

include a charity
It's good will.

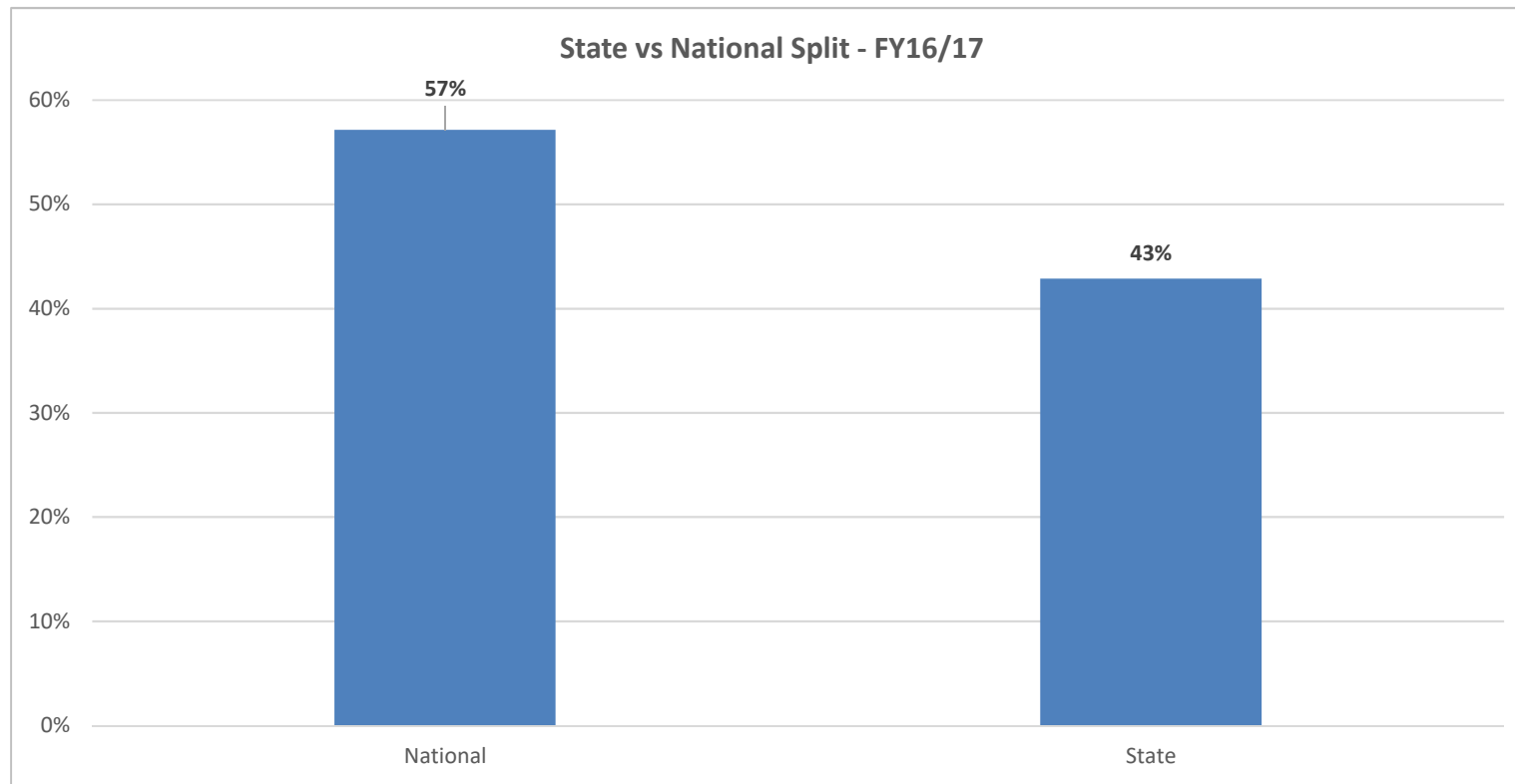
Survey Results FY16/17

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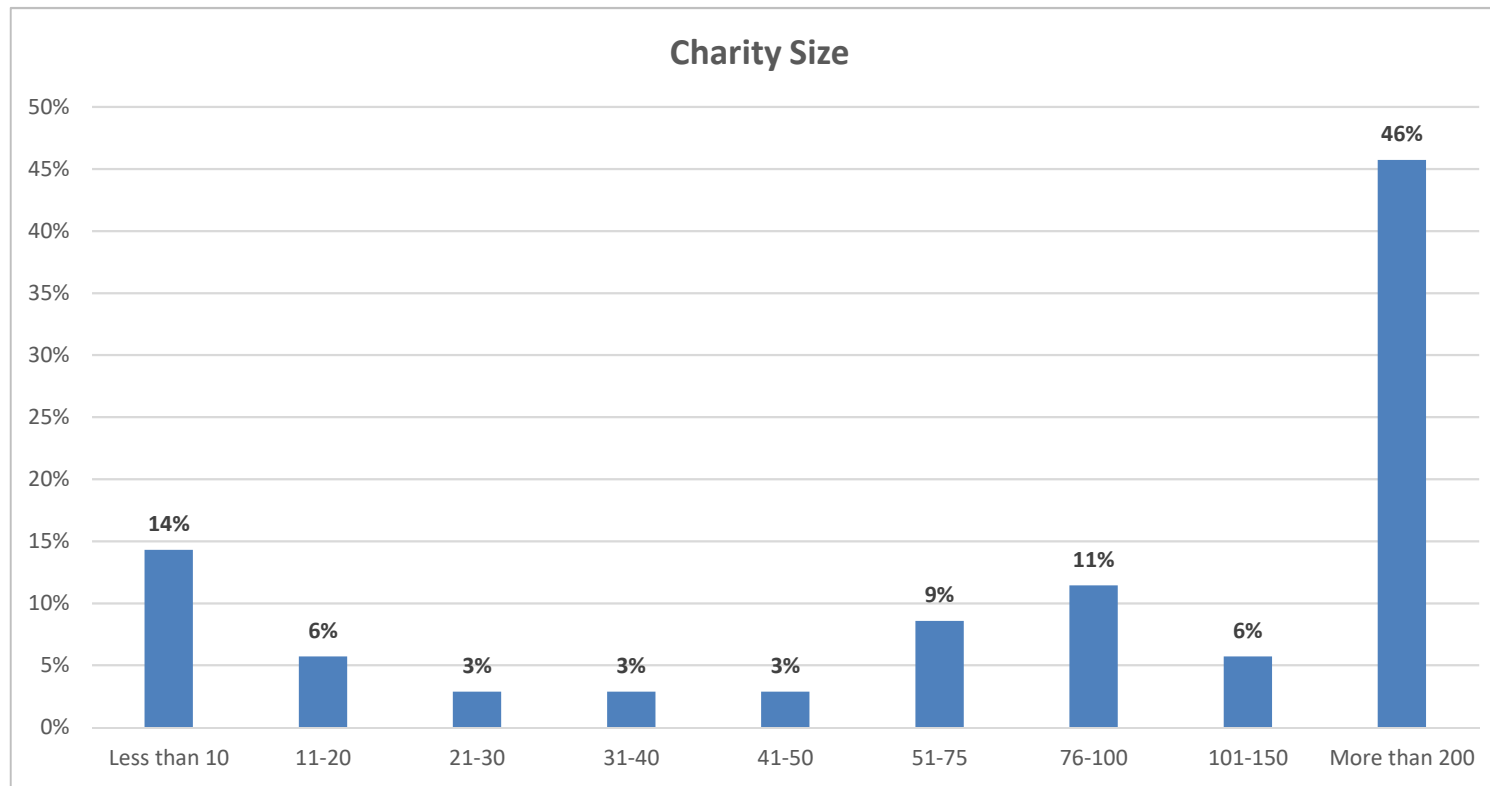
Participants

Participants – Geographical Reach



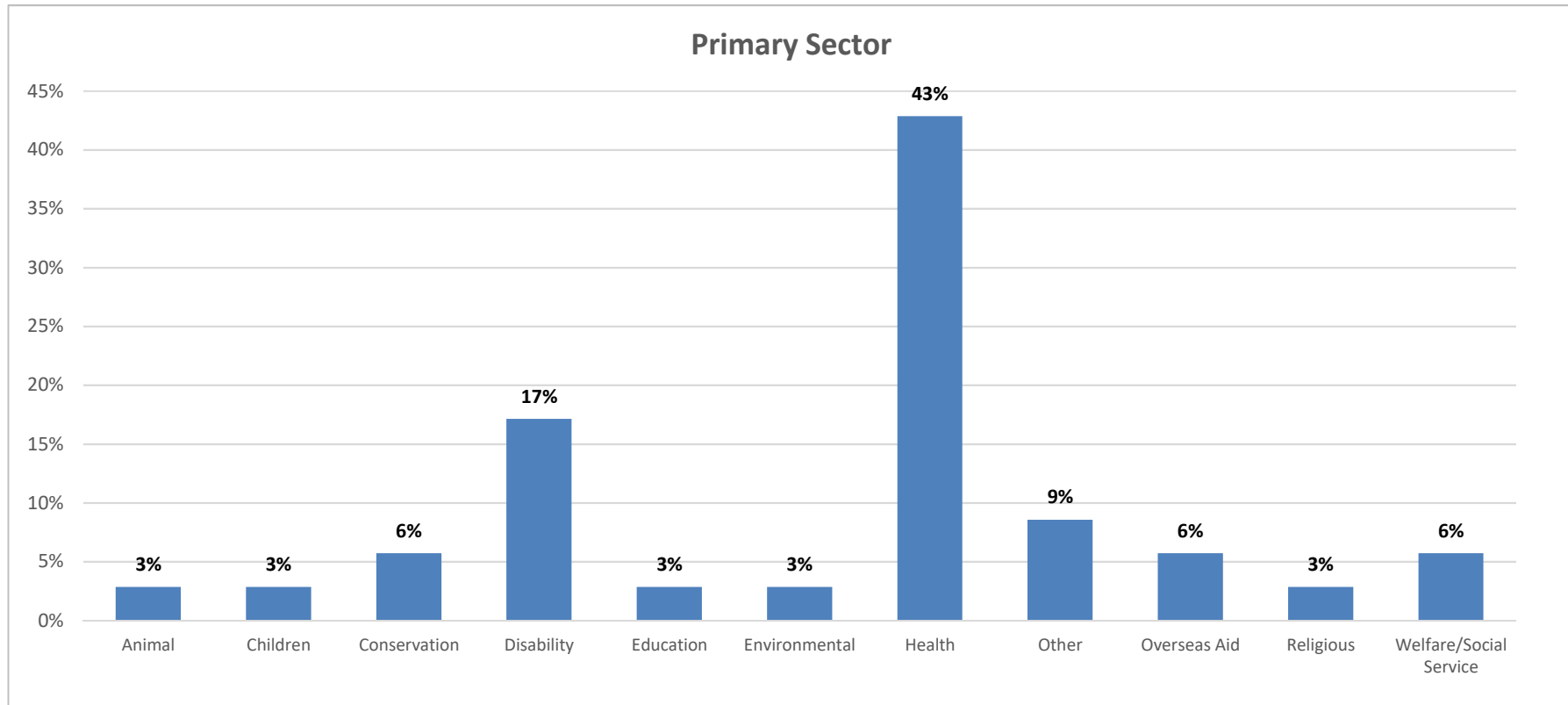
- 35 charities participated in the latest survey with almost 2/3 being National charities.

