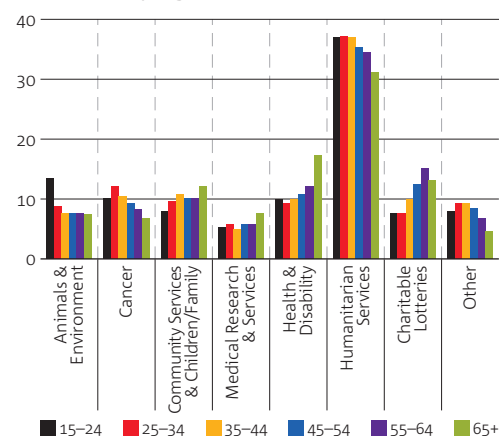
Regional areas however allocated a much bigger share of their total donations to Charitable Lotteries than metropolitan areas (16% versus 11%), while metropolitan areas gave more to Community Services & Children/Family charities (11% versus 8%).

Allocations were broadly similar across all other charity categories.

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 37% for 15 to 44 year olds to just 31% for over-65s.

Chart 11: Market share of total charity donations by age (% , 12 months to February 2016)



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

Over-65s allocated notably more of their charity donations to Health & Disability charities, at around 18% compared to between 9% and 12% across all other age groups. They also allocated the biggest share to Community Services & Children/Family (12%) and Medical Research (8%) charities.

In contrast, 15 to 24 year olds allocated a much larger share to Animals & Environment charities (14%) relative to all other groups (between 7% and 9%), while 25 to 34 year olds gave the biggest share to Cancer (12%). Donors aged between 55 and 64 gave the biggest share to Charitable Lotteries (15%).

A breakdown of market share by state is provided on pages 11–20.

The average annual donation for all charities increased by \$12 over the past year to \$348, with higher donations recorded in all charity sectors

Average donation size has increased by \$12 (or 3.5%) to \$348 per donor. Average donation size increased in all charity sectors, led by Medical Research (up 11.4% to \$161), Cancer (up 10.7% to \$149) and Health & Disability (up 6.4% to \$166). Average donation size was biggest by some margin for Humanitarian Services (\$432) and smallest for Other charities (\$124).

Average donation size increased in all states except WA, increased by most in SA, was highest in NSW and was lowest in QLD

Average donation size also increased in all states except WA (where it fell \$2 to \$320). Donation size increased most in SA, rising by \$21 (or 6.2%) to \$358. Donors in NSW had the highest average donation (\$386), and this figure was lowest in QLD (\$309). There were significant state differences in average donation by charity category (see pages 11–20 for details).

Average donations increased in both metropolitan (up \$12 to \$359) and regional (up \$11 to \$317) areas

By region, average donations increased in both metropolitan (up \$12 to \$359) and regional (up \$11 to \$317) areas. Average donations were bigger in metropolitan areas compared to regional areas in all categories except Cancer and Charitable Lotteries. The biggest difference was for Community Services & Children/Family, at 22% (or \$47) higher in metropolitan areas when compared to regional areas. Overall, donations were \$42 (12%) higher in metropolitan areas, compared to \$40 (14%) a year ago.

Chart 12: Average annual donation per donor (\$A)

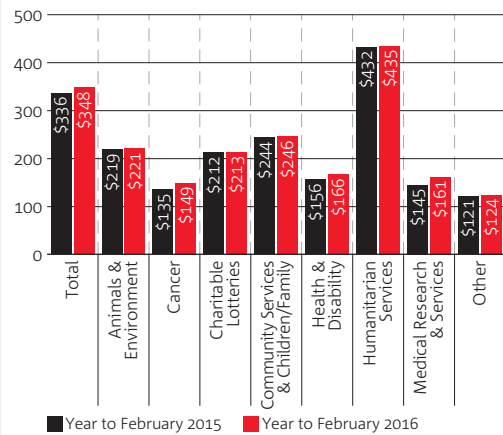


Chart 13: Average donation per donor (\$A)

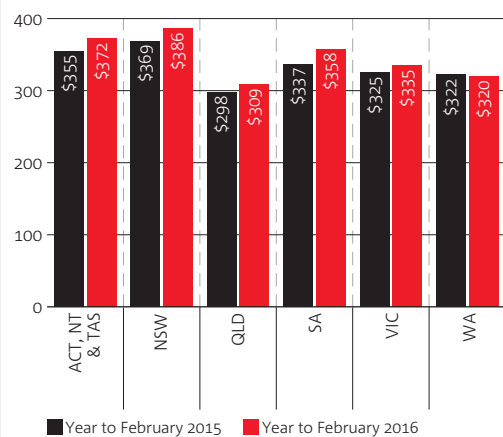


Chart 14: Average annual donation per donor by region (\$A)

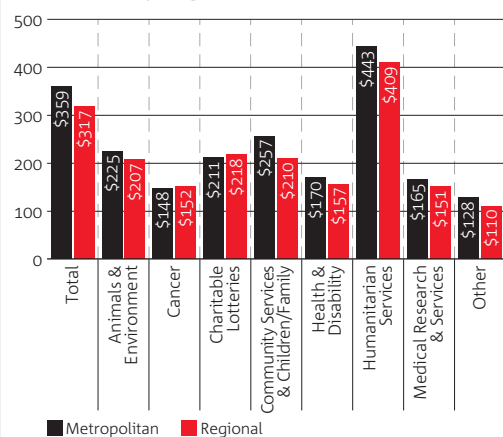
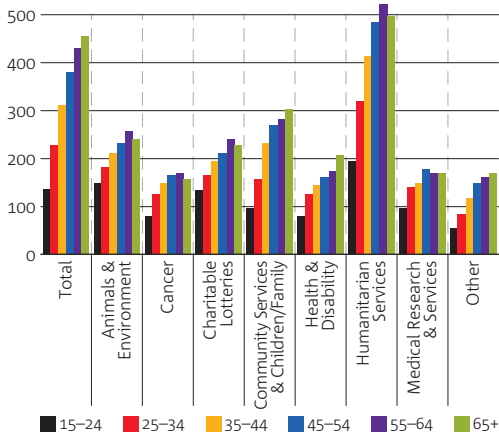


Chart 15: Average annual donation per donor by age (\$A, year to February 2016)



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

Donation size typically rises with age in all categories. Over the year to February 2016, the average total donation ranged from \$138 for 15 to 24 year olds to \$456 for over-65s. Donation size also increased in all age groups in the past year, except for 15 to 24 year olds (down 3%).

Middle Park (3206) in Victoria has emerged as the most generous postcode in Australia, with an average donation of \$327 per person

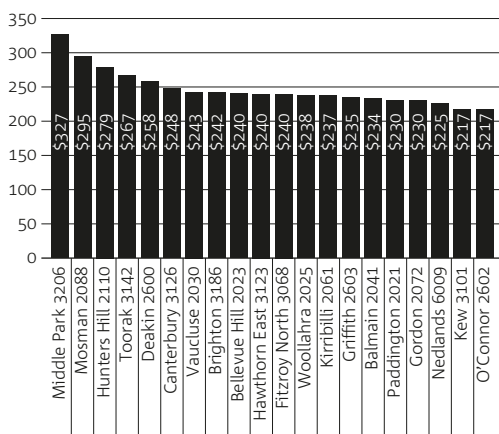
Middle Park (3206) has emerged as the most generous postcode in Australia for charitable giving over the year to February 2016, with an average donation of \$327 per person – more than three times the national average.

