



AUSTRALIAN
COMMUNITIES

Australian Communities

2020

Exploring social licence, trust and
the next generation of donors

mccrindle



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Executive summary

With a rich history in Australia, the charities and not-for-profit sector is core to Australian communities. While this remains true today, societal shifts, demographic realities and generational donor transitions are shaping a different giving landscape.

Charities are a pathway to fulfil social responsibility

Both Australian givers (61%) and charity workers (68%) strongly/somewhat agree that charities and not-for-profits provide an essential pathway for Australians to fulfil their human duty of providing hands-on help to others in need. Half of givers (50%) believe Australians have a responsibility to partner with charities and not-for-profits to bring about change. Charity workers are even more likely to agree, with almost three in five (58%) believing Australians have a responsibility to partner with charities and not-for-profit organisations.

The rise of the need responder

Charitable giving remains strong in Australia, with four in five Australians (82%) giving to charities or not-for-profit organisations. The way in which Australians are giving, however, continues to change. Today almost half of givers (46%) are need responders, being most likely to give when they hear about a need or an issue. In 2016 this was three in ten (30%), thus rising 16 percentage points in four years.

Growing nationalism in giving

More than two in three Australian givers (67%) are more inclined to support Australian charities with a local/national focus as they believe it is important to look after their own back yard first. In fact, one in five givers (21%) only support charities with a local/national focus.

This preference is reflected in the top causes givers support. In 2020 the top three causes Australian givers are highly motivated to support are disaster response in Australia (54%), animal welfare and wildlife support (47%) and children's charities (44%). The rise in rank from fourth to first for disaster response in Australia is likely because of the 2019/2020 summer bushfires in Australia.

In the last 12 months there has also been a notable rise in the number of givers choosing to support organisations associated with the environment, moving from the 12th most likely cause to support in 2019 to the seventh most likely cause in 2020.

Giving declines in times of financial hardship

In the current economic environment, there is a sense of uncertainty among many Australians which may impact their willingness to give. If Australian givers were to experience financial hardship, more than half (54%) believe the frequency and amount of their giving would decline.

Interestingly, more than half of Australian givers (55%) believe Australians should give less than 10% of their income to help those in need. In fact, two in five (41%) believe it should be less than 5% of their income.

Building social licence

Positive public sentiment towards an organisation is essential for it to maintain its social licence. Although the sector has experienced some trust challenges, there is still public permission to operate because of the role charities/not-for-profits play in society. To maintain and build social licence it is increasingly important for organisations to communicate the purpose of the organisation and prioritise transparency and accountability.

Not-for-profit leaders believe in the importance of transparency and accountability but are concerned about the impact this expectation has on the everyday life of the organisation. Balancing public desire for transparency with limited resources to deliver both transparent reporting and delivering impacts to the community is a challenge for charities/not-for-profits.

Younger donors strengthen social licence

Social licence for the charities/not-for-profit sector is on the rise, and more than charity workers expect. This is largely being driven by younger donors. More than a third of Gen Z (35%) and three in ten Gen Ys (28%) have increased their support for charities/not-for-profits to operate, compared to 16% of Gen X, 12% of Baby Boomers and 7% of Builders.

Building trust is a journey

In a time of decreasing trust in many societal institutions, a personal connection is key to engagement. More than four in five Australian givers (84%) definitely/somewhat trust the charities/not-for-profits they support to use their money wisely.

Australian givers and charity workers agree the best ways to build trust in the charities/not-for-profit sector are transparency (72%, 76%), integrity (64%, 73%), reputation (61%, 71%) and delivering strong outcomes (60%, 70%, Australian givers and charity workers respectively).

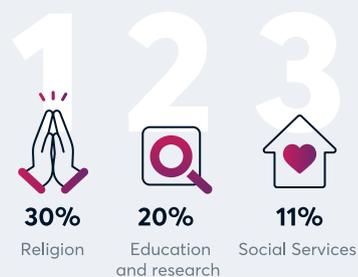
Commercial organisations operating for purpose and profit create opportunities for partnership

Society's expectations are shifting. The public expects corporates to not just operate for profit, but for the triple bottom line of people, profit and planet. This context provides opportunities for charities and not-for-profits to partner with commercial organisations to help them fulfil their corporate social responsibility. Not-for-profit leaders are optimistic about corporate partnerships as they can increase an organisation's impact. A word of caution is given, however, that partnerships must be formed on shared values, not just financial benefit, to allow organisations to stay true to their original mission of building a stronger society.

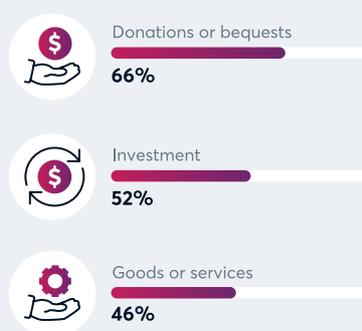
Snapshot of the charities and not-for-profit sector



Top 3 sectors NFPs



Charities receive revenue[^] from



NFPs are funded by



LEGEND*



Charities



Total revenue (\$ billion)



Employee



Estimated volunteer

WA

Charities: 4,398
 Total revenue: \$14.24 billion
 Employees: 123,082
 Estimated volunteers: 244,152

NT

Charities: 428
 Total revenue: \$1.64 billion
 Employees: 11,540
 Estimated volunteers: 9,996

QLD

Charities: 6,786
 Total revenue: \$21.51 billion
 Employees: 186,414
 Estimated volunteers: 445,698

SA

Charities: 3,468
 Total revenue: \$8.69 billion
 Employees: 81,176
 Estimated volunteers: 163,497

NSW

Charities: 15,411
 Total revenue: \$39.44 billion
 Employees: 323,578
 Estimated volunteers: 1,507,683

VIC

Charities: 11,686
 Total revenue: \$32.99 billion
 Employees: 294,879
 Estimated volunteers: 660,972

ACT

Charities: 988
 Total revenue: \$3.50 billion
 Employees: 22,905
 Estimated volunteers: 48,535

OTHER

national/multi-state

Charities: 288
 Total revenue: \$18.40 billion
 Employees: 160,739
 Estimated volunteers: 167,350

TAS

Charities: 1,138
 Total revenue: \$2.30 billion
 Employees: 28,183
 Estimated volunteers: 65,390

National totals (2017)



44,591*

Charities



Total revenue

2017
\$146 BIL



Employees

2017
1.26 MIL



Volunteers

2017
3.30 MIL

* excludes information from charities that have information withheld from ACNC Charity Register
 ^ excludes Basic Religious Charities and charities that did not operate in the 2017 reporting period
 † McCrindle projections

Changing giving landscape

The charities and not-for-profit sector is core to Australian communities with the oldest charities in Australia dating back more than 200 years. Throughout history the way in which Australians have engaged and donated to charities has changed. In the last few years the charity and not-for-profit sector has experienced significant shifts in donor expectations, digital disruption and deinstitutionalisation.

Donors are looking for a personalised experience

The days of set and forget generosity are on the decline with donors of all ages expecting a more personalised experience. Where once the personalised experience was provided for major donors, it has now become a mass donor expectation. This is in line with a broader societal shift towards customisation; where personalisation is not a suggestion but an expectation.

"The whole experience has shifted from mass-marketing of value or meaning to 'I want an individualised or personalised experience with the not-for-profit'. In the old days that would have been a major donor expectation, now it's a mass donor expectation."

– Richenda Vermeulen, Founder and CEO, ntegrity agency

The creation of meaningful touchpoints

In addition to a personalised experience, givers are looking to build relationships with the organisations they partner with. In many areas of society there is a swing away from the institution and a growing desire to connect to a cause and to people.

"People aren't drawn so much to organisations or institutions anymore; they're drawn more to a cause."

– Tim Hanna, outgoing CEO, Compassion Australia

Givers are looking for meaningful connection and involvement. The challenge is that this can mean something different to everyone. Givers are not always expecting to be practically involved, but even just understanding the impact of their specific donation can create a sense of connection.

"Meaningful connection can take on many different forms for the donors. It isn't necessarily that they roll up their sleeves and physically become involved, it can simply mean that we share with them the specific impact or outcomes of their financial contribution."

– Sarah Pennell, General Manager, Foodbank Australia

THE WHOLE EXPERIENCE HAS SHIFTED FROM MASS-MARKETING TO A PERSONALISED EXPERIENCE



Digital disruption

The rise of the digital has opened the door for new charities and not-for-profits to enter the scene, creating an increasingly competitive landscape for charities. New charities and not-for-profits can enter the market and excel quickly because of their creative, digital and agile approach. This can create challenges for legacy not-for-profits and charities who may be slow to change and have relied heavily on their reputation in the past.

"The largest charities are still dominating the giving landscape but there is an increasing level of choice for donors. Digital disruption has given the donor more information, more charities to choose from, more ability to seek transparency and have conversations with brands - ten years ago you could rely a lot more on your brand name and reputation."

– **Richenda Vermeulen, ntegrity agency**

Growing scepticism of charities

Over time Australians have started to question the efficiency and effectiveness of charities. They are more cautious about which organisations they support, with the digital age allowing potential givers to research the organisation thoroughly before deciding to engage with them. Givers are looking for organisations that can clearly show the difference their contribution is making.