Participants – Charity Size



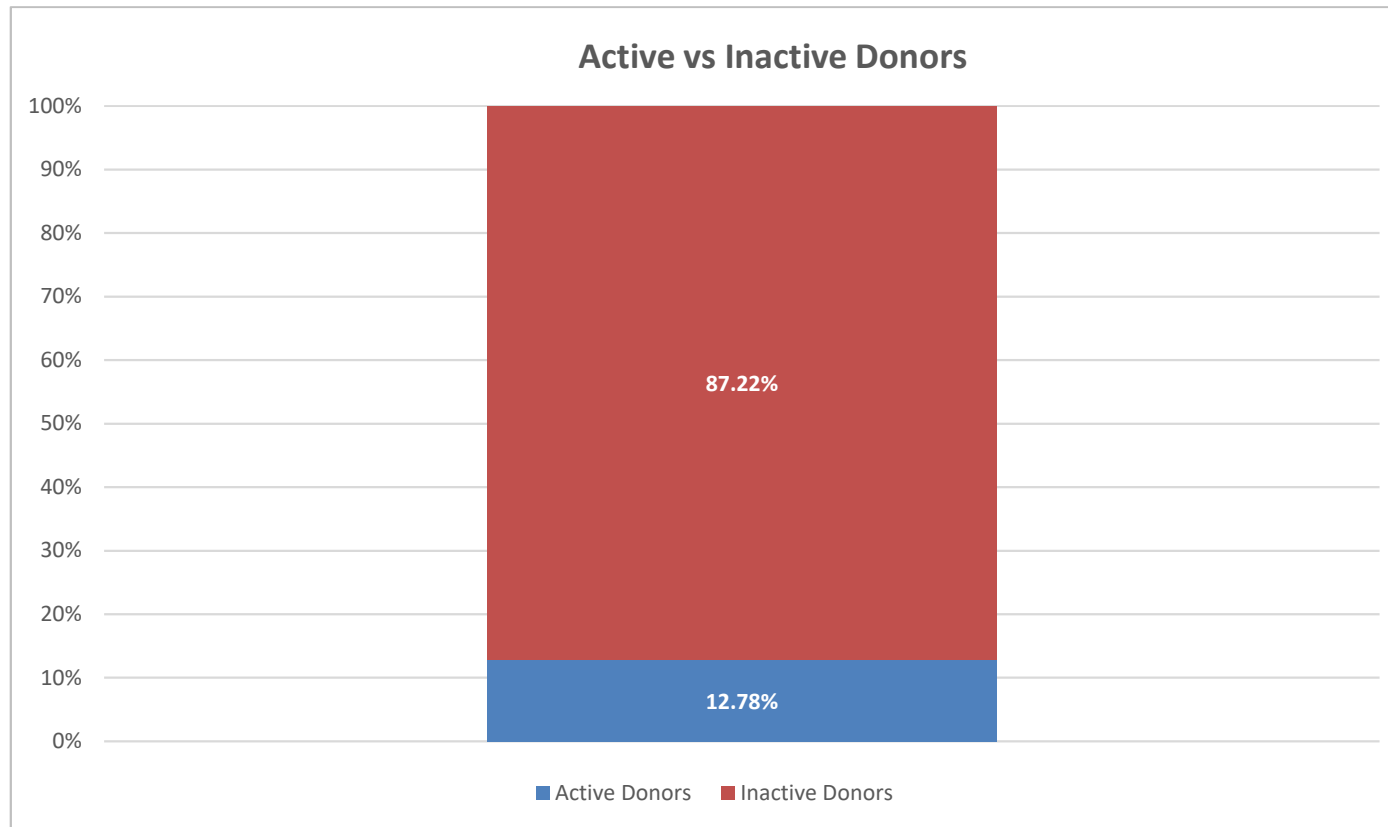
- More than half of the charities have a workforce with more than 100 employees.

Participants – Primary Sector



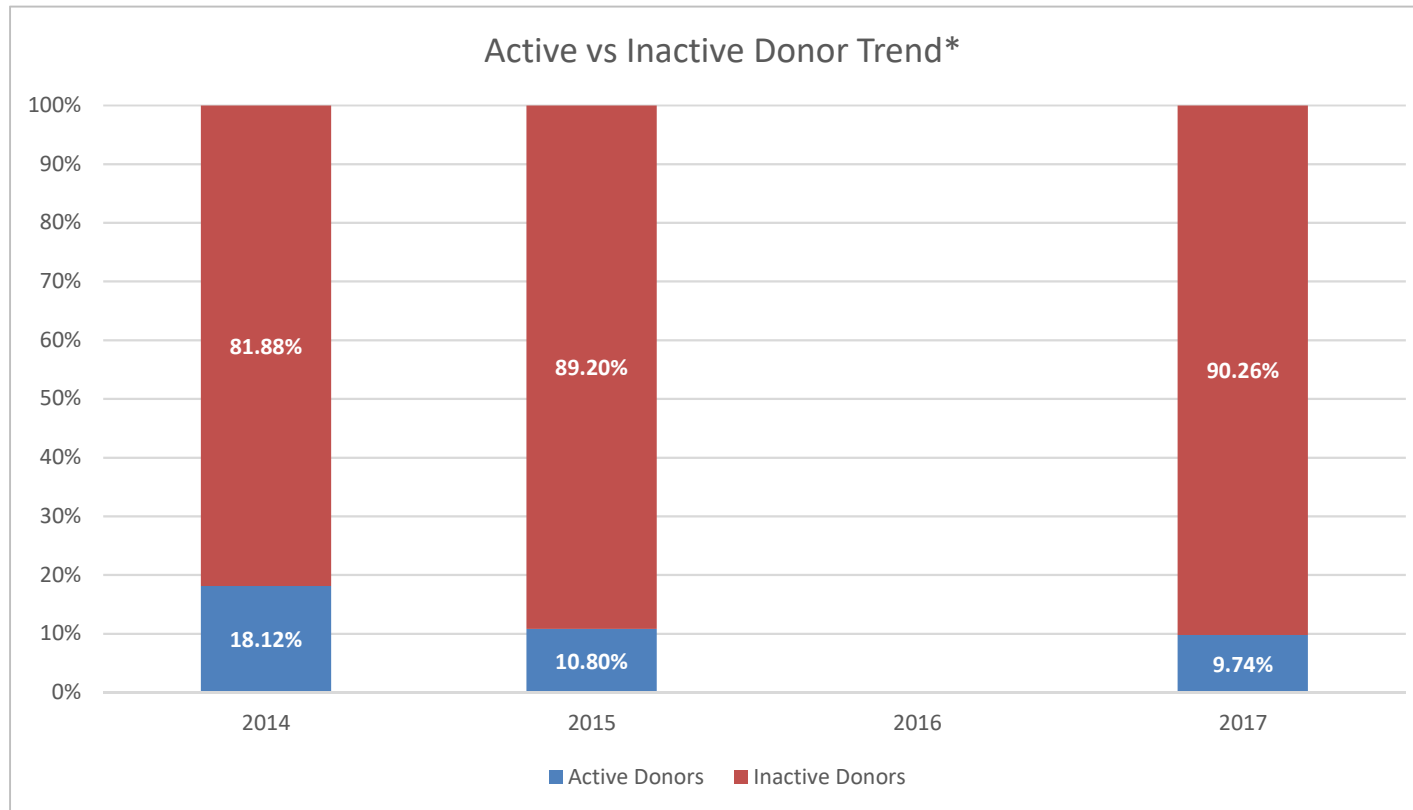
- As with previous surveys, Health is still the top Primary Sector for responders to the survey.

Participants – Donors



- The total donor base for the latest Survey participants is almost 10 million with 1.2 million identified as Active.
- The average number of Active donors is just over 37,000.

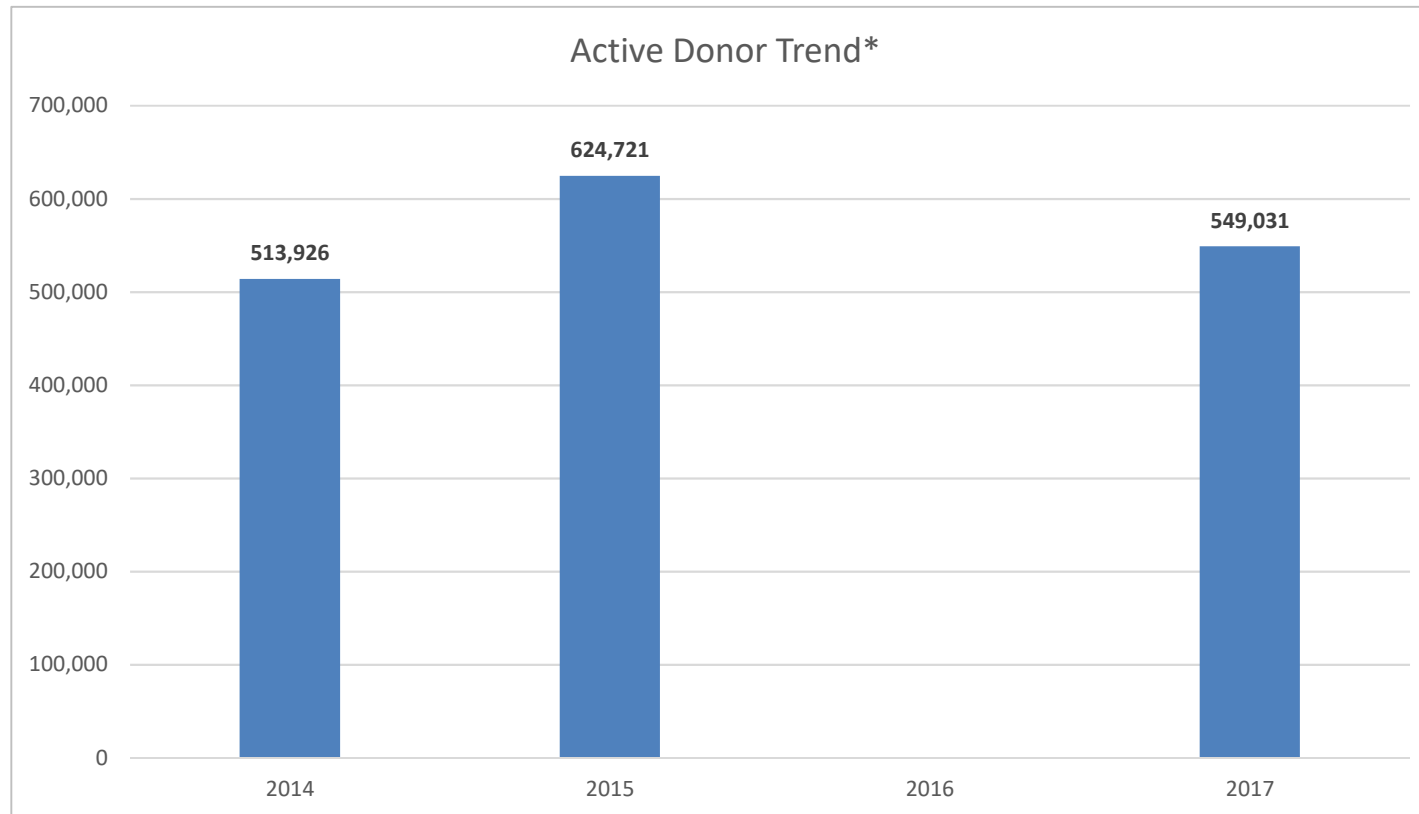
Participants – Donor Trend



- The number of Active Donors as a percentage of the whole donor pool has been slowly decreasing over the last 3 surveys.

