THE AUSTRALIAN COMMUNITY TRENDS REPORT

NATIONAL RESEARCH STUDY 2016

AUSTRALIAN COMMUNITIES

mccrindle
FORECASTS • STRATEGY • RESEARCH

R2L

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INTRODUCTION FROM MCCRINDLE

There is no more important industry in Australia than the not-for profit sector. The charities, social enterprises and community organisations across this nation provide much of the social infrastructure that builds the capacity and function of communities Australia wide.

The importance of the sector is recognised by Australians and practically lived out by the 4 in 5 adults who give financially to such organisations and the 1 in 4 who give at least once a month. However, this data shows the long-term engagement challenge with Australians twice as likely to make a one off donation than a regular one, and to volunteer at a stand alone event compared to an ongoing contribution. Amidst the message saturation, digital disruption, generational change and increasingly complex lives, communicating and connecting with donors will no doubt require a more sophisticated strategy than what worked in the past.

Amidst the global trends, demographic shifts and technological transformation, leaders may face change fatigue and resilience fatigue. However, the future is best influenced by focussed commitment to a clear vision, while responding with relevance to the external environment and the emerging trends. Mother Teresa's quote from half a century ago offers relevant encouragement today:

"I alone cannot change the world- but I can cast a stone across the waters to create many ripples".

It is our hope that this 2016 Australian Communities Report builds on the results from the 2015 study and offers insights to help Australia's not-for-profit leaders continue to create ripples of change that over time change local, national and indeed global communities.

INTRODUCTION FROM R2L

The Australian Communities Trends Report points to some of the challenges and opportunities which exist for non profit organisations. There is also the reminder of the special role that they play within the Australian community.

Having a clearly defined vision and mission will help organisations better define relationships with their customers – both beneficiaries and donors. Their values will help shape the way in which those relationships are developed over time.

To remain relevant, such organisations need to be aware of the changes occurring in the marketplace. We have seen evidence of consumer led changes in the retail, manufacturing and finance sectors. We note the changes brought about by government funding models. And there are the ever present changes experienced in the technology sector.

Understanding the impact on the donor community will help organisations build trust and relevance through the Australian community. More than ever, the sector needs to better understand and relate to its audience segments. Building for the future demands that while not neglecting its long term and traditional support bases, organisations must respond and relate to the changing expectations of younger audiences.

This report provides insights which will help to shape thinking and practice within the non profit sector.

RESEARCH OBJECTIVES

The objectives of the Australian Community Trends Report are to continue the longitudinal study which began in 2015 and to provide a detailed analysis of the effectiveness, engagement and awareness of the not-for-profit sector. Another objective is to help organisations understand the Australian community with particular focus on the emerging trends, the giving landscape and the current and emerging supporter segments.

Some of the key research instruments and outputs from this study are:

- Identification of national giving macro segments
- Not-for-profit awareness and benchmarking analysis
- Identification of giving blockers and enablers
- Giving Sentiment Index
- Understanding of young Australians aged 18-29 and how their giving habits differ from other Australians
- Not-for-profit staff and leaders snapshot.

RESEARCH METHODOLOGY

National survey and Young Australian Survey

The survey was sent out to a sample of Australians that reflected national demographics and those who indicated that they 'do not give financially to charitable organisations' were screened out of the survey. Survey respondents had at least given to a charitable organisation in the last two years.

This survey was in field from the 26th August to 1st September 2016 and there were 1,510 completed surveys in the nationally representative sample. The age group from 18-29 was then boosted to give a greater perspective from the younger generation, bringing the national survey to a total of 1,720 complete responses.

National focus groups

Three focus groups were run in Sydney on the 12th of September and three focus groups were run in Melbourne on the 7th of September with a total of 54 participants across the six groups. Focus group participants had to have given to a charitable organisation in the last six months.

Supporter survey

The supporter survey was sent out to the supporters of organisations involved in the research and had a total of 2,688 completed surveys. The end results were weighted to accurately reflect the number of supporters from each participating organisation. This component had a staged deployment based on the timeframes of the partner organisations with the first surveys sent on the 7th of July and the survey closed on the 14th of September.

Staff survey

The staff survey was sent out to staff of organisations involved in the research and had a total of 875 started responses and 825 completed responses. The end results were weighted to accurately reflect the number of staff from each participating organisation. This component also had a staged deployment to work in with the needs of the partner organisations with the first surveys sent on the 5th of July and the survey closed on the 15th of September.

Expert interviews

The expert interviews targeted key leaders in the not-for-profit sector, asking them to comment on findings from the study as well as emerging trends in the sector. Fieldwork began on the 19th of September and closed on the 21st of September with 14 complete responses.

THIS REPORT

Reference to the generations throughout this report refer to the following age categories:

- Generation Y: 22-36 year olds (those born from 1980-1994)
- Generation X: 37-51 year olds (those born from 1965-1979)
- Baby Boomers: 52-70 year olds (those born from 1946-1964)
- Builders: 71+ (those born before 1946)

National survey respondents in this report are sometimes referred to as ‘givers’ or ‘Australian givers’ as they give to charitable organisations at least every few years.

Focus group participants are referred to as ‘participants’ or as ‘charitable givers’ as they had to have given to charitable organisation in the last 6 months. Throughout the report these icons are used to represent the various age groups

Aged 19-26 years

Aged 27-40 years

Aged 41-60 years

Supporter survey respondents in this report are referred to as ‘supporters’. Survey questions asked supporters to reflect on the organisation that asked them to participate in the survey. Throughout the report these organisations are referred to as ‘their organisation’.

Staff survey respondents in this report are referred to as ‘staff’

A NOTE ON THE INCOME BRACKETS

High income bracket: Annual gross household income greater than or equal to $104,000

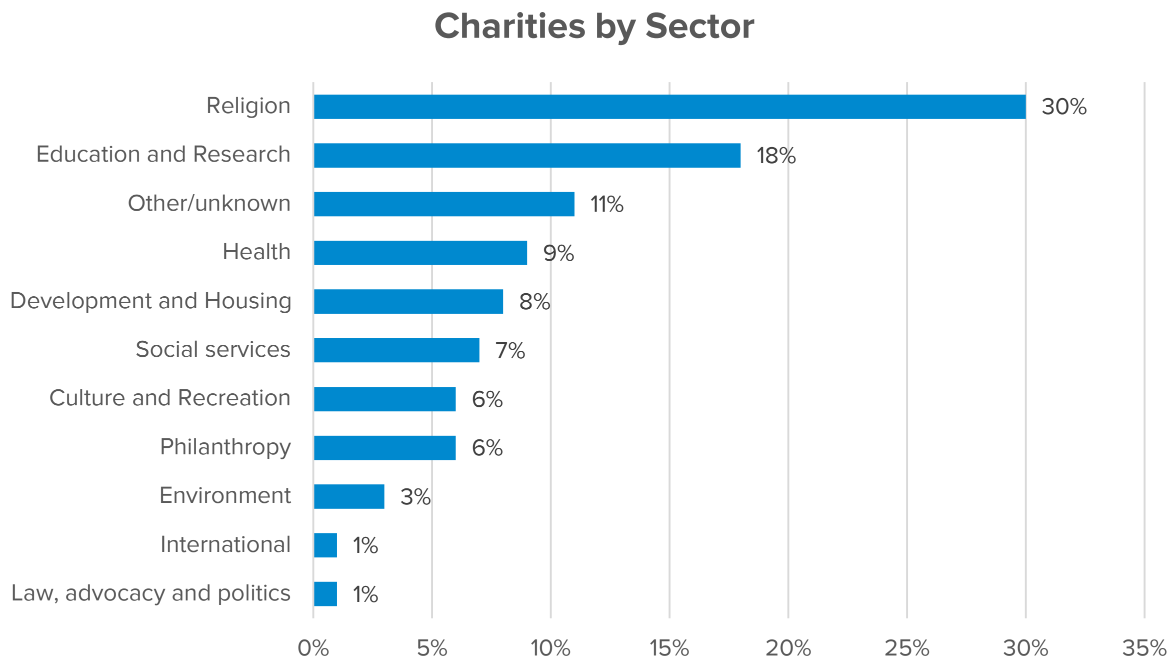
Lower income bracket: Annual gross household income less than or equal to $103,999

THE AUSTRALIAN NOT-FOR-PROFIT LANDSCAPE

Our growing charity landscape

The not-for-profit sector in Australia is comprised of a wide variety of charities, ranging from smaller organisations through to those with an annual income of over $100 million. The Australian charities sector is growing, with approximately 37,200 charities accumulating a combined total income of over $122 billion. The charitable sector also employs approximately 10% of Australians in the workforce. [1]

The Australian charities sector is extremely diverse and comprises a range of sectors. The biggest proportion are religious charities, and make up almost 1 in 3 (30%) charities in Australia. The next largest charity sector is that of Education and Research, which makes up nearly one-fifth (18%) of all charities in the country. [2]



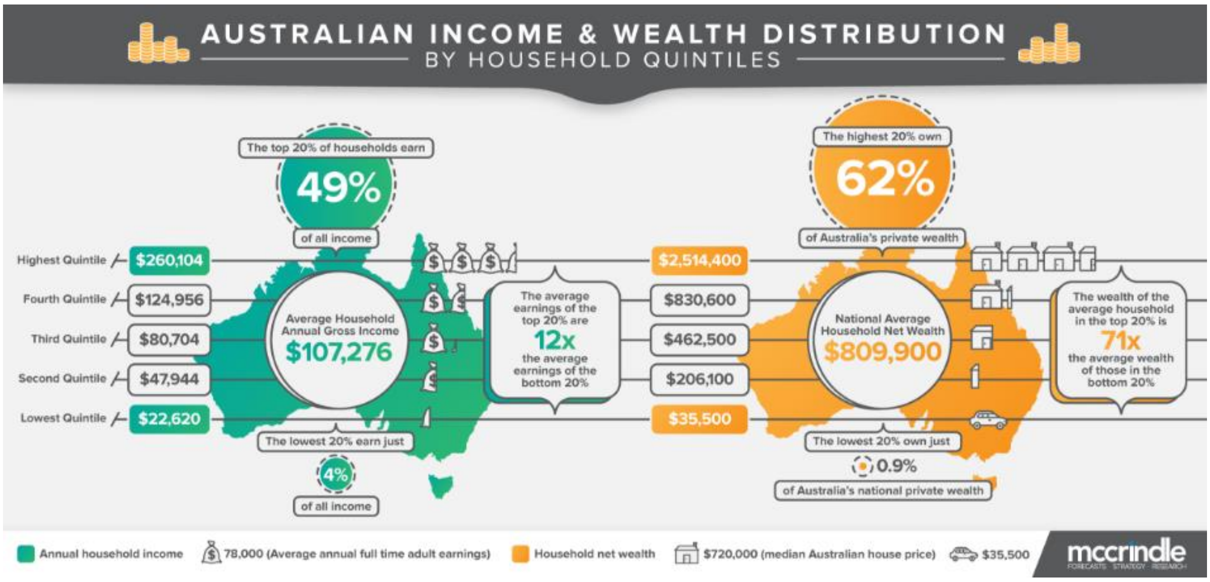
[1] Australian Charities and Not-for-profits Commission, *Australian Charities Report 2014*
[2] Australian Charities and Not-for-profits Commission, *Australian Charities Report 2014*

CHANGES AND CHALLENGES IN THE EXTERNAL ENVIRONMENT

While Australians are generous in their giving to not-for-profit and charitable organisations, there are changes and challenges taking place in the external environment which affects this generosity and provides a context for the giving landscape.

Household wealth

Australia has long been labelled “land of the middle class”, but the latest analysis of the Australian Bureau of Statistics wealth and income data shows that this is less the case today.



While the average household annually earns just over $107,000, the top 1 in 5 earns more than twice this (exceeding $260,000) while the bottom 1 in 5 takes home around one-fifth of this (a little over $22,000). This means that while the bottom fifth of households get 4% of all income, the top fifth get almost half of all earnings (49%).

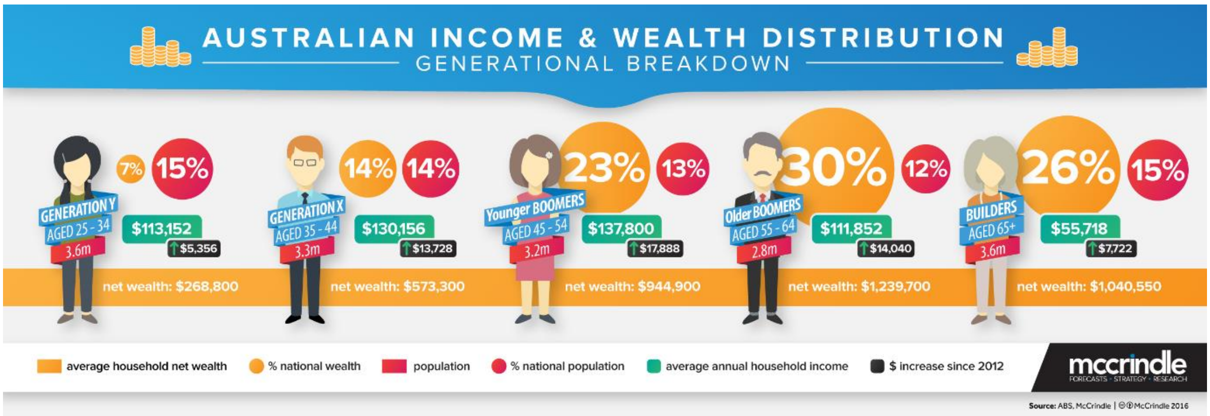
The wealth of the highest quintile households on average is 71 times that of the lowest quintile households. While the average Australian household has seen wealth increase by 6% in the last 2 years (an increase of $45,400), the highest fifth of households have averaged increases of 8% (an increase of $189,500). Only upon reaching the fourth of five quintiles does the average household net wealth ($830,600) exceed the average house price ($720,000), while the highest quintile households on average have a net worth exceeding 3 average Australian homes.

Home ownership

The great Aussie dream of owning your own home is still true for many Australians, with 2 in 5 (40%) owning their own home with a mortgage and 28% owning their home outright. The remaining 30% are renting, and understandably so with a median house price in Sydney of $1,000,000 and approaching over $800,000 in Melbourne.

Income distribution

While home ownership is a priority for Australians, house prices have exceeded wages growth in such a way that this dream is harder to attain. This house price growth in turn has created a growing disparity between the wealth of those with assets (Baby Boomers and Generation X) compared to Generation Y who are struggling to enter the housing market and who are starting their earning years later in life and with more debt.



While Gen Y have a household net worth of $268,800, it is less than half that of the Gen Xers who are just a decade older. The highest net worth generation in Australia, the Boomers aged 55-64, not only have a net wealth almost 5 times that of the generation of their children (Gen Y) but they still have a decade or more of earnings and wealth accumulating ahead of them.

Generation Y: High incomes, low wealth

While Generation Y are income rich, earning in gross household terms $113,152 per annum, their net worth is modest at $268,800. As they enter their mid-30's, they are approaching their key earning years however such has been the low wages growth over the last two years their household incomes have only increased by $5,356, or 5% since 2013. While Gen Y households on average earn more per annum than the older Boomers aged 55-64 who are rapidly easing out of their full-time working roles, these Boomers managed income increases almost three times that of the younger generation over this period ($14,040).

Generational changes applied to giving

While the younger Baby Boomers have reached their income peak, net worth peaks amongst the older Baby Boomer generation. Baby Boomers are thinking about the future but they are also starting to think about the legacy they can leave and the difference they can make with their money. They are moving their focus from success to significance.

DONOR OF THE FUTURE

Understanding the emerging generations and their attitudes towards giving

LEGEND 18 - 29 year olds | 30+ year olds

35%
of 18-29 year olds give financially at least once a month compared to 29% of 30+ year olds

13%
don't give financially compared to 7% of 30+.

% WHO THINK THE ORGANISATIONS THEY SUPPORT DO THIS "TOO LITTLE"

25% vs 12% The level of communication I receive — 2.1x

27% vs 15% The level of thanks I receive — 1.8x

21% vs 8% The frequency of donation requests — 2.6x

21% vs 9% The amount spent on admin — 2.3x

TOP 7 CAUSES FOR THE YOUNGER GENERATIONS

% of Australians highly motivated by this cause

- Animal welfare
- Children's charities
- Mental health
- Disability
- Medical / cancer research
- Domestic & family violence
- Homelessness

LEVELS OF VOLUNTEERING ARE HIGHER AMONGST THE YOUNGER GENERATIONS

46%
of 18-29 year olds have volunteered for charitable organisations in the past compared to 31% of 30+

TOP 3 MOTIVATIONS FOR VOLUNTEERING

18-29	30+
61% To make the world a better place	**54%** My responsibility to give back to the community
55% The feeling I get when I volunteer	**48%** The feeling I get when I volunteer
35% My responsibility to give back to the community	**44%** To make the world a better place

TOP MOTIVATIONS FOR GETTING INVOLVED WITH CHARITIES

18-29	30+
65% Know and trust the charity	**67%** Know and trust the charity
63% To make a better world	**51%** To make a better world
56% See the need	**50%** See the need
54% The feeling I get from doing something for another	**48%** That it is Australian based

PREFERENCE FOR RAISING AWARENESS OVER TAKING DIRECT ACTION

46%
say they would prefer to raise awareness versus 23% who would prefer to take action (compared to 29% and 34% of 30+ year olds respectively)

COMMUNICATION CHANNELS

% who say this is extremely / very important

1. **51%** Word of mouth
2. **50%** Website
3. **44%** Social media channels

20%

The younger generation are less likely than 30+ year olds to indicate that it is extremely/very important to them for admin costs to be kept below 20% of the total fundraising costs (56% versus 75%)

18-29 year olds are more likely to prefer to run their own fundraising events than 30+ year olds (25% compared to 11%)

NATIONAL SURVEY

4 in 5

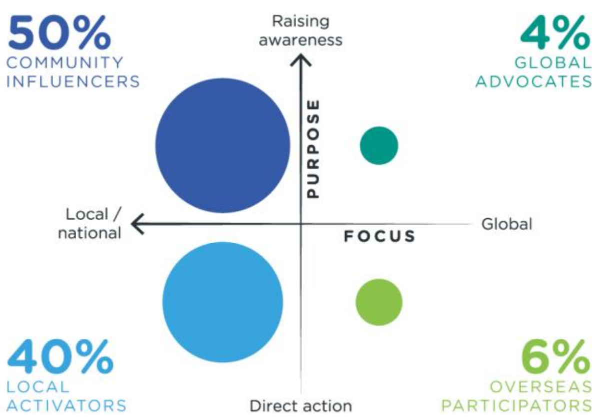
AUSTRALIANS GIVE FINANCIALLY TO CHARITIES / NOT-FOR-PROFITS

1 in 4 give at least once a month

However, **1 in 5** don't give at all

MOST OF THESE SUPPORT IN OTHER WAYS TOO

- **59%** Donating goods
- **34%** Volunteering
- **17%** Fundraising/promoting
- **13%** Raising awareness



COMMUNICATION CHANNELS

% who say this is extremely / very important

1. **39%** Word of mouth
2. **33%** Website
3. **31%** Television

Australians believe the biggest advertising channel in the next decade will be social media campaigns (29%).

THE 5 CHARITY ESSENTIALS

% who say this is extremely / very important

- **72%** Administration costs kept below 20%
- **72%** Verification of registration as a charity
- **71%** Transparent reporting of admin costs
- **65%** Where donations are allocated
- **65%** Reporting specific impacts and costs

TOP MOTIVATIONS FOR GETTING INVOLVED WITH CHARITIES

SUPPORTING

- **68%** Know and trust the charity
- **54%** To make a better world
- **52%** See the need

VOLUNTEERING

- **51%** The feeling I get when I volunteer
- **51%** Responsibility to give back to the community
- **49%** To make a better world

THE LONG-TERM ENGAGEMENT CHALLENGE

Australians are twice as likely to...