"Most individuals nowadays probably bring a more cautious approach, not so innocently trusting the enterprise... Looking for anything on social media that suggests there is a shadow over the organisation from previous activities or behaviours."

– **George Savvides, former Chairman, World Vision Australia**

WE'VE SEEN AN INCREASING LEVEL OF CHOICE

The rise of lifestyle giving through social enterprises

The rhetoric of Australian society is increasingly focused on making consumer decisions that have a positive impact. People are looking for ways to fulfil a need while still doing social good.

"Society as a whole I think is more open to doing good. Making sure that from their purchases, to the decisions they make they have a positive impact on the world, people and the environment"

– **Daniel Flynn, Co-founder Managing Director, Thankyou**

The benefit of social enterprises is that Australians receive something tangible and usable for their support that they generally would have purchased anyway. The impact this will have on Australians' generosity towards charities and not-for-profits, however, is yet to be fully realised.

"Younger donors are aware of the impact they can make through both donations to charity and purchases as a consumer. We can't yet quantify whether less charitable donations are made because people are buying from social enterprises instead. What we do know is that those likely to donate - are likely to buy ethically."

– **Richenda Vermeulen, ntegrity agency**

Beliefs about the sector

Charities provide a pathway for Australians to help those in need

Both Australian givers (61%) and charity workers (68%) strongly/somewhat agree that charities and not-for-profits provide an essential pathway for Australians to do their human duty of providing hands-on help to others in need.



There is an expectation that generosity towards charities and not-for-profits should extend further than an individual's finances. Positively Australian givers (40%) and charity workers (40%) are in agreement on this, with two in five strongly/somewhat agreeing that even if Australians give financially, they still have a responsibility to give of their time and skills as they are able to support charities/not-for-profits.

Interestingly, while there is a sense of human duty to help those in need, givers and charity workers are open to the relationship being transactional. Three in five Australian givers (60%) and charity workers (62%) strongly/somewhat agree that it's fine for the relationship between Australians and charities/not-for-profits to be transactional; in other words Australians pay their donation to charities to deliver services to help people in need. Half of givers (50%) believe that Australians have a responsibility to partner with charities and not-for-profits to bring about change. Charity workers are even more likely to agree, with almost three in five (58%) believing the relationship should be a partnership.

TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS?

Strongly/somewhat agree



Government has the primary responsibility to fund areas of need

In every area tested, Australian givers believe the government has the primary responsibility to fund areas of need within society. It is believed that the secondary responsibility falls to charities. This is true in every area except for unemployment, where commercial organisations (38% givers, secondary responsibility) are expected to provide support in this area after the government (85% givers, primary responsibility).

Charity workers are consistent with Australian givers, with many believing the government has the primary responsibility to fund areas of need, followed by charities. The exception to this is in the areas of unemployment and the environment where once again, commercial organisations are believed to have the secondary responsibility to fund (42% unemployment, 37% environment).

TOP FIVE EXPECTATIONS OF THE GOVERNMENT FROM AUSTRALIAN GIVERS

Responsibility to fund areas of need by rank

● Government ● Charities/not-for-profits ● Commercial organisations



Organisations looking to government and for-profit organisations for ongoing funding

To ensure access to ongoing funding for their organisation, charity workers believe the government needs to assist more with direct funding (54%) and that corporations and for-profit organisations need to support them (48%). Charity workers also place expectation on their own organisations

to develop ways to be self-sustainable rather than relying on donations (44%). More than two in five charity workers (42%) also believe the government needs to assist with more non-monetary benefits through rebates, and free or discounted services.

Finances and giving

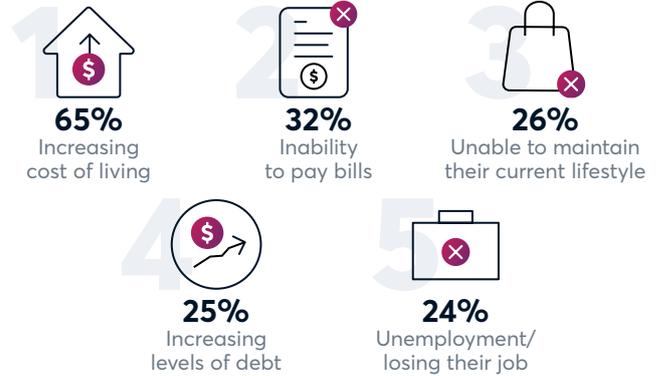
Challenging giving environment

In the current economic environment, there is a sense of uncertainty among many Australians which may impact their willingness to give. Just one in six Australian givers (16%) believe their level of financial support for charities/not-for-profits has significantly/somewhat increased in the last five years. Charity workers are even less optimistic, with just one in ten (11%) believing the levels of financial support have increased compared to five years ago.

"I think there's an economic concern, and people are not spending as they could, even in the not-for-profit space."

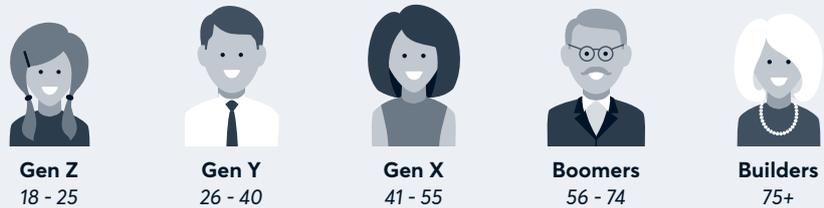
– Tim Hanna, outgoing CEO, Compassion Australia

TOP FIVE FINANCIAL SITUATIONS THAT AUSTRALIAN GIVERS ARE SIGNIFICANTLY CONCERNED ABOUT



Australian givers have different financial concerns depending on their age. In the rising gig-economy and flexible working environment almost two in five Gen Z (37%) are concerned about unemployment/losing their job, along with three in ten Gen X (31%) and Gen Y (30%). A third of Gen X (32%) are significantly concerned they will not be able to retire, while more than a third of Gen Y (35%) are concerned about having increasing levels of debt.

WHICH OF THE FOLLOWING FINANCIAL SITUATIONS ARE YOU SIGNIFICANTLY CONCERNED ABOUT?



Unemployment/losing my job	37%	30%	31%	11%	1%
I won't be able to retire	18%	28%	32%	14%	2%
Having increasing levels of debt	28%	35%	30%	14%	11%

Cost of living decreases the ability to give to charities/not-for-profits

More than half of Australian givers (52%) believe the cost of living and housing prices in Australia have significantly/somewhat decreased their ability to give to charities/not-for-profits in the last 12 months. For two in five Australian givers (40%), however, the current environment has had no impact.

Those in the family forming years – Gen Y (55%) and Gen X (53%) – are the most likely to feel the pinch, with more than half believing the current environment has significantly/somewhat decreased their ability to give. This is greater than Baby Boomers (50%), Gen Z (48%) and Builders (47%).

In financial hardship, giving declines

If Australian givers were to experience financial hardship, more than half (54%) believe the frequency and amount of their giving would decline. One in four (25%) say the frequency would stay the same but the amount would decline. Just 10% say the frequency and amount would stay the same.

Builders (68%) and Baby Boomers (70%) are the most likely to say that both the frequency and amount would decline (cf. 55% Gen X, 47% Gen Y, 32% Gen Z). Gen Z, however, are the most likely to maintain consistency with a third of Gen Z (34%) saying the frequency would stay the same but the amount would decline (cf. 28% Gen Y, 24% Gen X, 21% Baby Boomers, 19% Builders). It is important to keep in mind, however, that Gen Z and Gen Y are the most likely to be need responders in their giving while older generations are more likely to be regular or frequent givers.

Giving should be less than 10% of income

More than half of Australian givers (55%) believe Australians should give less than 10% of their income to help those in need. In fact, two in five (41%) believe it should be less than 5% of their income.

It will be interesting for charities/not-for-profits to navigate the future giving landscape as Gen X, who are now in their peak earning years, are the most likely to believe Australians should give less than 10% of their income to help those in need. Three in five Gen X (63%) and Gen Y (57%) hold to this belief, followed by more than half of Gen Z (53%) and Baby Boomers (52%) and two in five Builders (43%).

Builders, who have largely been the backbone of the charity sector, however, are the most likely to say giving should not be a percentage but whatever they are able to give (47% cf. 42% Baby Boomers cf. 28% Gen X, 24% Gen Y, 25% Gen Z). Charity workers are also more likely to say no percentage but whatever they are able to give (53% cf. 32% givers).

HOW MUCH OF THEIR INCOME SHOULD AUSTRALIANS GIVE TO HELP THOSE IN NEED?



As wealth increases, giving increases too

For two in five Australian givers, their wealth has increased in the last five years (40% significantly/somewhat/slightly increased). For just 5%, their wealth has increased significantly, while one in seven (14%) have somewhat increased their wealth compared to five years ago. Almost three in ten givers' (28%) wealth has remained the same, while another three in ten (32%) say their wealth has decreased.

Australian givers' changes in giving reflect their changes in wealth. Over the past five years, a third of Australian givers (36%) have increased their giving. For two in five (39%) their giving has remained the same, while a quarter (24%) have decreased their giving in this time.