*Only charities who responded to the last 3 surveys were included in these statistics.

Participants – Donor Trend

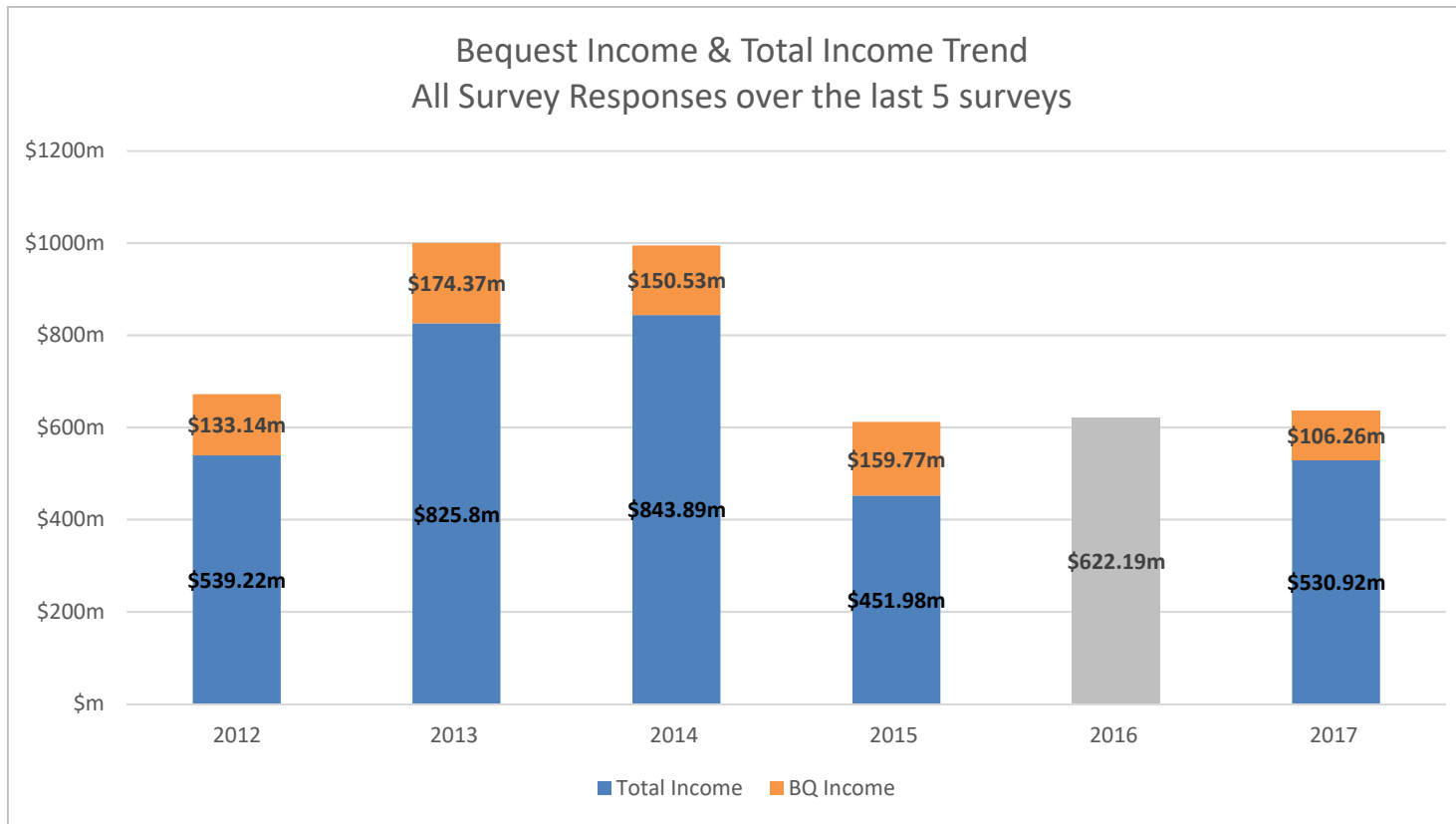


- Whilst the percentage of Active donors within the whole donor pool is decreasing (see previous slide) the actual number of Active donors is steadily increasing.
- The average number of Active donors across all 3 surveys for 2017 is 44,413.

*Only charities who responded to the last 3 surveys were included in these statistics.

Fundraising Income

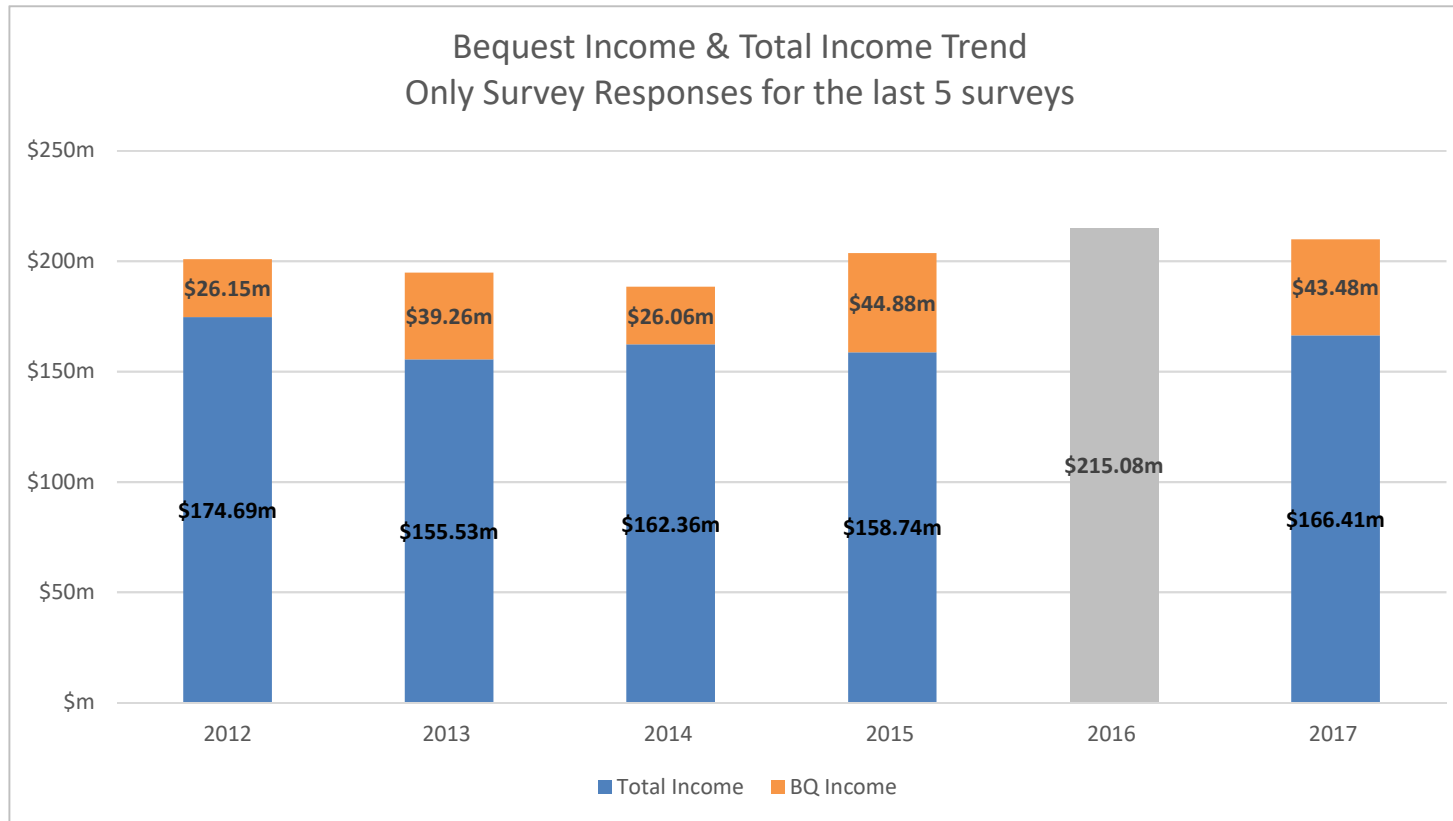
Fundraising Income – Overall and Bequest



- There is a drop in overall income between 2014 and 2015, due to the decrease in the number of participants.
- Total Fundraising income for 2017 participants was reported at \$637.17m.

* 2016 was populated via the Historical FR Income question - this figure could not be accurately split with BQ Income so a total has been provided.

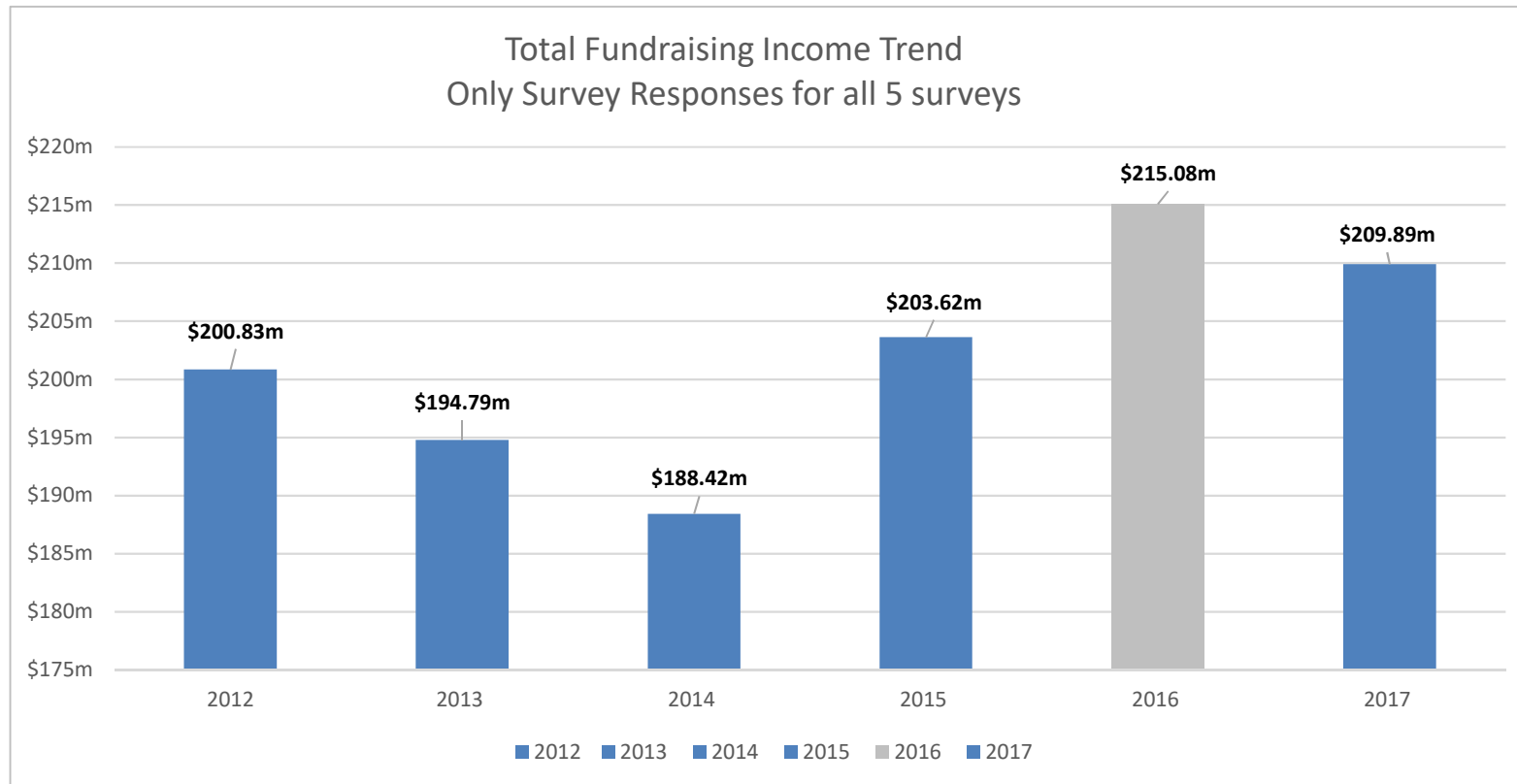
Fundraising Income – Overall and Bequest



- Of those participants who responded to all 5 surveys, the change is quite small.
- Total Fundraising income for 2017 participants (who also recorded income for the prior 4 surveys), was reported at \$209.9m.