...give a one-off donation than to donate regularly

56% vs. **28%**

...volunteer for an event than be an ongoing volunteer

21% vs. **11%**

TOP 7 CAUSES

% of Australians highly motivated by this cause

- **30%** Mental health
- **32%** Homelessness
- **33%** Disability
- **37%** Disaster reponse in Australia
- **44%** Animal welfare
- **46%** Medical research
- **47%** Children's charities

30% 35% 40% 45% 50%

BLOCKERS & ENABLERS TO GIVING

	BLOCKERS	ENABLERS
EMOTIONAL	Oversaturation of charities Doubting how much gets through Already give to people in need Role of government funding	Personal connection Show impact of individual gift Stories of change/impact Frontline participation
PRACTICAL	Donation requests intrusive Risings costs, variable income Set amounts/ongoing contracts Complex giving process	Tech-enabled communications Values alignment 'One-click' giving Micro-giving, small steps

CHANGES AND CHALLENGES IN THE EXTERNAL ENVIRONMENT

% who strongly / somewhat agree

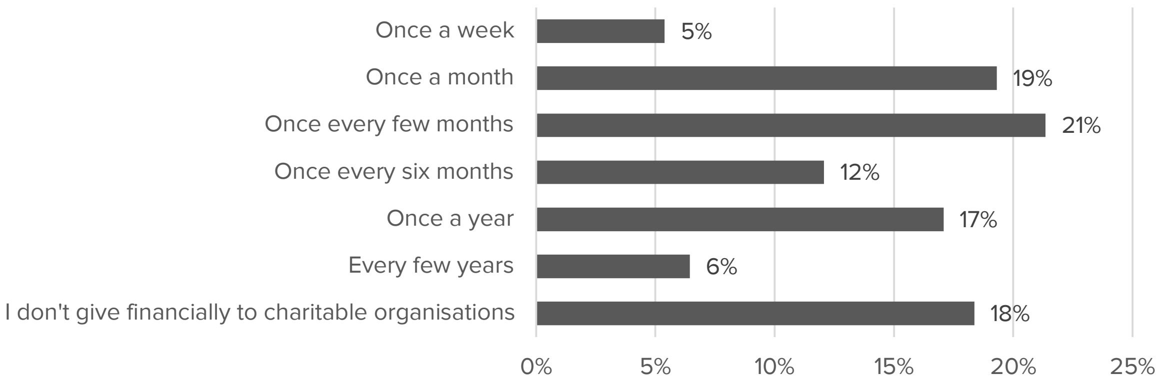
1. **73%** Growing gap between rich and poor
2. **67%** Rising cost of living
3. **60%** Younger generations not as generous

NATIONAL SURVEY

GIVING PRACTICES IN AUSTRALIA

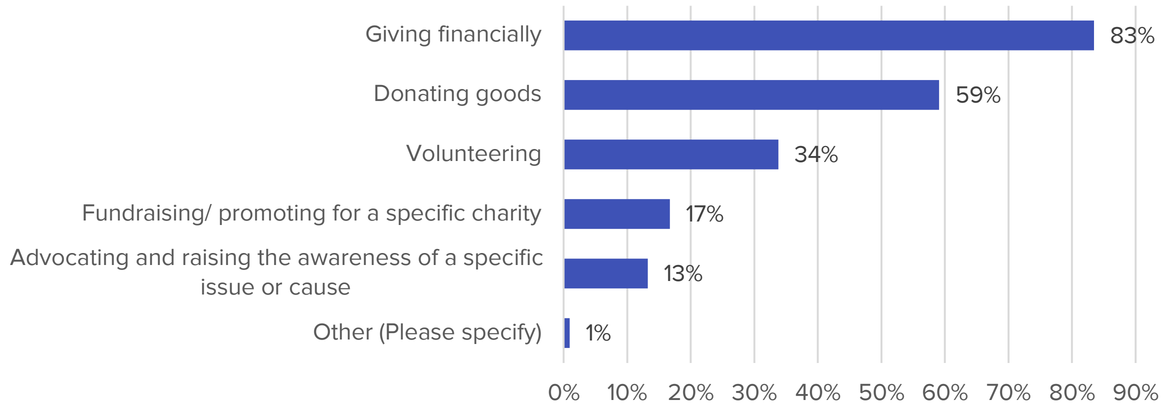
The following graph indicates how often Australians give financially to a charitable organisation. This result is representative of 2,014 respondents. 504 respondents (18%) indicated that they do not give financially to charitable organisation and were excluded from the remainder of the survey.

Q. How often do you give financially to a charitable organisation?
(n=2,014)



4 in 5 Australian givers (80%) give financially to charitable organsations. A further 57% give every six months or more. This decreased slightly from 84% and 60% respectively in 2015.

Q. In which of the following ways have you supported charitable organisations in the past?
(Please select all that apply)



4 in 5 Australian givers (83%) have given financially to organisations. 3 in 5 (59%) have donated goods to charitable organisations and third (34%) have volunteered for a charitable organisation.

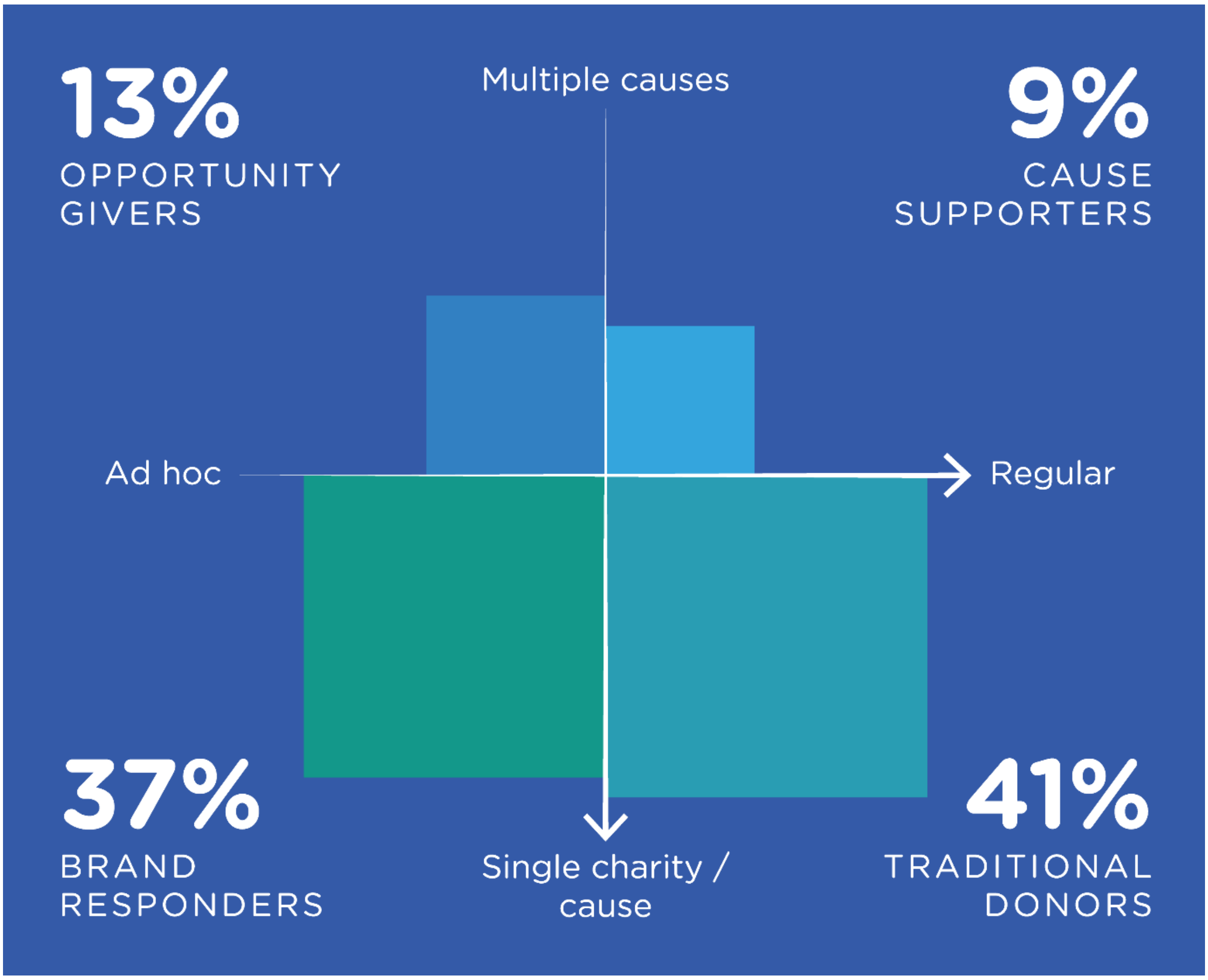
Responses listed in the ‘other’ category included donating blood, buying raffle tickets and buying goods (such as at the Salvos or Anzac day badges).

Generational Insights

Higher proportions of individuals from Gen X and the Baby Boomers would support a charitable organisation through giving financially (85% and 90% respectively cf. 75% Gen Y) or donating goods (61% of Gen X and BB cf. 51% Gen Y).

While the younger individuals may feel more stretched to give financially, Gen Y Australians compensate and give through their time. Almost 2 in 5 (37%) Gen Y are more likely to support a charitable organisation through volunteering compared with their older counterparts from Gen X (29%).

NATIONAL GIVING MACRO SEGMENTS



The **National Giving Macro Segments** consider whether Australians give to multiple causes or to a single charity or cause as well as how regularly they give.

The results of these segments show that Australian givers are more likely to connect with a single charity or cause, increasing from 2015, and are more likely to give ad hoc than on a regular basis.

Opportunity givers

When approached for a donation, hear about a need or issue AND support and give to a number of different charitable organisations and spread giving across many different charitable organisations.

This segment is more likely to be female than male (59% cf. 41%) and more than a third are Gen Y (37%, 24% Gen X and 22% Baby Boomers). Their number one preferred way to support charities is to give money to an organisation as a one-off donation.

Cause Supporters

Semi regularly throughout the year, on a frequent or regular basis AND support and give to a number of different charitable organisations, spread giving across many different charitable organisations.

This segment is slightly more likely to be female than male (55% cf. 45%) and this is a segment that occurs is consistently across the generations (27% are Gen Y, 27% Gen X and 30% are Baby Boomers). These givers also prefer to support charities by giving money to organisations as a one-off donation.

Traditional Donors

When approached for a donation, when hear about a need or issue AND largely give to a single charitable organisation, most of my giving goes to two or three main charitable organisations.

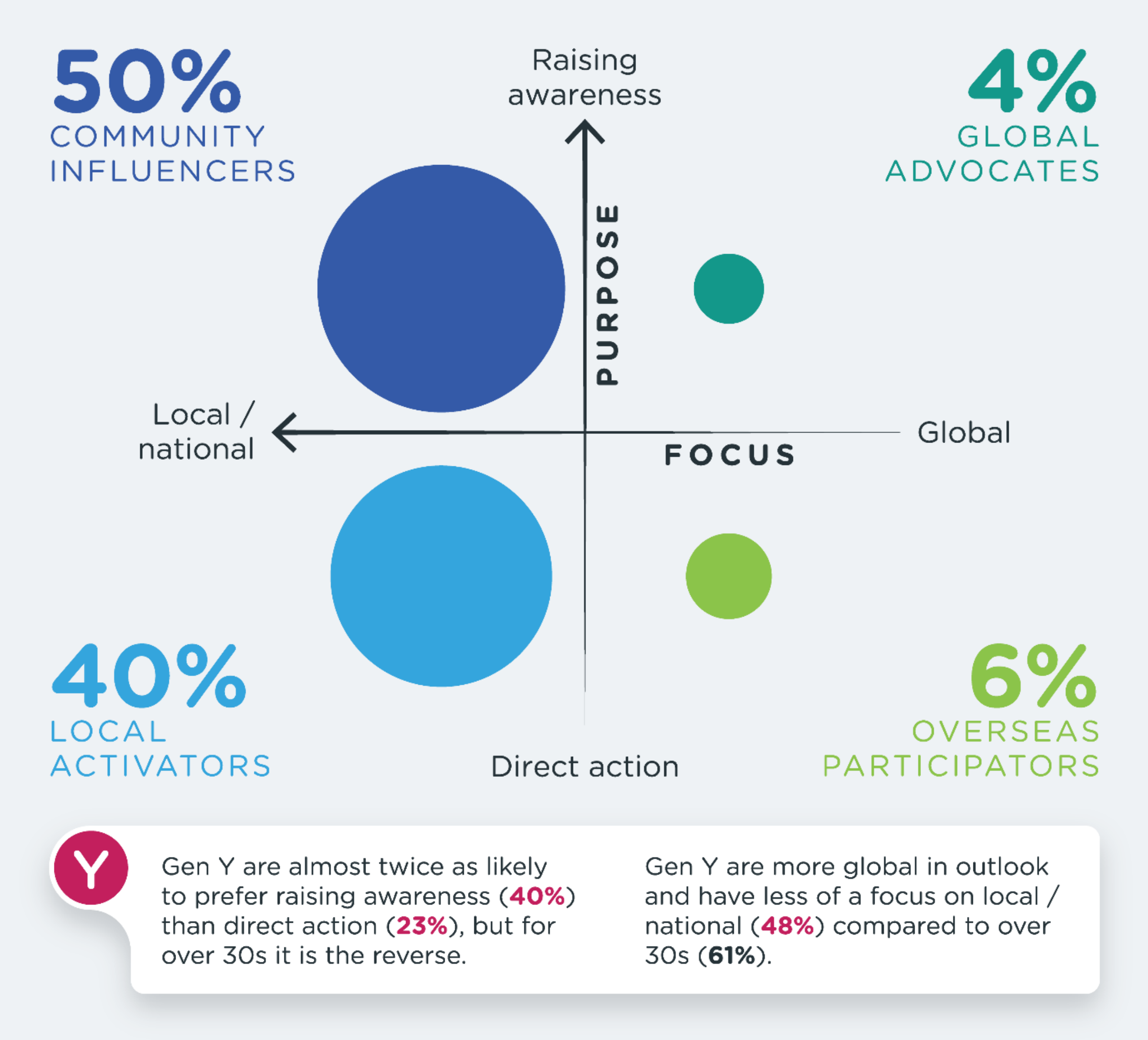
In 2016 this is that largest giving segment, making up 41% of all respondents. This segment has an even representation of males and females (52% and 48% respectively) and this is a segment that occurs is consistently across the generations but with a slightly larger representation from Gen Y (30%, 25% Gen X and 27% are Baby Boomers).

Brand Responders

Semi regularly throughout the year, on a frequent or regular basis AND largely give to a single charitable organisation, I spread my giving across many different charitable organisations and causes.

This segment has slightly more males than females (52% cf. 48%) and this is a segment that has a higher representation of Baby Boomers than any of the other segments (35%, 20% are Gen Y and 28% are Gen X).

GIVING SENTIMENT MATRIX



The **Giving Sentiment Matrix Pictured** above looks at respondents by their preferences of awareness or direct action and their preferences towards supporting local/national or global issues.

Overall Australians have a greater preference towards local/national causes and are slightly more likely to take direct action than want to raise awareness in support of charities. There is a greater shift towards raising awareness as the younger generations increasingly prefer this over direct action.

Local activators

Prefer to support charities with a local/national focus and are slightly more likely or much more likely to take action and assist those affect by an issue.

51% of this segment are male and 49% are female. Baby Boomers are significantly more likely to make up this category of givers, a total of 42% whilst only 15% are Gen Y and 24% are Gen X.

Community Influencers

Prefer to support charities with a local/national focus and are much more likely or slightly more likely to raise awareness of issues rather than take direct action.

Males are slightly more likely to make up this segment than females (52% cf. 48%). Gen Y make up more than a third of this segment (35% cf. 25% of Gen X and 24% of Baby Boomers).

Overseas Participators

These givers only support or prefer to support charities with a global focus and are slightly more likely or much more likely to take action and assist those affected.

Half of this segment are male and half are female. This group are also most likely to be Gen Y (40% cf. 23% Gen X and 18% are Baby Boomers).

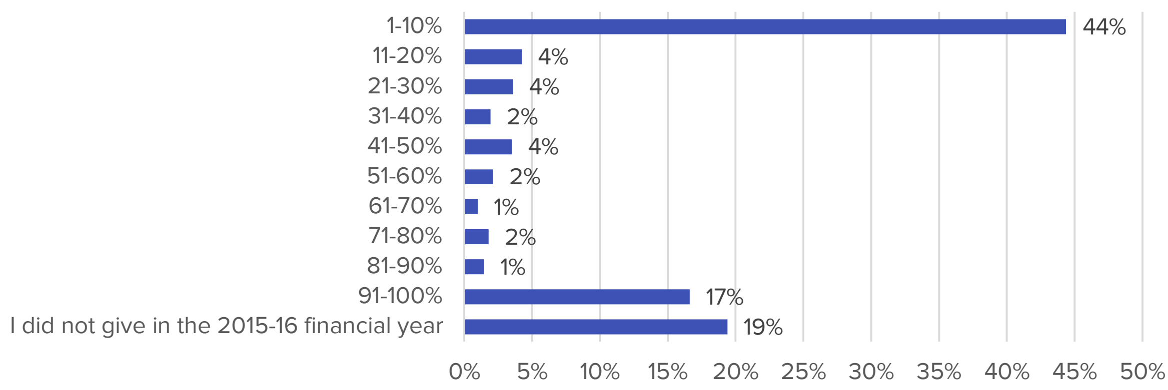
Global Advocates

These givers only support, or prefer to support charities with a global focus and are slightly more likely or much more likely to focus on awareness of issues.

Most likely to be male (63% and 37% females) and Gen Y (37% cf. 26% Gen X and 11% who are Baby Boomers), this segment is the smallest of all the giving segments.

Tax deductible giving

Q. What proportion of your giving in the 2015-16 financial year did you claim as tax deductible?



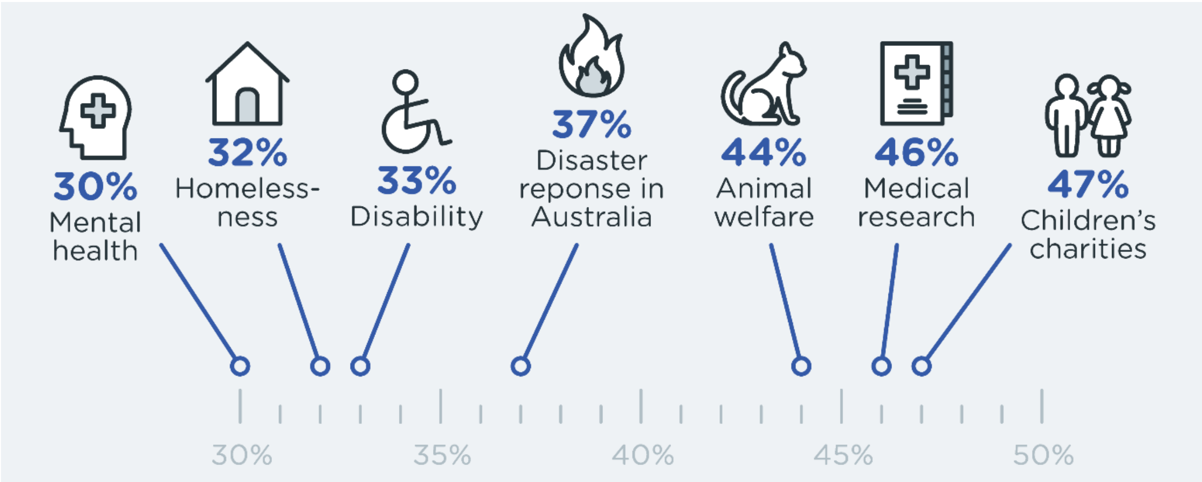
44% of Australians who give to charitable organisations indicated that they only claimed ten percent or less of their giving as tax deductible in the 2015-16 financial year.

Q. Please list the first 5 charitable organisations that come to your mind for each of the following categories.

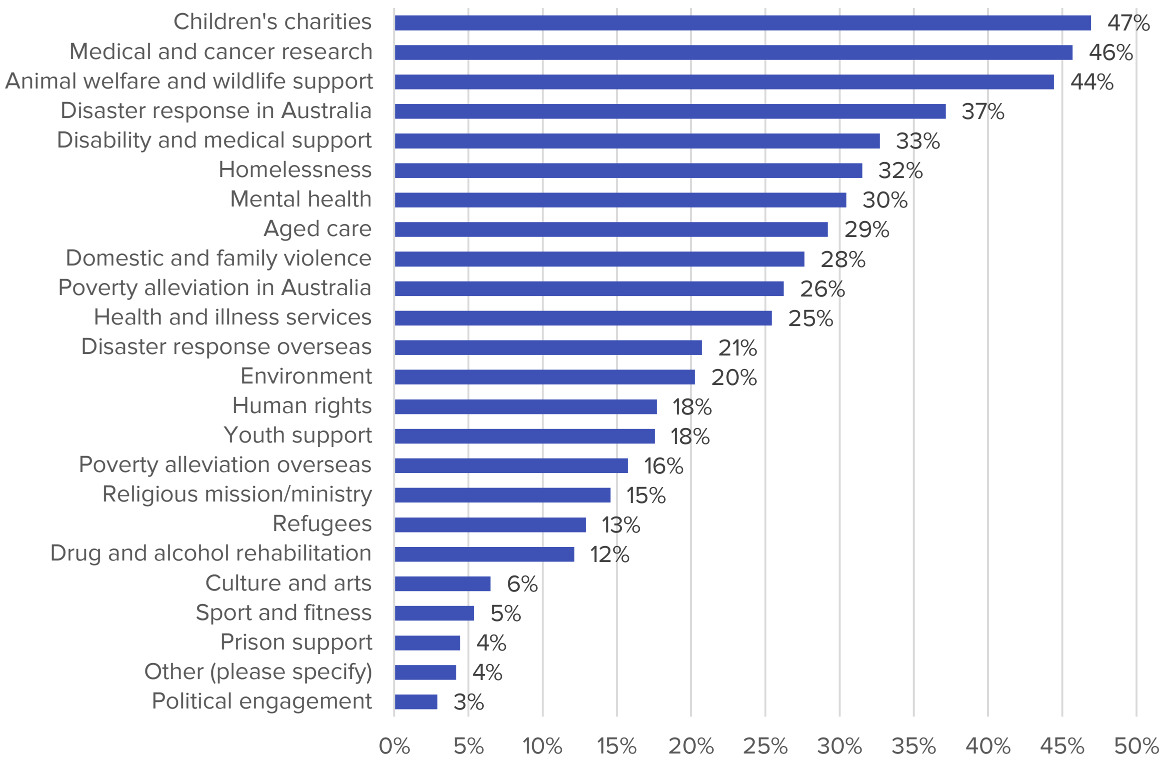
The following table shows the top five organisations that come to mind for the following types of charitable organisations and the approximate counts of how many times it was mentioned. Any responses indicating that a respondents wasn't sure have been removed from this count.

Animal Welfare	Poverty Alleviation Overseas	Medical and Cancer Research	Disability and Medical Support	Religious Mission/ Ministry
RSPCA (986)	World Vision (334)	Cancer Council (525)	Red Cross (57)	Salvation Army (264)
WWF (139)	Red Cross (130)	Cancer Foundation (67)	Guide Dogs (22)	St Vincent De Paul (107)
Peta (31)	Unicef (129)	Breast Cancer (58)	Cerebral Palsy (20)	Red Cross (57)
Animal Welfare League (26)	Oxfam (112)	Heart Foundation (55)	Fred Hollows (20)	Church (43)
Guide dogs (21)	Salvation Army (44)	Daffodil Day (45)	Endeavour Foundation (18)	Anglicare (22)

CAUSES TO SUPPORT



Q. Which of the following areas of need would you be highly motivated to give money to, or to volunteer for an organisation associated with this area?
(Please select all that apply)



Nearly half of Australian givers (47%) indicate that they would be highly motivated to give money to or volunteer for children's charities. As the charitable area attracting the highest level of motivation, children's charities are closely followed by medical and cancer research (46%) and animal welfare and wildlife support (44%).