Unsurprisingly, Gen Z and Gen Y, who are likely either entering the workforce or progressing in their careers, are the most likely to say their wealth has increased in the last five years (63% Gen Z, 54% Gen Y cf. 36% Gen X, 21% Baby Boomers, 13% Builders). Positively, as their wealth has increased so too has their financial giving. Three in five Gen Z (58%) have increased their financial giving over the last five years (cf. 47% Gen Y, 31% Gen X, 25% Baby Boomers, 16% Builders).





FOUR IN FIVE AUSTRALIANS GIVE FINANCIALLY

Giving behaviour

Charitable giving remains strong in Australia with four in five Australians giving to charities or not-for-profit organisations (82%). There has been a slight decline, however, in those who give at least annually. Today just over seven in ten Australians (72%) give at least annually compared to more than three in four (77%) in 2019. One in four Australians (24%) give at least monthly while more than one in six (18%) do not give at all.

Giving is not just financial

In addition to giving financially, more than three in five Australians (64%) have donated goods to charities/not-for-profits in the past 12 months. A third of Australians have volunteered (33%) while more than one in five have been involved with fundraising for a specific charity (23%) or advocating and raising awareness (21%).

Almost half of those who volunteer (48%) do so at least once a month while more than a quarter (26%) volunteer at least once every few months.

Consistent with previous years, young givers are more likely to advocate and raise awareness than their older counterparts (33% Gen Z cf. 12% Builders).

WAYS OF GIVING

	 Gen Z 18 - 25	 Gen Y 26 - 40	 Gen X 41 - 55	 Boomers 56 - 74	 Builders 75+
Donating goods	61%	58%	63%	70%	71%
Volunteering	38%	33%	30%	36%	31%
Advocating and raising awareness of a specific issue or cause	33%	29%	18%	12%	12%
Fundraising/promoting for a specific charity	26%	33%	20%	14%	12%

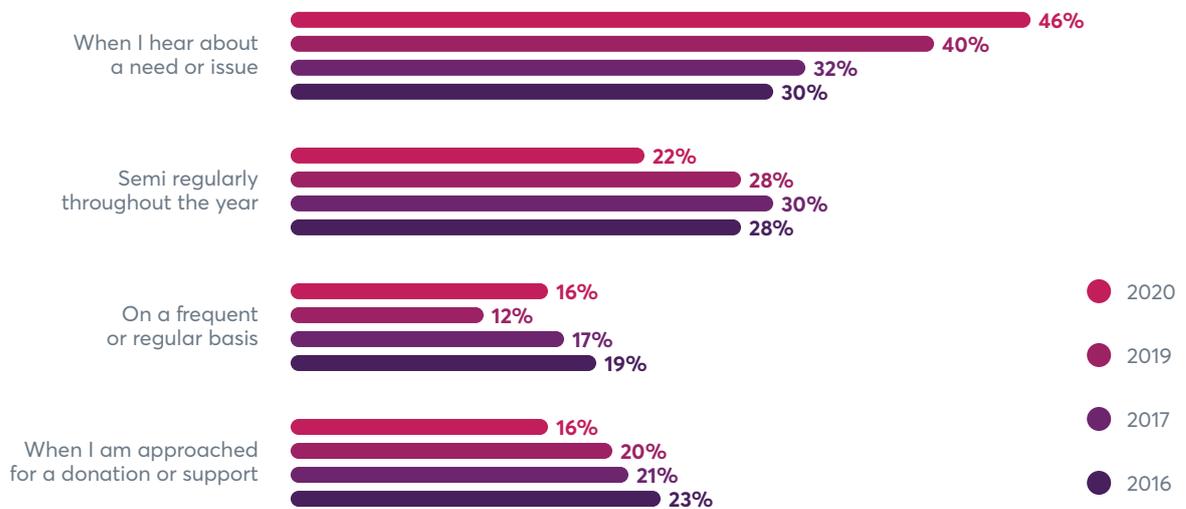
Australians giving as need responders continues to grow

Since 2016 the proportion of Australians who are most likely to give when they hear about a need or issue has risen by 16 percentage points (46% cf. 30% 2016). The proportion of those who give semi regularly throughout the year, however, has declined since 2016 (28% cf. 22% 2020).

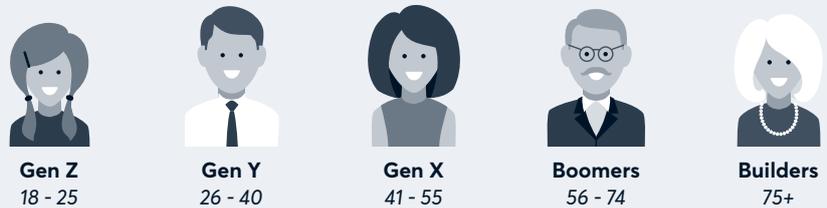
Younger Australian givers are driving the rise in need responders, being more likely than their older counterparts to give when they hear about a need or an issue (59% Gen Z, 54% Gen Y cf. 42% Gen X, 36% Baby Boomers, 35% Builders).

Older Australian givers are more likely to be regular givers than their younger counterparts (27% Builders cf. 6% Gen Z).

WHEN ARE YOU MOST LIKELY TO GIVE TO A CHARITABLE ORGANISATION?



WHEN ARE YOU MOST LIKELY TO GIVE TO A CHARITABLE ORGANISATION?



	Gen Z 18 - 25	Gen Y 26 - 40	Gen X 41 - 55	Boomers 56 - 74	Builders 75+
Hear about a need or issue	59%	54%	42%	36%	35%
Semi regularly throughout the year	18%	20%	22%	28%	22%
Approached for a donation or support	18%	15%	17%	14%	16%
Frequent or regular basis	6%	10%	19%	22%	27%

Australians highly motivated to give to disaster response in Australia

In light of the 2019/2020 summer bushfires in Australia, more than half of Australian givers (54%) are highly motivated to give money to or volunteer for organisations associated with disaster response in Australia. This makes it the number one area Australians are motivated to give to and increases its rank from fourth in 2019.

Animal welfare and wildlife support remains the second most likely cause Australians are motivated to support (47%). This is followed by children's charities (44%) and medical and cancer research (43%), both of which have seen a decline in ranking since 2019.

The rise in environmental giving

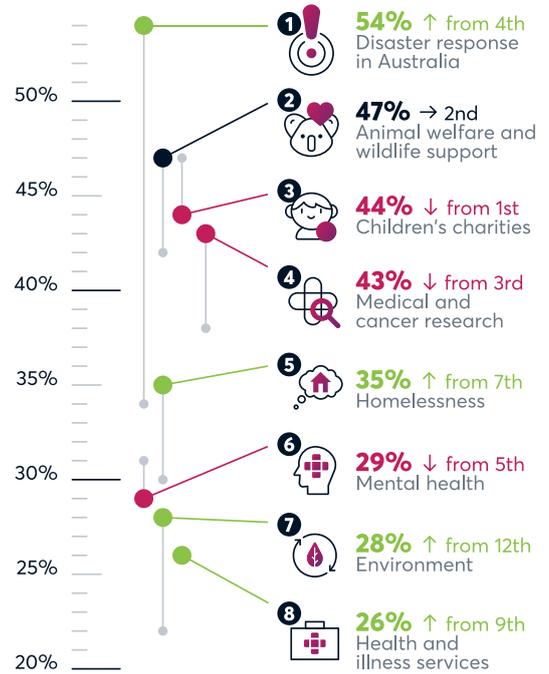
Australians' motivation to support organisations associated with the environment is increasing, moving from the 12th most likely cause to support in 2019 to the seventh most likely cause in 2020.

Younger givers are driving the rise in support for the environment, being more likely than their older counterparts to give to organisations with an environmental focus (41% Gen Z, 34% Gen Y cf. 26% Gen X, 21% Baby Boomers, 13% Builders).

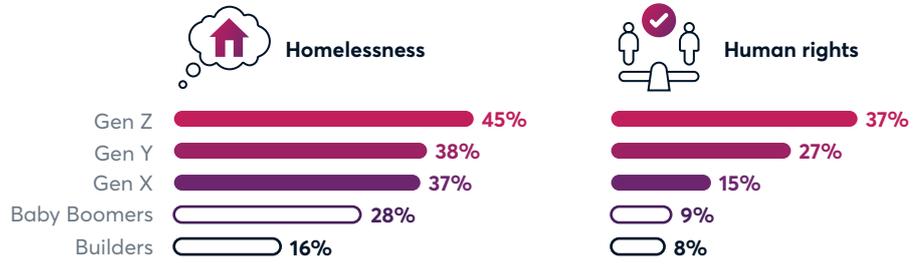
TOP 8 CAUSES

% who are highly motivated to support

- Rank up from 2019
- Rank down from 2019
- No rank change
- % change from 2019



YOUNGER GIVERS ARE ALSO MORE LIKELY TO SUPPORT ORGANISATIONS FOCUSED ON HOMELESSNESS AND HUMAN RIGHTS



Top three causes by generation



Gen Z
18 - 25



Gen Y
26 - 40



Gen X
41 - 55



Boomers
56 - 74



Builders
75+

Rank	Gen Z (18-25)	Gen Y (26-40)	Gen X (41-55)	Boomers (56-74)	Builders (75+)
1	Animal welfare & wildlife support 52%	Animal welfare & wildlife support 52%	Disaster response in Australia 53%	Disaster response in Australia 64%	Medical & cancer research 61%
2	Disaster response in Australia 46%	Disaster response in Australia 48%	Animal welfare & wildlife support 46%	Medical & cancer research 46%	Disaster response in Australia 60%
3	Homelessness 45%	Children's charities 47%	Children's charities 45%	Children's charities 43%	Animal welfare & wildlife support 37%

Australians prefer to support organisations that directly assist and respond to issues

"Aussies are a fairly practical group. When they see something happening practically, that has an impact on the ground to everyday people I think they are drawn to that rather than something ethereal or academic. They warm to something that is making a difference."