Mosman (2088) was the next most generous postcode, donating \$295, followed by Hunters Hill (2110) with \$279, Toorak (3142) with \$267 and Deakin (2600) with \$258.

Not surprisingly, the 20 most generous postcodes are mostly high-income areas. Indeed, the latest data from the Australian Taxation Office indicates an average taxable income of around \$120,000 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.

Chart 16: Top postcodes for charitable giving: Australia (average spend per person, 12 mths to Feb 2016)



But 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 taxable incomes.

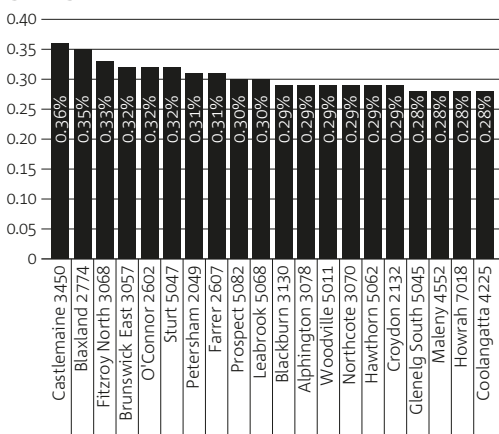
In this instance, Castlemaine (3450), with an average income of just \$42,650, is ranked as the most generous postcode in Australia, donating 0.36% of average incomes to charity.

Next most generous were Blaxland (2774) with average donations of 0.35% of income, Fitzroy North (3068) with 0.33%, and Brunswick East (3057), O’Connor (2602) and Sturt (5047) with 0.32%.

It is also notable that the 20 most generous postcodes by income had an average taxable income of just under \$60,000.

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

Chart 17: Top 20 postcodes for charitable giving: Australia (as a % of income, 12 mths to Feb 2016)



NEW SOUTH WALES (NSW)

Humanitarian Services charities attracted the biggest share of charitable giving (37%) in NSW, while Medical Research charities attracted the least (5%).

The average donation per donor increased to \$386 in the year to February 2016 (\$369 in 2015), with average donation size increasing in all charity sectors.

Chart 18: Market share of total charity donations, NSW (12 months to February 2016)

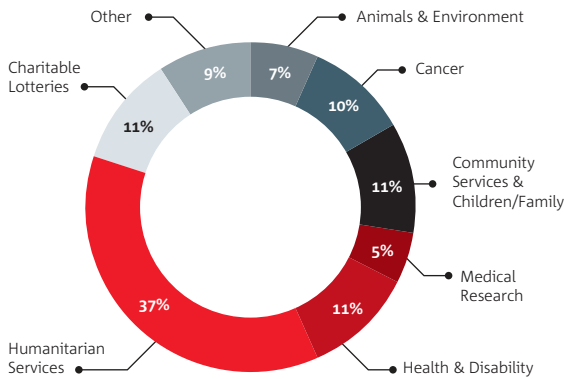
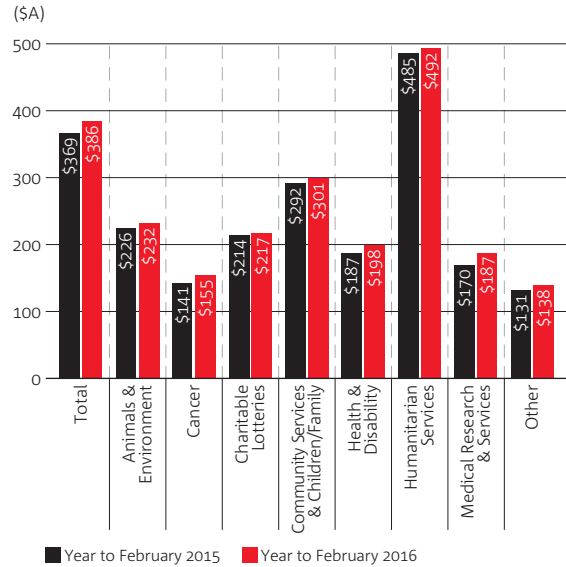


Chart 19: Average donation per donor, NSW



Charitable giving in NSW grew by 6.3% in the year to February 2016 (1.2% a year ago), in line with the Australian average.

Giving increased in all charity categories over the past year, led by Other (8.4%) and Humanitarian Services charities (7.9%).

Chart 20: Growth in Charitable Giving Index, NSW vs total (percentage change, year-on-year)

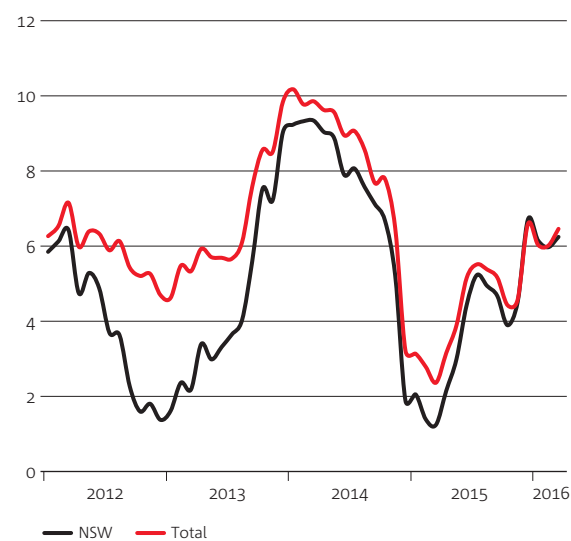
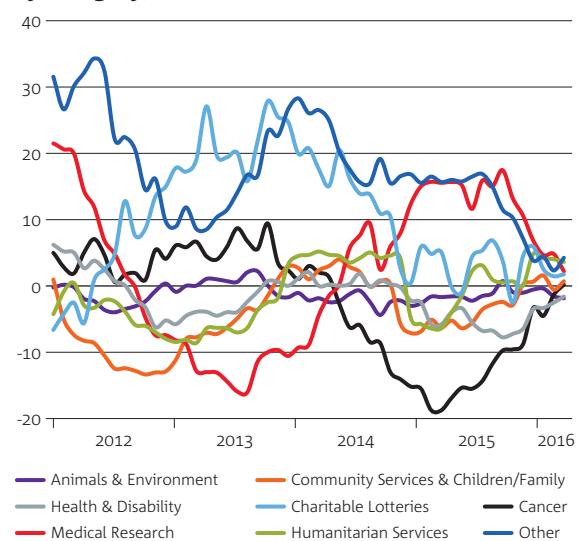


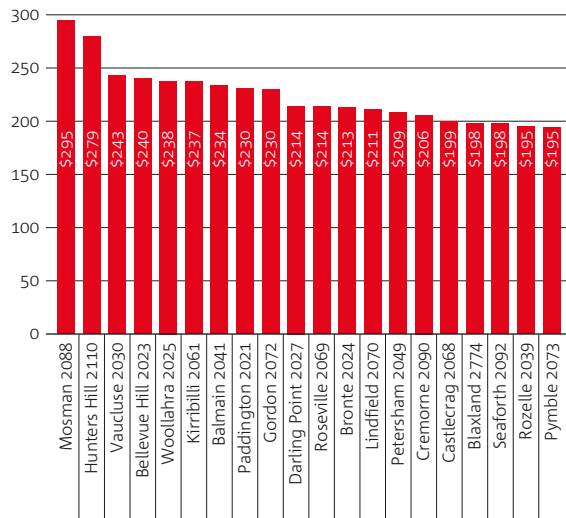
Chart 21: Growth in Charitable Giving Index by category, NSW (percentage change, year-on-year)