Some of the most common 'other' answers were none, listing specific organisations or AIDs and Diabetes.

Gender

Across most areas, females were more highly motivated to give money to, or volunteer for an organisation.

In particular, females were more motivated to give money than males in these areas:

	Male	Female	% Difference
Animal welfare and wildlife support	36%	53%	17%
Children's charities	39%	55%	16%
Domestic and family violence	21%	34%	13%
Environment	16%	24%	8%
Health and illness services	22%	29%	7%
Mental health	27%	34%	7%
Homelessness	28%	35%	7%
Human rights	15%	21%	6%

Generational Insights

Australians from the Baby Boomer and Builders generations were more motivated to give money to areas such as medical and cancer research (63% Builders', 51% Baby Boomers) and aged care (42% Builders, 30% Baby Boomers) than those from the younger generations (39% and 26% respectively).

On the other hand, individuals from Gen Y compared with those from the Baby Boomers showed more motivation to give in areas concerning social issues. This included domestic and family violence (33% cf. 26%), the environment (27% cf. 17%), mental health (36% cf. 26%), human rights (23% cf. 14%) and youth support (22% cf. 14%).

Household Type

Households with children (56%) were more motivated to give money to or volunteer for children's charities than households without children (43%).

Qualitative insights – Causes to support

Australians drawn to children and animal welfare because they are helpless

Participants expressed that the innocence and helplessness of both animals and children was a key factor in encouraging them to give to these causes.

A lot of people are drawn to children because of their innocence.

I think for children's charities, they are such a young age and they haven't had a life, they are so vulnerable...Children are helpless and you can make it a bit more comfortable for them.

If you're not a sick child or an animal no one cares.

Drawn to causes which are more likely to affect them or someone they know

Charitable givers are more likely to give to causes that might one day affect them. Medical causes are also more likely to affect givers as many know someone who has gone through something similar.

The top five move your heart.... Some of them you think it might be my kid in the future or I might get cancer in the future.

Medical support of people is a basic thing people need and all people are aware of these problems.

Participants expect and would like to see domestic and family violence, mental health and refugees higher on the list

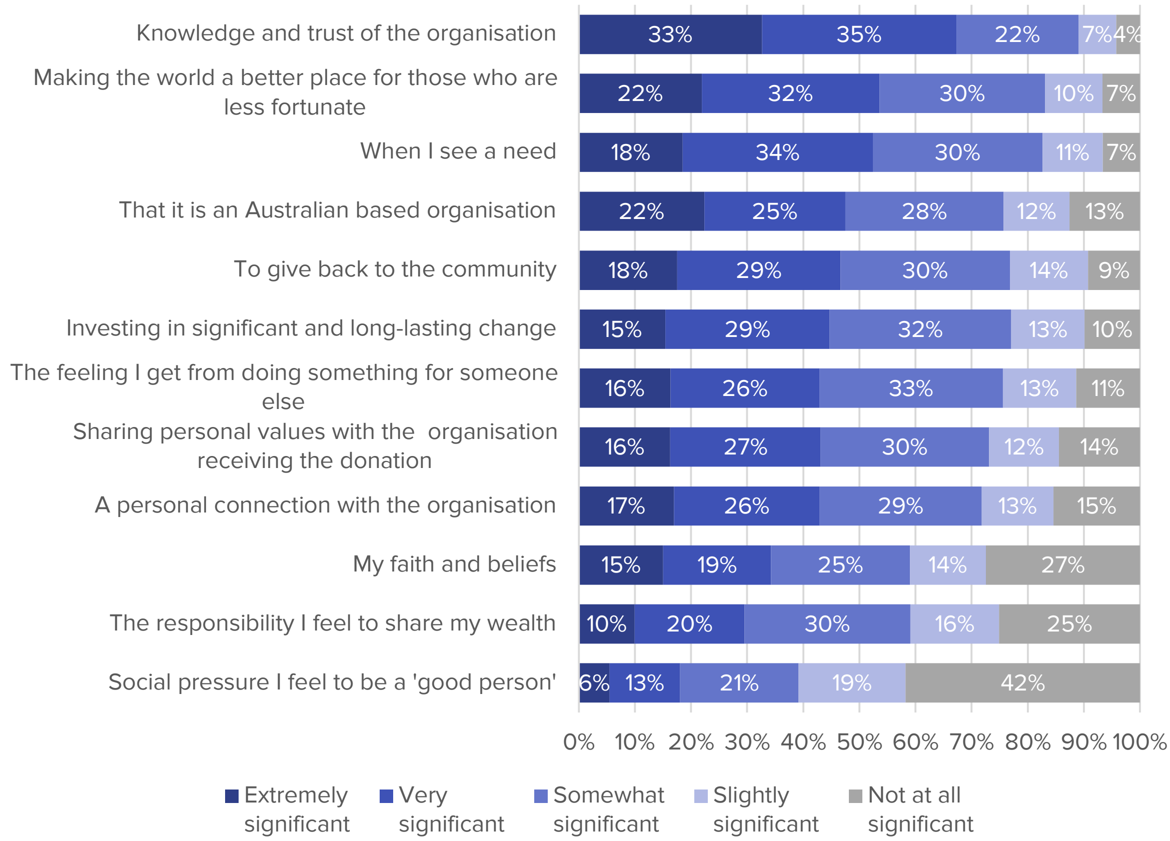
Refugees- I would like to see a bit more support for them. They struggle for funding... and refugees might need the money to buy food etc.

Mental health, just maybe more awareness, people don't understand or want to understand. It's important that people have more knowledge, it does affect a lot of people.

I think domestic violence is a really big issue at the moment.

DECISION DRIVERS

Q. How significant are the following motivations on your decision to get involved with a charitable organisation?



Knowledge and trust of the organisation is the most significant influence on Australian givers getting involved with a charitable organsation. Almost 7 in 10 Australian givers (68%) indicated that this is extremely or very significant as a motivation for getting involved. Australians are also highly motivated by an organisation that makes the world a better place for the less fortunate (54%) and their own knowledge of a need (52%).

Generational Insights

Gen Y Australians are responsive givers, and are more motivated to be involved with a charitable organisation when they see the impact of their giving on the people around them.

Gen Y individuals were more likely to be significant contributors to a charitable organisation if they had a personal connection with an organisation (51% cf. 34% of Baby Boomers) or felt that they could make the world a better place for those who are less fortunate (63% cf. 56% of Gen X and 47% of Baby Boomers). At least 3 in 5 Gen Y Australians (60%) were also more motivated to give when they saw the need, compared with only 53% of Gen X and 47% of the Baby Boomers who would respond in the same way.

Household Type

More than 1 in 2 households with children (54%) indicated that giving back to the community was significant motivation to being involved with a charitable organisation. Comparatively, only 43% of households without children saw this factor as their motivation.

Income

Australians falling in the higher income brackets (36%) suggested that the responsibility to share their wealth was an extremely or very important motivator to being involved with a charitable organisation. A smaller proportion of those from the lower income bracket (27%) felt that same responsibility of sharing their wealth.

Social perceptions important for the younger individuals

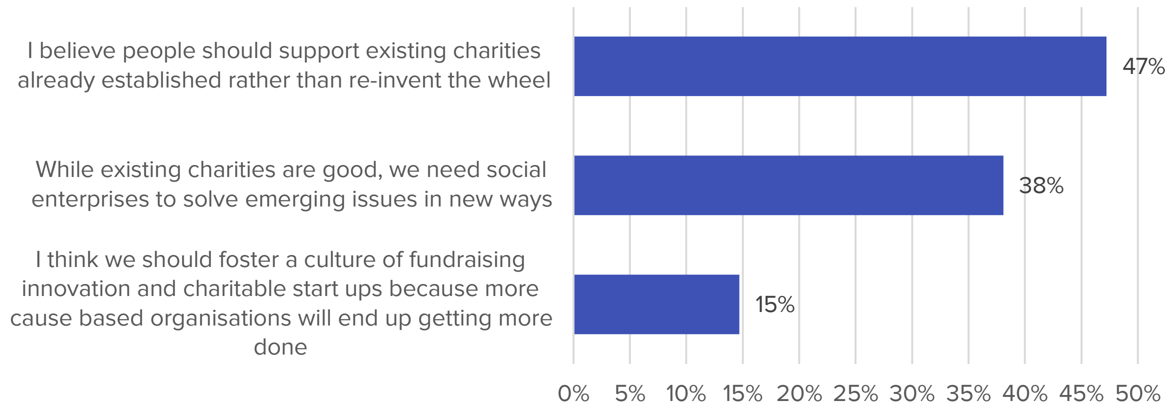
Gen Y individuals are generally more concerned about their social image, and would build their reputation through their actions.

More than 1 in 2 Gen Y Australians (56%) compared with those from Gen X (44%) and the Baby Boomers (35%) revealed that their motivation to give and get involved with a charitable organisation was due to the feeling elicited from doing something for someone else.

Similarly, 30% of Gen Y individuals indicated that the social pressure they feel to be a ‘good person’ was an extremely or very significant motivator to get involved with a charitable organisation. On the other hand, only 6% of the Baby Boomers and 8% of individuals from the Builder’s generation felt such social pressure in needing to be involved with a charity.

CHARITY INVOLVEMENT

Q. Thinking about your level of involvement with charities, which of the following best sums up your attitude?



Almost half of Australian givers (47%) would prefer to support charities already in existence rather than have people reinvent the wheel. 53% of Australian givers are more supportive of innovation in the charitable sector, with 38% considering social enterprises important in this process.

Generational insights

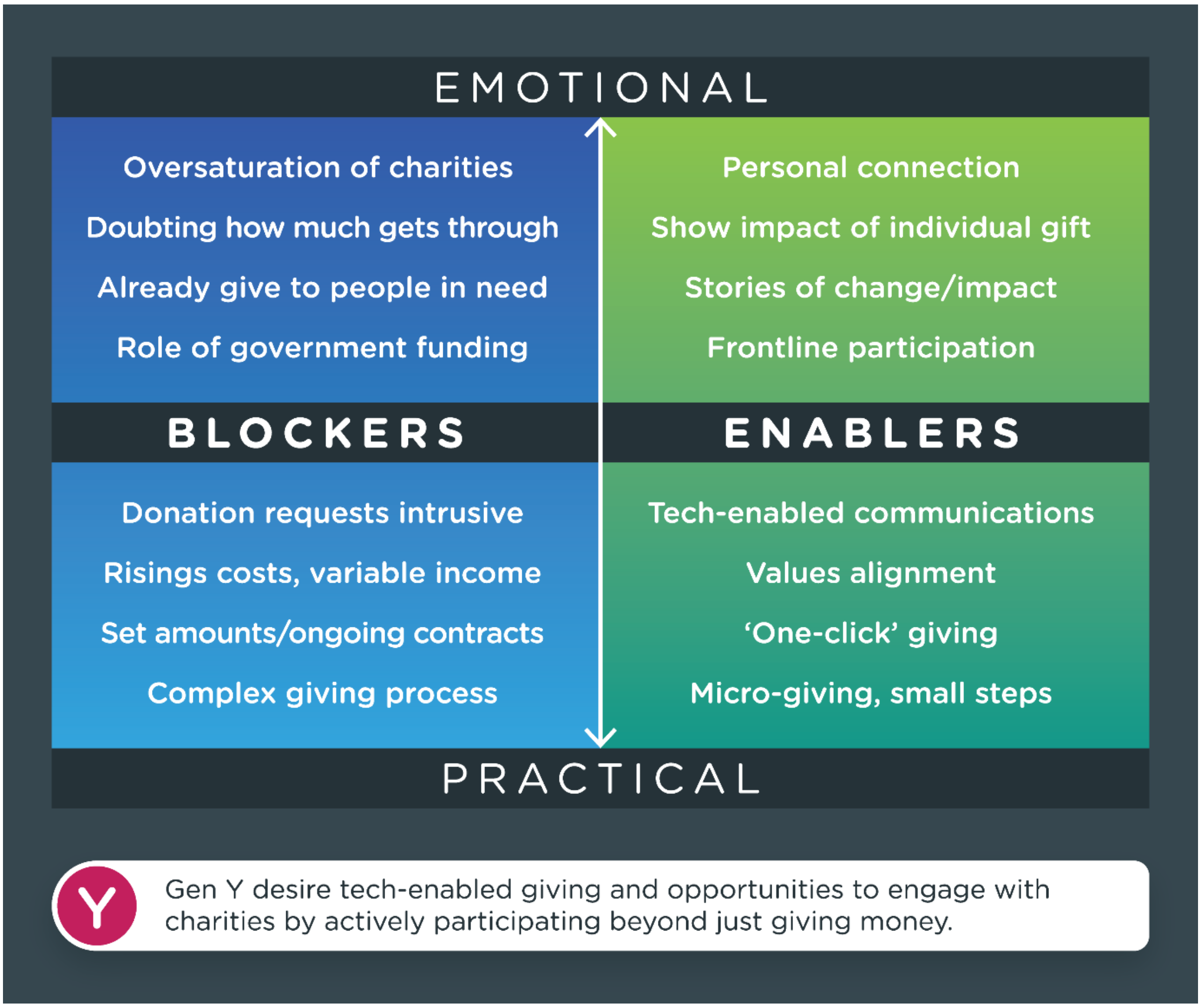
Baby Boomers (58%) have a stronger desire than those from Gen Y (33%) and Gen X (43%) to keep supporting existing charities rather than re-inventing the wheel of involvement.

QUALITATIVE INSIGHTS - BLOCKERS AND ENABLERS TO CHARITABLE GIVING

The following emotional and practical blockers and enablers to charitable giving were defined by focus group participants.

Emotional refers to something that personally disconnects or engages someone in charitable giving.

Practical refers to an organisation's tangible actions which stop or encourage a charitable donation.



How can some of these blockers be overcome?

OVERCOMING BLOCKERS

Providing information on where a supporter's donation specifically went to

"I would like to see where my money is going, not every dollar but what are you using it for? Maybe it is progress, like what are we trying to aim for?"

Creating flexible options for people to engage and donate to organisations

"I was ready to give him money. And he would only take a monthly donation. I would have given him $100 but it was the inflexibility."

Encouraging simple electronic forms of giving

"It's easy. If they have links through PayPal I am more likely to donate. So making it easy with two clicks etc."

Provide opportunities for young people particularly to be able to volunteer and feel part of the organisation as this ultimately leads to more giving

"Giving time creates a greater relationship with the charity... It introduces people to the story and means a personal attachment. For charities to offer that is wise."

Expert Insights - Engaging the younger generation

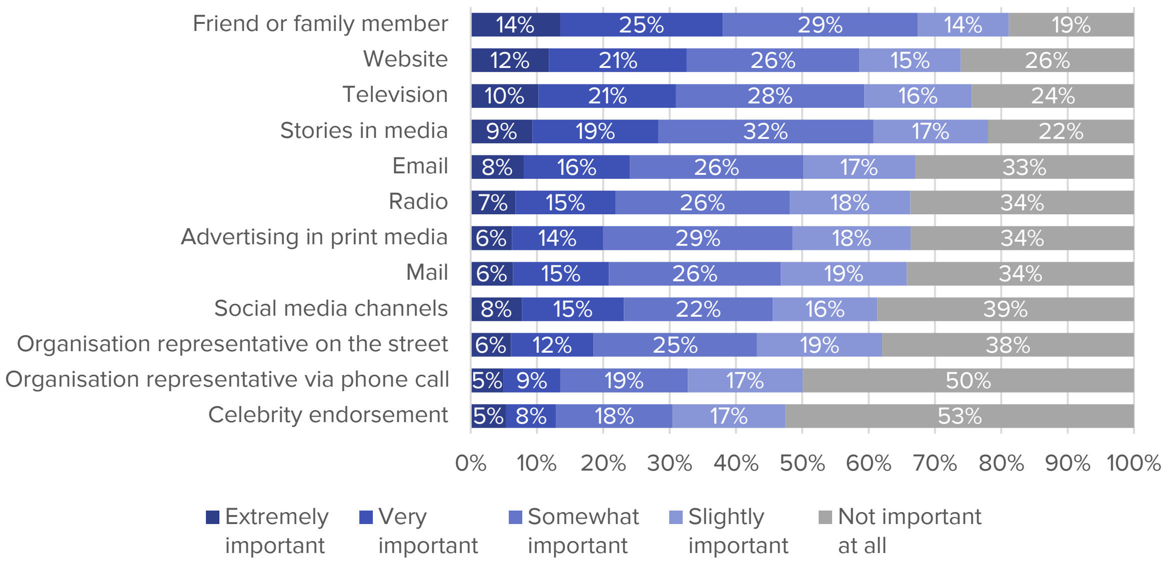
Experts recognise that young people are very different from their existing donor base, and that to build a sustainable donor base there is need for engagement. Young Australians desire an experience, a strong emotional connection, and a sense of partnership with an organisation. They desire ease of accessibility and interaction; the donor model needs to be simple to use.

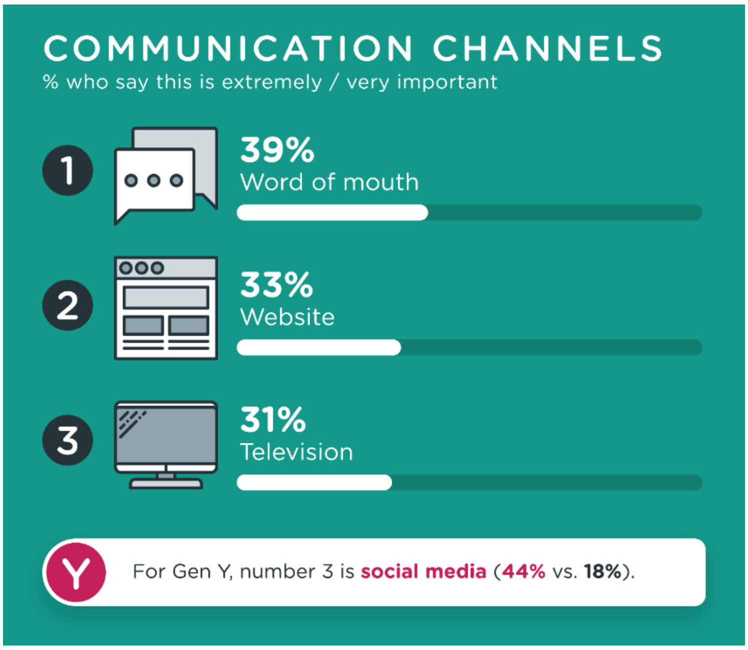
Practically it's about recognising young people absorb information very differently now, they like to see results of their giving. They don't give because they want to feel good about giving, they give because they want to be a part of the solution.

> *It's about a strong emotional connection, a younger person has to be invested in what you are doing, they have to see transparency, and they want the donor model to be very simple and easy to do.*
>
> *Young people want to raise funds in a way that is not a passive one-way transaction they want to get involved, they want to do something; they want it to be based around an activity that excites them.*

COMMUNICATION

Q. How important are the following communication channels in helping you engage with causes, not-for-profit organisations, and charitable organisations?





Word of mouth by way of friends or family members is the most influential channel through which Australian givers hear about and engage with charitable organisations (39% of Australian givers consider this to be extremely or very important). This validates the ingrained Aussie 'sceptiscism' and our need to hear information from someone we trust in order to fully trust the information we are receiving. Websites are increasingly seen as reliable sources of information with 33% of Australian givers considering these as extremely or very important to them engaging with a charitable organisation.