– **Tim Hanna, outgoing CEO, Compassion Australia**

The data supports this, with the proportion of Australians preferring to support organisations that are directly assisting and engaging in responding to an issue increasing since 2016. Today almost half of Australian givers (47%) much/slightly prefer to support organisations who are directly assisting and responding to issues. This has risen from 32% in 2016 and 38% in 2019. The proportion of Australian givers who prefer to raise awareness, on the other hand, is decreasing (25% cf. 32% 2016).

Although, overall, younger givers prefer to support organisations who are directly assisting and engaging in responding to issues, they are more likely than older generations to prefer to raise awareness. Almost two in five Gen Z (39%) and Gen Y (37%) much/slightly prefer to support organisations which are focussed on raising awareness of an issue compared to one in five Gen X (19%), one in ten Baby Boomers (11%) and 13% of Builders.

Growing sense of nationalism

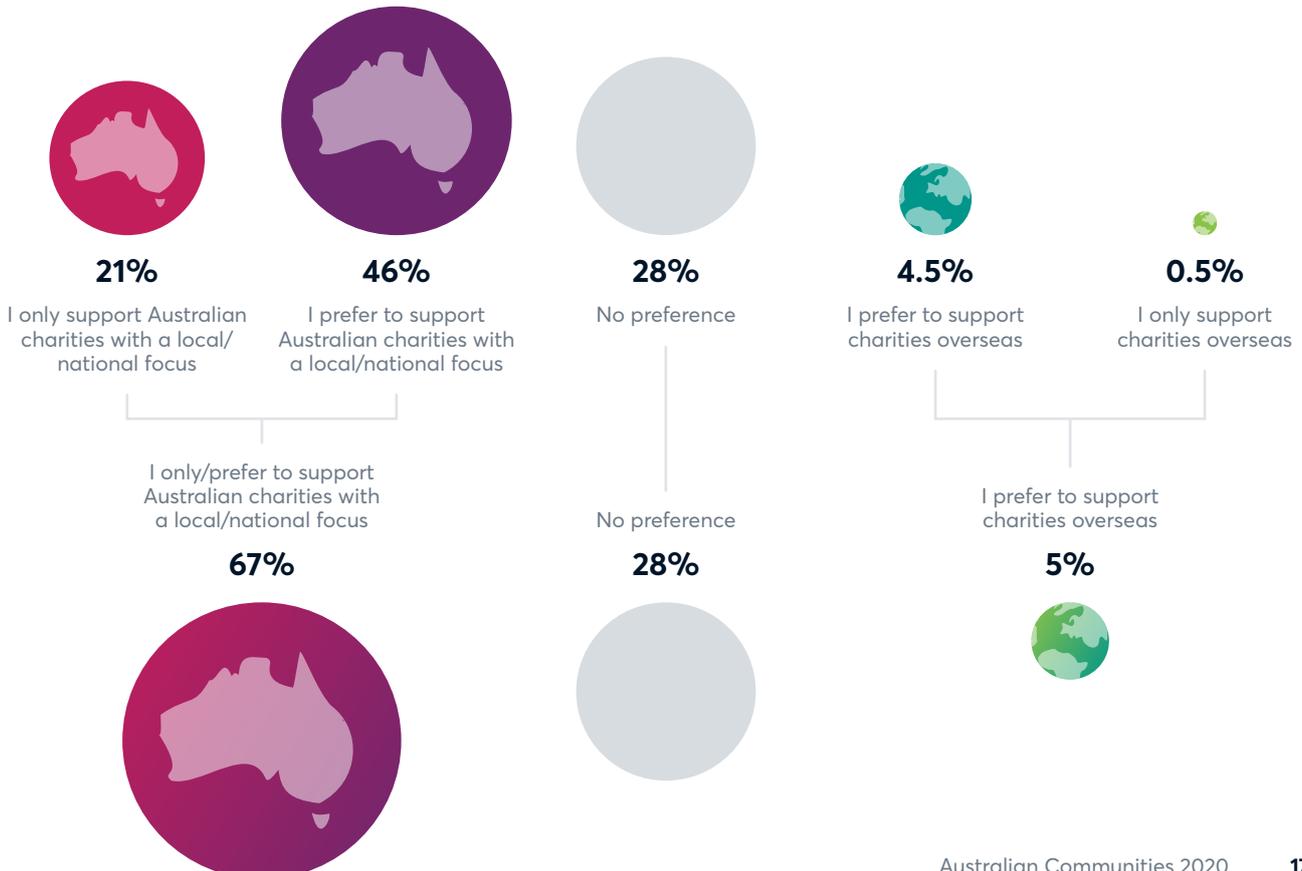
More than two in three Australian givers (67%) only support or prefer to support Australian charities with a local/national focus as they believe it is important to look after their own back yard first. In fact, one in five givers (21%) only support charities with a local/national focus. Almost three in ten (28%) have no preference, while 5% only support or prefer to support charities overseas where there is the greatest human need over and above Australian charities.

Although still only a small proportion, Gen Z and Gen Y show they are globally minded generations, being more likely to only support or prefer to support organisations overseas (7% Gen Z, 6% Gen Y cf. 3% Gen X, 5% Baby Boomers, 2% Builders).

Australian givers choose to support charities with a local/national focus because they believe charity begins at home. There are many who want to put Australia first and support the many needs that are present within Australian society.

Givers who prefer to support organisations with an overseas focus do so because they believe Australia is a rich country and other countries need it more.

WHICH OF THE FOLLOWING BEST DESCRIBES YOU?



Social licence

Social licence is often understood as 'public permission to operate'. Positive public sentiment towards an organisation is essential for it to maintain its social currency and social licence. Positively, social licence for the charities/not-for-profit sector is on the rise, and more so than charity workers expect.

One in five Australian givers (20%) say their public support for charities/not-for-profits to operate has significantly/somewhat increased over the last five years. During this same time period just 15% of charity workers believe public support for charities/not-for-profits to operate has significantly/somewhat increased.

AUSTRALIAN GIVERS ARE 4X MORE LIKELY TO SAY THEIR SUPPORT FOR THE CHARITIES/NOT-FOR-PROFIT SECTOR TO OPERATE HAS...



20%
Significantly/
somewhat increased



5%
significantly/somewhat
decreased

Younger donors strengthen social licence

Positively, it is the donors of the future that are most likely to say their own support for charities/not-for-profits to operate has significantly/somewhat increased in the last five years. More than a third of Gen Z (35%) and three in ten Gen Y (28%) have increased their support for charities/not-for-profits to operate compared to 16% of Gen X, 12% of Baby Boomers and 7% of Builders.

Charities/not-for-profits seen as vital for a just society

The positive reputation of the sector is also on the rise, with more than one in five Australian givers (21%) and charity workers (22%) believing it has significantly/somewhat increased in the last five years. This makes Australian givers four times more likely to believe the positive reputation of the sector has significantly/somewhat increased (21%) than significantly/somewhat decreased (5%) over the last five years.

AUSTRALIAN GIVERS ARE 4X MORE LIKELY TO SAY THE POSITIVE REPUTATION OF THE SECTOR HAS...



21%
Significantly/
somewhat increased



5%
significantly/somewhat
decreased

Not-for-profit leaders agree with this sentiment, believing that although the sector has experienced some trust challenges there is still public permission to operate because of the role charities/not-for-profits play in society. It is, however, becoming increasingly important to clearly communicate the purpose of the organisation and the why behind what they do to maintain this social licence.

"I believe charities and non-profits have been knocked a little bit in recent years by some scandals. Notwithstanding that, there's still a higher level of trust in charities, and the public do see them as vital in delivering on the aspirations of the public for a just, fairer, healthier society."

- Sarah Pennell, Foodbank Australia

POSITIVELY, SOCIAL LICENCE FOR THE CHARITIES/NOT-FOR-PROFIT SECTOR IS ON THE RISE



Social licence connected to cause

Some causes, more than others, are seen to have a strong social licence. A weaker social licence is often found when people believe the organisation or cause is unnecessary. This can sometimes be when it is seen as the individual's responsibility to help themselves rather than to rely on the support of others.

"I think [social licence] very much depends on which cause you're talking about. Some causes have credence and a lot of currency with the Australian public, some causes have less currency. People think that they should be doing that themselves, we shouldn't be asking other people for money to spend."

– **Tim Hanna, outgoing CEO, Compassion Australia**

Charities/not-for-profits receive special privileges because of social licence

Australian givers (56%) and charity workers alike (51%) believe the government and therefore society has entrusted charities/not-for-profits with special privileges even above commercial organisations, such as tax exemption, religious freedoms, rebates etc.