NEW SOUTH WALES (NSW)

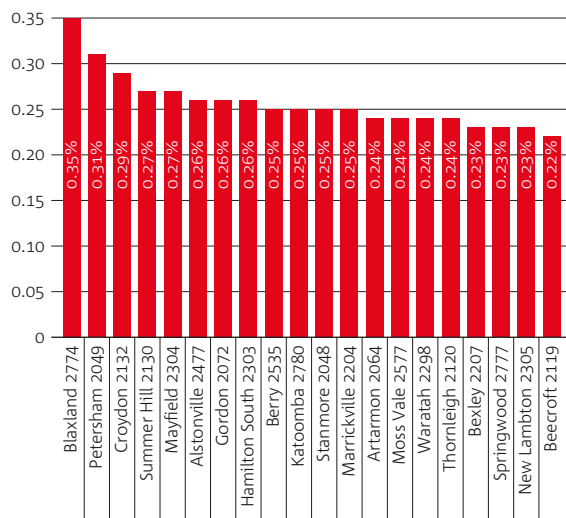
Mosman with an average donation of \$295 per person and Hunters Hill (\$279) were the most charitable suburbs in NSW for dollar giving ...

Chart 22: Top 20 postcodes for charitable giving, NSW (average spend per person, \$A, 12 months to February 2016)



... while the suburbs of Blaxland and Petersham gave the most as a share of their incomes (0.35% and 0.31% respectively).

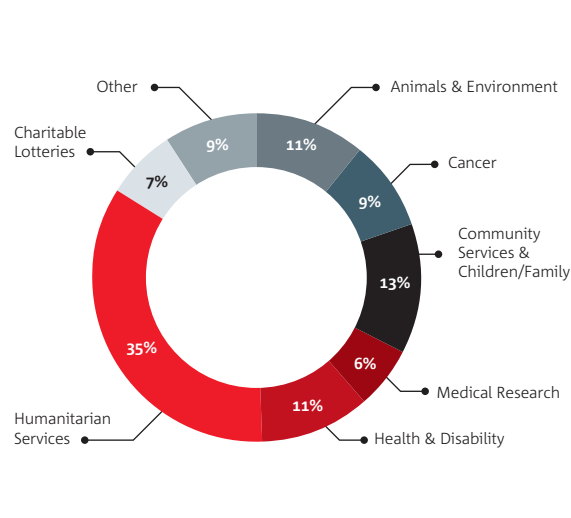
Chart 23: Top 20 postcodes for charitable giving, NSW (as a % of income, 12 months to February 2016)



VICTORIA (VIC)

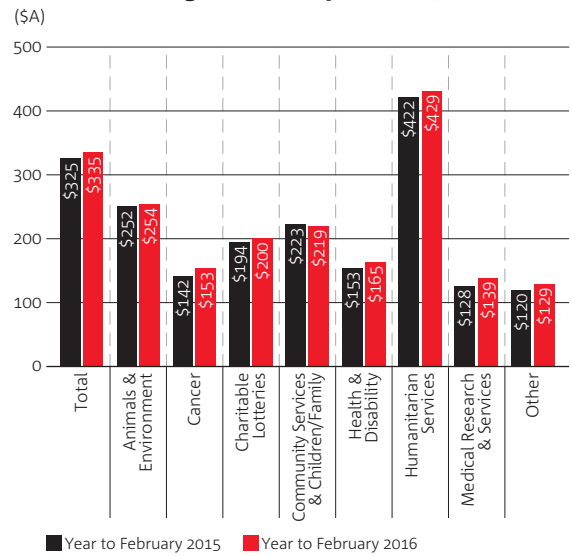
Humanitarian Services charities attracted the biggest share of charitable giving (35%) in Victoria, while Medical Services (6%) charities attracted the least.

Chart 24: Market share of total charity donations, VIC (12 months to February 2016)



The average donation per donor rose to \$335 in the year to February 2016 (\$325 in 2015), with donations higher in all charity sectors except Community Service & Children/Family.

Chart 25: Average donation per donor, VIC



VICTORIA (VIC)

Charitable giving in Victoria grew by 9.6% in the year to Feb 2016 (2.1% a year ago) – well above the Australian average and fastest of all states.

Giving increased in most charity categories except Cancer (-1.2%) and was led by Medical Research (37.2%) and Other (22.2%) charities.

Chart 26: Growth in Charitable Giving Index, VIC vs total (percentage change, year-on-year)

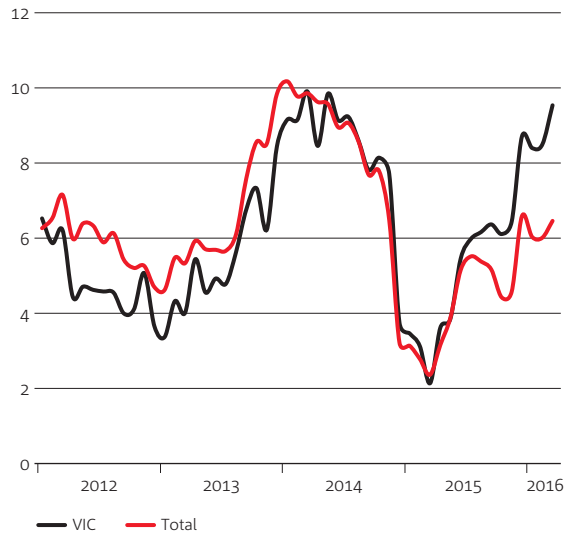
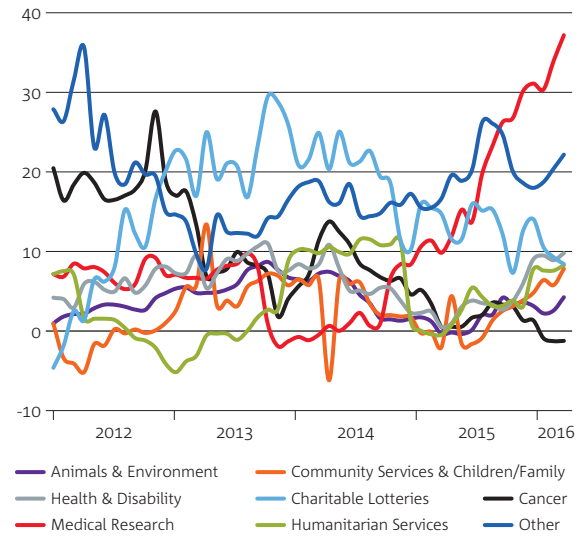


Chart 27: Growth in Charitable Giving Index by category, VIC (percentage change, year-on-year)



Middle Park with an average donation of \$327 per person and Toorak (\$267) were the most charitable suburbs in Victoria for dollar giving ...

... while the suburbs of Castlemaine and Fitzroy North gave the most as a share of their incomes (0.36% and 0.33% respectively).