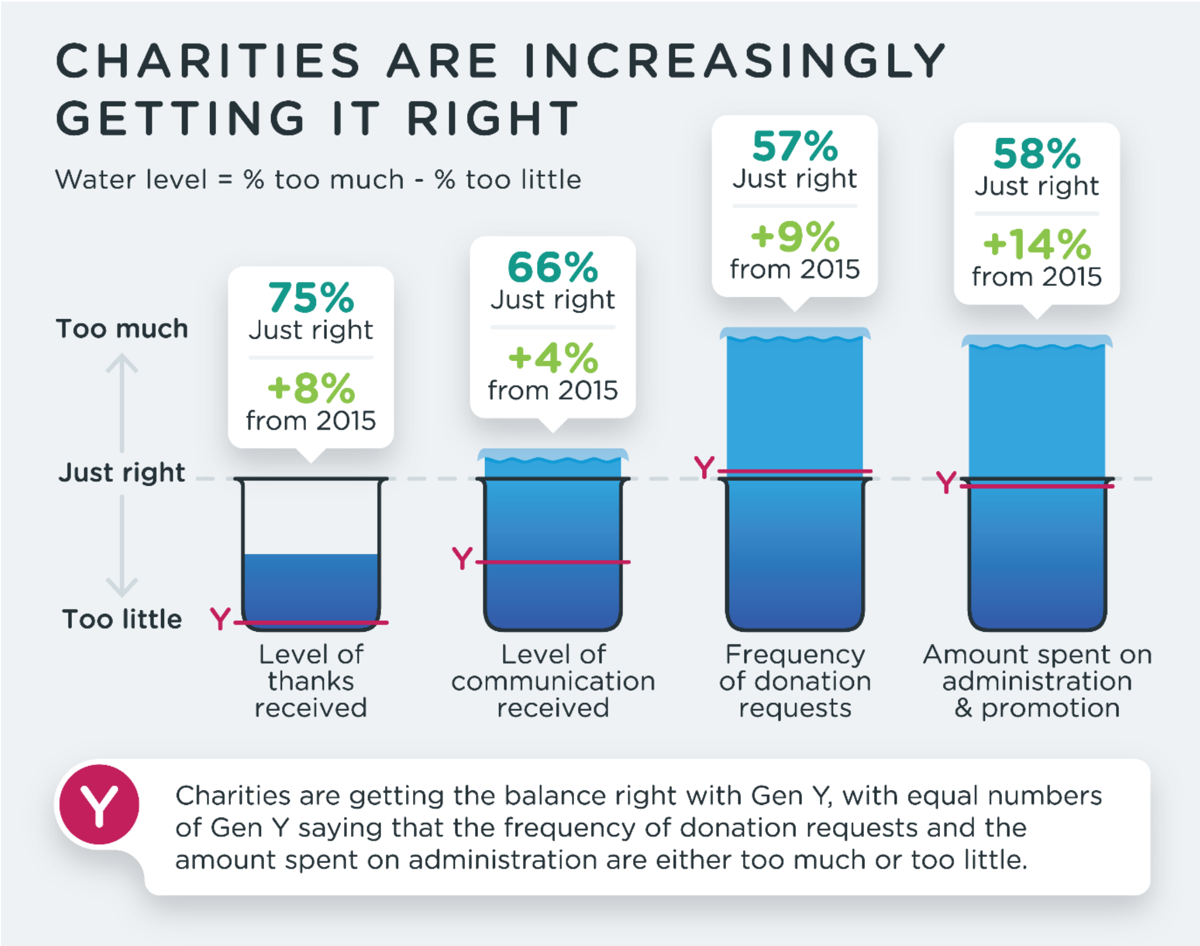
Generational Insights

Extremely + very important	Gen Y	Gen X	Baby Boomers
Advertising in print media	32%	19%	11%
Stories in media	40%	28%	21%
Social media channel	41%	21%	11%
Organisation representative via phone call	25%	12%	5%
Television	41%	30%	25%
Website	49%	35%	21%
Celebrity Endorsement	25%	10%	5%
Organisation representative on the street	30%	17%	12%
Email	36%	24%	16%
Friend or family member	49%	40%	27%
Radio	31%	21%	15%
Mail	30%	20%	12%

Higher proportions of Gen Y compared with Gen X or Baby Boomer Australians would say that a variety of communication channels are very or extremely important to helping them engage with causes, not for profit organisations and charitable organisations.

Household Type

37% of households with children emphasised the importance of television in assisting them to engage with causes and not-for-profit organisations whereas only 28% of households without children see the television as an effective communication channel.

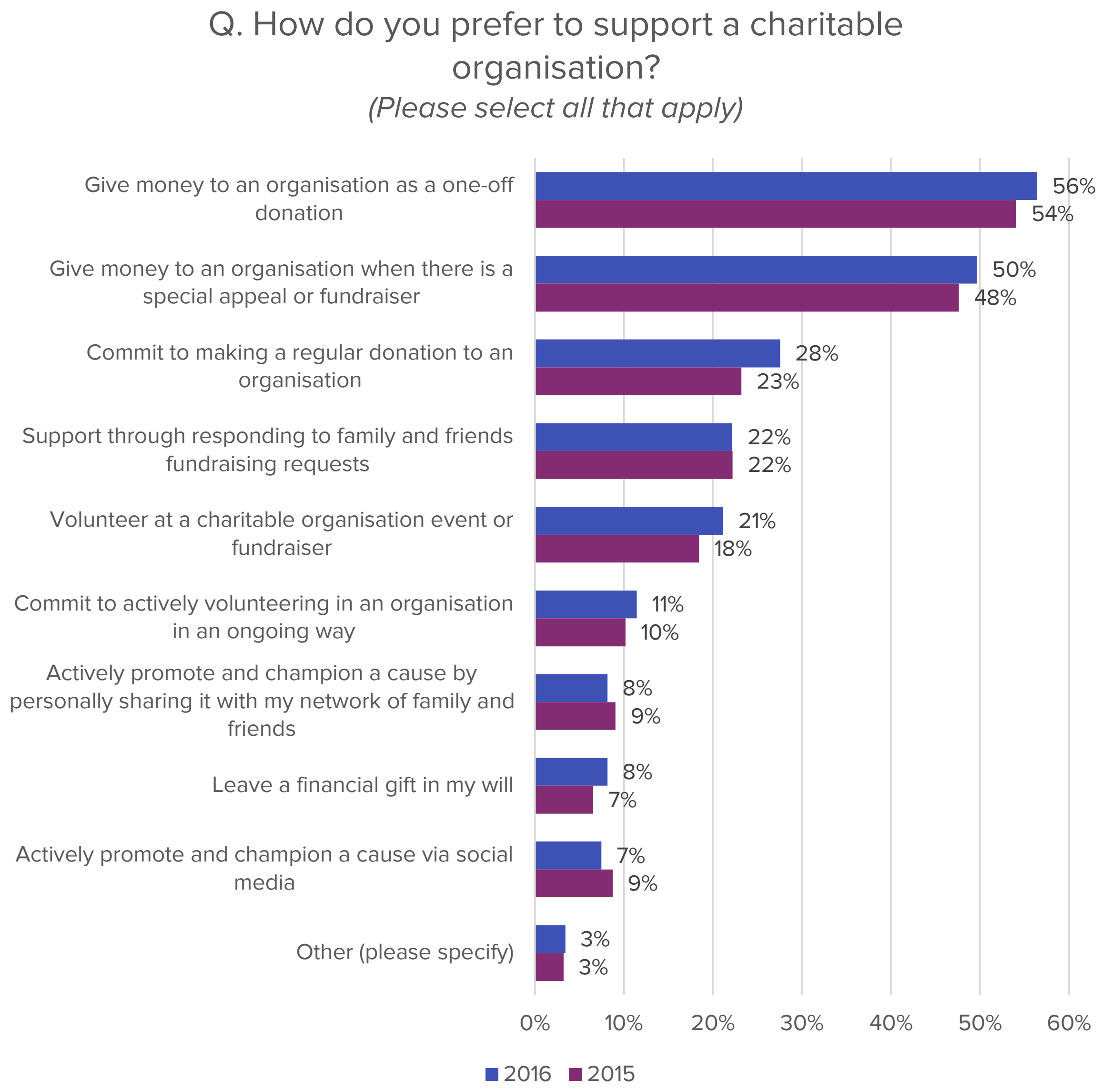


The above visual is in answer to the question 'Thinking about the main charitable organisation that you have supported or do financially support, please rate the following on whether it is too little, too much or just right.'

If the results are below the water line it shows that overall respondents felt that the organisations they support are not delivering enough in that area. If the water line is above the top of the jar, it indicates that organisations are overdoing it. The top of the jar indicates where organisations are getting it just right.

The level of thanks received by individuals is the most likely aspect of their involvement with a charity to be considered as too little (18%). The level of communication received is considered by many (66%) to be just right, however individuals are more likely to indicate that they receive too much communication (19%) than not enough (16%).

SUPPORTING ORGANISATIONS



Australian givers are increasingly preferring to give sporadically to charitable organisations. 56% prefer to give one-off donations and a further 1 in 2 (50%) prefer to give to special appeals or fundraisers.

The most common 'other' responses were when I can afford to, when I feel like it, none of these ways and giving physical items.

Generational Insights

Gen Y individuals are more likely to support a charitable organisation through social media and their participation in events held by charitable organisations. 12% of Gen Y individuals would actively promote and champion a cause via social media channels, compared with only 5% of the Baby Boomer generation.

1 in 4 Gen Y individuals (24%) compared with only 19% of Baby Boomers would volunteer at a charitable organisation or fundraiser to support the organisation.

Income

At least 1 in 3 Australians (33%) falling in the higher income bracket prefer to support a charitable organisation by committing to making regular donations to an organisation. This is comparative with those from the lower income bracket, with only 1 in 4 (26%) stating that their support is through regular donations to an organisation.

Qualitative insights - Why are one off donations on the rise?

The study found that one of the reasons for this was that participants had a strong preference for flexibility and being able to donate what they wanted, when they wanted to. Importance was placed on having the flexibility to be able to give to multiple causes or something that is topical that comes up.

I give it when I feel like it, they shouldn't be pestering for it.

Mine is once off (approximately monthly). I follow some organisations on social media and when things come up like greyhound racing I see I can give for the difference.

I give once off; I don't like being locked in. I want to give willingly.

QUALITATIVE INSIGHTS – SUPPORTING ORGANISATIONS

Role of government in charitable giving

While participants expressed that the role of the government should be to solve some of the issues present in society currently being taken care of by charities, they felt that the government could not be relied upon to do this. They indicated that it was difficult to know what adequate funding for charities would be.

Not really – you can't wait for the government to do what they are supposed to do.

It's a bit of an unknown, no one really knows how much they are giving. For some charities do they need $50,000 and are they getting $10,000?

Research before giving

The majority of respondents would research an organisation if it was for a longer term commitment but not if it was for a simple one off donation.

Values alignment

Overall sharing their own personal values with an organisation was of high importance to the majority of participants. Many participants indicated that it would be essential if they were donating ongoingly or giving a large amount to an organisation, otherwise it was a 'nice to have.'

It is vital to have the same values that underpin the organisation. There is a certain self-gratification to know your values are helping globally. It is good to know the organisation is working on behalf of you.

For regular giving it needs to be something I strongly believe in but if it is $5 in a bucket then I don't need to be as invested.

I think because of the over saturation of charities, you have to narrow them down somehow and that is the way I do it.

I don't want to give recognition to anything that is against my personal values…

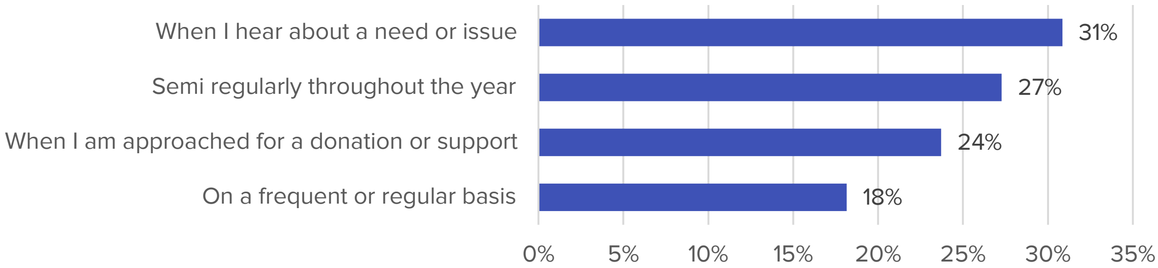
Charitable organisations with a Christian connection

For Christian participants, an organisation with a Christian connection would make them more likely to give to an organisation. For those who did not have a Christian background, about half of these participants didn't mind whether their charitable organisation had a Christian background or not, as long as they still delivered good results. There were some, however who had a negative perception of this type of organisation due to stories of corruption.

For me, it is irrelevant why they are doing it, a lot of Christian organisations do a lot of good work and I don't think they are doing that for God.

Personally I don't care either way, if I'm going to support a charity I'm going to do it, it wouldn't make me trust or not trust.

Q. Which of the following best describes when and how you give to a charitable organisation?



Almost 1 in 3 Australian givers (31%) primarily give when they hear about a need or an issue. 27% give semi-regularly throughout the year and nearly a quarter (24%) primarily give only when approached for a donation. Less than 1 in 5 Australians (18%) give on a frequent or regular basis.

Generational Insights

Gen Y Australians are more likely to be reactive than regular givers, with more than 2 in 5 Gen Y individuals (42%) responding to a charitable organisation when they hear about a need or issue. Instead, a higher proportion of Gen X (20%) and Baby Boomers (22%) than Gen Y (14%) would give on a frequent or regular basis to a charitable organisation.

Qualitative insights - Crowd funding websites

— Most charitable givers feel some form of social pressure to give to a friend asking for a donation through one of these sites.

There is a lot of pull from seeing each other donate in a friendship group "oh come on "whoever" you didn't put in your bit", it's a bit of a pull to get more money.

If I was asked by children from school, or if a friend asks to give my child a donation, I would personally find it difficult to say no. I'm supporting the child or the person [not the charity.]

— It would depend on the friend asking as to whether participants would give regardless of what the charity was.

It is nice to see people passionate about something so I would donate a bit.

— Some are selective of which friends they would donate to.

Depends on the friend, if it is someone that regularly gives to charity then I don't need to hesitate at all.

— For some there is a trust transference that if the friend was supporting the charity, they would then trust the charity.

Supporting the friend is more important than the actual charity.

— There is a sense of excitement in seeing the money grow and their friends or themselves reach their goal.

What would encourage further donations after an initial crowd funding request?

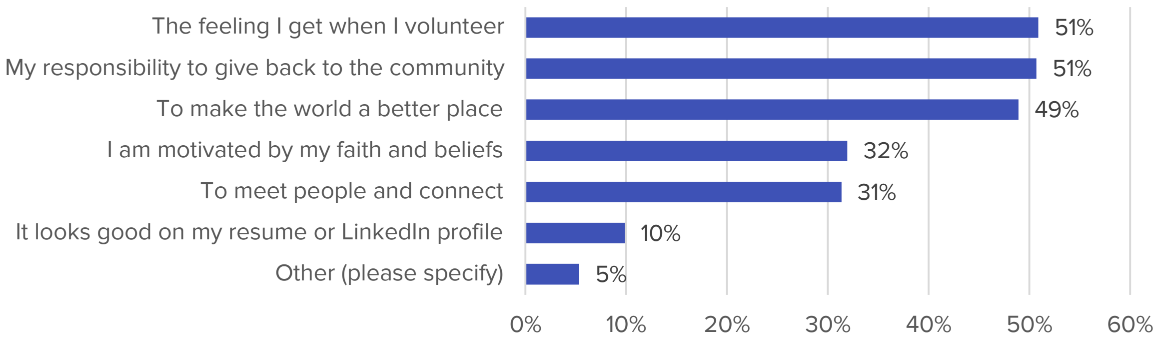
— An email thanking the giver for the donation and sharing how their donation has made an impact.

— Asking the giver whether they would like to get involved in any fundraising efforts similar to their friend's.

VOLUNTEERING

1 in 3 respondents (34%) indicated that they have supported a charitable organisation by volunteering in the past. The following questions give more insights into their motivations and and how often they volunteer.

Q. Why do you volunteer in the way you do?
(Please select all that apply)



Responsibility and satisfaction are the key motivators for volunteers with more than half of volunteers indicating that they do so because of the feeling they get when they volunteer (51%) or because they feel it is their responsibility to give back to the community (51%). Almost half (49%) are also motivated by their desire to make the world a better place.

The most frequent 'other' responses were that it fills time, fulfils a passion, just to help, belief motivation and to give without giving financially.

Gender

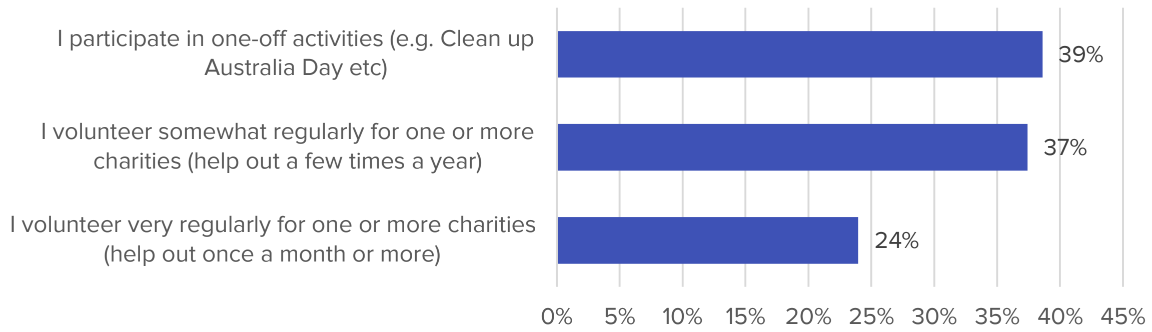
More than 1 in 3 females (36%) would volunteer for a charitable organisation to meet people and connect, compared with only 1 in 4 males (25%) who have the same motivation.

Generational Insights

Younger individuals feel the responsibility for improving their future world, while the older individuals are more retrospective and show a desire to be giving back to their community. More than 3 in 5 Gen Y (62%) and 1 in 2 Gen X (50%) indicated that they volunteer for a charitable organisation to make the world a better place compared with only 38% of Baby Boomers who hold this view.

On the other hand, more than 3 in 5 Baby Boomers (64%) and 43% of Gen X compared with 39% of Gen Y volunteer for a charitable organisation as they feel the responsibility to give back to the community.

Q. Which of the following best describes your approach to volunteering?



Volunteering is similarly considered as a sporadic way of giving by many Australian givers with 39% of those who volunteer doing so for one-off events such as Clean Up Australia Day. Other volunteers (61%) are more regular with the giving of their time, helping out a few times a year (37%) or at lease once a month (24%).

Time restraints prove to be a factor in influencing an individual's regularity in volunteering for a charitable organisation.

Generational Insights

Time-poor students and young workers are more commonly participating in once-off activities while the older generations in retirement are more likely to volunteer very regularly for one or more charities.

35% of the Baby Boomers and 40% of Australians from the Builder's generation compared with only 13% of Gen Y and 21% of Gen X would volunteer very regularly for one or more charities. Instead, almost 1 in 2 Gen Y (47%) and 41% of Gen X participate in one-off activities instead of regularly volunteering.

Household Type

45% of households with children would participate in one-off activities compared with 36% of households without children. On the other hand, more than 1 in 5 households without children (27%) compared with 16% of households with children would volunteer very regularly.

Qualitative insights - Giving beyond money

Volunteering

Highly positive about donating items

Participants spoke highly of the idea of donating items rather than money. It was stated that if they couldn't give money then this was a good option and they didn't need to be concerned about corruption or lack of transparency.

There is less chance of corruption.

Some charities are putting out bags and you just put your stuff (clothes, items etc) in there and they collect them. It is convenient.

Expert Insights - Volunteering

Experts understand there is an increasing desire of Australians to be involved in charitable organisations in an experiential way. Particularly for young people, they desire to go on a journey, have a tangible experience and develop a partnership, not just a transactional relationship of donating money and the charity does the work. Experts also recognise that the ability of an organisation to engage a donor on multiple levels and take them on a journey, can increase loyalty and generosity towards the organisation. When Australians give of their time not just their money there is a sense of partnership and advocacy towards an organisation.

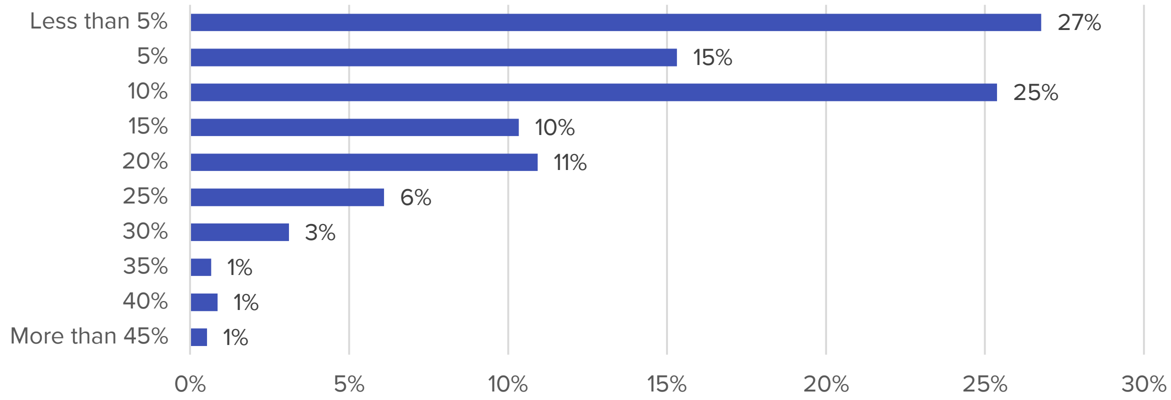
The challenge for charitable organisations is the time and administration costs incurred with the management of volunteers. For some charities too, there is the appropriateness of having volunteers within their organisation. Even so, there was an overall sense that charities that can navigate this well and find opportunities for Australians to engage and partner with their organisation would be well to do so.