Three in five charity workers (60%) definitely/to some extent believe the circumstances under which they operate are special privileges. A quarter (24%) are very conscious of these special privileges and don't take them for granted, while more than a third (36%) appreciate them. Two in five charity workers (40%), however, do not believe these conditions are special privileges but are required for charities/not-for-profits to operate.

Expectations rise due to benefits

While the special privileges the government provides to charities/not-for-profits are appreciated within the sector, there is a sense among not-for-profit leaders that the special privileges increase the expectations of the Australian public.

"Yes 100%. The idea that if you have a tax break, therefore, we expect more is there."

– **Daniel Flynn, Thankyou**

Australian givers support this sentiment, with three in five givers (61%) strongly/somewhat agreeing the charities/not-for-profit sector must operate as more trustworthy than commercial organisations (cf. 65% charity workers).

For some not-for-profit leaders, it is not necessarily that the expectation on charities is higher than commercial organisations but that they are now held to the same standard. Where once charities/not-for-profits were granted more leniency as they exist to help people, there is now an expectation that charities/not-for-profits are accountable and transparent like any other commercial organisation.

"I don't think givers expect more than they do from corporates or anybody else. I think in the past, they didn't expect as much, and now they are expecting charities to be professional, efficient and effective. Not more so than any other organisation, but perhaps in the past the public has been a bit easier on charities. The perception was that charities were amateur in a sense. That is changing now, they expect their charities to be accountable and up to the task of being entrusted with money."

– **Sarah Pennell, Foodbank Australia**



The challenge of donor-led engagement

Public permission to operate is often strengthened through accountability and impact reporting. The public have a desire to see the tangible impacts of their donation and how it specifically is making a difference. Often where impacts are clearly reported, donor engagement increases.

"Younger generation donors want to know explicitly where the money is going and what it's doing and who it is touching, so all of that means far greater accountability and transparency is needed in what we do. The outcome has to be real impact. The public wants to see that they're getting the best value for their donation when it comes to outcomes."

– Sarah Pennell, Foodbank Australia

There is some concern from not-for-profit leaders, however, regarding the long-term impacts of responding to donor-led engagement. Development decisions which are made based on the potential donor response, rather than an investment in long-term change, can impact trust and social licence. It is important for organisational leaders, therefore, to focus on engaging with the best development practices so the organisation can then deliver on its objectives and build trust and social licence within the Australian community.

"Donors, as a whole, often want to control the outcome or at least know what the outcome is. One of the issues with that is we can have donor-led work and donor-led activity in the charitable space, which may not be the best development practices. It may not be the most sustainable work, but it makes donors happy and they can get more money. But then, over time, if the work doesn't stand up and isn't really making a difference, then ultimately donors lose trust."

– Daniel Flynn, Thankyou

The burden of transparency

Not-for-profit leaders believe in the importance of transparency and accountability but are concerned about the impacts of this in the everyday life of the organisation. At their core, charities/not-for-profits exist to help solve complex problems, which is challenging and requires space and time to innovate. A challenge for charities/not-for-profits is balancing the public accountability and desire for transparency to build social licence with the need to create space to deliver on organisational objectives.

"In terms of regulation we have to check the balance between good accountability and good transparency without crushing people so much that they can't actually function. So much of the resources of an organisation are going to that and less to the actual cause, so I think there's a balance to be had somewhere, and I think we have to be careful how we walk that balance from a regulatory, governance point of view."

– Tim Hanna, outgoing CEO, Compassion Australia

OFTEN WHERE IMPACTS ARE CLEARLY REPORTED, DONOR ENGAGEMENT INCREASES

A united voice helps to build social licence

Not-for-profit leaders believe developing unity across the charity sector may help build stronger social licence by allowing the sector as a whole to speak into issues. The conversation around administration costs, for example, is one where some feel the charities/not-for-profit sector has lost its voice. The Australian Community Trends report 2019 found that more than four in five givers (84%) believe administration costs should comprise 20% or less of an organisation's total revenue. Staff of charities/not-for-profits, however, believe they can achieve greater outcomes if their administration costs are above 20%.

Without the voice of the charities/not-for-profit sector speaking into this issue, the public will continue to believe that administration costs must remain below 20%. Over time, the incongruence between administration costs and giver expectations may negatively impact social licence. Not-for-profit leaders believe the development of an industry body to speak into subjects such as administration costs and market wages for staff members may help the charities/not-for-profit sector regain its voice.

"There are so many misconceptions of what not-for-profits are and should be - from overhead to staff salaries. There are over-assumptions on charity expenditure while at the same time little understanding that not-for-profits need to make strategic investments to deliver the best outcomes - as would be expected of any business! Unfortunately, there is no industry body, voice or consortium that has gotten together to try and dispel those myths. I think those myths have become truth and are decreasing trust in the not-for-profit sector. We've seen this in the bushfire response."

– Richenda Vermeulen, ntegrity agency



Trust

"We are in a much more cautious and sceptical world these days. It's really hard for charities to say, 'please trust us with your money so we can make a difference' ... People in the community are much more careful about walking over the trust bridge."

– George Savvides, former Chairman, World Vision Australia

According to the Australian Charities and Not-for-profit commission (ACNC), trust levels in the charities/not-for-profit sector have reduced over the last five years. In 2013, 37% of Australians had high trust, which has declined to 30% in 2015 and 24% in 2017¹.

Despite trust levels decreasing, almost three in five Australian givers (57%) and charity workers (59%) strongly/somewhat agree that Australians place a higher trust in charities/not-for-profits than commercial organisations.

AUSTRALIAN TRUST IN NOT-FOR-PROFITS DECREASING¹

Proportion who have high trust

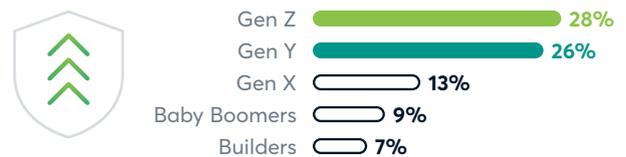


Younger donors increasing trust

Positively, for one in six Australian givers (17%) their trust in the sector has significantly/somewhat increased compared to five years ago. Once again it is the younger generations who are having the positive effect. Almost three in ten Gen Z (28%) and one in four Gen Y (26%) have significantly/somewhat increased their trust in the sector compared to five years ago (cf. 13% Gen X, 9% Baby Boomers, 7% Builders).

YOUNGER DONORS MORE TRUSTING OF THE CHARITIES/NOT-FOR-PROFIT SECTOR THAN THEY WERE FIVE YEARS AGO

Significantly/somewhat increased their trust



There is still room for improvement, however, with not-for-profit leaders believing Australians are less likely to intrinsically trust charities. The Australian public are doing their research before engaging with charities/not-for-profits and are looking for greater transparency and control over the outcomes.

"I think in previous generations, there was just an unquestioned belief that charities do the right thing, that they're good and noble and should be supported. I think the younger generation is more questioning and want proof, outcomes and greater participation and control."

– Sarah Pennell, Foodbank Australia

PEOPLE IN THE COMMUNITY ARE MUCH MORE CAREFUL ABOUT WALKING OVER THE TRUST BRIDGE

Maintaining accountability while letting go of donor control

The idea of giving donors greater participation and control can sound a noble one. But if organisational leaders don't respond to this opportunity appropriately, it may have negative implications for the sector long term. At its core, donors' desire for control can come from a lack of trust in the leadership and management of charities/not-for-profits to do their role effectively. Not-for-profit leaders agree charities/not-for-profits need to be held accountable to their organisational outcomes, but there needs to be a greater level of trust from the Australian public in the process. It may take time to build this trust, but it is important for leaders in the sector to start the conversation about control and accountability.

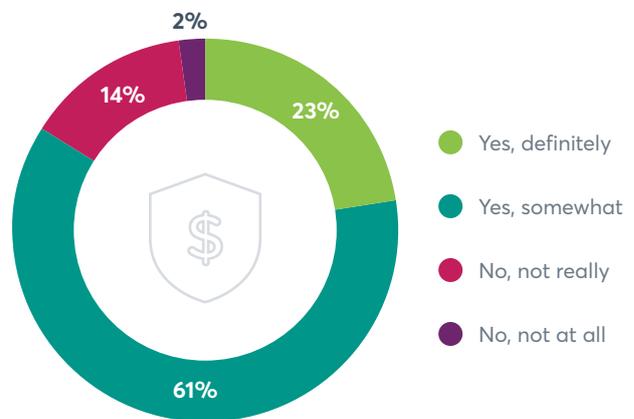
"Put really simply, if you invest in Facebook, you put your money in and that's it. You don't tell Mark Zuckerberg how much he can spend on marketing; how much he can put into new product development... So, as investors you put the money in. You're not controlling how it's spent. But you are absolutely holding that company accountable to achieving the main thing. When it comes to not-for-profits, speaking very broadly, not everyone's up for that. 'I'll give you the money, but I'm not really backing the CEO or the leadership team of that company and I need to know where it's going and how my money's going to be used'. It seems like such an innocent question, but then it assumes that you know better than that management team...It is this idea of letting go of control but absolutely holding people accountable to results and to impact."