Chart 28: Top 20 postcodes for charitable giving, VIC (average spend per person, \$A, 12 months to February 2016)

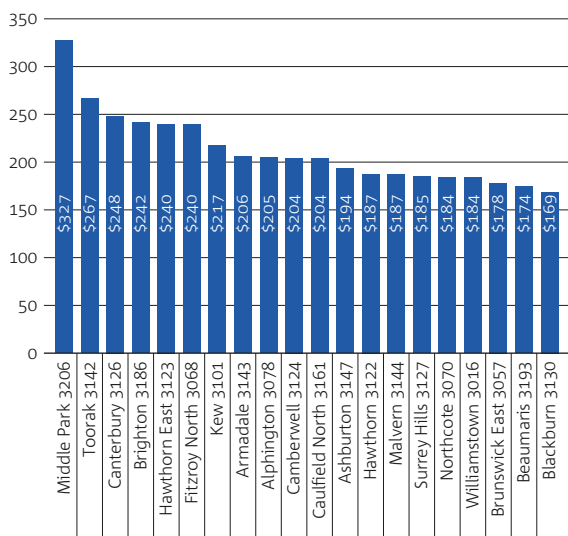
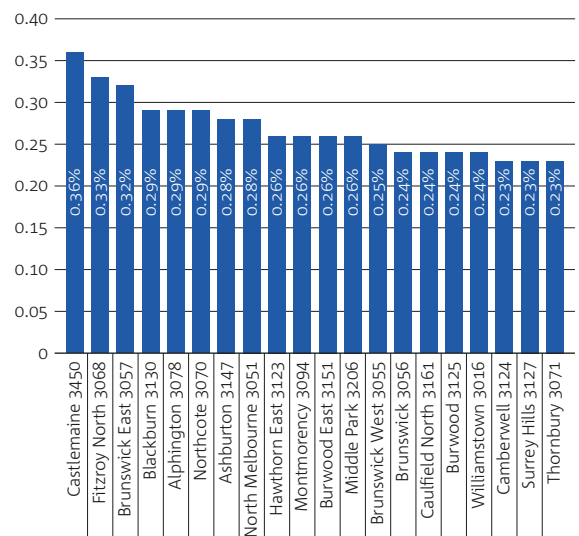


Chart 29: Top 20 postcodes for charitable giving, VIC (as a % of income, 12 months to February 2016)



QUEENSLAND (QLD)

Humanitarian Services charities attracted the biggest share of charitable giving (28%) in Queensland, while Medical Research (5%) and Other (5%) charities attracted the least.

Average donation per donor rose to \$309 in the year to February 2016 (\$298 in 2015), with donation size higher in all charity sectors except Humanitarian Services and Other.

Chart 30: Market share of total charity donations, QLD (12 months to February 2016)

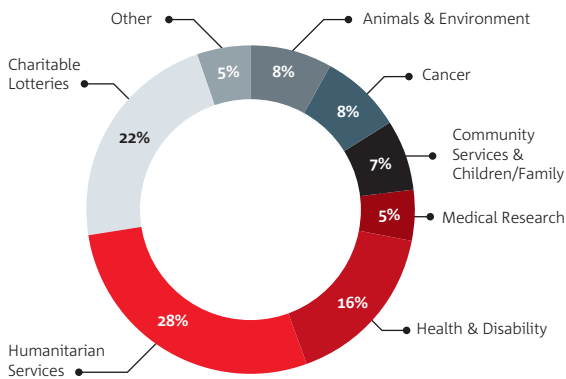
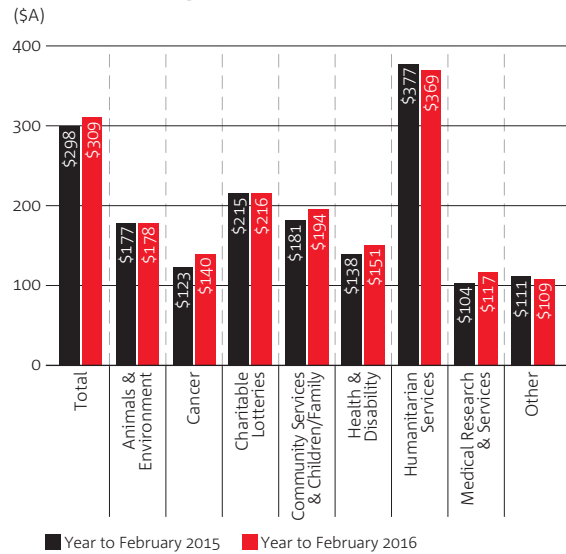


Chart 31: Average donation per donor, QLD



Charitable giving in QLD grew 4.7% in the year to February 2016 (3.4% a year ago) – below the Australian average after exceeding it last year.

Giving increased in most categories except Charitable Lotteries (-0.5%) and Animals & Environment (-0.2%), led by Cancer (11.4%).

Chart 32: Growth in Charitable Giving Index, QLD vs total (percentage change, year-on-year)

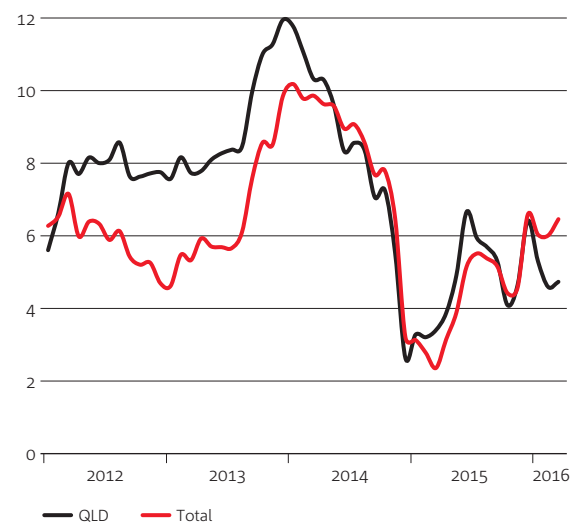
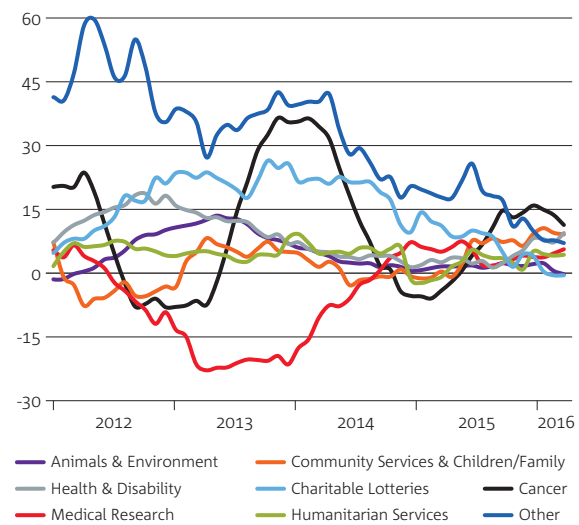