* 2016 was populated via the Historical FR Income question - this figure could not be accurately split with BQ Income so a total has been provided.

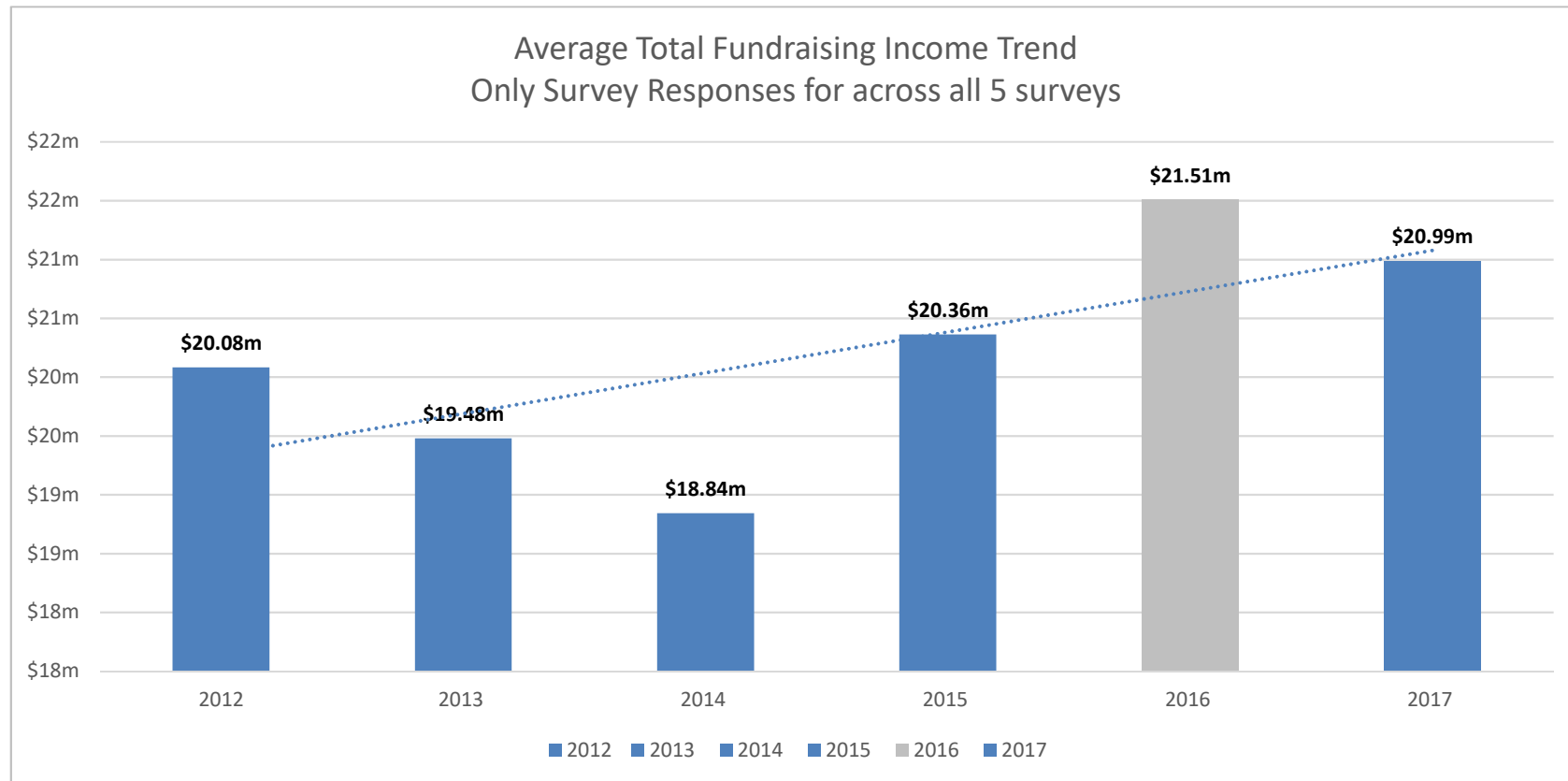
Fundraising Income – Overall Income



- Of those participants who responded to all 5 surveys, the change is quite small.
- Total Average Fundraising income for the 2017 participants (who also recorded income for the prior 4 surveys), was reported at \$20.1m.

* 2016 was populated via the Historical FR Income question - this figure could not be accurately split with BQ Income so a total has been provided.

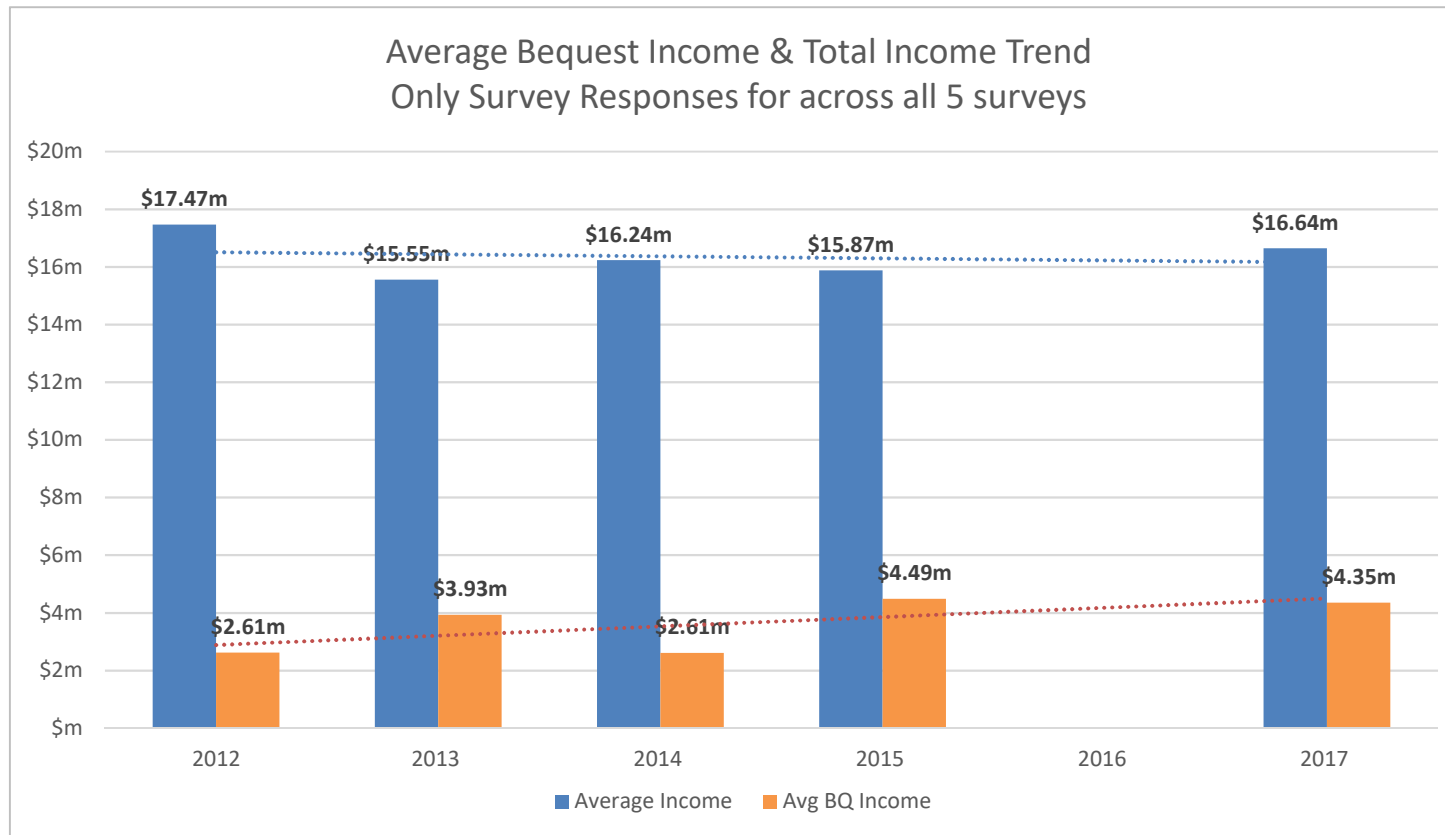
Fundraising Income – Average Income



- One third of the participants have responded to the last 5 surveys.
- The Average Total Fundraising Income is increasing, even with the dip in 2014.

* 2016 was populated via the Historical FR Income question.