– Daniel Flynn, Thankyou

Personal connections build trust

In a time of decreasing trust in societal institutions, personal connection is key to engagement. Australian givers are trusting of organisations with which they are personally connected. More than four in five Australian givers (84%) definitely/somewhat trust the charities/not-for-profits they personally support to use their money wisely.

DO YOU TRUST CHARITIES/NOT-FOR-PROFITS YOU SUPPORT TO USE YOUR MONEY WISELY?



Building trust is a journey

"Like any relationship, rebuilding trust in any capacity takes time. I think there's got to be clarity around what a true north looks like and true north should hopefully solve the issue at hand. Then you go on that journey together. The journey has to be transparent, open and vulnerable otherwise I don't think trust can be rebuilt."

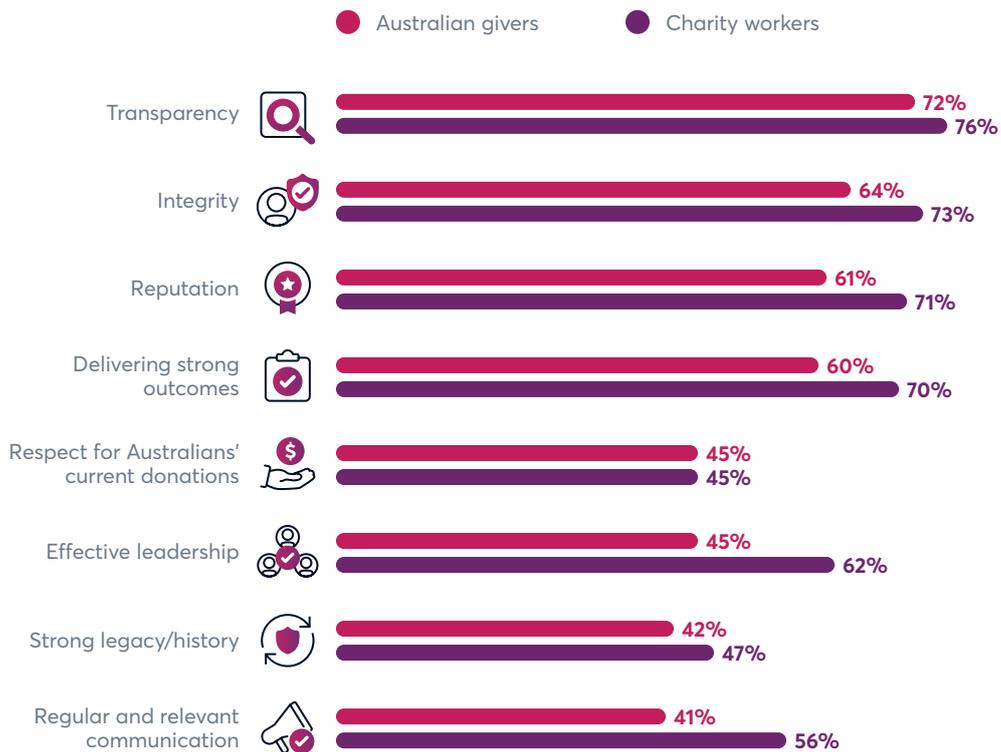
– Daniel Flynn, Thankyou

Keys to building trust

Australian givers and charity workers agree that the best ways to build trust in the charities/not-for-profit sector are transparency (72%, 76%), integrity (64%, 73%), reputation (61%, 71%) and strong outcomes (60%, 70%, Australian

givers and charity workers respectively). Interestingly, charity workers (62%) are more likely than givers (45%) to believe that effective leadership helps to build trust in the sector.

WHAT ARE THE KEY ELEMENTS THAT BUILD TRUST IN THE CHARITY/NOT-FOR-PROFIT SECTOR?



Transparency is essential to trust

Both Australian givers and charity workers believe the number one way to rebuild trust is transparency. Positively, almost four in five Australian givers (78%) are satisfied (extremely/very/somewhat) with the level of transparency regarding finances for the charities/not-for-profit sector. There is room for improvement, however, with less than one in three (28%) extremely/very satisfied. One way to help build trust through transparency is to be prepared to explain the why behind the decisions.

"I think the charity sector needs to ensure that there is good accountability and transparency, that you are able to explain why you do everything. The scrutiny and the questions that come, you need to be prepared to answer them... so at the end of the day you can say it's traceable where their contribution went."

- Tim Hanna, outgoing CEO, Compassion Australia

Communicate the delivery of outcomes

Another way to build trust is through the communication of strong outcomes. This helps givers understand that the organisation is truly making a difference. Volunteers and beneficiaries of the work can play a vital role in this area. As volunteers have no ulterior motive for their endorsement, they can often compel high levels of trust.

"Volunteers and the individuals the mission cares for can be the trusted advocates for the mission. Ensuring there is sufficient voice back from those who are being supported or impacted by the charity builds donor trust. When they advocate for how great it's been and without them 'I don't know where I'd be', that's powerful. So by having the two sets of voices, the volunteer and the beneficiary, any donor hearing those kinds of validating voices, would say 'wow it really is happening, they really are making a difference, they really are engaging in the community, I can see where my money is making a difference in the lives of other people.'"

– George Savvides, former Chairman, World Vision Australia

Invest in effective leadership

To help build trust with Australian givers, communicate the effectiveness of the leadership team. In response to the increasing trend of donor-led engagement, charities/not-for-profits need to value donor input while also communicating the experience and effectiveness of the leadership team. To help build trust with the organisation, givers need to build trust with its leaders. Where possible, invest in developing effective leaders and communicate the leadership wins of the organisation with givers.

**WHERE
POSSIBLE,
INVEST IN
DEVELOPING
EFFECTIVE
LEADERS**

ACNC helps to build trust

More than four in five charity workers (86%) are supportive (definitely/somewhat) of the government increasing compliance, regulation and reporting requirements to help build trust in the sector. Not-for-profit leaders are aligned with this, believing in the work of the ACNC and appreciating how the regulation of the sector is helping to build trust.

"I was very pleased when the current government decided not to do away with the ACNC because I have found it to be reasonable, easy to deal with and an asset with regard to building trust with the public."

– Sarah Pennell, Foodbank Australia



Purpose and profit

"In recent years we have been talking more about social enterprise, and issues around environment and human dignity. The social conversation now expects for-profit organisations to make some meaningful contribution to our social and physical environment to positively impact the world."

– George Savvides, former Chairman, World Vision Australia

The expectations of society are shifting. The public expects corporates to not just operate for profit, but for the triple bottom line of people, profit and planet. Not-for-profit leaders, Australian givers, and charity workers alike are becoming aware of this changing trend. Two in five Australian givers (40%) and charity workers (38%) strongly/somewhat agree they have observed an increase in for-profit organisations running social projects and awareness campaigns. Not-for-profit leaders believe this is a positive step for society as more organisations are operating with a social conscience.

"It is a good thing for society, that a broader part of our marketplace is endeavouring to pursue community objectives and social objectives as part of their everyday work and organisational activity."

– George Savvides, former Chairman, World Vision Australia

'Purpose' as a marketing strategy

Despite the growing popularity of commercial organisations operating for purpose and profit, not-for-profit leaders have concerns about the Australian consumer navigating the changing landscape. There is a sense that organisations can interpret 'purpose' in many different ways and what is presented as their 'purpose' may not necessarily bring about social good.

"When it comes to social enterprises and the term purpose, there's just so much grey area right now. A lot of corporates are using the term purpose, as a replacement for their mission, but what that is might not necessarily make the world a better place."

– Richenda Vermeulen, integrity agency

Others have concerns that the for-purpose approach is used more as a marketing strategy rather than an internal shift within the organisation around its mission, values and objectives. Where it is used as a marketing strategy the Australian public may feel like their purchases are achieving some sort of social good, almost an activist act, but they may be misled in the process.

"What I am seeing is commercial organisations woke-washing. There's a strong social flavour to their marketing and their propositions to the public, which if you scratch the surface, is only symbolic at best. I worry about the lines blurring and the public being misled about the true motivations of commercial companies reporting to be social enterprises."

– Sarah Pennell, Foodbank Australia

Greater regulations for commercial organisations running social projects

When it comes to for-profit organisations running as social enterprises, Australian givers are more cautious than charity workers. Half of Australian givers (50%) have concerns around for-profit organisations operating as social enterprises, while two in five charity workers (39%) feel the same. Australian givers are slightly less concerned about for-profit organisations operating social projects and awareness campaigns (38% cf. 31% charity workers).

More than three in five Australian givers (64%) and charity workers (62%) strongly/somewhat agree with this, believing there should be disclosure or regulatory requirements on for-profit organisations running social projects and awareness campaigns. They are both less likely, however, to believe that for-profit organisations running social projects and awareness campaigns should receive the same tax benefits as charities/not-for-profits for those projects.