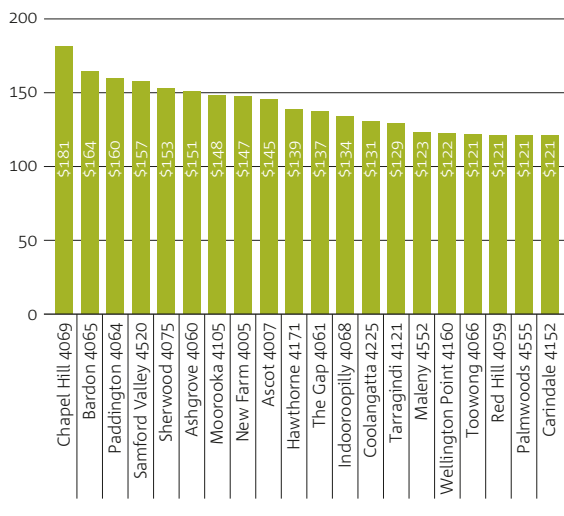
Chart 33: Growth in Charitable Giving Index by category, QLD (percentage change, year-on-year)



QUEENSLAND (QLD)

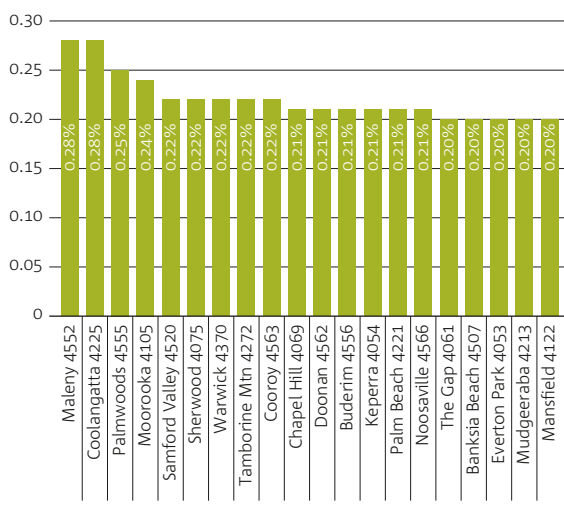
Chapel Hill with an average donation of \$181 per person and Bardon (\$164) were the most charitable suburbs in Queensland for dollar giving ...

Chart 34: Top 20 postcodes for charitable giving, QLD (average spend per person, \$A, 12 months to Feb 2016)



... while the suburbs of Maleny and Coolangatta gave the most as a share of their incomes (0.28%).

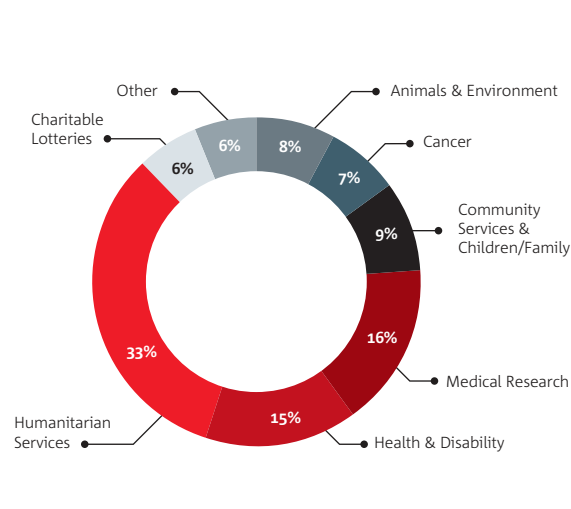
Chart 35: Top 20 postcodes for charitable giving, QLD (as a % of income, 12 months to February 2016)



SOUTH AUSTRALIA (SA)

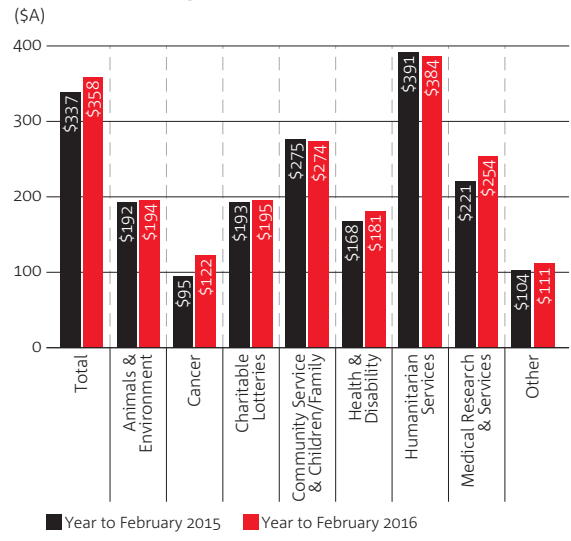
Humanitarian Services charities attracted the biggest share of charitable giving (33%) in South Australia, while Charitable Lotteries (6%) and Other (6%) charities attracted the least.

Chart 36: Market share of total charity donations, SA (12 months to February 2016)



Average donation per donor rose to \$358 in the year to February 2016 (\$337 in 2015), with donations higher in all charity sectors except Community Service & Children/Family.

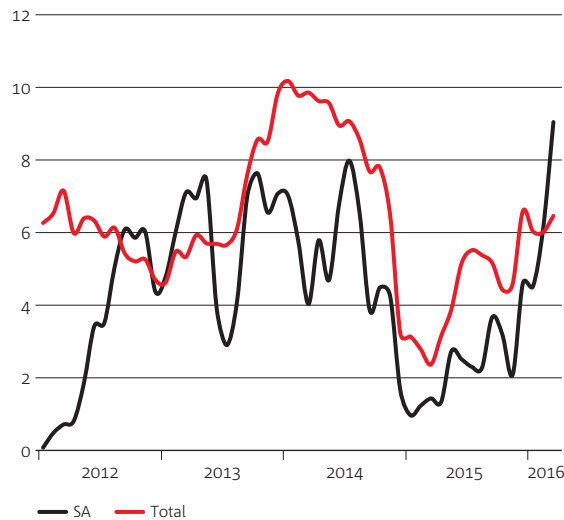
Chart 37: Average donation per donor, SA



SOUTH AUSTRALIA (SA)

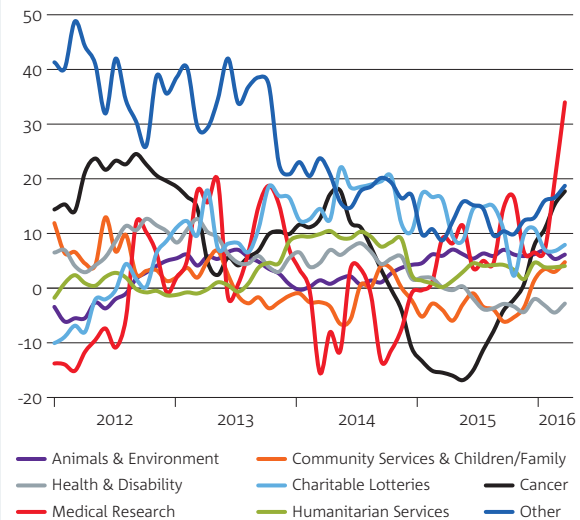
Charitable giving in South Australia grew 9.1% in the year to February 2016 (1.4% a year ago) – above the Australian average and a new state high.