> *The more ways supporters are involved with organisations the more loyal they are so the longer they stay on board and the more likely they are to talk to others about their involvement, it's a challenge for organisation... increasingly we are an experience driven society, we want the experience not just the transaction.*

> *The younger generation have a social conscience and a greater sense of social responsibility.... a much higher sense of giving back to the community, much greater awareness of the role they can play even if they don't have any money in improving society... the willingness is there the challenge will be the increased administrations and the increased obstacles to becoming a volunteer.*

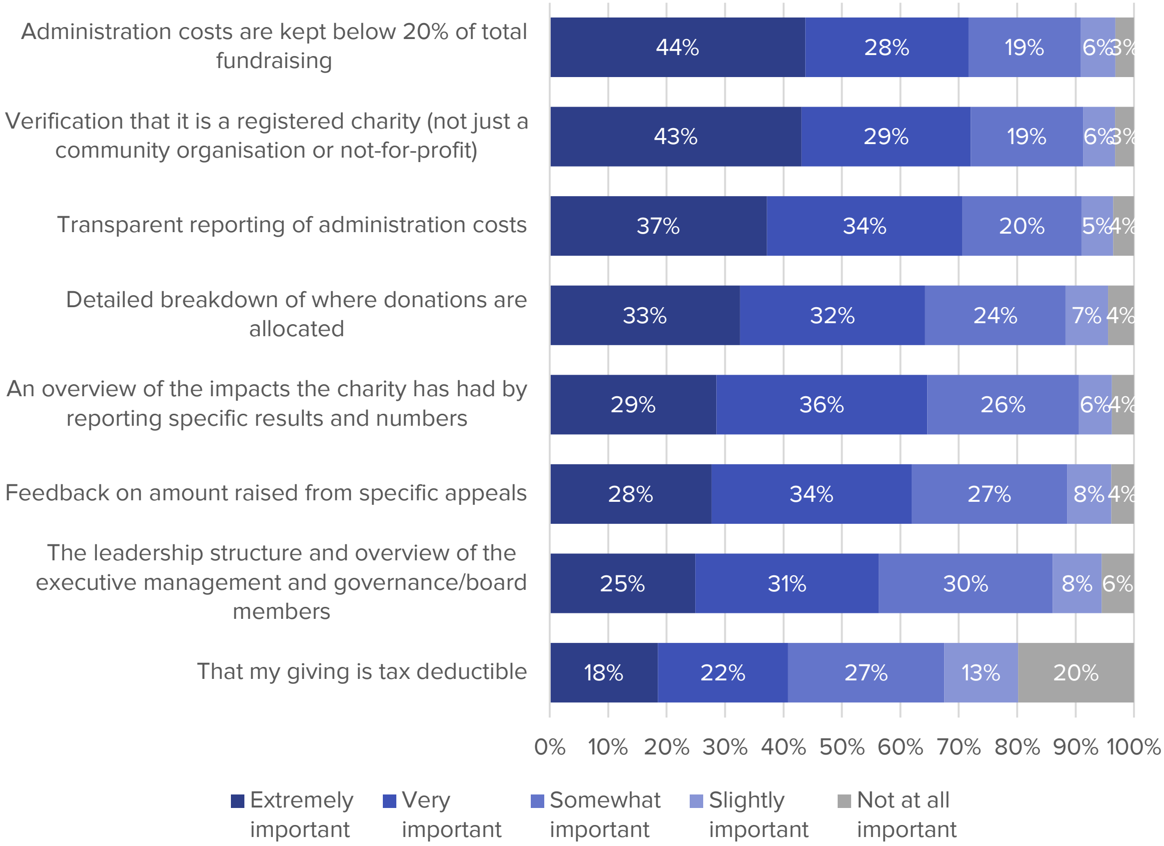
ADMINISTRATION COSTS

Q. What do you think are reasonable administration costs of a charitable organisation you support?



A large proportion of Australian givers (67%) believe that administrative costs should account for 10% or less of a charitable organisations' expenditure. The median for the reasonable administrative costs is 10%.

Q. How important is it to you that a charitable organisation provides you with the following information?



THE 5 CHARITY ESSENTIALS

% who say this is extremely / very important

72% Administration costs kept below 20%

72% Verification of registration as a charity

71% Transparent reporting of admin costs

65% Where donations are allocated

65% Reporting specific impacts and costs

Gen Y is less focussed on keeping administration costs below 20%, dropping this to 6th position at **56%**.

Australian givers have certain expectations of the organisations they give to. Administration costs and verification are the most important aspects for Australian givers with 9 in 10 (91%) suggesting that it is at least somewhat important to keep administration costs below 20% of fundraising and a further 9 in 10 (91%) requiring verification that the organisation they are supporting is a registered charity. It is of the lowest importance that their giving is tax deductible with only 67% indicating that this is at least slightly important to them.

Gender

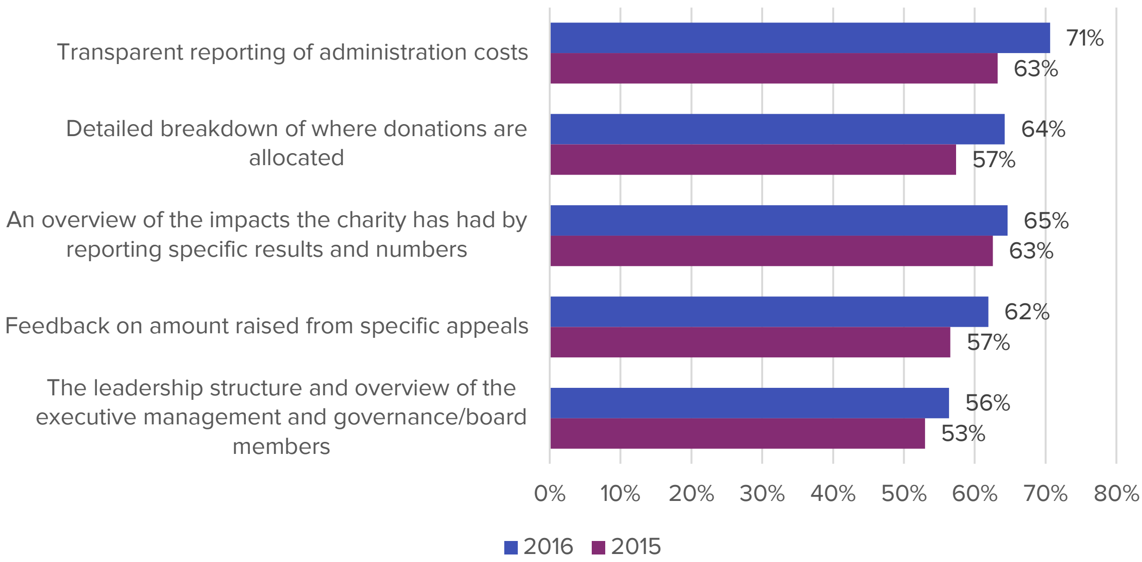
68% of females say that it is extremely or very important that a charitable organisation provides feedback on the amount raised from specific appeals compared with 56% of males.

Income

More than 1 in 2 Australians (51%) falling in the higher income bracket indicated that it is very or extremely important that their giving is tax deductible, while only 37% of those in the lower income bracket were concerned by this aspect.

2016 compared to 2015

- Extremely and very important



A higher proportion of repondents in 2016 indicated that each of the above aspects of organisational reporting are extremely or very important to them.

Expert Insights - Administration Costs

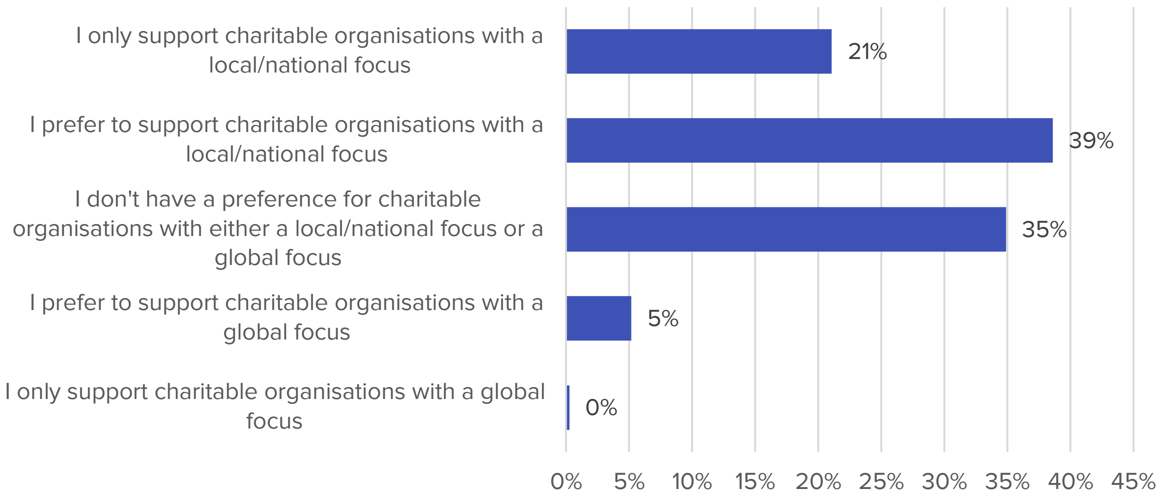
There is a desire by experts to reframe the question of Australian society to not what are the administration costs but what impact is an organisation having. Universally there is an understanding that charitable organisations need to be transparent with their administration costs, experts recognise that the public have a right to know that their money is being used effectively for its intended purpose. Nevertheless, there was concern among experts in comparing administration costs alone as currently there is no consistent definition of what administration costs include. A number of experts suggested an area of improvement for the sector in transparency of reporting, could be to develop a standardised reporting guideline of administration costs. This would enable charities to be compared on consistent information.

Further to this, experts suggest currently the public is motivated by input, and they would like this to transition to a greater focus on output. There is a sense that sometimes a bigger investment is required to get a bigger return, and the ability of the charity to clearly communicate the impact of that bigger investment is key.

> *Overall in the not for profit space we are not coming up with the right message…. that actually says look for us to deliver a high quality service that gives you the best return on your commitment, your support, obviously there are costs that are incurred, and that's what it costs us to do our work.*
>
> *I think for charities it's not just saying this is the percentage, it's actually demonstrating the impact of the gift, and demonstrating the efficiency and effectiveness of the organisation in addressing that cause.*

LOCAL V GLOBAL

Q. When looking to support a charitable organisation do you have a preference for those with a local/national focus or a global focus?



2 in 5 Australian givers (39%) are more locally/nationally focused, preferring to support organisation primarily with this focus. 35% suggest that they don't have a preference between a local or global focus.

Generational Insights

1 in 4 Australians from the Baby Boomers (25%) compared with 18% of Gen Y indicated that they only support charitable organisations with a local/national focus.

Qualitative insights – Local v Global giving

As evidenced in the survey, younger respondents were more likely to give globally than older respondents. The focus groups uncovered some of the reasons behind why this is the case. The older participants who were more focused on giving nationally stated that this is the case because they are worried about corruption in other countries and looking after the needs of Australians as a priority.

One of the ones that really concerns me is the perception of corruption. In Australia we have our laws and ways. Once you leave the country, especially world aid organisations you think does the money go to the people? Is it going to go to the kids?

I would rather tackle the issues nationally first and then maybe globally… it's not that I don't care about global issues, but we need to concentrate on one thing at a time.

National – there is enough to address here without spreading ourselves too thin.

Among all participants there were many who didn't mind whether organisations had a national or global focus. These participants were more concerned about whether the money was going to the right place. There were a greater number of younger people (aged 19- 26) who didn't mind whether it was local or global giving.

There are so many different good causes that are global and some that are national. It depends on the specific cause and where it is happening.

It doesn't process for me, if it is a good cause, there is a need and the money is actually going to get there then great.

As long as your helping people, I wouldn't mind where you donate.

Expert Insights - Local V Global

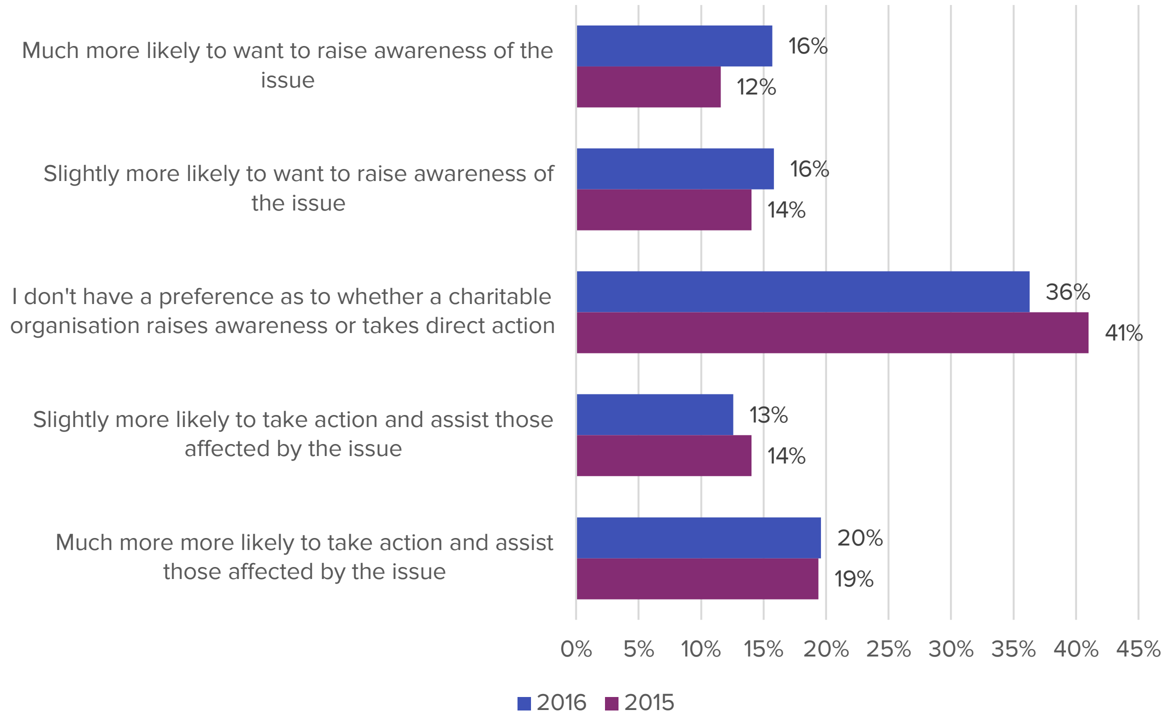
There is a trend for Australians to be more inclined to support local/national organisations when compared to global organisations. Experts suggest that Australia is a fairly nationalistic society and there is a sense that we need to look after our own backyard, the concept that charity begins at home may also play a part in Australians desire to support local charities. Increasingly young Australians are more likely to identify as global citizens with a greater global focus, which therefore may give them a greater inclination to support global organisations than older Australians.

Younger donors are more likely to support overseas aid and development.

This is in your own backyard…. it is a fairly nationalistic society in Australia.

AWARENESS V DIRECT ACTION

Q. When selecting a charitable organisation to support, do you look for charitable organisations which are focused on raising awareness and educating around an issue or cause, or charitable organisations which directly assist and are actively engaged in r



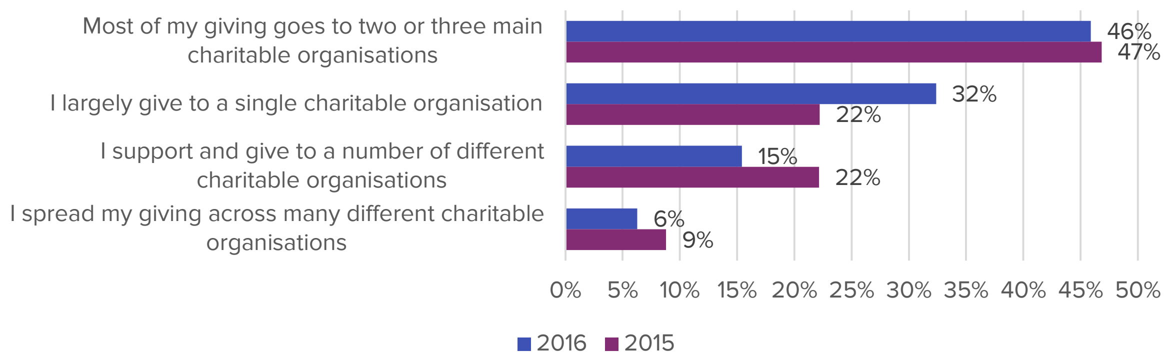
Just over a third of Australian givers (36%) don't have a preference as to whether a charitable organisation has a focus on raising awareness or taking direct action. A third (32%) however prefer to raise awareness about issues whilst another third (33%) suggest that they would prefer to support an organisation which are focused on taking action and practically assisting those affected by the issue.

Generational Insights

Look for charitable organisations which are...	Gen Y	Gen X	Baby Boomers
Slightly or much more likely to want to raise awareness of the issue	39%	32%	24%
Slightly or much more likely to take action and assist those affected by the issue	26%	30%	40%

Younger Australians are more likely to want the charitable organisation that they support to raise awareness on an issue. On the other hand, those from the older generation would prefer their charitable organisation to take action and assist those affected by an issue.

Q. Please indicate which of the following responses best represents how you distribute your giving to charitable organisations.



For the most part, Australian givers are focused on giving to select organisations. Almost half (46%) give to two to three main charitable organisations and a further third (32%) focus their giving on a single organisation. 21% of Australians are more sporadic with their approach, giving to a number of different charitable organisations.

Gender

A higher proportion of males (35%) than females (29%) would primarily give to a single charitable organisation.

Q. What most stops you from giving more to charitable organisations or causes?

The vast majority of survey respondents indicated that the key reason why they don't give more money to charities is their **lack of money** to be able to do so. Some expanded that this meant they were already on a low income themselves or felt they couldn't afford it.

> *Lack of spare change and unwillingness to subscribe to donating.*

> *My own lack of funds.*

The other main factor that stopped respondents from giving more money was a **lack of trust** in where money that they were giving was going. There were concerns that the money didn't directly go to those who needed it as well as a lack of accountability with current charities.

> *(What stops me giving more) is not knowing where and how the funds are used, especially with overseas organisations.*

> *I don't believe most money goes to where it is supposed to.*

Other reasons by respondents for what stops them giving to more charities is the **over saturation of charities** and that some **hassle you to give money** to them.

Q. What is one thing that charitable organisations could do which could enable you to better support them?

The most frequent response to this question was that there is **nothing** that charitable organisations can do to enable more support. Some of these responses alluded to the idea that it is not up to the organisation to try and illicit more support but it is up to the individual's own personal choice.

> *Nothing, we have chosen those we support.*

Another frequent response to this question was that it would be a motivating factor to support more if they knew the **money was going to the right place**. Some respondents were concerned that they money they gave was not safely being distributed where it should be. This provides an opportunity for charitable organisations to work on ways to communicate where exactly the money is going.

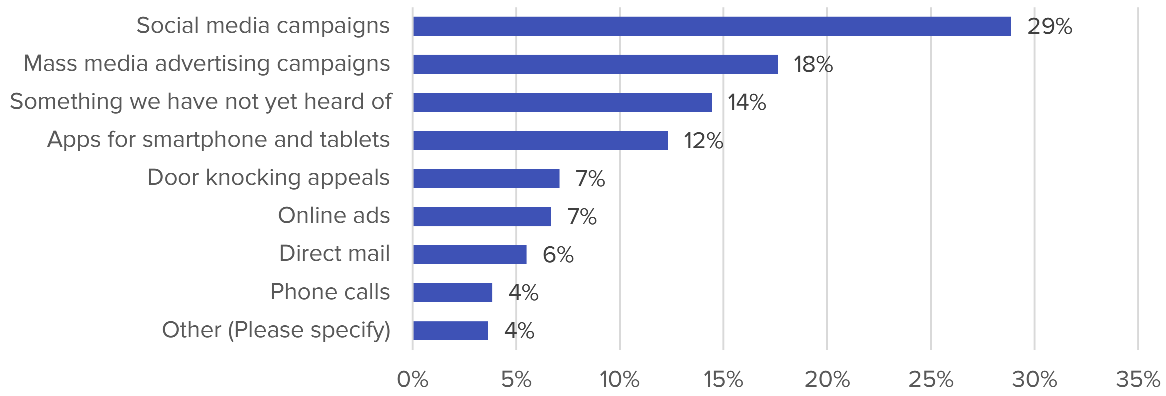
> *Keeping people up to date on where the donated money is going [would enable more support].*

> *Allow more money to go to charity instead of advertising and salaries.*

Some of the other key factors were providing **more information on the charity** and **where the money goes**, opportunities for **volunteering**, allowing **one off donations** and **increasing general awareness** of the cause and charity.

FUNDRAISING CHANNELS

Q. What do you think will be the biggest advertising and fundraising channels for community and charitable organisations in a decade (2026)?



With the growth and development of technology, social media campaigns were predicted to be the biggest fundraising channel for charitable organisations in the next decade (29%). Mass media campaigns however are still considered to be a prominent communication channel for fundraising (18%).

The most common 'other' responses were not sure, television and at large gatherings of people.

Gender

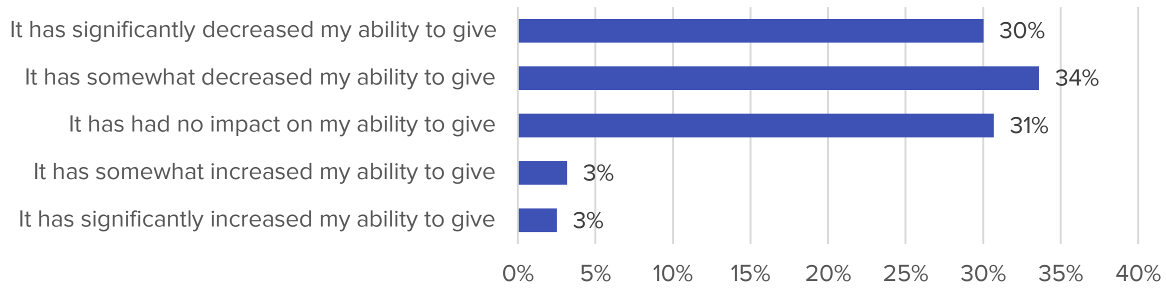
35% of females compared to only 22% of males indicated that social media campaigns will be the biggest advertising and fundraising channels for community and charities.

Generational Insights

Almost 2 in 5 Gen Y Australians (39%) see social media campaigns as the main advertising and fundraising channels for community and charities. On the other hand, smaller proportions of those from less tech-savvy age groups, Gen X (30%) and Baby Boomers (22%), would see social media to be effective for advertising and fundraising purposes.

EXTERNAL INFLUENCES ON GIVING

Q. Has the cost of living and changing housing prices in Australia over the last year or so impacted your ability or willingness to give to charities?



Increases in house prices and the cost of living over the last year have had a significant impact on Australians' giving, or more perhaps on their perception of their ability to give. 64% indicate that these increased costs have decreased their ability to give to charities whilst just 6% suggest it has increased their ability to give.

Generational Insights

Gen X and Baby Boomer Australians, who are more likely to own a home outright or with a mortgage than Gen Y, have revealed that the changes in the cost of living and house prices in Australia has decreased their ability to give to an extent.

Almost 7 in 10 Baby Boomer Australians (67%) and 62% of Gen X compared with 59% of Gen Y have expressed that the changes to living costs have somewhat or significantly decreased their ability to give.