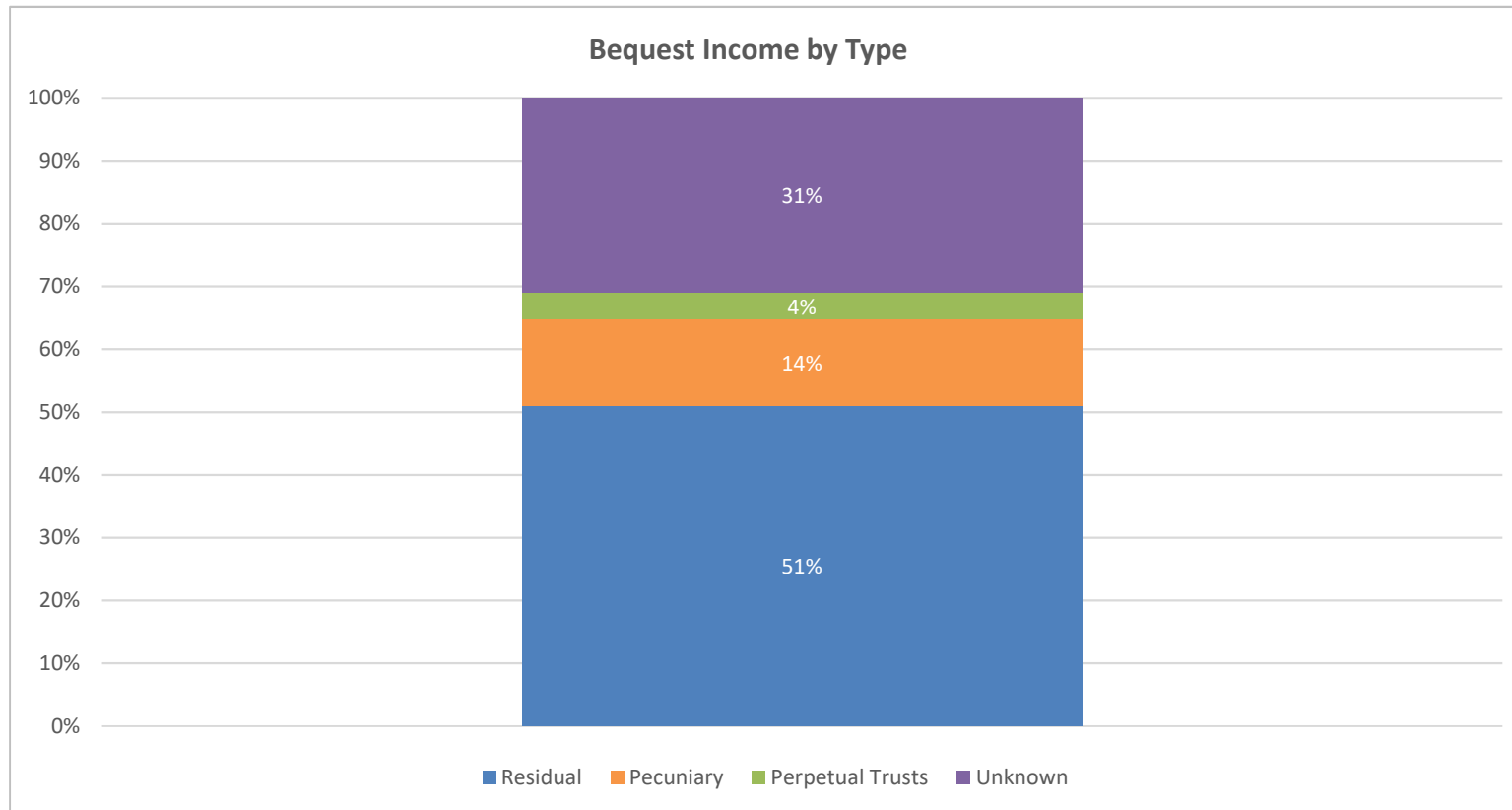
Fundraising Income – Average Income Trend



- Of those participants who responded for all 5 surveys, the average Bequest Income has been increasing.

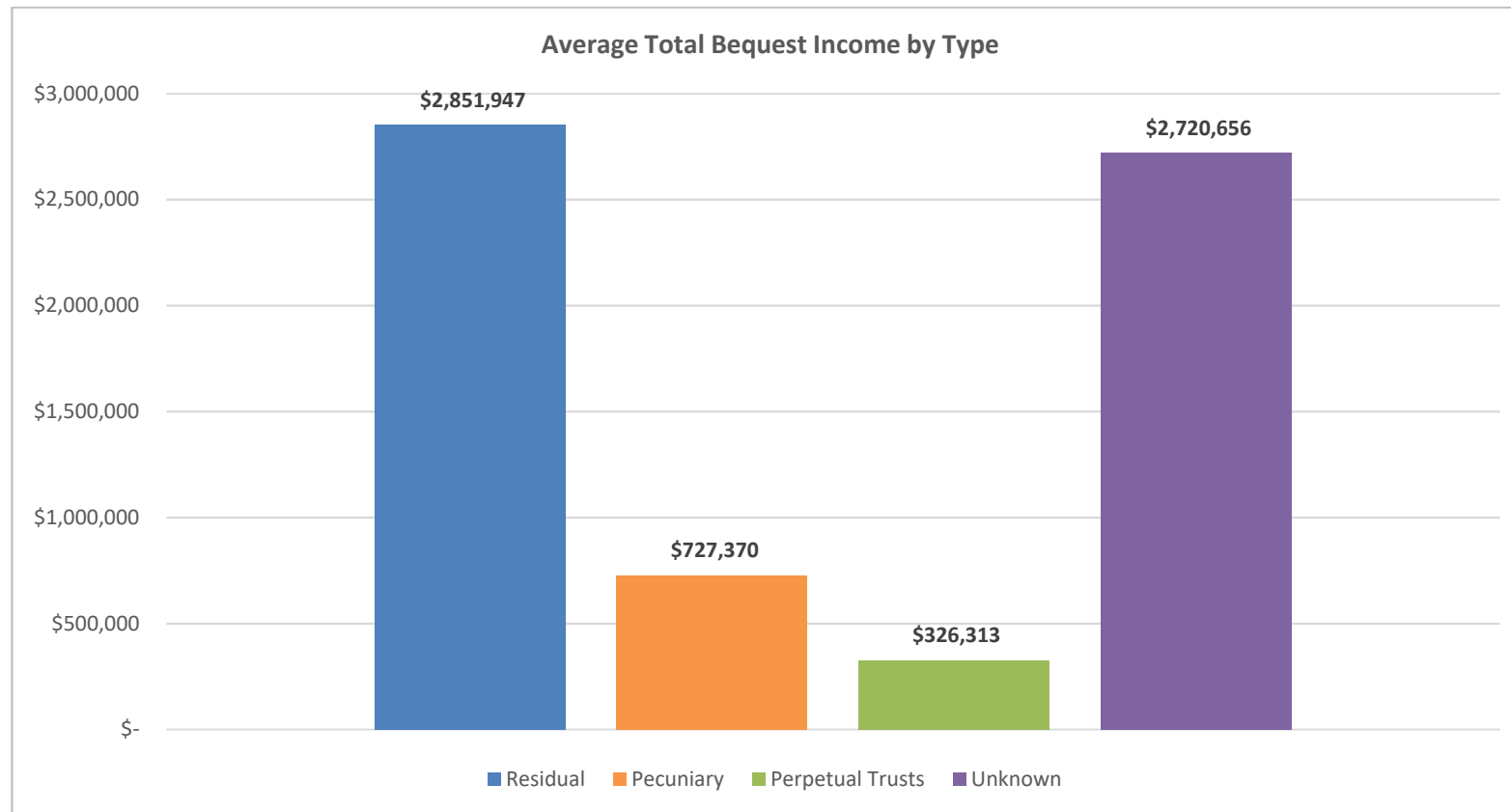
* 2016 was populated via the Historical FR Income question - this figure could not be accurately split with BQ Income so has not been shown.

Fundraising Income – Bequest Income by Type



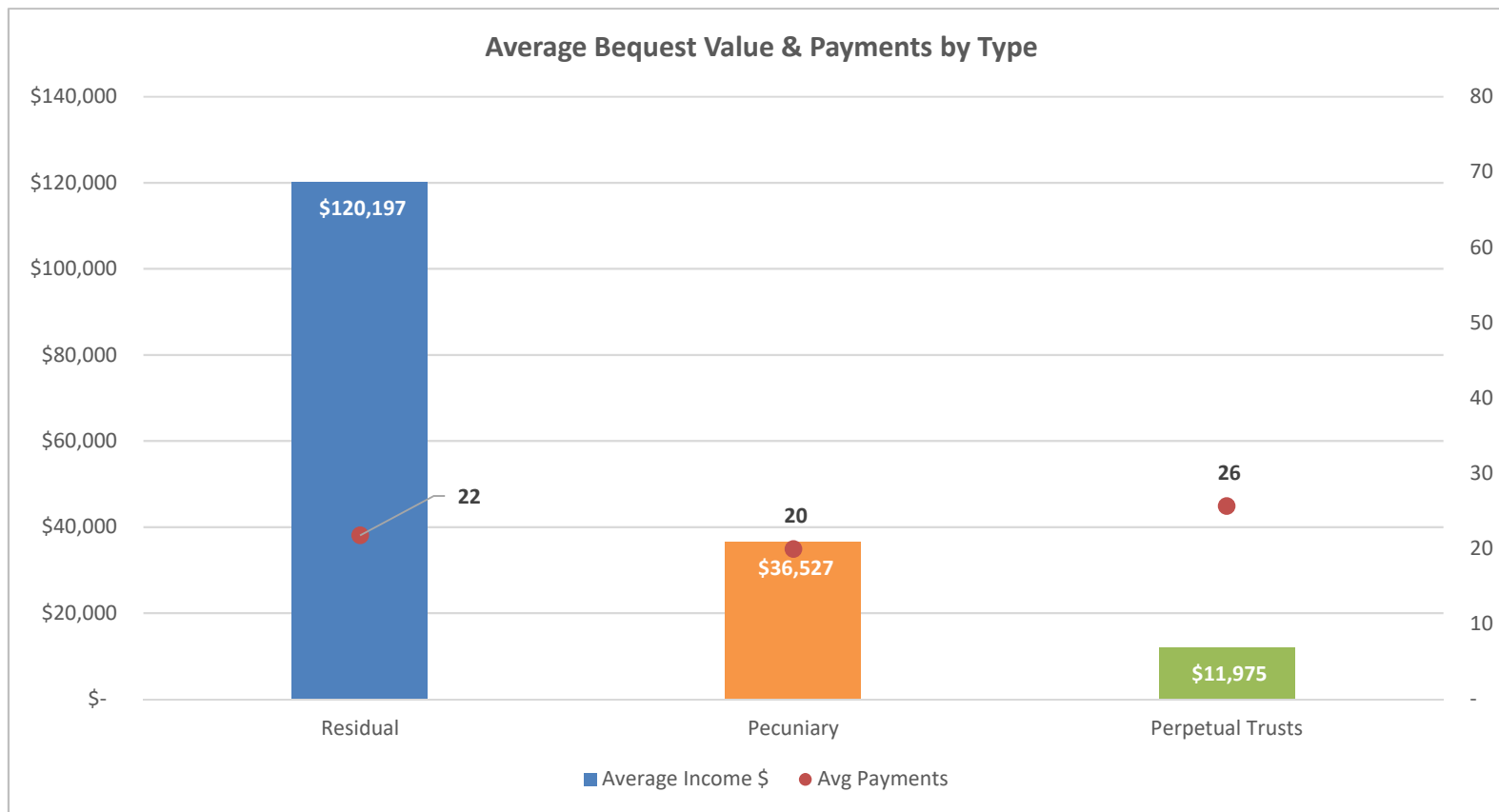
- Where Bequest Type was not supplied, the Income was allocated to Unknown.
- Just over 50% of Bequest Income is from Residuals.

Fundraising Income – Average Total Bequest Income



- Where the participants specified the type of Bequest received in the survey, the average total of that income across all participants (total income – not the average value of the Bequest itself).
- The Total Average Bequest Income across all survey participants is \$3.7m.