Chart 38: Growth in Charitable Giving Index, SA vs total (percentage change, year-on-year)



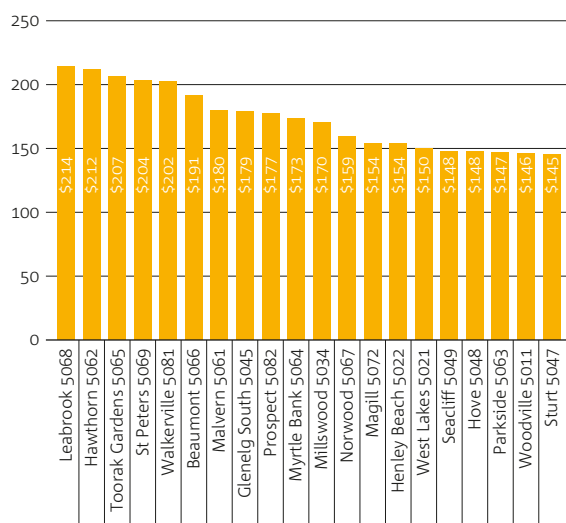
Giving increased in all categories except Health & Disability (-2.8%), led by Medical Research (34%), Other (18.7%) and Cancer (17.7%).

Chart 39: Growth in Charitable Giving Index by category, SA (percentage change, year-on-year)



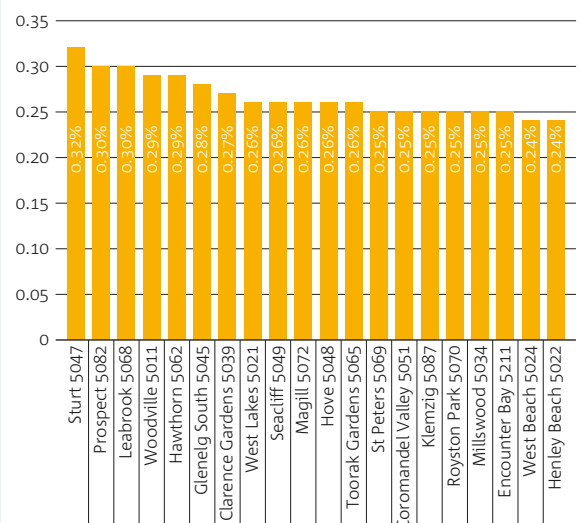
Leabrook with an average donation of \$214 per person and Hawthorn (\$212) were the most charitable suburbs in South Australia for dollar giving ...

Chart 40: Top 20 postcodes for charitable giving, SA (average spend per person, \$A, 12 months to Feb 2016)



... while the suburbs of Sturt, Prospect and Leabrook gave the most as a share of their incomes (0.32%, 0.30% and 0.30% respectively).

Chart 41: Top 20 postcodes for charitable giving, SA (as a % of income, 12 months to February 2016)



WESTERN AUSTRALIA (WA)

Humanitarian Services charities attracted the biggest share of charitable giving (37%) in WA, while Medical Services (4%) charities attracted the least.

The average donation per donor fell to \$320 in the year to February 2016 (\$322 in 2015), with donations lower in all charity sectors except Cancer and Medical Research.

Chart 42: Market share of total charity donations, WA (12 months to February 2016)

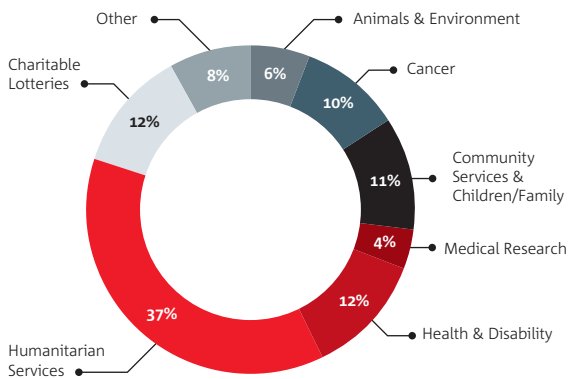
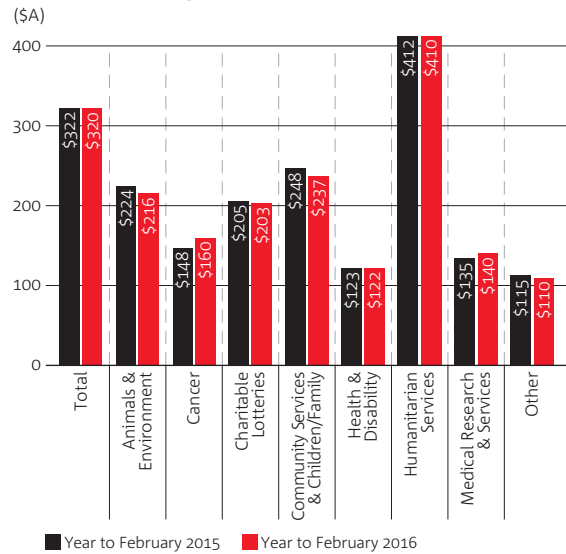


Chart 43: Average donation per donor, WA



Charitable giving in WA slowed to 2.5% in the year to February 2016 (5.9% a year ago) – below the Australian average and slowest of all states.

Giving fell for Animals & Environment (-9.7%) and Medical Research (-5.1%) and grew fastest for Community Service & Children/Family (9.3%).

Chart 44: Growth in Charitable Giving Index, WA vs total (percentage change, year-on-year)

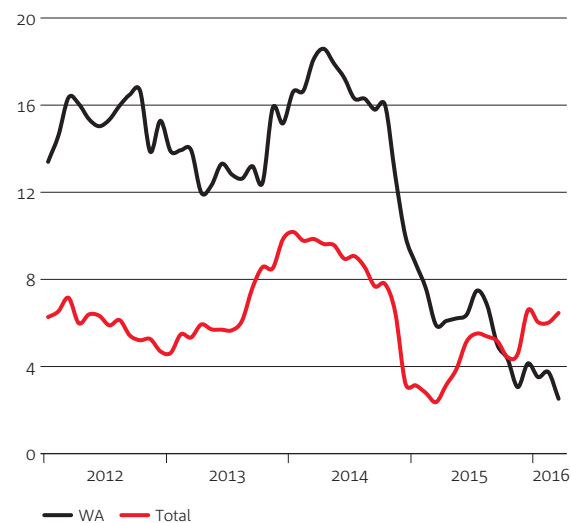
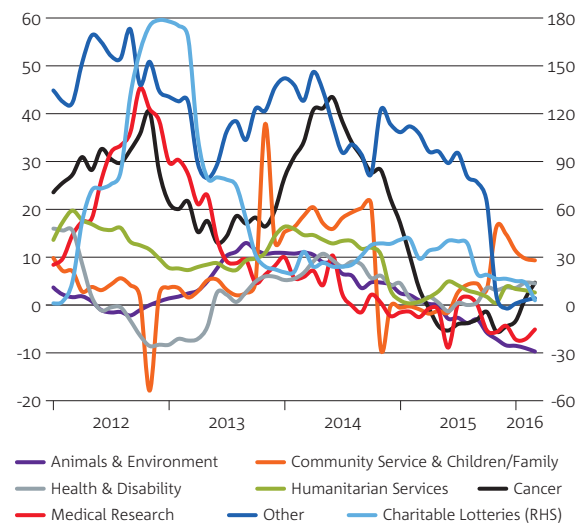