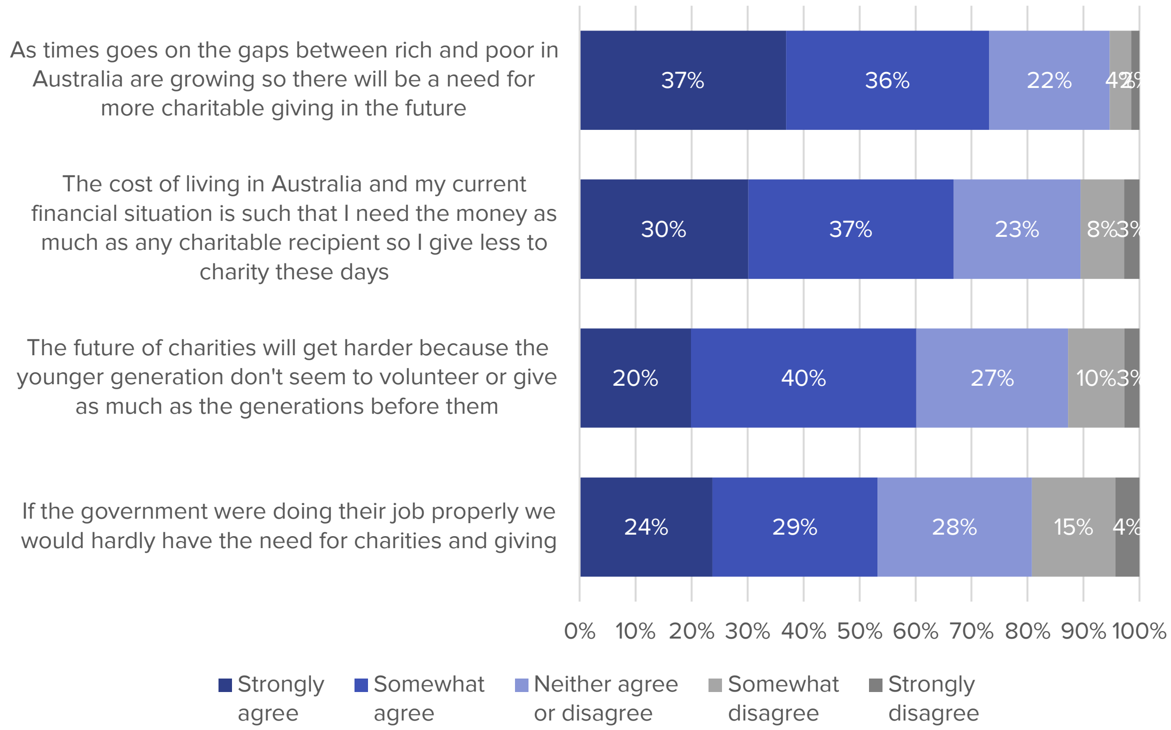
State

72% of Australians from QLD see that the changing costs of living have somewhat or significantly decreased their ability to give, compared with the other states such as NSW (60%) and VIC (61%).

Income

More than 2 in 3 individuals in the lower income bracket (67%) compared with only 55% of those from the higher income bracket have expressed that the changes in cost of living and housing prices have somewhat or significantly decreased their ability to give.

Q. Please indicate to what extent you agree with the following statements.



Generational Insights

2 in 3 Baby Boomer Australians (66%) (cf. 54% of Gen Y and 57% of Gen X) somewhat or strongly agree that the future of charities will get harder because the younger generation don't seem to volunteer or give as much as the generations before them.

Income

7 in 10 Australians in the lower income bracket (70%) somewhat or strongly agree they are giving less to charity these days due to the cost of living in Australia and their current financial situation, while only 56% of those in the higher income bracket feel the same way.

3 in 4 Australians in the lower income bracket (75%) compared with 2 in 3 of those in the higher income bracket (66%) also somewhat or strongly agree that there will be a growing gap between the rich and poor in Australia.

Expert Insights - Changing times changing giving

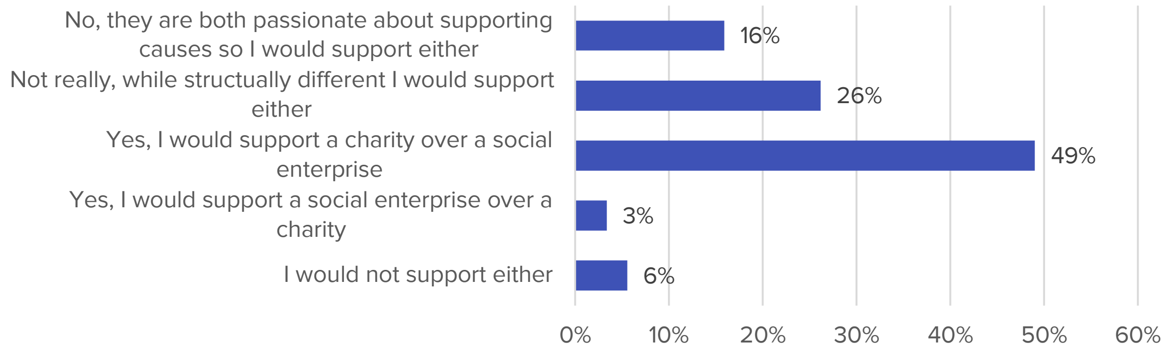
Experts commented that the Australian community is feeling under pressure. This may be cause for concern as often it is the 'middle' Australian that gives the greatest volume of donations. This may be motivated by a greater sense of empathy, awareness and understanding of another's situation. A sense of vulnerability to the changing economic market in their own lives may impact the amount they are able to give to charities.

At this point, tension is experienced with Australia being among one of the wealthiest countries in the world, yet in the changing times its people feel they are in need as much as an any charitable recipient, and this affects their giving habits. Experts understand that some Australians are 'doing it tough' however, it is felt there may be a perception deficit about understanding real need, and vulnerability of the charitable recipients.

> *Charity giving is very driven by consumer certainty or on the flipside consumer uncertainty. When we feel comfortable with our lives and when we feel secure we are more able to think about others than when we feel insecure. It's about the perception of the donor not necessarily about the reality.*
>
> *The people who give the most are not the uber rich, but the people who are not well off and can empathise with those who are in need.*

ATTITUDES TOWARDS CHARITIES

Q. When you think about registered and traditional charities compared to social enterprises, do you see a difference between them?



Perceptions of registered charities compared to social enterprises are varied. 42% don't consider there to be significant difference between them, however almost half (49%) suggest that they would support a charity over a social enterprise. Only 3% would support a social enterprise over a charity.

Gender

More than 1 in 2 males (53%) compared with 45% of females specified that they would support a charity over a social enterprise.

Qualitative insights – Social Enterprise

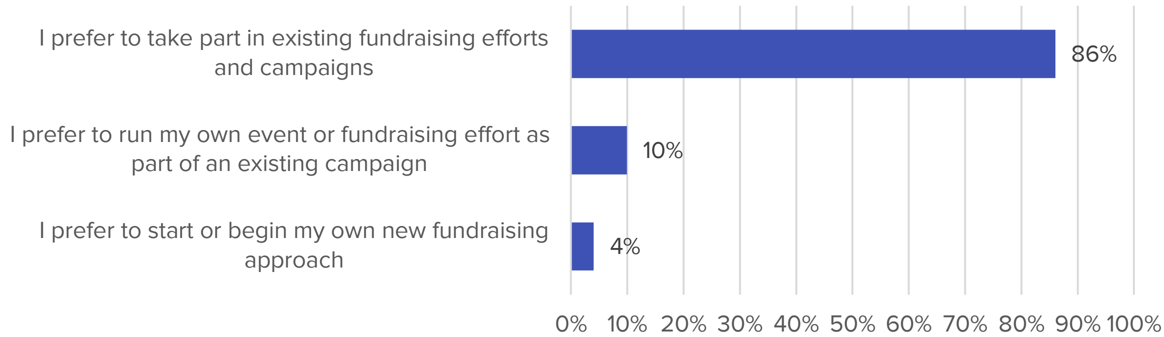
Participants in the focus groups were shown the above graph on how likely Australians would be to support social enterprises over traditional charities. A potential reason why there was such a large number of respondents who would support a traditional charity over social enterprise could be a lack of awareness of what a social enterprise is. There was a very low number of participants who knew what a social enterprise was but when they were explained a definition there were a few who indicated that they have supported one in the past.

The younger generations were more open to the idea of a social enterprise.

Despite this, there was still some hesitation around the idea of a social enterprise as it is a new concept and the fact that they are not able to research the company in the store while purchasing. Participants explained that they would like clarity on exactly what goes to the ground.

I would personally like to know how much is being sent off.

Q. Are you more likely to join an existing cause or campaign or start your own fundraising approach?



The majority of Australian givers (86%) would prefer to support existing causes and campaigns rather than start their own, however, 14% would prefer to run their own events, 4% of these preferring to try a whole new approach.

Income

15% of higher income earning individuals compared with only 8% of individuals falling in the lower income bracket would prefer to run their own event or fundraising effort as part of an existing campaign.

QUALITATIVE INSIGHTS – NEXT STEPS FOR CHARITABLE ORGANISATIONS

Multi-tiered levels of engagement

There is a desire from participants to be involved in charities, however increasingly this is to be on their own terms. Charitable givers did not want to be locked into long term contracts, but desire flexibility in donation amounts and involvement. Older generations suggested they were time poor, however younger generations stated they didn't have money to give but still wanted to be involved.

There is a need for charitable organisations to provide multi-tiered levels of engagement that allow people to engage with them in an appropriate way to their age and stage of life.

Raise awareness about the charity instead of focussing only on monetary supports, offer options to help support the organisation in other ways e.g. volunteering, office admin, social awareness, media program.

Community Building

Particularly in the younger generations there is a desire to be a part of a community that brings about social change. To be involved in something bigger than themselves with the knowledge that together they can make a difference. This gathering of community is not just in the online space but in the physical space as well with a passion for running events that bring people together as a community. It is about going on the journey to bring about social change together.

Take the kids on the journey, I am always thinking with my boys how do I take them with me? How do I give them a value or ownership with it? How do we do it together as a family?

Effective communication of results

Repeatedly participants want to see the results of where their money is going. They want to know how has it practically helped people in need. When participants knew their donation was being effective, there was a desire to continue engaging with the charity.

Low pressure advertising, show where money is going.

When you get a result, let a person know that their ongoing donation actually helped.

Create engaging and fun experiences

There is a desire among participants particularly in the younger generation to be involved in experiences with charitable organisations. They don't want to just give their money and tick it off the list and feel good. Their desire is to get involved in more of a partnership relationship with organisations. Their desire is for the donation experience to be fun and meaningful.

Having events so you can link it with an experience. I think that is important. I tend to give more if I can link it with an experience.

Associating with relevant brands and events is really important for young people. Like through music festivals you hear about charities that you wouldn't have already.

Expert Insights - Challenges for the sector

Moving forward experts suggest creating multiple platforms of engagement, charitable organisations need to understand the different donors and segment marketing strategies to target these appropriately. The engagement of young people is key to sustainability, however there is a need to recognise the current donors and continue to engage them in ways and platforms that suit them.

Charitable organisations are increasingly seen as businesses and potentially need to think more commercially than ever before, the relationship with charities needs to be mutually beneficial for continued engagement. Whilst also recognising that the Not for Profit Sector is unique in its offering of volunteerism and involvement which is a key part of building community.

The ability of charities to adapt to changing stakeholder expectations will impact their sustainability into the future. Increasingly there is a desire from Australians to be involved in the journey of support, they want to engage in a tangible experience, and want to know that their contribution is making an impact.

Going forward, charitable organisations need to be clear about their purpose, how they are achieving it, create opportunities for donors to engage on multiple levels, and effectively communicate the impact they are having.

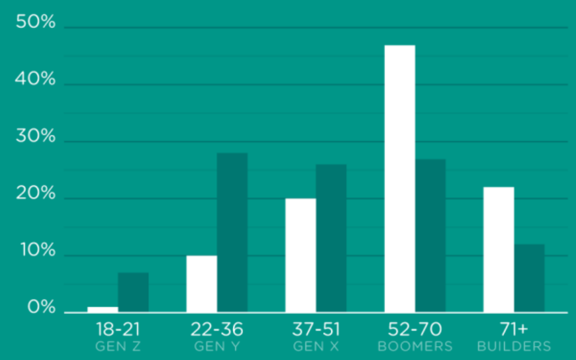
Responding to changing stakeholder expectations, transparency, ability to communicate impact.

Perhaps in the past it was primarily mono-dimensional, charity does, donor gives, I think there has to be far more engagement in a way that it used to be there.

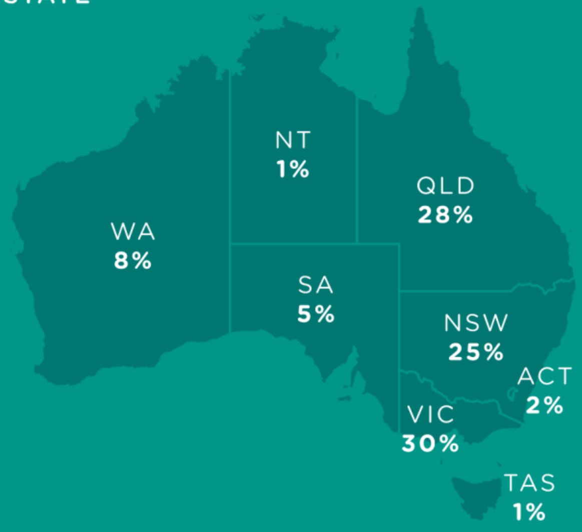
SUPPORTER SURVEY

DEMOGRAPHIC OVERVIEW

AGE



STATE



GENDER

	Male	Female
Supporters	38%	62%
National average	50%	50%

TOP 10 AREAS OF NEED

% of supporters highly motivated to give or volunteer by this cause

1. Disaster response overseas
2. Disaster reponse in Australia
3. Religious mission / ministry
4. Poverty alleviation overseas
5. Homeless-ness
6. Children's charities
7. Animal welfare
8. Poverty alleviation in Australia
9. Medical and cancer research
10. Refugees

INFORMATION ON WEBSITE

% who say this is extremely / very important

1. **82%** Impact and effectivess of programs
2. **67%** Percentage of administration costs
3. **40%** Most recent annual report

WORDS THAT DESCRIBE CHARITIES

RELEVANT INNOVATIVE RELIGIOUS
HELPFUL PURPOSEFUL
APPROACHABLE LEADERSHIP
CARING FRIENDLY
COST EFFICIENT
TRUSTWORTHY
IMPACTFUL PROFESSIONAL

SUPPORTERS RATING OF THEIR RELATIONSHIP WITH THE ORGANISATION

- **49%** Very satisfied
- **39%** Somewhat satisfied
- **9%** Unsure
- **2%** Disappointed
- **1%** Very disappointed

NET PROMOTER SCORE

NPS/NRS = [9+10] - [0+1+2+3+4+5+6]

Scores of promoters — Scores of detractors

AUSTRALIA'S HIGHEST RATED SECTOR

29
+2 from 2015

NET PROMOTER SCORE (SUPPORTERS)

On a scale of 0 to 10, how likely would you be to recommend this organisation to a friend looking for a charity to support?

53

NET REPEATER SCORE (SUPPORTERS)

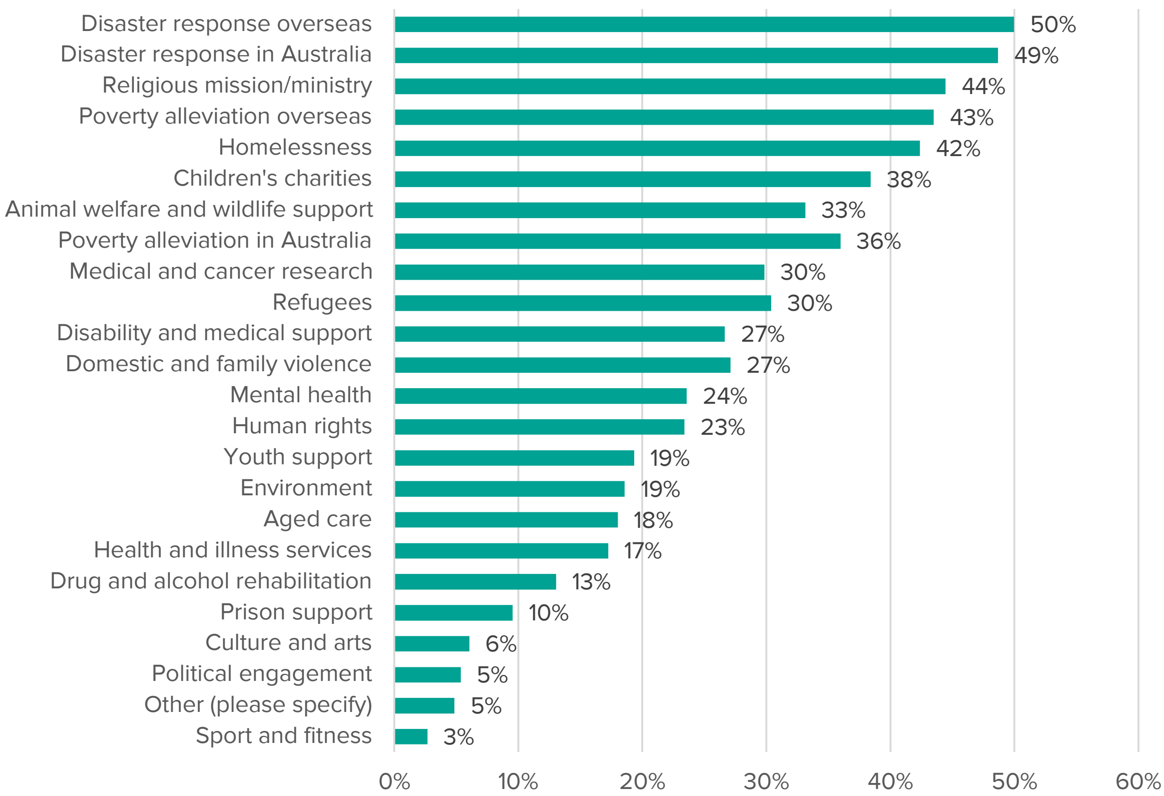
On a scale of 0 to 10, how likely is it that you would make the same decision to support this organisation if you were able to remake your choice?

SUPPORTER SURVEY

SUPPORT OF CHARITIES GENERALLY

Giving motivators

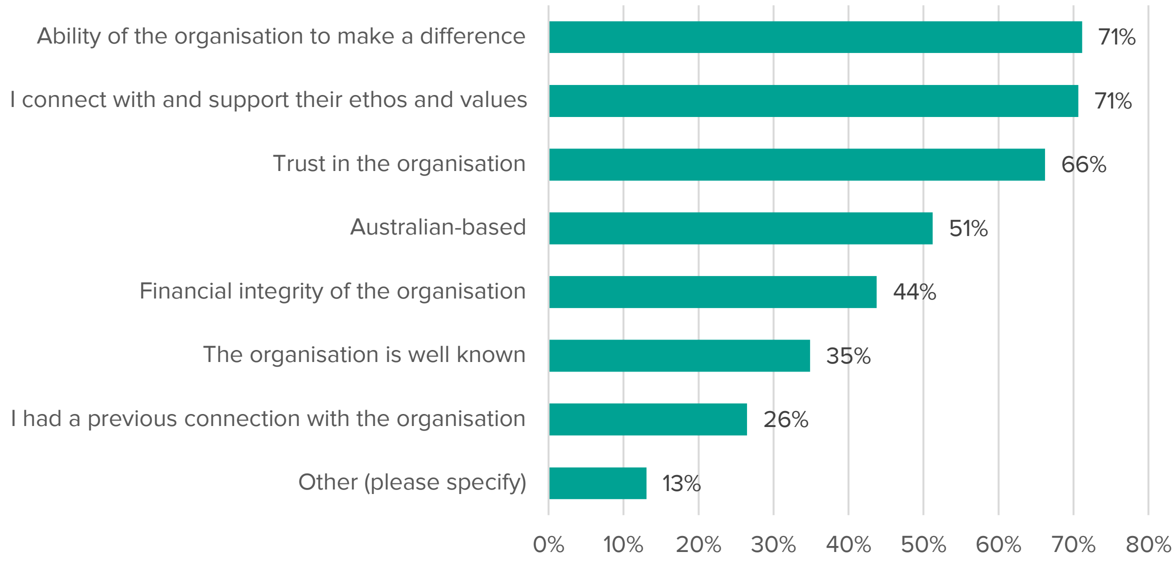
Q. Which of the following areas of need would highly motivate you to give money or to volunteer for an associated organisation?



Concern for those experiencing the impact of disasters is the top motivation for supporters to give money or volunteer for an organisation. Marginalised groups who may have less agency against social structures also ranked strongly in the top responses, along with missions and ministries associated with a religion and medical and cancer research.

Decision drivers

Q. Which of the following are key factors in why you decided to support your organisation?

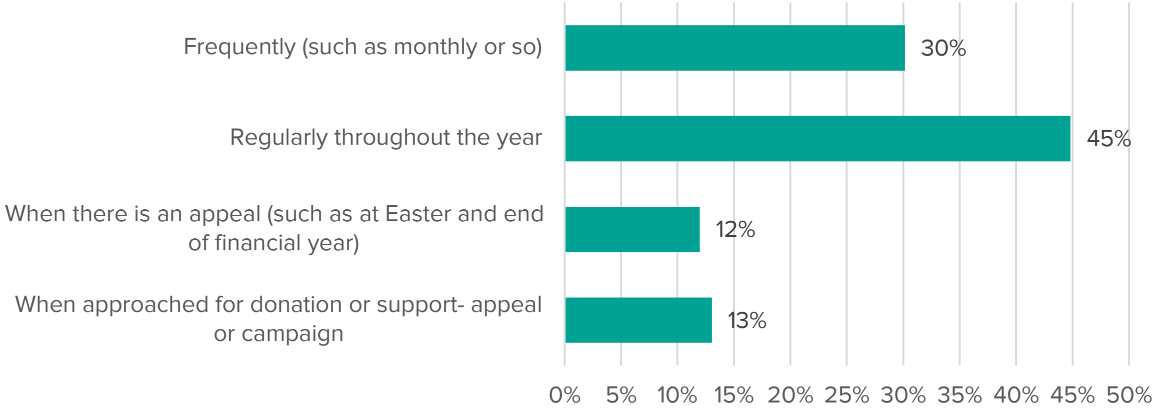


Supporters indicated that a wide range of factors influenced their decision to support the organisation they support. The ability to make a difference was key for many supporters (71%), closely followed by a connection with the organisations' ethos and values (71%) and trust in the organisation (66%). Being Australian-based was important for 51% of supporters when choosing to support an organisation, along with the financial integrity (44%), how well known the organisation is (35%) and past connections supporters had with the organisation (26%).