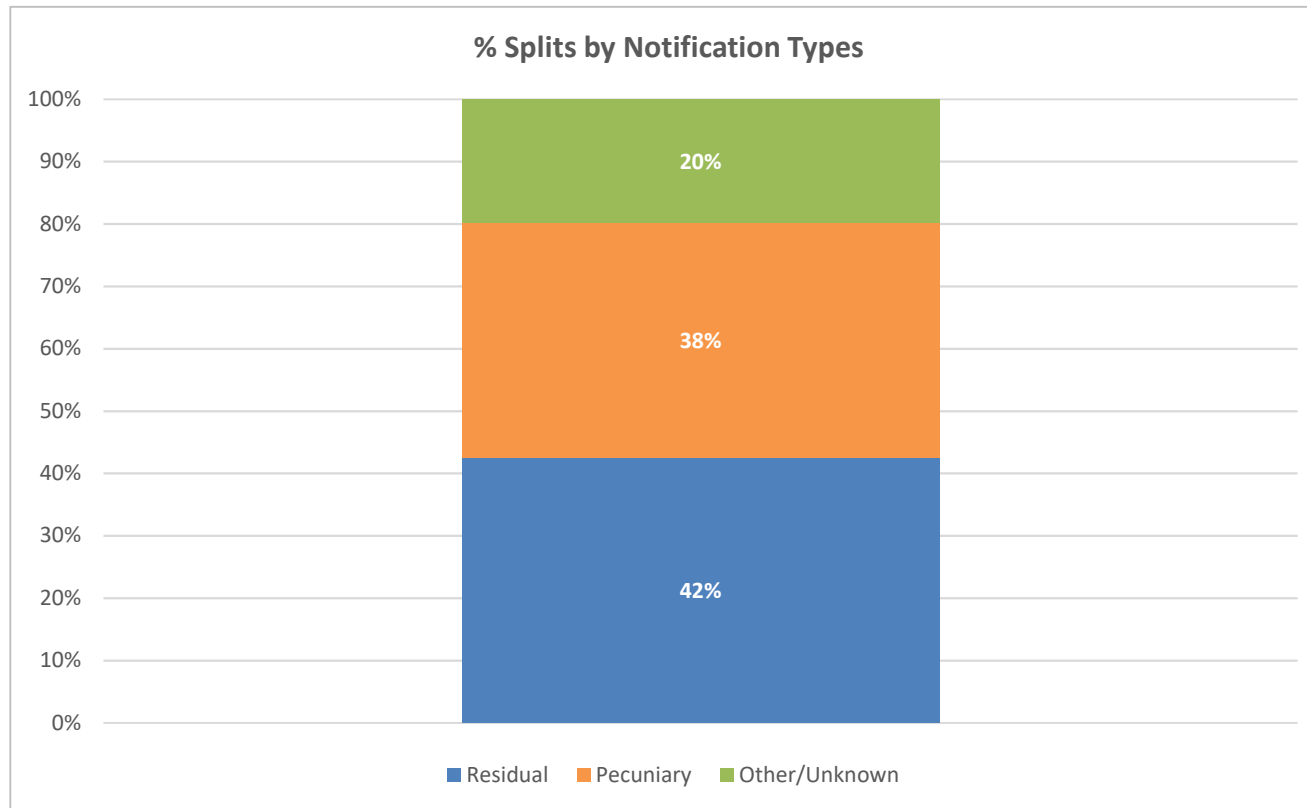
Fundraising Income – Average Bequest Value



- Where specified, the Average Residual Bequest value is more than 3 times higher per payment than Pecuniary or Perpetual Trusts.
- Although charities are on average receiving more Perpetual Trusts, the average value of each Trust is significantly lower.
- The overall Average Bequest gift is \$59,812 across the 3 Bequest types.

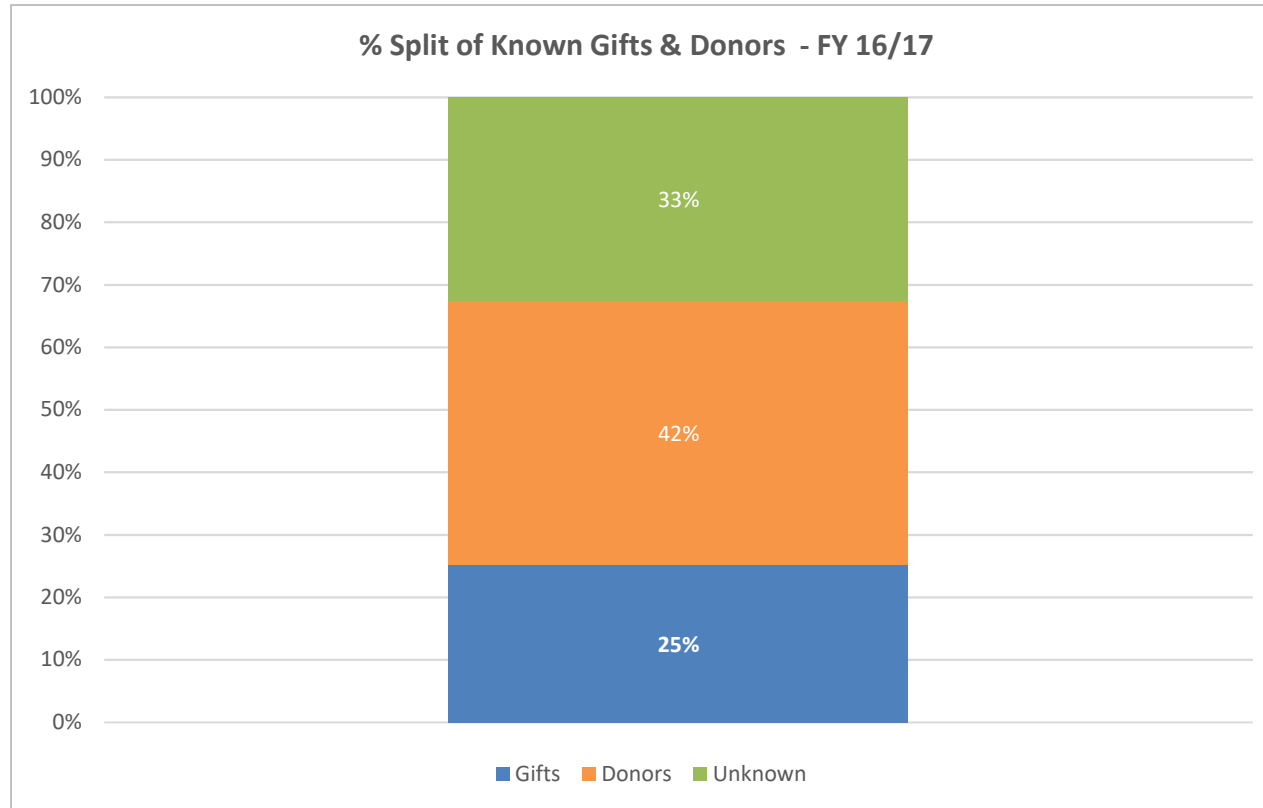
Bequest Detail

Bequest Detail – Death Notification Types



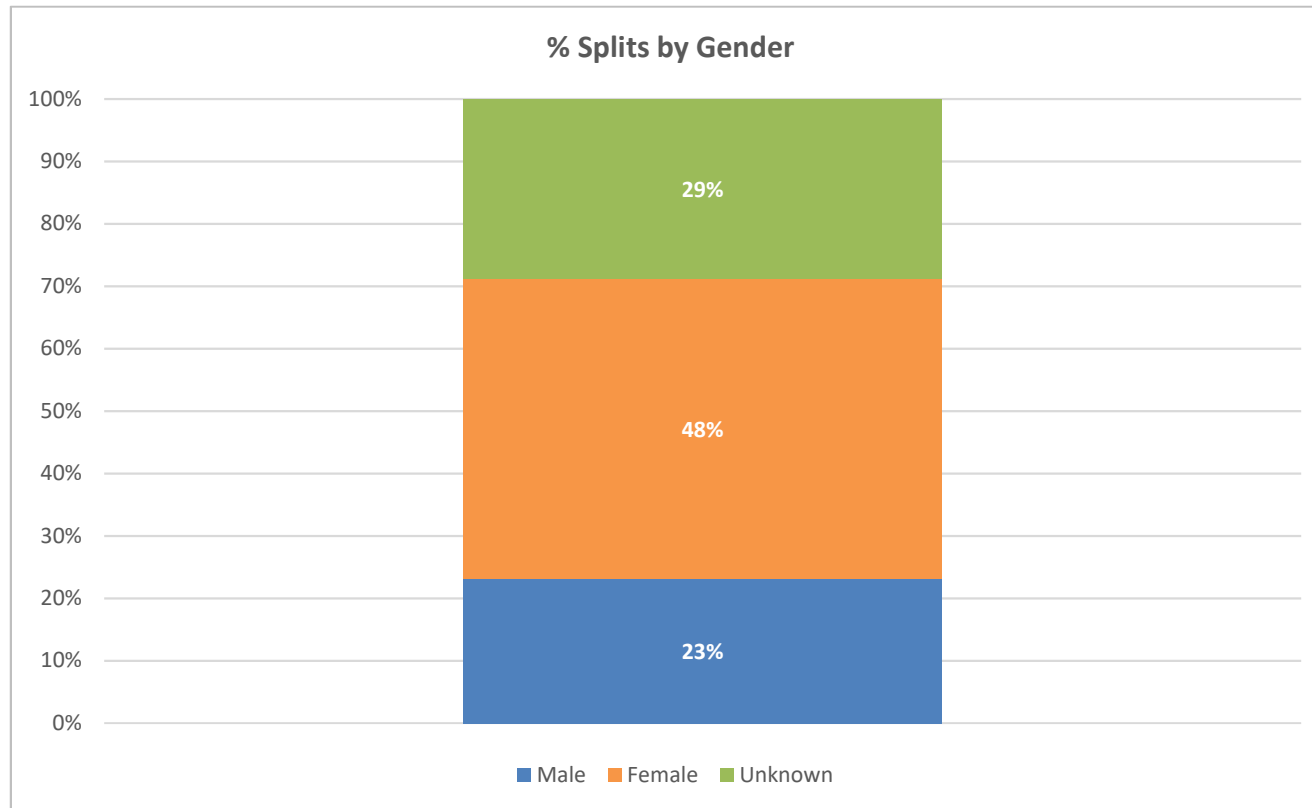
- Fairly even split between Residuals and Pecuniary Notifications.
- The average number of notifications for respondents was 12.