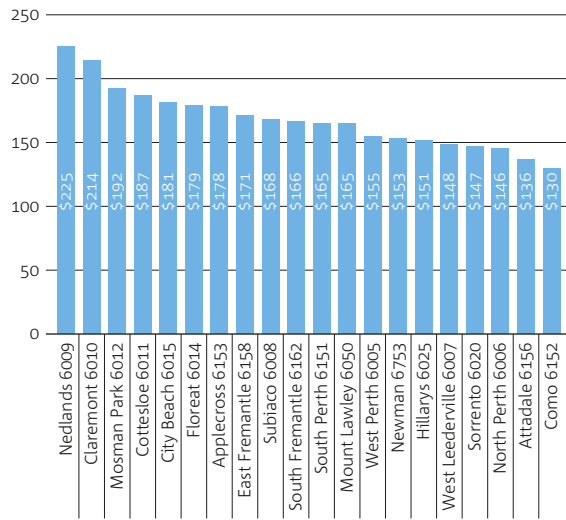
Chart 45: Growth in Charitable Giving Index by category, WA (percentage change, year-on-year)



WESTERN AUSTRALIA (WA)

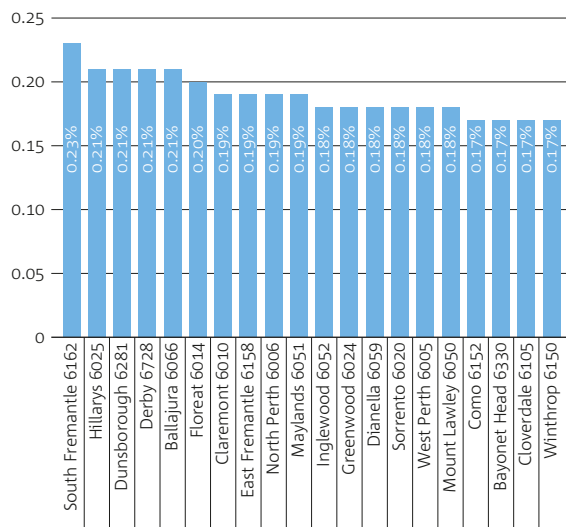
Nedlands with an average donation of \$225 per person and Claremont (\$214) were the most charitable suburbs in WA for dollar giving ...

Chart 46: Top 20 postcodes for charitable giving, WA (average spend per person, \$A, 12 months to Feb 2016)



... while the suburbs of South Fremantle (0.23%), Hillarys, Dunsborough, Derby and Ballajura (0.21%) gave most as a share of their incomes.

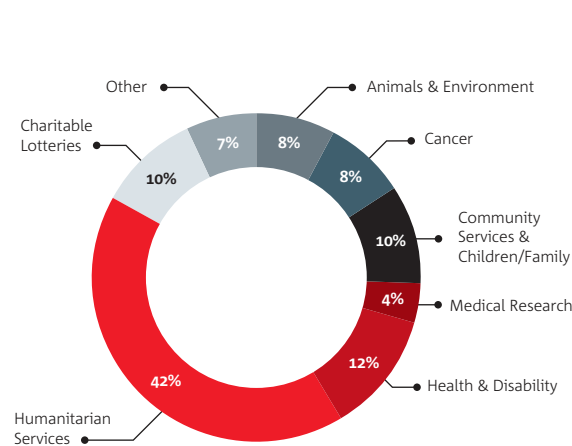
Chart 47: Top 20 postcodes for charitable giving, WA (as a % of income, 12 months to February 2016)



(ACT, NT & TAS)

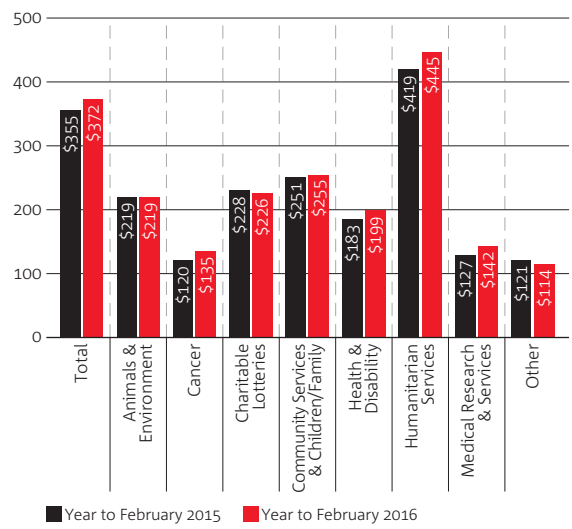
Humanitarian Services charities attracted the biggest share of charitable giving (42%) in the ACT, NT & TAS, while Medical Services (4%) charities attracted the least.

Chart 48: Market share of total charity donations, ACT, NT & TAS (12 months to February 2016)



Average donations rose to \$372 (\$355 in 2015), with donations higher in all sectors except Animals & Environment (unchanged), Charitable Lotteries and Other (lower).

Chart 49: Average donation per donor, ACT, NT & TAS (\$A)



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

Charitable giving in the ACT, NT & Tasmania grew 6.3% in the year to February 2016 (-0.4% a year ago) – broadly in line with the Australian average.

Giving increased in all categories except Health and Disability (-4.1%) and grew fastest for Humanitarian Services (11.6%).

Chart 50: Growth in Charitable Giving Index, ACT, NT & TAS vs total (percentage change, year-on-year)

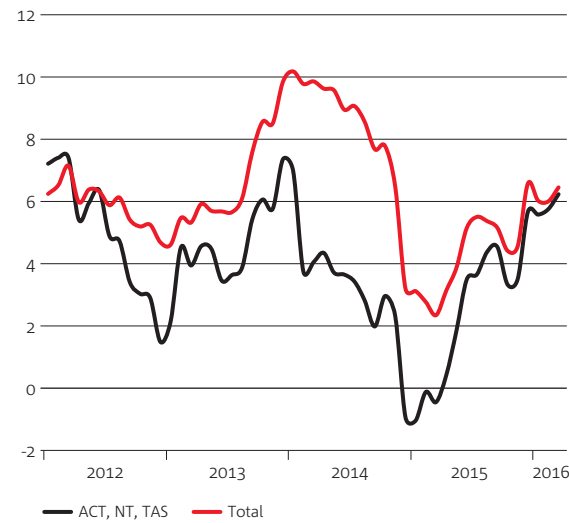
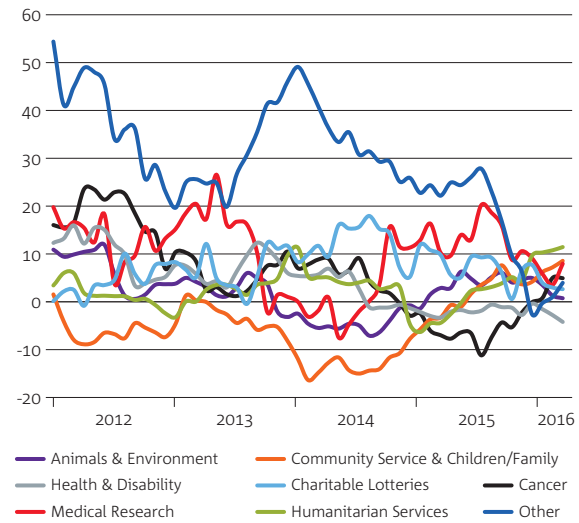


Chart 51: Growth in Charitable Giving Index by category, ACT, NT & TAS (percentage change, year-on-year)



Deakin with an average donation of \$258 per person and Griffith (\$235) were the most charitable suburbs in the ACT for dollar giving ...

... while the suburbs of O'Connor and Farrer gave most as a share of their incomes (0.32% and 0.31% respectively).