Other responses included growing up in families that supported the organisation, the tax effectiveness of giving to the organisation and religious associations of the organisation.

Giving behaviours

Q. Which of the following best describes when and how you give to a charitable organisation?



3 in 4 supporters give regularly or frequently (75%) to charitable organisations. Nearly 1 in 2 supporters (45%) give regularly throughout the year with another 30% giving frequently. Just over 1 in 10 give when there is an appeal (12%) or when approached (13%).

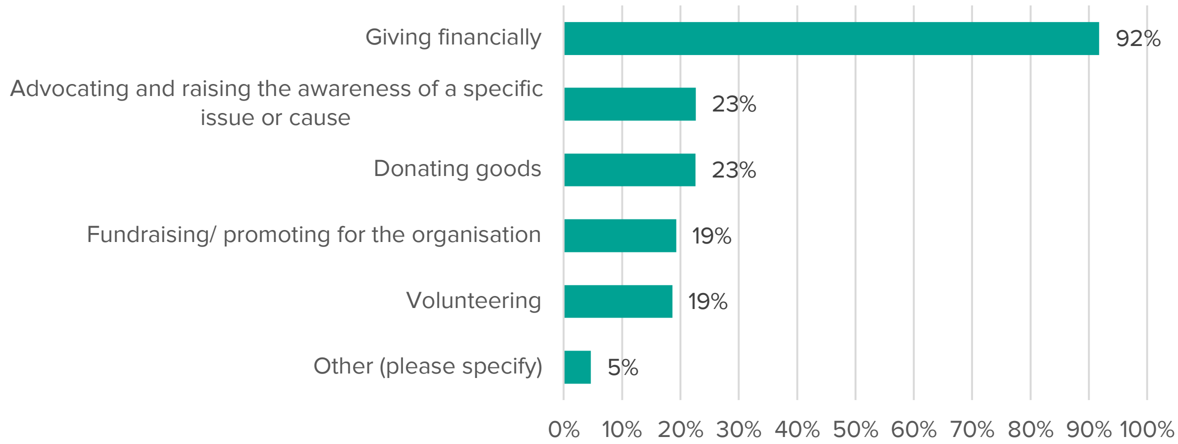
Generational insights

Individuals from Gen Y are likely to be transitioning from study to work and may be less financially secure than their older counterparts.

Supporters from Gen X (40%) and the Baby Boomer (48%) generation were more likely to give to a charitable organisation regularly throughout the year than younger supporters from Gen Y (35%). On the other hand, Gen Y (16%) were more likely to give only when approached for a donation or support-appeal campaign compared with those from Gen X (13%) and the Baby Boomers (12%).

Supporting methods

Q3.1 - Which of the following ways have you supported your organisation in the past?



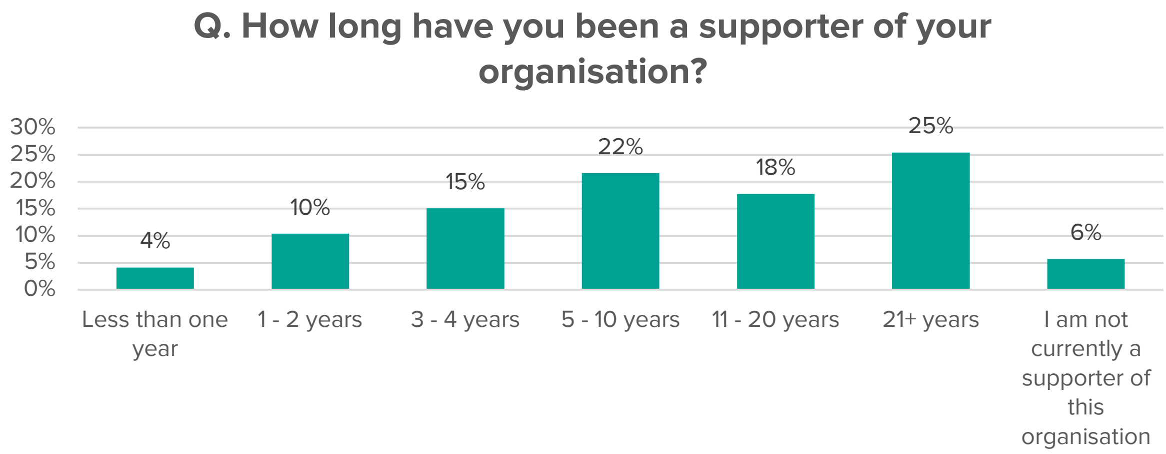
The primary way supporters have supported an organisation in the past is through financial contributions (92%). They have also been involved in advocacy (23%), donating goods (23%), fundraising/promoting for the organisation (19%) and volunteering (19%).

Other responses included working for a charity, doorknocking or visiting overseas projects run by the organisation.

Describing organisations

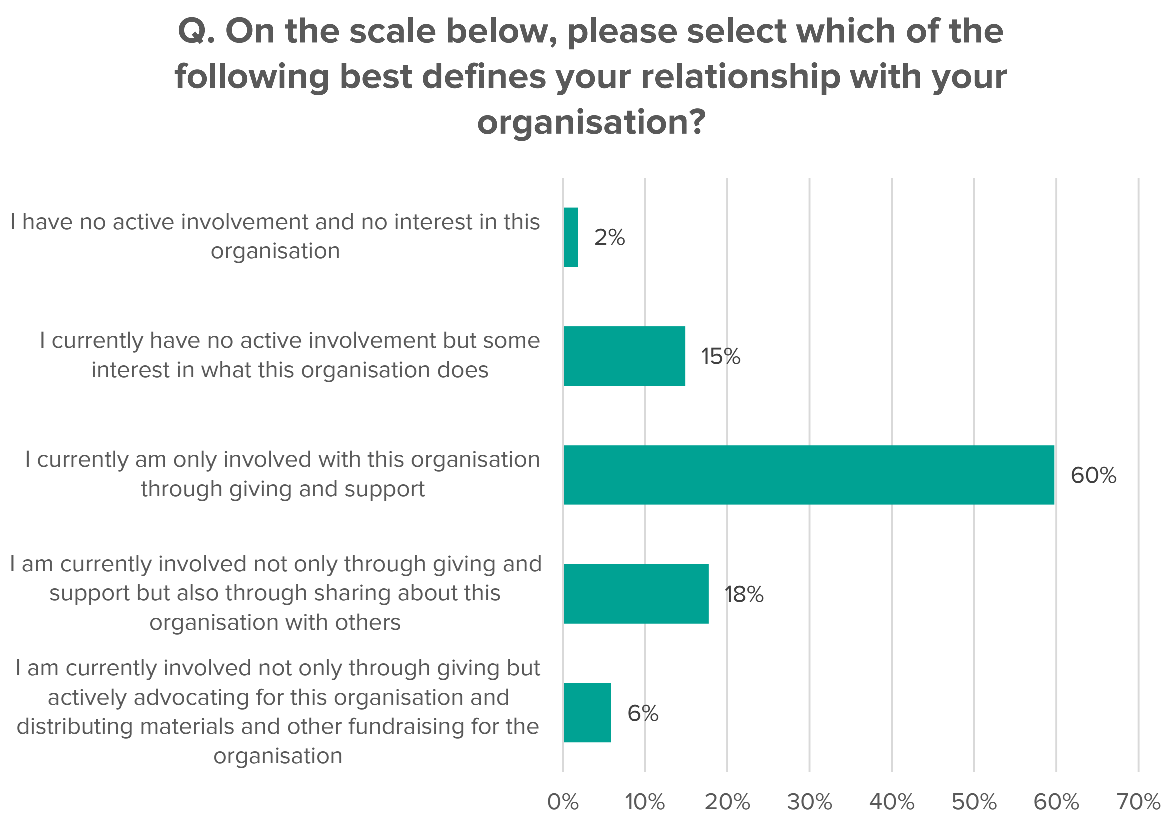
In the above visual, the bigger the word the more frequently it was selected.

Length of support



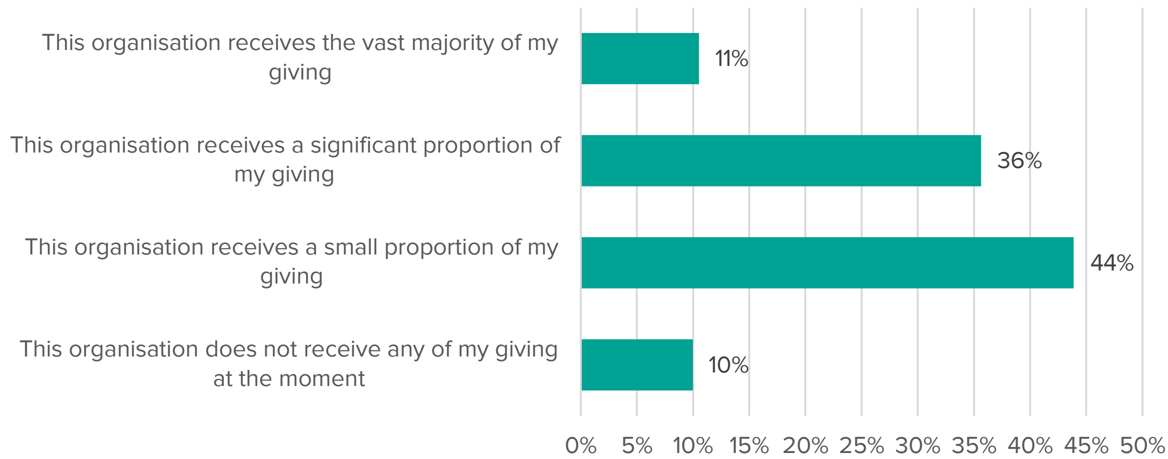
3 in 5 Gen Y supporters (59%) and 38% of Gen X supporters have supported their organisation for 1-4 years. 45% of Baby Boomers have supported their organisation for over 11 years, while only 12% of Gen Y individuals have supported their organisation for this same period of time.

Involvement level



Proportion of giving

Q. Thinking about your total financial giving (e.g. to all charities, community groups, churches/other religious institutions) how much does your organisation receive?



The trend to giving to a range of causes is increasing as the number of charities available to support grows. Just 11% of supporters give the vast majority of their giving to one organisation. More than 1 in 3 supporters (36%) say they give a significant proportion of their giving to one organisation, while 44% give just a small proportion of their giving to the one organisation. Interestingly 10% of supporters indicated that they are not giving any amout to their organisation at the moment.

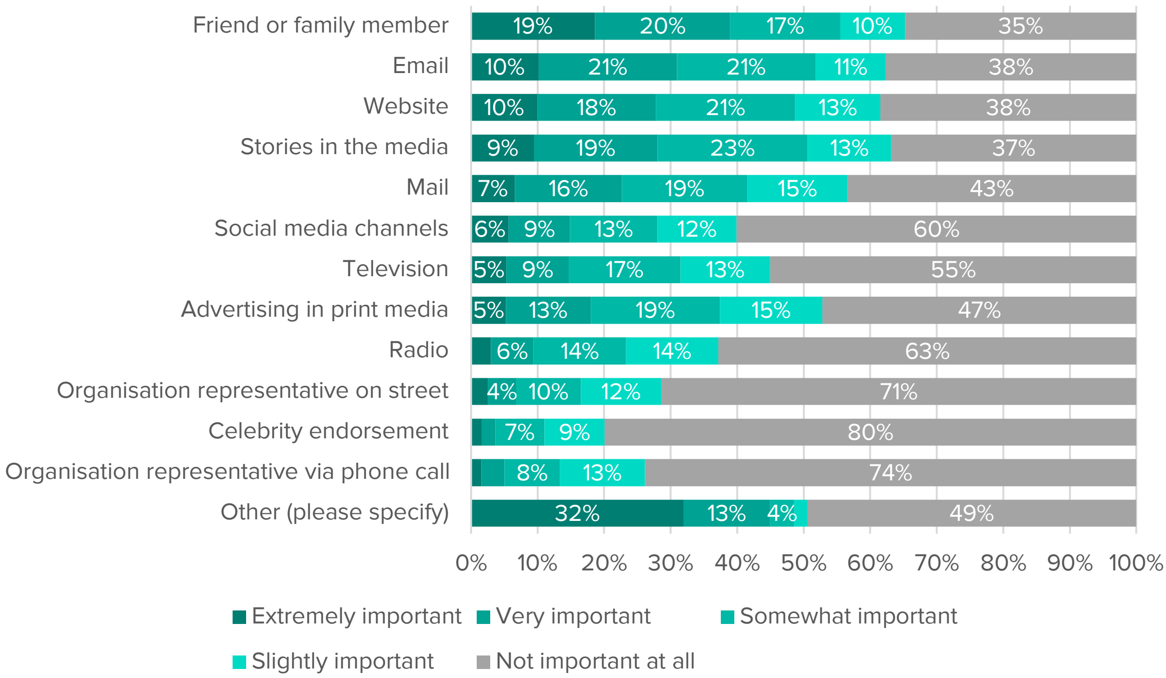
Generational Insights

Older supporters are more faithful in giving to the one organisation, with almost 1 in 2 Baby Boomers (47%) and 44% of Gen X individuals stating that their supported organisation receives a significant proportion or vast majority of their giving. Only 2 in 5 Gen Y individuals (39%) indicated that a significant proportion of their giving was given to the one organisation.

COMMUNICATION

Important communication channels when first engaging

Q. How important were the following communication channels in helping you first engage with the organisation?



Supporters indicated that trusted personal relationships and digital communication channels were important to their decision to first engage with the organisation they support. Family and friends were identified by supporters as the most important communication channel when first engaging with an organisation followed by email, website, and stories in the media. Other responses included indications of the church being important in their decision.

Gender insights

Television and social media channels were extremely or very important communication channels for females (34%) compared with males (22%) when engaging with an organisation.

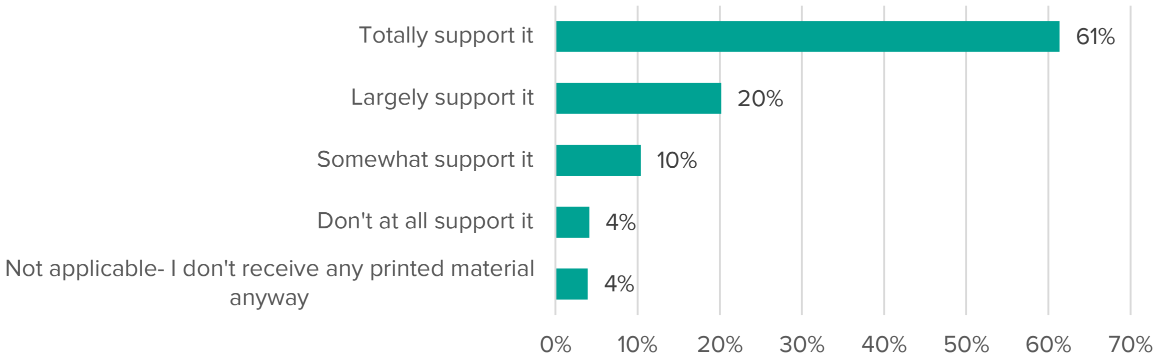
Generational Insights

Extremely or very important	22-36	37-51	52-70
Website	47%	40%	25%
Mail	20%	17%	24%
Friend or family member	61%	49%	36%
Social media channels	32%	21%	12%
Email	29%	35%	33%
Stories in the media	39%	34%	27%

A higher proportion of supporters from Gen Y than those from the older generations indicated that websites, social media, stories in the media or a friend or family member were important communication channels when engaging with an organisation. On the other hand, targeted and traditional communication channels such as email and mail appealed more highly to Baby Boomer supporters (24%) than Gen Y (20%) and Gen X (17%).

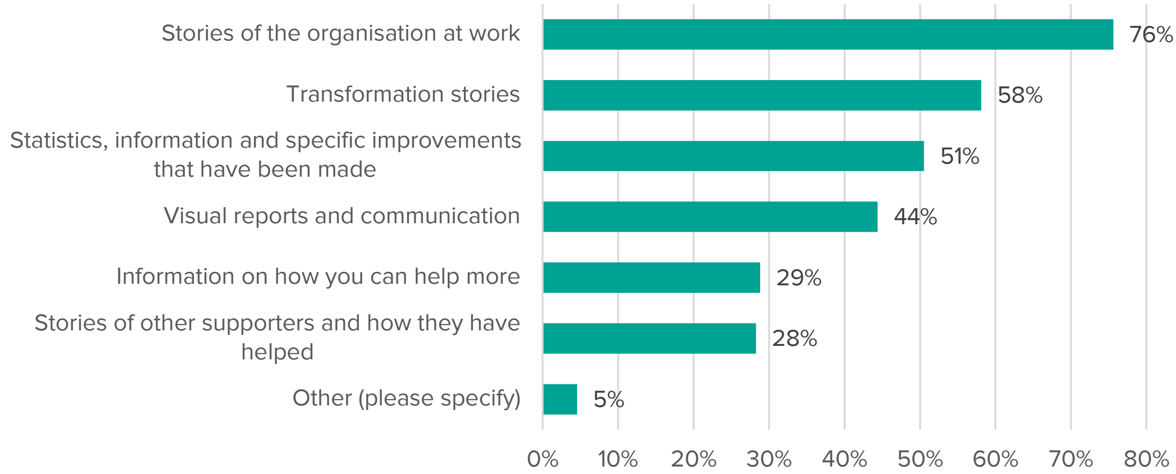
Email communication

Q. With increased costs of postage, if your organisation was to send most communications through email would you support this move?



Preferred content in communication

Q. When your organisation communicates with you (this could be through a newsletter or update in any form) which of the following types of communication do you most engage with in terms of the content?

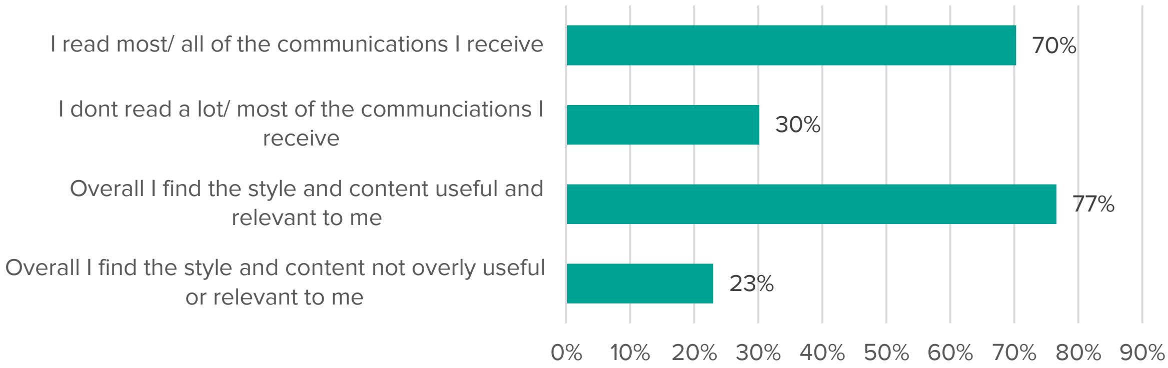


Supporters highlighted their preference for receiving engaging stories of the organisation at work with more than 3 in 4 (76%) selecting this type of content as their preferred type of communication to receive in a newsletter. Similarly, the power of stories was echoed through the second top ranking content type, transformation stories, which was selected by 58% of supporters to be the type of content they most engage with.

These were followed by statistics, information and specific improvements (51%) and visual reports and communications (44%), both making content from the organisation quick to consume and easy to understand.

Reception of communication

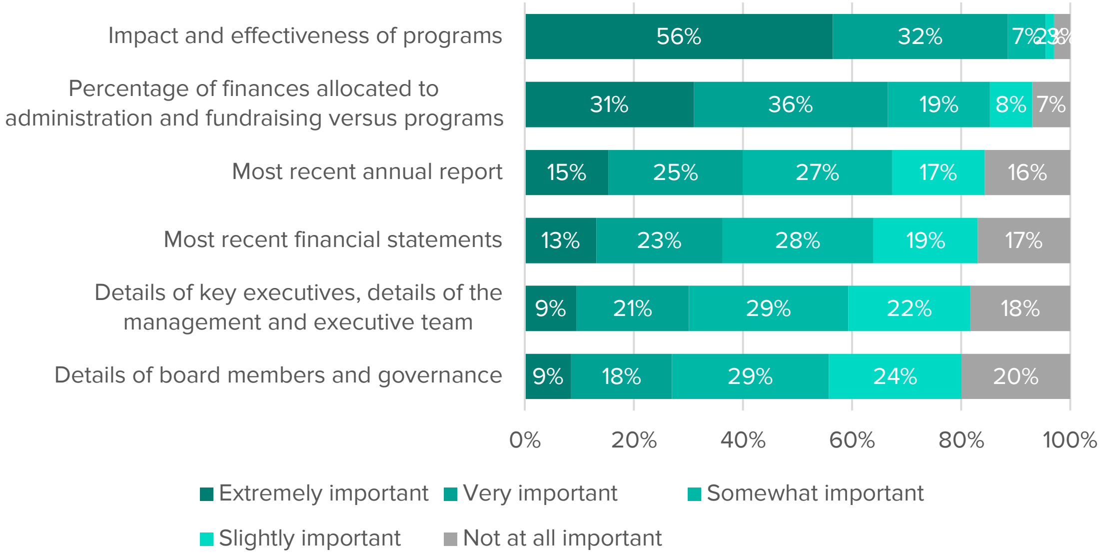
Q. How do you feel about the current amount and type of communication you receive from your organisation?