Bequest Detail – whether known to Charity



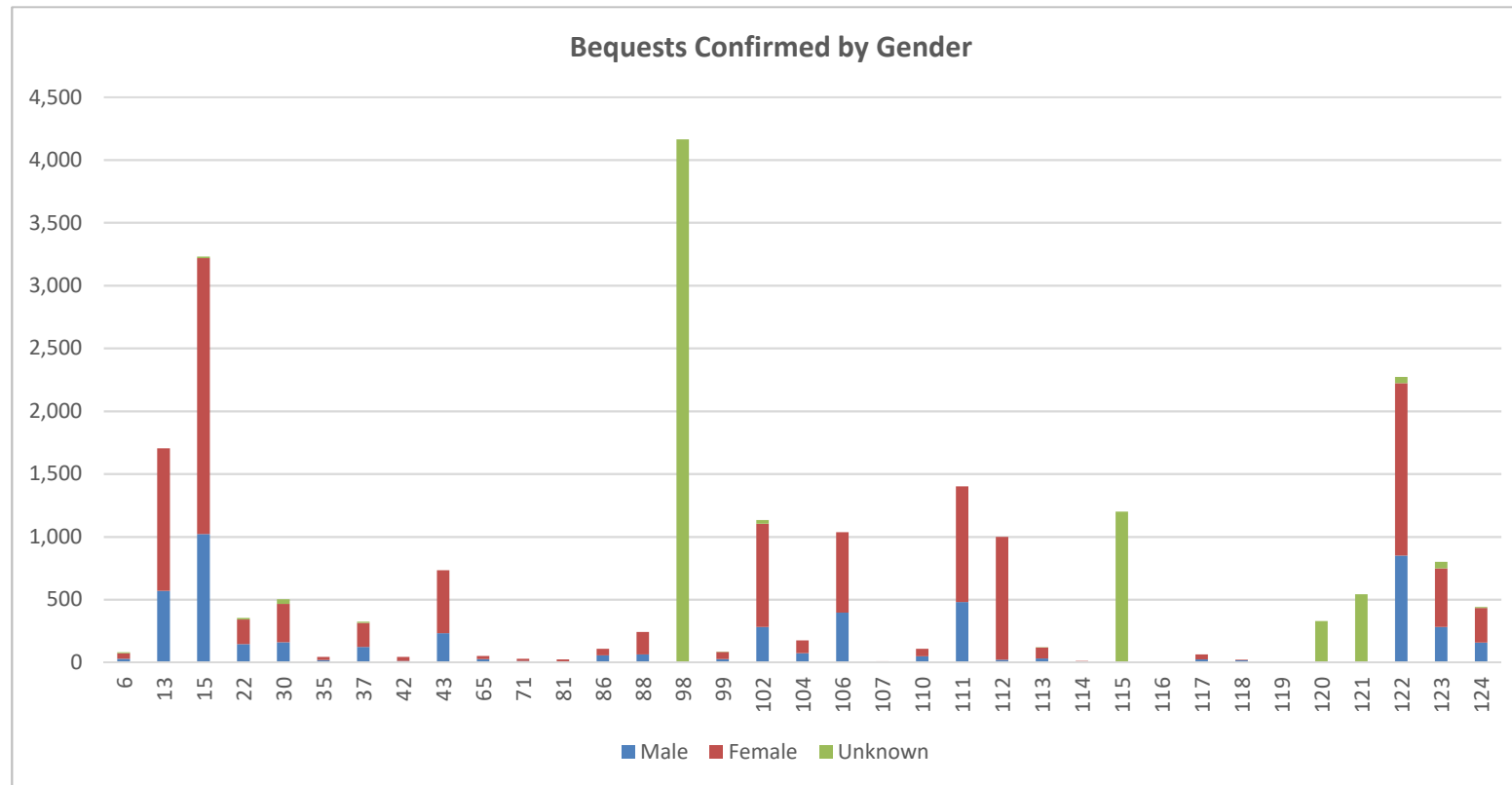
- Just under half of the Bequests realised in 2017 were from known donors (although it was not known there was a gift in their will), a quarter were from gifts known in advance of the notification and the remainder were not known in advance.

Bequest Detail – Bequestor Gender



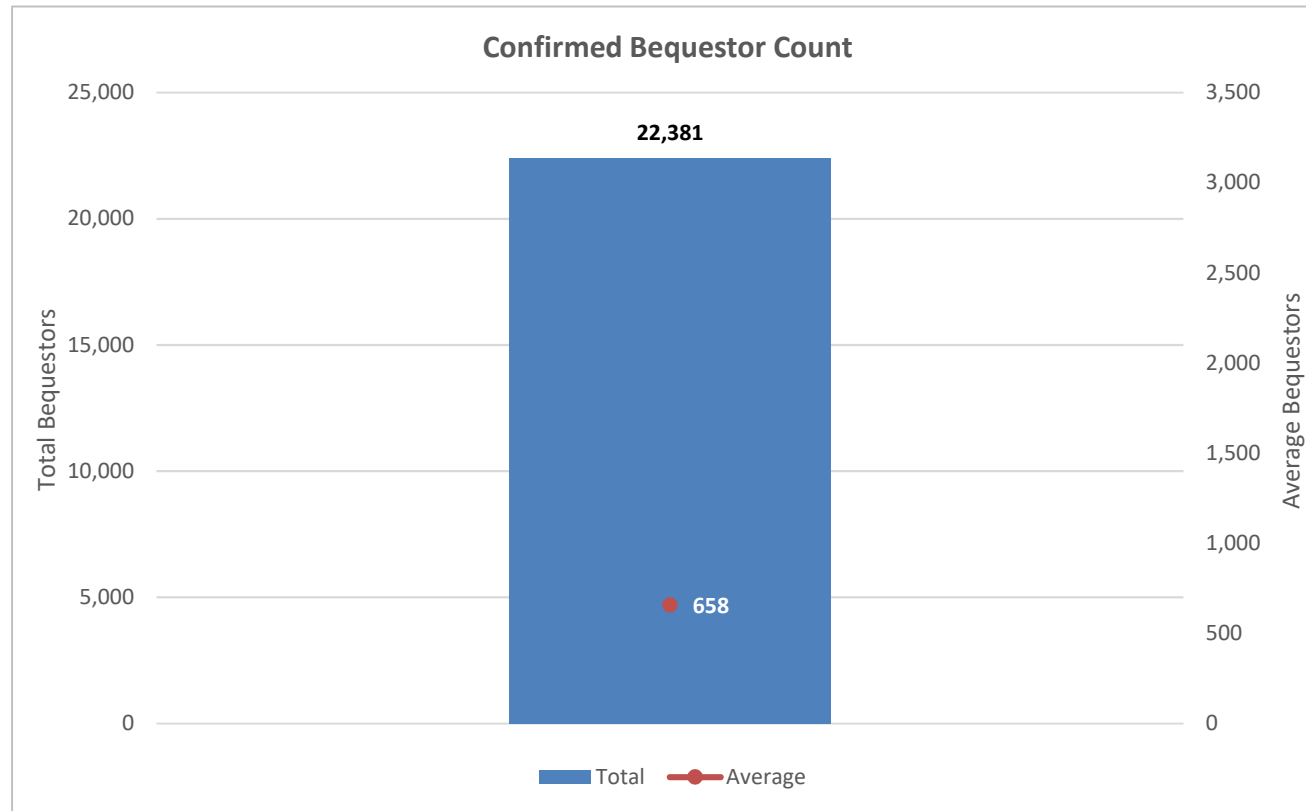
- Just under half of the Bequestors are Female.

Bequest Detail – Confirmed Bequestor by Gender



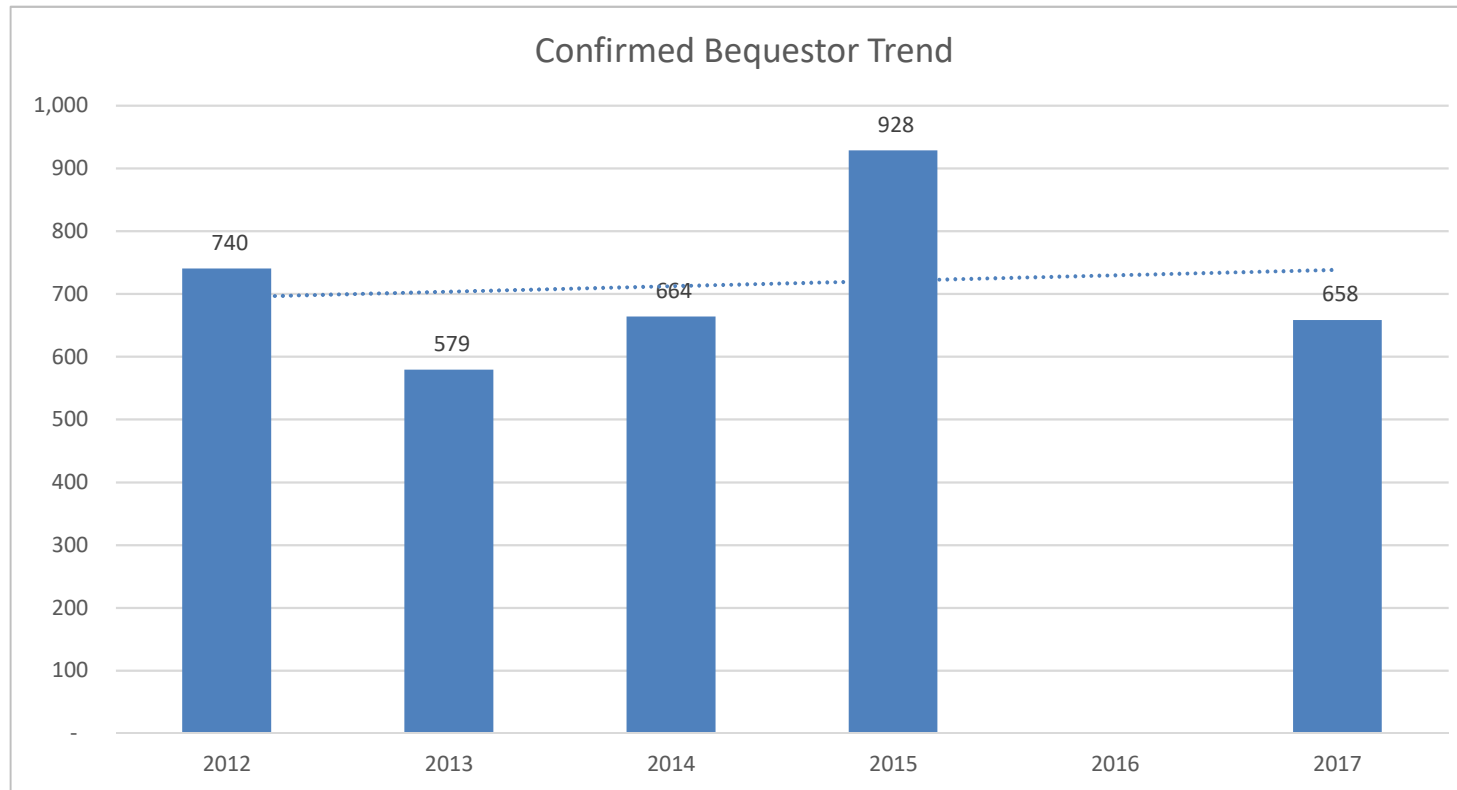
- The Survey Respondents who are anonymised in this chart.
- 22 of 35 Survey Responders are able to accurately report on the gender of all their Confirmed Bequestors.