Chart 52: Top 20 postcodes for charitable giving, ACT (average spend per person, \$A, 12 months to February 2016)

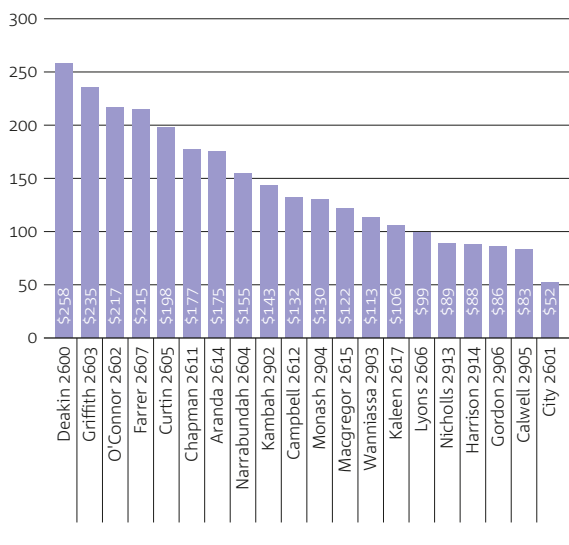
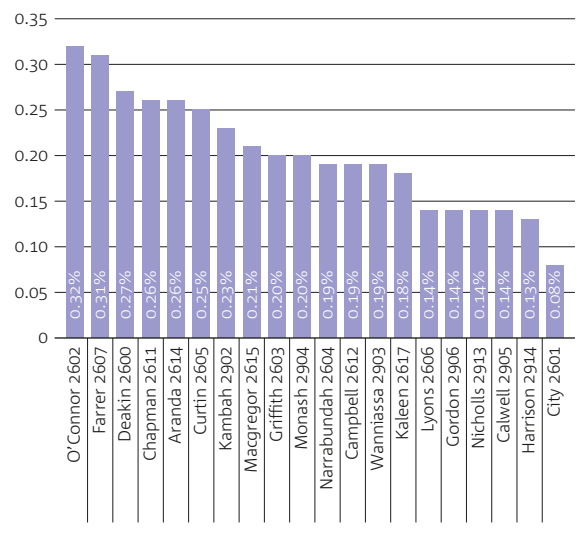


Chart 53: Top 20 postcodes for charitable giving, ACT (as a % of income, 12 months to February 2016)



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

Stuart Park with an average donation of \$107 per person and Nightcliff (\$99) were the most charitable suburbs in the NT for dollar giving ...

... while the suburbs of Nightcliff, Leanyer and Stuart Park gave most as a share of their incomes (0.16%, 0.15% and 0.15% respectively).

Chart 54: Top postcodes for charitable giving, NT

(average spend per person, \$A, 12 months to Feb 2016)

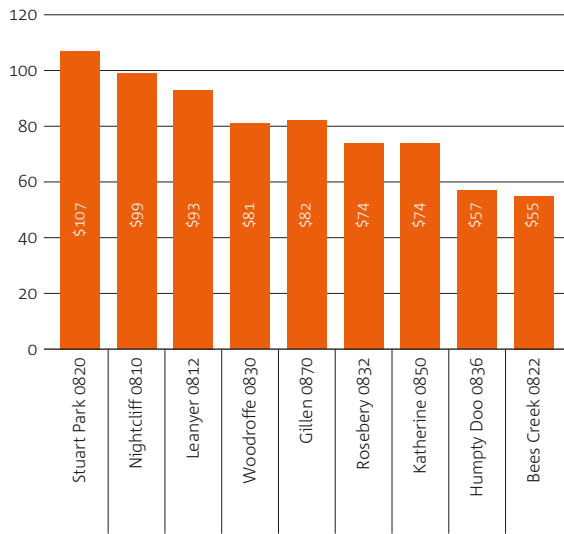
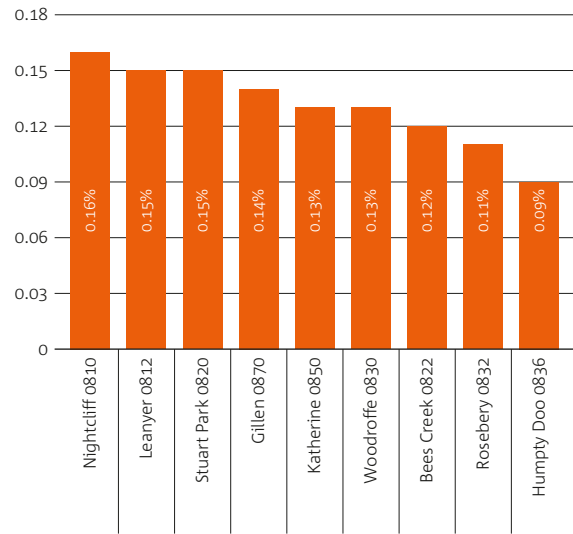


Chart 55: Top postcodes for charitable giving, NT

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



South Hobart with an average donation of \$161 per person and Sandy Bay (\$149) were the most charitable suburbs in TAS for dollar giving ...

... while the suburbs of Howrah and South Hobart gave the most as a share of their incomes (0.28% and 0.26% respectively).

Chart 56: Top 20 postcodes for charitable giving, TAS

(average spend per person, \$A, 12 months to Feb 2016)

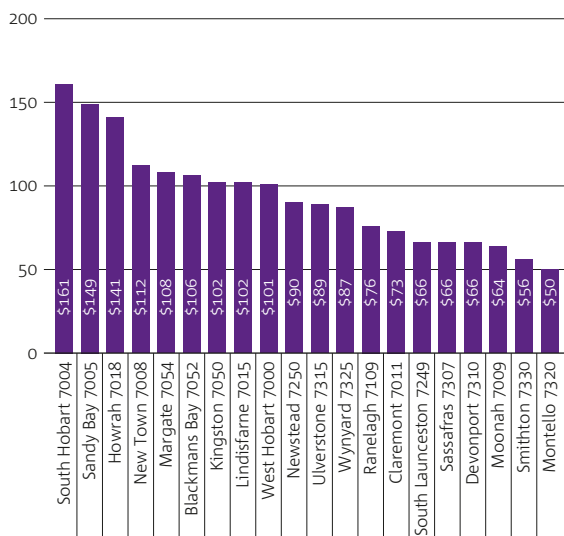
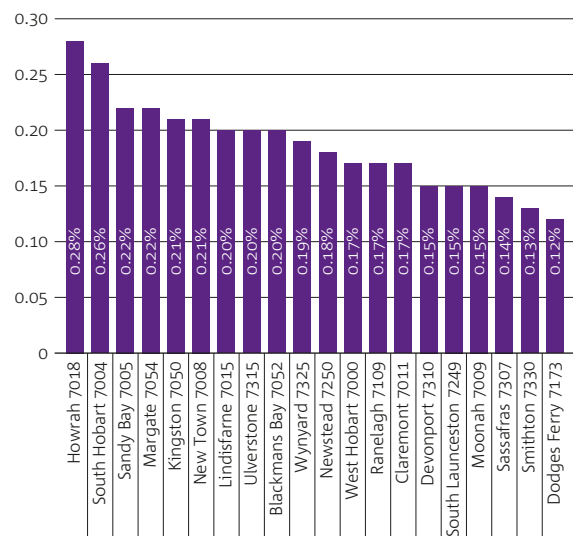


Chart 57: Top 20 postcodes for charitable giving, TAS

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





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