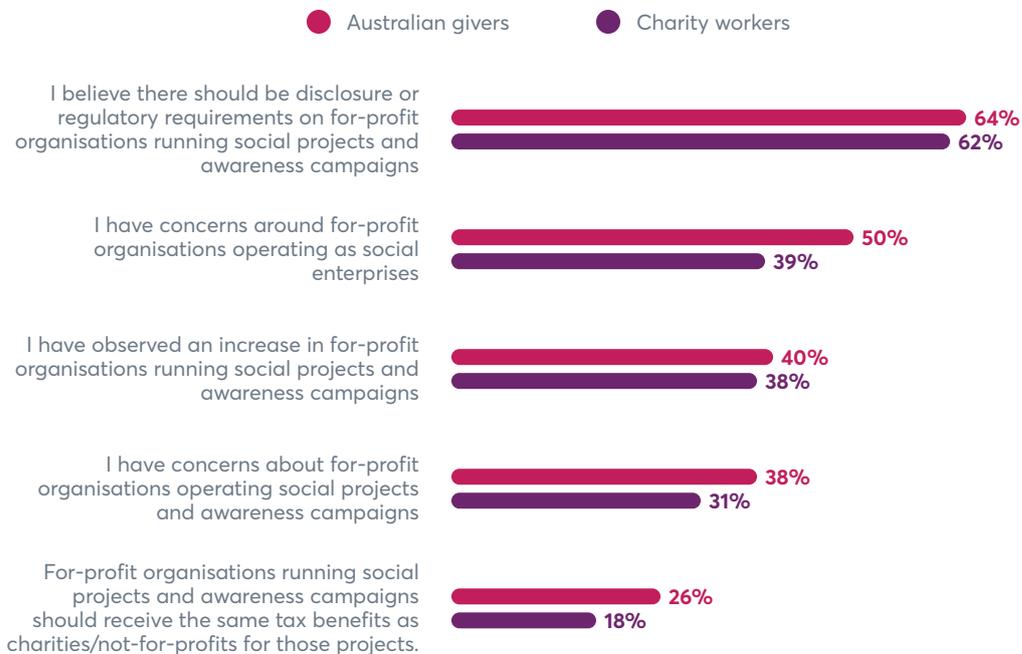
Not-for-profit leaders agree with charity workers, believing there is a need for greater regulation and clarity around social enterprises, so that givers and consumers are clear on the impacts of their engagement.

“There needs to be more self-regulation around social enterprises and the impact they are making. It’s easy to mark yourself as a social enterprise but it’s becoming harder for customers to discern the impact that is, or isn’t, being made.”

– **Richenda Vermeulen**, ntegrity agency

TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS?

strongly/somewhat agree





PARTNERSHIPS WITH CORPORATE ORGANISATIONS CAN PRODUCE GREAT RESULTS

Partnership opportunities

"The appetite for corporate partnerships is only going to increase. Corporates are not going to start their own charities. That's something we used to fear but corporates are showing they understand the complexity of impact, charity, and giving and staying within their zone of what they know they are good at. They want partners on the not-for-profit side. This is a big opportunity for not-for-profits to productise their value for corporates and build shared value."

– **Richenda Vermeulen, ntegrity agency**

In a time where the societal expectation of commercial organisations operating for purpose and profit is increasing, organisations will potentially be looking to partner with charities to help them fulfil their corporate social responsibility. The rise of organisations operating for purpose and profit may in fact not encroach on the charities/not-for-profit sector but provide the opportunity to increase impact through corporate partnership.

"Partnering with corporate organisations is in our DNA — that's what we do. We exist because of the food and grocery industry, they are our partners. They give us our supplies and we engage with them on promotional programs to help raise awareness of the issue we address."

– **Sarah Pennell, Foodbank Australia**

Shared values are essential to partnership

Partnerships with corporate organisations can produce great results. For these partnerships to be successful, however, they need to be based on shared values. These shared values allow the two organisations to work together to achieve outcomes, allowing both organisations to stay true to their purpose.

"I think we can, and we should [partner with corporate organisations] where the particular values of the organisation are sympathetic to each other. You have got to be careful about partnering with those whose values are quite different where the only reason to partner would be financial rather than the cause or the passion behind what we're doing. If the only reason you're partnering is money, I think you have to be really cautious about that."

– **Tim Hanna, outgoing CEO, Compassion Australia**

Invest in good governance

To enable charities/not-for-profit organisations to maximise the opportunity of corporate partnership, not-for-profit leaders believe there needs to be a level of board maturity for charities/not-for-profit organisations. Although it can be challenging at times, when resources are limited, it is important to think about board composition in order to take advantage of partnership opportunities.

"I see a future where much larger charity partnerships are possible and so the challenge for the governance boards of those charities and not-for-profits is the choice of who they should partner with in a complimentary sense, sharing a common mission and purposeful impact that they desire to achieve. That requires a board that is both agile and experienced, with an executive team who are comfortable in pursuing strategically challenging partnerships. That might be too much of a challenge to some traditional charities who might not have that kind of capability on team, or on the Board. In the time ahead it might be important for organisations aware of their limitations to think about the composition of their boards and the capabilities of their executives before they engage with larger organisations who are looking for partners, to fulfil their community contribution and their social licence commitments."

– George Savvides, former Chairman, World Vision Australia

Avoid mission drift

All organisations, whether for-profit or not-for-profit, are susceptible to mission drift. It is the commitment to the mission and purpose, however, that allows organisations to succeed. At a time when opportunities may become available for charities/not-for-profits to partner with commercial organisations, it is important that organisations first and foremost stay true to their original mission. To stay true to the mission, the mission must first be clear and simple. It needs to be well-understood throughout the organisation and decisions need to be made in alignment with it. Not-for-profit leaders remind us that it is OK to say no to a partnership opportunity if it does not align with the organisation's mission.

"One of my big concerns is that, at times, control comes from where money comes from. I don't love the reality of that but I think what we've noticed is we have to be really careful not to have mission drift, because you're about to get more money, or access to more people through the corporate partnership. The amount of times we've had to say no in our 11 years shocks us and would shock many people."

– Daniel Flynn, Thankyou

**TO STAY TRUE TO THE
MISSION, THE MISSION
MUST FIRST BE CLEAR
AND SIMPLE**



Leading change

The charities/not-for-profit sector is complex and must navigate ever changing public expectations. Despite this, it remains a pillar of Australian society with more than four in five Australians giving to charities/not-for-profit organisations (82%).

The pace of change can, at times, feel overwhelming and leave leaders uncertain of their next step. The first step to responding to change, however, is to be aware of it. It is important to take the time to understand the levels of trust Australian givers place in charities/not-for-profit organisations, to be aware of what it takes to rebuild trust and glean from those who have gone before. This report explores some of the key trends affecting the sector today including social licence, trust and the rise of commercial organisations operating for purpose and profit.

To position an organisation for future success, it is not just awareness of the trends but responding to them that is important. Three key takeaways for leaders who want to understand the times and respond are:

1. Simplification of mission is critical
2. Move from complexity to simplicity
3. Lead change

1. Simplification of mission is critical

To help organisations achieve their ultimate purpose there needs to be clarity around the mission. Charities/not-for-profit organisations often have complex problems to solve with limited resources. If they are not careful, charities/not-for-profits can be pulled in more directions than their resources allow. To remain true to the mission, requests to the organisation should be put through a filter: 'will this help us achieve our purpose?'

"We try to avoid being pulled in all directions, by constantly saying, 'will this action, will this initiative, help us feed more people?'"

- Sarah Pennell, Foodbank Australia

**SIMPLICITY BREEDS
PASSION, AND
COMPLEXITY BREEDS
INDIFFERENCE**



IF YOU WANT PEOPLE TO BE PASSIONATE ABOUT YOUR CAUSE YOU HAVE TO MAKE IT SIMPLE



2. Move from complexity to simplicity

Once the mission is clear, a leader's key role is to reduce complexity and increase simplicity within the organisation. Simplification of the mission provides clarity on where to allocate resources and allows an organisation to focus on its true objectives, both internally and externally. It is important for organisations to simplify their processes to allow their organisation to respond to changes in the sector. If left to its own devices, every organisation trends towards complexity. It is a fight for simplicity.

"You never drift into simplicity; you always drift into complexity. You have to be very intentional about cutting to the chase and saying, this is what we do, this is why we do it ... Simplicity breeds passion, and complexity breeds indifference. If you want people to be passionate about your cause you have to make it simple."

– **Tim Hanna, outgoing CEO, Compassion Australia**

3. Lead change

The charities/not-for-profit sector largely exists to lead change. This may be change for justice, the environment, the alleviation of poverty or the building of community. Whatever sphere you may find yourself in, continue to lead change, continue to speak for those who don't have a voice and make a difference in our communities.

"Anyone who works for a not-for-profit knows that sometimes you get knocked down and then you have to get up and go again, at times this could quieten the voices but I think we need to lead change, speak up boldly and strongly, and in that process we do that with humility and vulnerability."