Over one third of supporters were positive about the communications they receive from the organisation they support and indicated that they read most or all of the communication they receive (70%). A further 1 in 3 indicated that they find the style and content of communication material they receive to be useful and relevant to them (77%). More than 1 in 7 (30%) do not read a lot or most of the communications they receive and just over 1 in 10 (23%) do not find the style and content useful or relevant to them.

Information available on website

Q. How important is it that the following information is available on your organisation's website?



INFORMATION ON WEBSITE

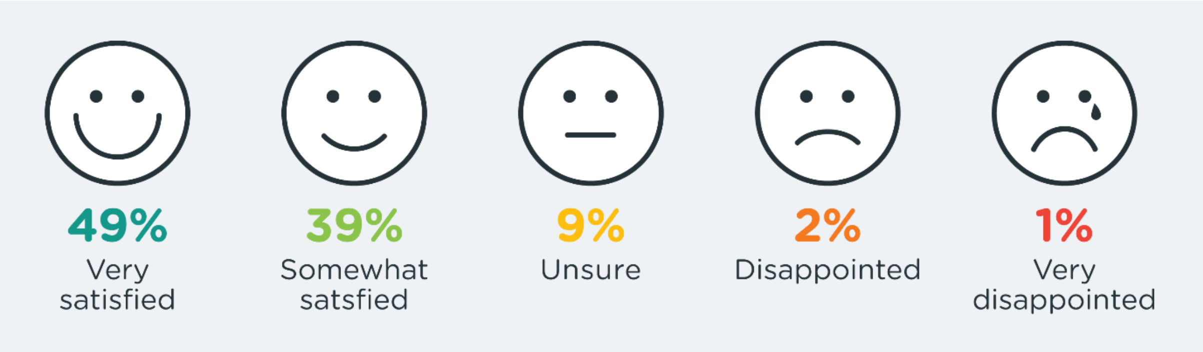
% who say this is extremely / very important

1. **82%** Impact and effectivess of programs
2. **67%** Percentage of administration costs
3. **40%** Most recent annual report

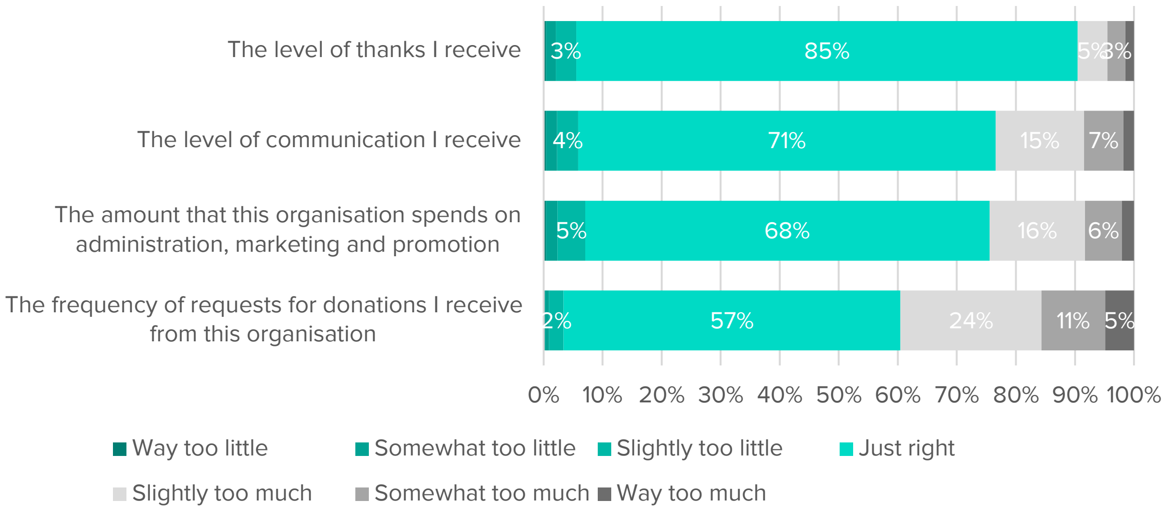
Websites are increasingly a key commnunication channel for organisations and supporters, however websites need to be strategically used, displaying only the most important information and strategically showcasing it on the website. The results highlight that supporters most want to see the impact and effectiveness of programs and then the percentages of finances allocated to administration. The third most important piece of content to make readily available on the website as identified by supporters, is the most recent annual report.

Satisfaction with relationship

Q. How would you rate your relationship with your organisation?



Q. Please indicate whether your organisation provides too much, too little or the right amount for each of the following statements.



Supporters overall feel there is just the right level of thanks (85%), communication (71%), money spent on administration, marketing and promotion (68%) and frequent requests for donations (57%). 1 in 3 supporters (35%) however feel that the frequency of requests for donations is slightly or somewhat too much and 5% indicate that they receive way too many requests for donations. 1 in 4 supporters (22%) feel there is slightly or somewhat too much money spent on administration, marketing and promotion.

Generational Insights

Way too little + somewhat + slightly	22-36	37-51	52-70
Level of communication I receive	47%	40%	25%
Level of thanks I receive	20%	17%	24%
Frequency of request for donations I receive from this organisation	61%	49%	36%
Amount that the organisation spends on administration, marketing and promotion	32%	21%	12%

More supporters from Gen Y than the Baby Boomers expressed that the organisation they support falls short of their expectations in regards to the level of communication they receive (47% cf. 25%), the frequency of requests for donations (61% cf. 36%) and the amount that the organisation spends on administration, marketing and promotion (32% cf. 12%).

State insights

Way too little + somewhat + slightly too little	NSW	VIC	QLD	TAS	NT	SA	WA	ACT
Level of communication I receive	5%	9%	4%	12%	7%	3%	3%	4%
Level of thanks I receive	7%	6%	5%	4%	12%	2%	4%	1%
Frequency of requests for donation	3%	5%	2%	0%	9%	1%	4%	1%
Amount spent on admin, marketing, promotion	7%	8%	6%	15%	22%	8%	5%	1%

NET PROMOTER SCORE

The Net Promoter Score (NPS) developed by Bain & Company is based on the fundamental perspective that every organisation's clients can be divided into three categories: Promoters, Passives, and Detractors.

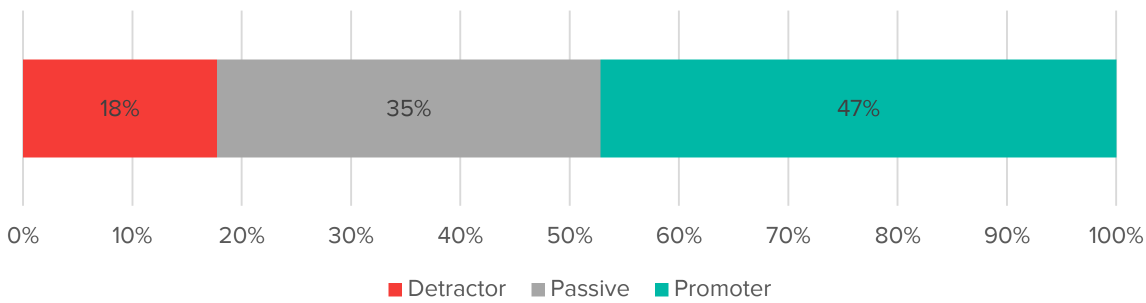
Supporters respond on a 0-to-10 point rating scale and are categorised as follows:

- Promoters (score 9-10) are loyal enthusiasts who will keep engaging and refer others, fuelling growth.
- Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- Detractors (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

NET PROMOTER SCORE = % PROMOTERS − % DETRACTORS

In order to provide a context to the 2016 ACT Supporter's NPS, a score above 0 is considered a good score, with organisations often receiving a negative result.

Q. On a scale of 0 to 10, how likely would you be to recommend your organisation to friends and acquaintances looking for a charity to support?



AUSTRALIA'S HIGHEST RATED SECTOR

29

+2 from 2015

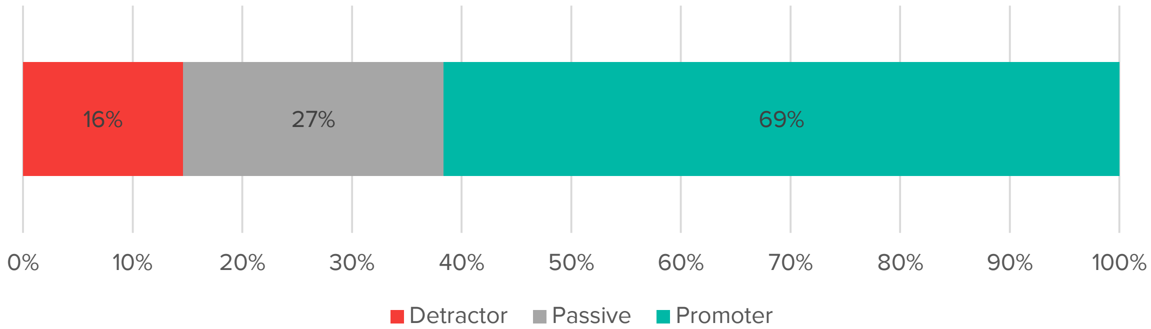
NET PROMOTER SCORE (SUPPORTERS)

On a scale of 0 to 10, how likely would you be to recommend this organisation to a friend looking for a charity to support?

NET REPEATER SCORE

The Net Repeater Score (NRS) is calculated in the same way as the NPS, however is a reflection of whether supporters would make the same decision to support the organisation they are currently supporting if they had the chance to make the decision again.

Q. On a scale from 0-10, how likely is it that you would make the same decision to support your organisation if you were able to remake your choice?



Similar to the NPS the Net Repeater Score (NRS) takes the promoter score and minuses the dectractor score. The NRS for 2016 ACT supporter's is 53.

53

NET REPEATER SCORE (SUPPORTERS)

On a scale of 0 to 10, how likely is it that you would make the same decision to support this organisation if you were able to remake your choice?

Future support

Q. Thinking about the next three years, please indicate the level of support you expect to give to your organisation.

Over 4 in 5 supporters (82%) expect to continue to financially support their organisation at the same capacity over the next three years. 1 in 10 (11%) will increase their financial support and just 7% will decrease their financial support over the next three years.

Generational Insights

More than 4 in 5 Baby Boomer supporters (83%) expect to continue financially supporting their organisation in the same capacity in the next three years, compared with 74% of Gen Y and 77% of Gen X.

On the other hand, 16% of Gen Y and 17% of Gen X compared with 9% of Baby Boomers expect to increase their financial support of their organisation or other programs.

STAFF SURVEY

HOW STAFF SEE THEIR ORGANISATION

APPROACHABLE LEADERSHIP
IMPACTFUL TRUSTWORTHY
COST EFFICIENT
PURPOSEFUL
INNOVATE
RELIGIOUS
CARING HELPFUL
FRIENDLY PROFESSIONAL

STAFF ATTITUDES TOWARDS THEIR ORGANISATION AND WORK

4 in 5
staff members say that they are largely, or definitely proud to be a staff member at their organisation

4 in 5
staff members also say that they find their work satisfying and fulfilling

THINKING FORWARD OVER THE NEXT 5 YEARS...

1 in 4
staff members are optimistic that their organisation will be significantly better in five years time

2 in 4
A further 44% believe that their organisation will be somewhat bette in this time

STAFF RECOMMENDATIONS

3 in 4
staff members are highly likely to recommend their organisation to friends and acquaintances looking for a charity to support

The main reason staff members recommend their organisation is because they believe in the vision and work their organisation are doing

NET PROMOTER SCORE

48

NET PROMOTER SCORE (STAFF)

On a scale of 0 to 10, how likely would you be to recommend this organisation to a friend looking for a charity to support?

Almost 3 in 5 staff members (57%) are highly likely (9 or 10) to recommend their organisation to friends and acquaintances looking for a charity to support, including 44% who scored their organisation 10 out of 10.

Many staff members who are highly likely to recommend their organisation to friends and acquaintances, do so because they believe their organisation are doing good work in the community and are achieving their goals and mission. Recommendations may also be given because staff members consider their organisation to be transparent with their spending or because they see the hard work of other staff members around them.

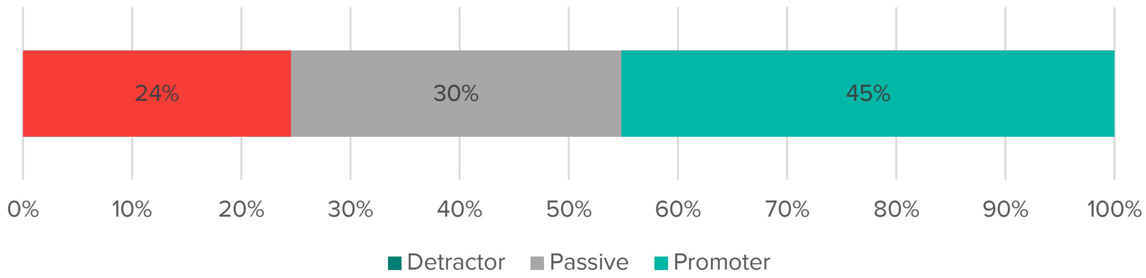
Staff members who are less likely to recommend their organisation, may feel discouraged to do so, if they believe the funding is not being directed to the work on the ground, but being spent in unecessary areas. Another reason that staff members may be reluctant to recommend their own organisation, is that they feel other organisations are doing better work in the same field.

NET CULTURE SCORE

Likelihood of recommending charity as place to work

The Net Culture Score (NCS) is calculated using the same method of the NPS however measures the perceptions of the organisational culture by asking whether staff would recommend their organisation as a place to work. Those who selected 9 or 10 on the scale are highly likely to recommend their organisation as a place to work (Promoters), whilst those who select up to 6 are likely to discourage others from working at the organisation (Detractors).

Q. On a scale from 0-10, how likely is it that you would recommend your organisation as a place to work to a friend or contact?



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NET CULTURE SCORE (STAFF)

On a scale of 0 to 10, how likely would you be to recommend this organisation to a friend looking for a place to work?

Just under half of staff members (45%) are highly likely (9 or 10) to recommend their organisation as a place of work to a friend or acquaintance, including 31% who scored their workplace 10 out of 10.

Staff members are likely to recommend their organisation as a place to work because they feel that their workplace is friendly and supportive of staff and that the work itself is very rewarding. A number of staff members suggested that they would be willing to recommend their organisation as a place of a work, but only if they thought their friend or contact was willing to take a pay cut, deal with the stress and challenges of the work or were passionate about the cause of the organisation.

The staff members that selected detractor scores (0-6), suggested their reason for doing so was due to poor management, stressful and demanding workplaces and/or low pay in their organisations.

STRENGTHS OF THE ORGANISATION

There are a number of areas staff members see as their organisation's biggest strengths. These strengths have been summarised, for insight into the main themes from staff responses.

A genuine care for those in need

Many staff members see their organisation's biggest strength as the genuine care the organisation has for those in need. Staff members across the different organisations feel fulfilled knowing that their organisation places strong emphasis on care and support for staff, supporters and most importantly those that are receiving services.

Connection with the community

A number of staff members believe their organisation's greatest strength is its connection with the community. This applies to both the community in which the organisation works, as well as with supporters of the organisation. Staff members are likely to see this relationship as mutually beneficial; their organisations are able to understand needs and as a result the community feel motivated to support the organisation.

Reputation

For some organisations, staff members believe that their strength is found in their history as a reputable organisation. Staff felt that this bolsters supporter trust in the organisation, and also gives the organisation a voice in their field.

Hard working staff and volunteers

A large number of staff members suggested that the people within an organisation are what help to make it effective, successful and genuine. It was strongly noted that hard working staff members and volunteers are needed to help organisations achieve their goals and work towards their vision.

Vision and values

Many staff members believe their organisation's greatest strength is its core vision and values. Staff are likely to align themselves quite closely with the purpose of the organisation, and truly believe in what their organisation is working towards.

Management and processes

A few staff members believe that their organisation's biggest strength lies within the management approach and processes within the organisation. Some staff members suggested that their organisations' flexible approach allows them to respond quickly to different needs, while others thought the regulation and procedures in their workplace helped to achieve the mission and goals.

CHALLENGES FOR THE ORGANISATION

Staff members also recognise that their organisations face a number of challenges. Following is a summary of the greatest challenges staff indicated their organisations are facing.

Funding

Staff members most commonly indicated that the biggest challenge for their organisation is acquiring enough funding to carry out their work effectively. Some of the funding challenges mentioned by staff members included inconsistency, an ageing supporter base, as well as not having the resources to meet demand.

Recognition and awareness

A number of staff members indicated that their organisation needs to establish a stronger brand name in Australia, and to gain recognition as a reputable and capable organisation in their field. A few staff members also mentioned that spreading awareness of their organisation in the general public, rather than just within their own network is a challenge.

External influences

Many staff members saw the greatest challenge for their organisation to be external influences such as changing social, political and cultural conditions. Different external influences were seen to be challenges, depending on the organisation that a staff member worked for. Other external influences mentioned included globalisation, the growing gap between rich and poor and the current political climate.

Organisational cohesiveness and communication

A lack of cohesiveness among organisational branches, systems, locations and/or levels was seen by many staff members to be the greatest challenge facing their organisation. These challenges include focussing too strongly on management rather than grassroots operations, favouring urban locations rather than rural areas, employing managers who do not have a comprehensive understanding of the organisation, and inefficient internal systems and processes. Many staff members suggested that more effective communication between different parts of the organisation is needed in order to improve cohesiveness and unity.

Staff development and retention

Some staff members suggested that the biggest challenge for their organisation is in retaining staff. A high level of staff turnover is seen by respondents to result from a stressful work environment, a lack of appreciation and investment from the organisation. It was suggested by many staff members that staff members often suffer from ‘compassion fatigue’, and feel undervalued and overworked. Organisations could overcome these challenges by investing more in professional development for both staff members and volunteers, and through fostering a more nurturing culture within the organisation.

APPENDIX: DEMOGRAPHICS

DEMOGRAPHICS OF NATIONAL SURVEY

	This survey #	This survey %	National % of population aged 18+
GENDER			
Male	754	50%	50%
Female	756	50%	50%
TOTAL	1,510	100%	100%
AGE			
18-21	77	5%	GEN Z 7%
22-36	409	27%	GEN Y 28%
37-51	394	26%	GEN X 26%
52-70	448	30%	BOOMERS 27%
71+	182	12%	BUILDERS 12%
TOTAL	1,510	100%	100%
STATE			
NSW	484	32%	32%
VIC	400	26%	25%
QLD	298	20%	20%
TAS	30	2%	2%
NT	13	1%	1%
SA	106	7%	7%
WA	149	10%	10%
ACT	30	2%	2%
TOTAL	1,510	100%	100%

SUPPORTER DEMOGRAPHICS

The responses for this survey were averaged across the organisations involved. This was so that organisations with a larger number of respondents did not have views that were over represented.

GENDER	This survey %	National % of population aged 18+
Male	38%	50%
Female	62%	50%
TOTAL	100%	100%
18-21	1%	GEN Z 7%
22-36	10%	GEN Y 28%
37-51	20%	GEN X 26%
52-70	47%	BOOMERS 27%
71+	22%	BUILDERS 12%
TOTAL	100%	100%
NSW	25%	32%
VIC	30%	25%
QLD	28%	20%
TAS	1%	2%
NT	1%	1%
SA	5%	7%
WA	8%	11%
ACT	2%	2%
TOTAL	100%	100%

STAFF DEMOGRAPHICS

The responses for this survey were averaged across the organisations involved. This was so that organisations with a larger number of respondents did not have views that were over represented.

GENDER	This survey %	National % of population aged 18+
Male	28%	50%
Female	72%	50%
TOTAL	100%	100%
18-21	2%	GEN Z 7%
22-36	47%	GEN Y 28%
37-51	29%	GEN X 26%
52-70	21%	BOOMERS 27%
71+	0%	BUILDERS 12%
TOTAL	100%	100%
NSW	52%	32%
VIC	5%	25%
QLD	37%	20%
TAS	0%	2%
NT	0%	1%
SA	2%	7%
WA	2%	11%
ACT	1%	2%
TOTAL	100%	100%

The Australian Communities Forum is the nation's one-day event focused on delivering the key demographic and social trends transforming Australian communities. A focus of this year's event will be technology, and how organisations can best engage in these changing times.

This annual event provides compelling case studies, the latest research, practical workshops and great networking opportunities across the commercial, not-for-profit and government sectors.

Whether you are part of a community-based organisation, charity, government agency or commercial organisation with a community focus, the Australian Communities Forum will deliver the latest information in an interactive format, with innovative local examples and the sharing of great ideas.

CHANGING DEMOGRAPHICS, EMERGING TECHNOLOGIES

Friday 15th Sep 2017
8:30am-4:30pm
Customs House
31 Alfred Street, Sydney NSW

australiancommunities.com.au

Early bird $295 each
Standard $395 each

*Fee includes full day attendance, hand-outs and slides where available, full catering (morning tea, lunch and afternoon tea)

- **Changing times, emerging trends; A snapshot of Australia and communities now and towards 2030**
- **Strategies to engage with fragmented communities in diverse places**
- **Donor trends: Understanding and responding to changing giving behaviour**
- **Four keys to achieving digital success**
- **Bringing tech-enabled giving to one of Australia's longest standing campaigns**
- **Communicating and engaging with Generation Z**
- **How not-for-profits can think like a start-up and lead like an entrepreneur**

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