– **Daniel Flynn, Thankyou**

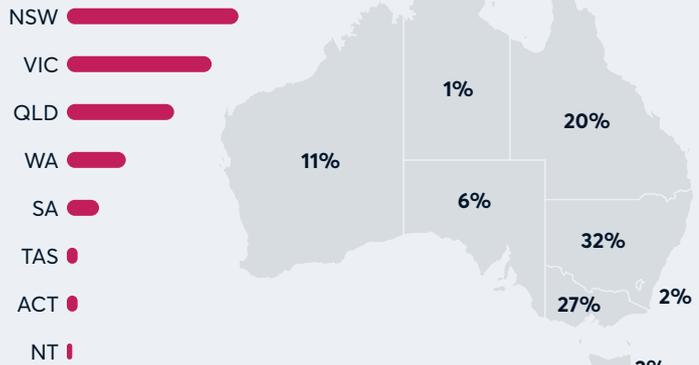
Demographics

Survey respondents: Australian givers

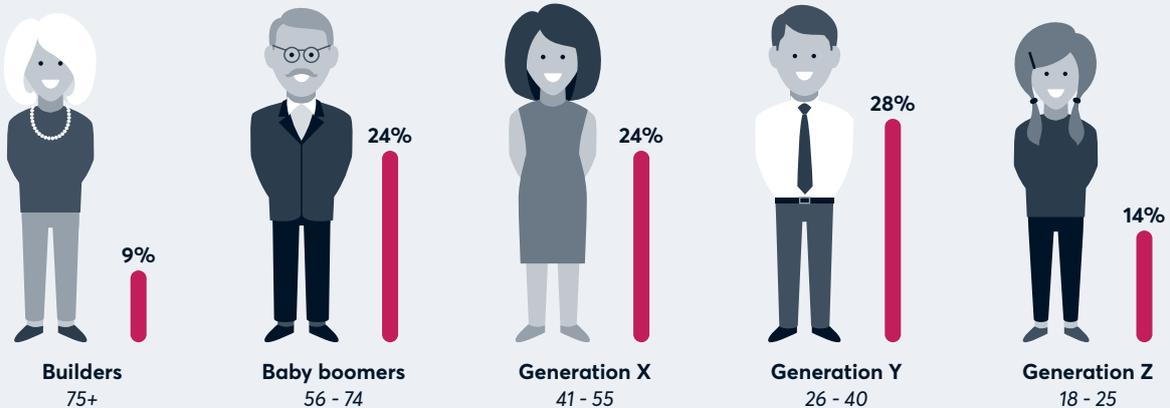
Are you male or female?



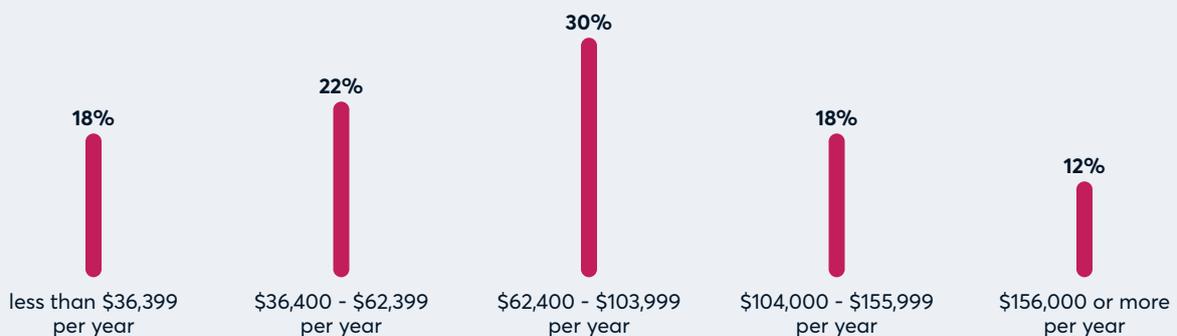
Where do you usually live?



What age will you be in 2020?

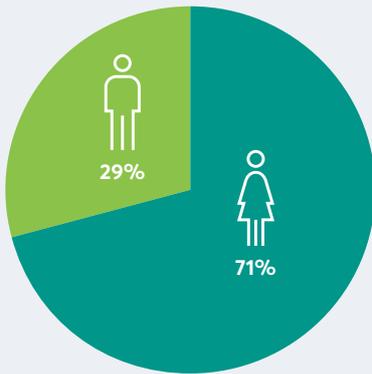


Income

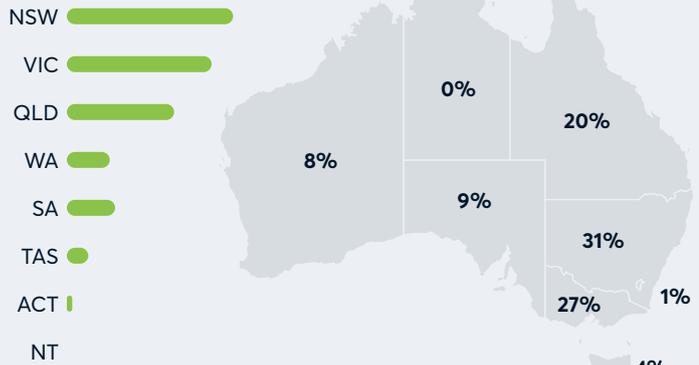


Survey respondents: charity workers

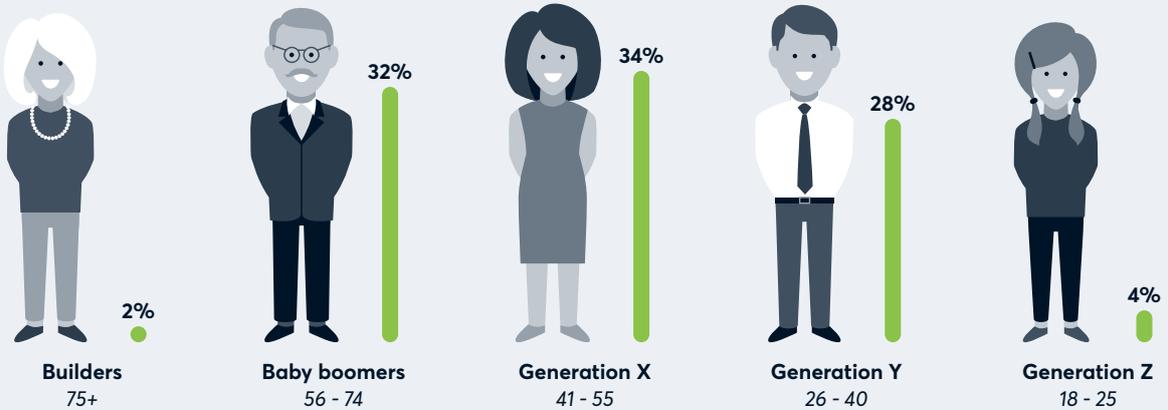
Are you male or female?



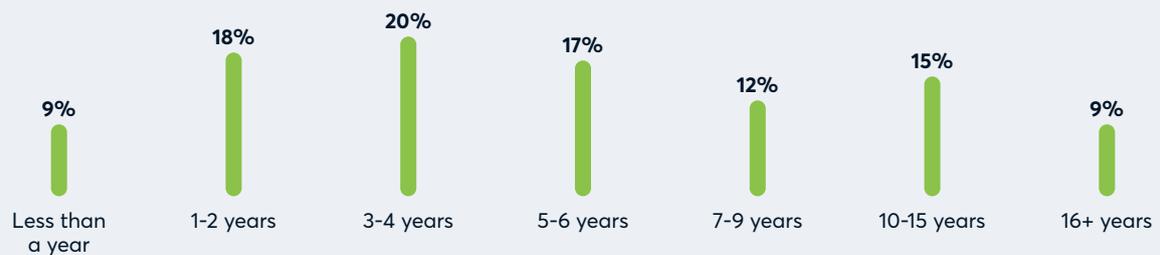
Where do you usually live?



What age will you be in 2020?



Length of time working for organisation



Research objectives

The *Australian Communities 2020* report summarises the key trends affecting the not-for-profit sector, to equip organisational leaders for strategic decision-making.

The purpose of this research is to:

- Understand the giving behaviour of Australians
- Explore the strength of social licence for charities/not-for-profits to operate in Australia
- Give insight into the trust levels of givers
- Explore the rise of purpose and profit among commercial organisations
- Understand not-for-profit leaders' perspectives on trends in the charities/not-for-profit sector.

Research methodology

The *Australian Communities 2020* report collates both quantitative and qualitative data. Quantitative data was collected through two online surveys, while qualitative data was gathered through five in-depth interviews.

Online survey of charity workers

The survey of charity workers was in field from the 7th of October to the 19th of December 2019. It was completed by a sample of 402 people working in the charities/not-for-profit sector. Throughout this report, these respondents are referred to as 'charity workers'.

Online survey of Australian givers

The survey was sent to a nationally representative sample of Australians. Respondents who indicated they 'do not give financially to charitable organisations' or only 'give every few years' were screened out of the survey, leaving a sample of 1,078 Australians who have given to a charitable organisation in the last 12 months.

The survey of Australian givers was in field from the 6th to the 8th of January 2020. Throughout this report, these respondents are referred to as 'Australian givers' or simply 'givers'.

Generational insights are based on the following age brackets:

- Generation Z: aged 18 to 25
- Generation Y: aged 26 to 40
- Generation X: aged 41 to 55
- Baby Boomers: aged 56 to 74
- Builders: aged 75+

In-depth interviews

Five in-depth phone interviews were conducted with not-for-profit leaders in November and December 2019. Throughout this report, these respondents are referred to as 'not-for-profit leaders'.

Graphs and rounding

Data labels on the graphs in this report have been rounded and may, therefore, sum to 99% or 101%. Any calculations where two data points have been added are based on raw data (not the rounded data labels on the graph) which have then been rounded once combined.

Additional sources

Reference to the economic and financial reporting of the Australian charity sector has been made throughout this report. The sources used for this are the Australian Charities Report 2013 through 2017.

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