Bequest Detail – Confirmed Bequestor



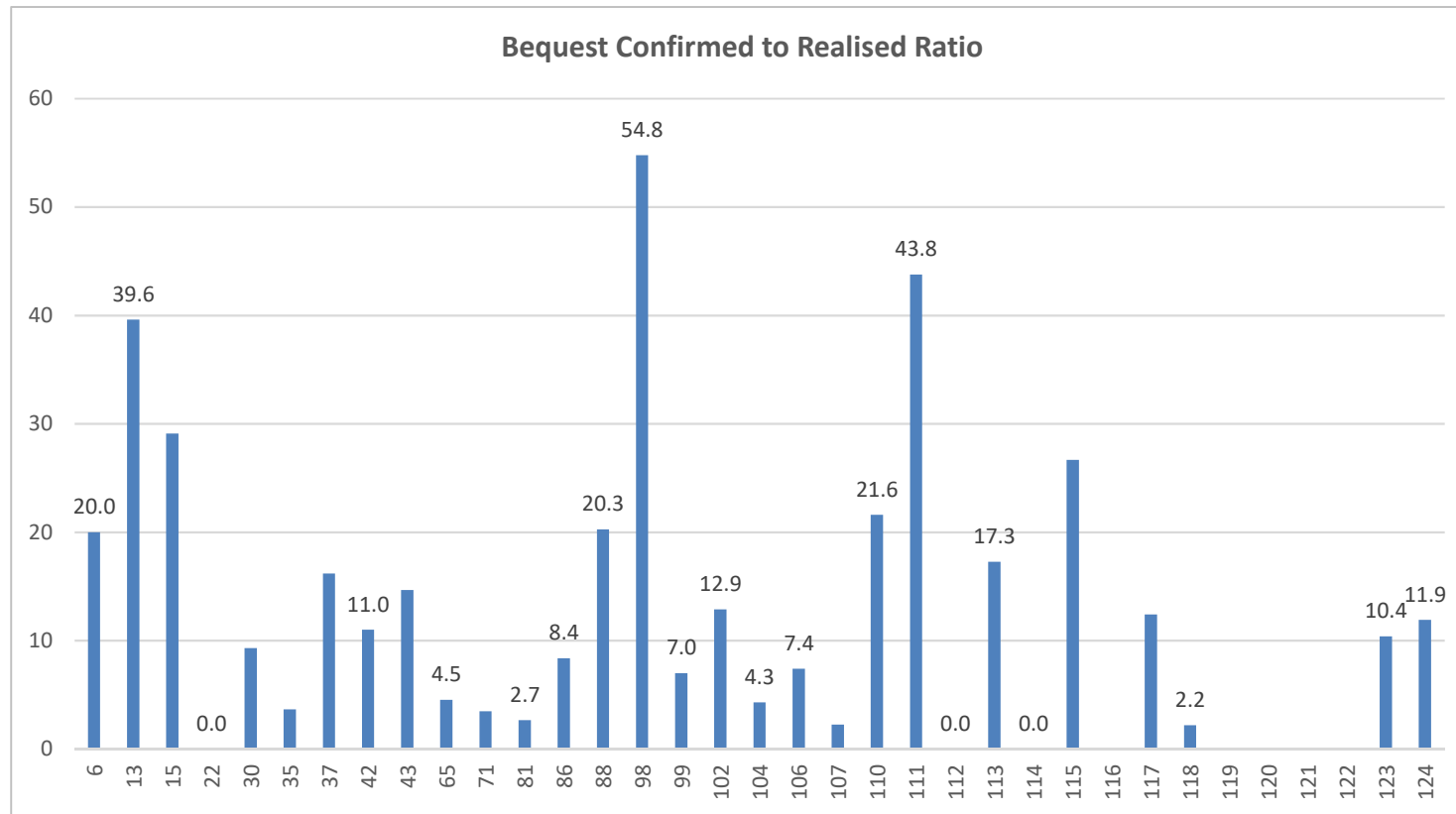
- Of the 34 respondents, the total Confirmed Bequestor count is 22,381 with an average of 658 per participant.

Bequest Detail – Confirmed Bequestor Trend



- The average number of Confirmed Bequestors has been slowly increasing over the last 5 surveys.

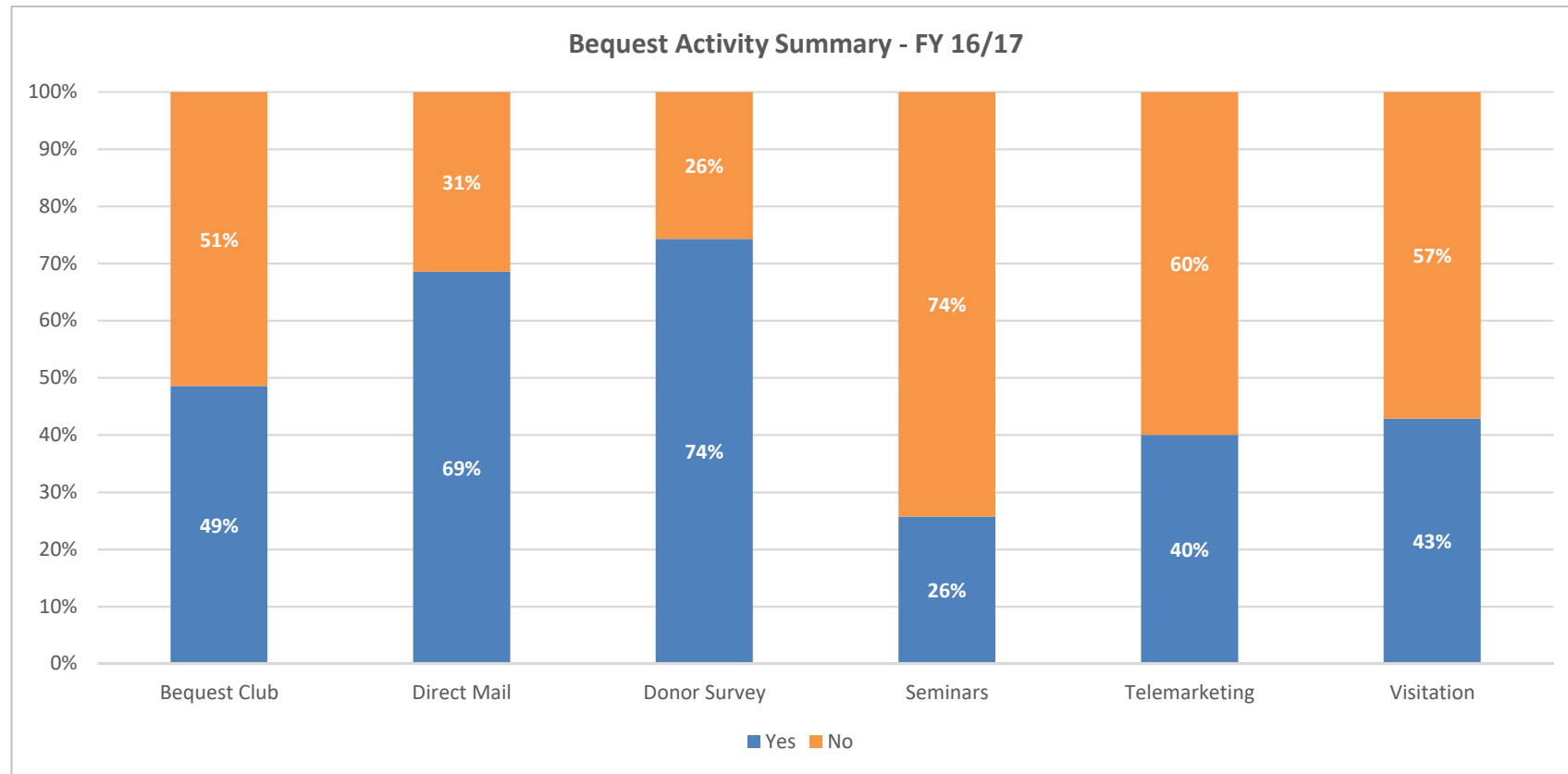
Bequest Detail – Confirmed-to-Realised Ratio



- These ratios differ greatly between the Survey Respondents (who are anonymised in this chart).
- The ratio is defined as the number of Confirmed Bequestors divided by the number of realised Bequests in that survey.
- The Confirmed-to-Realised Ratio across all respondents is 24.07

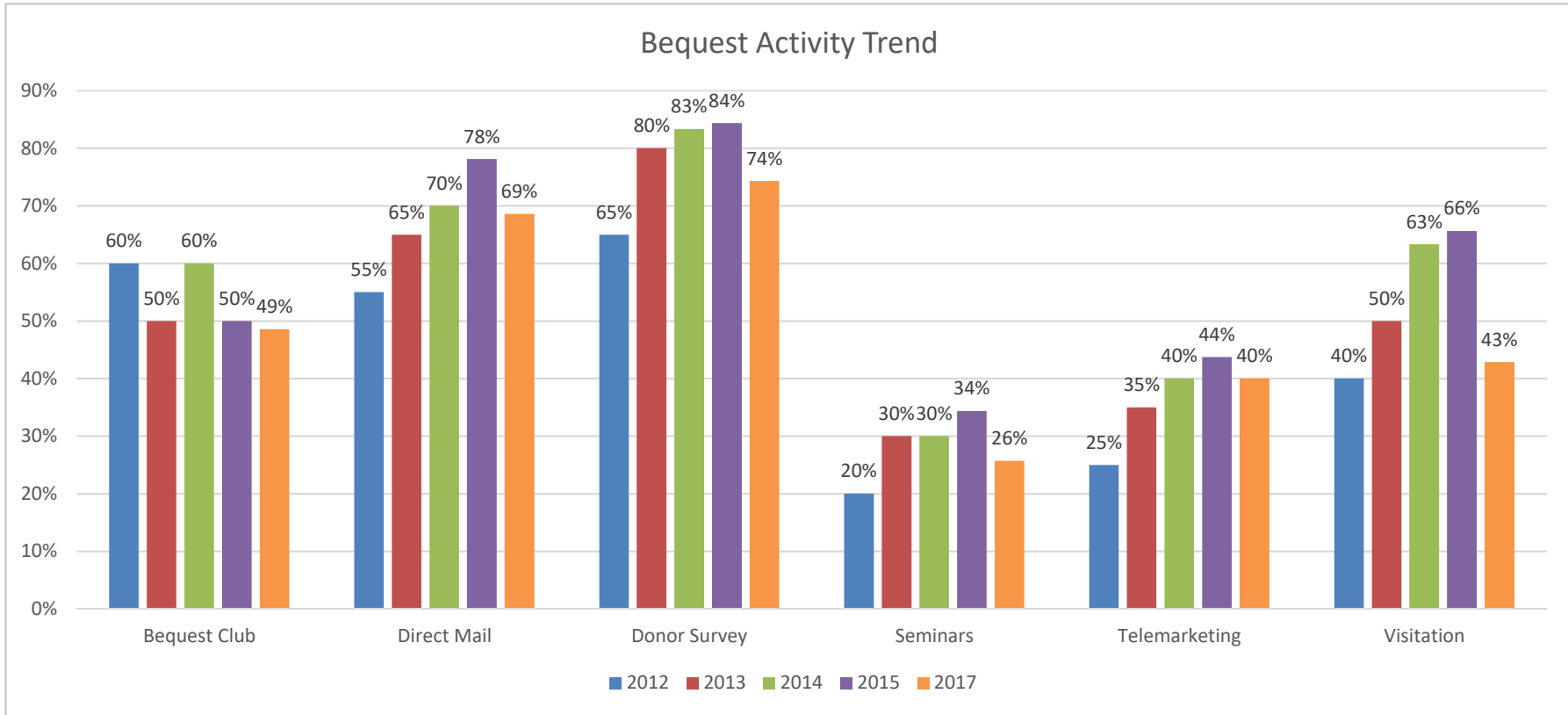
Bequest Activities

Bequest Activities – Program Summary



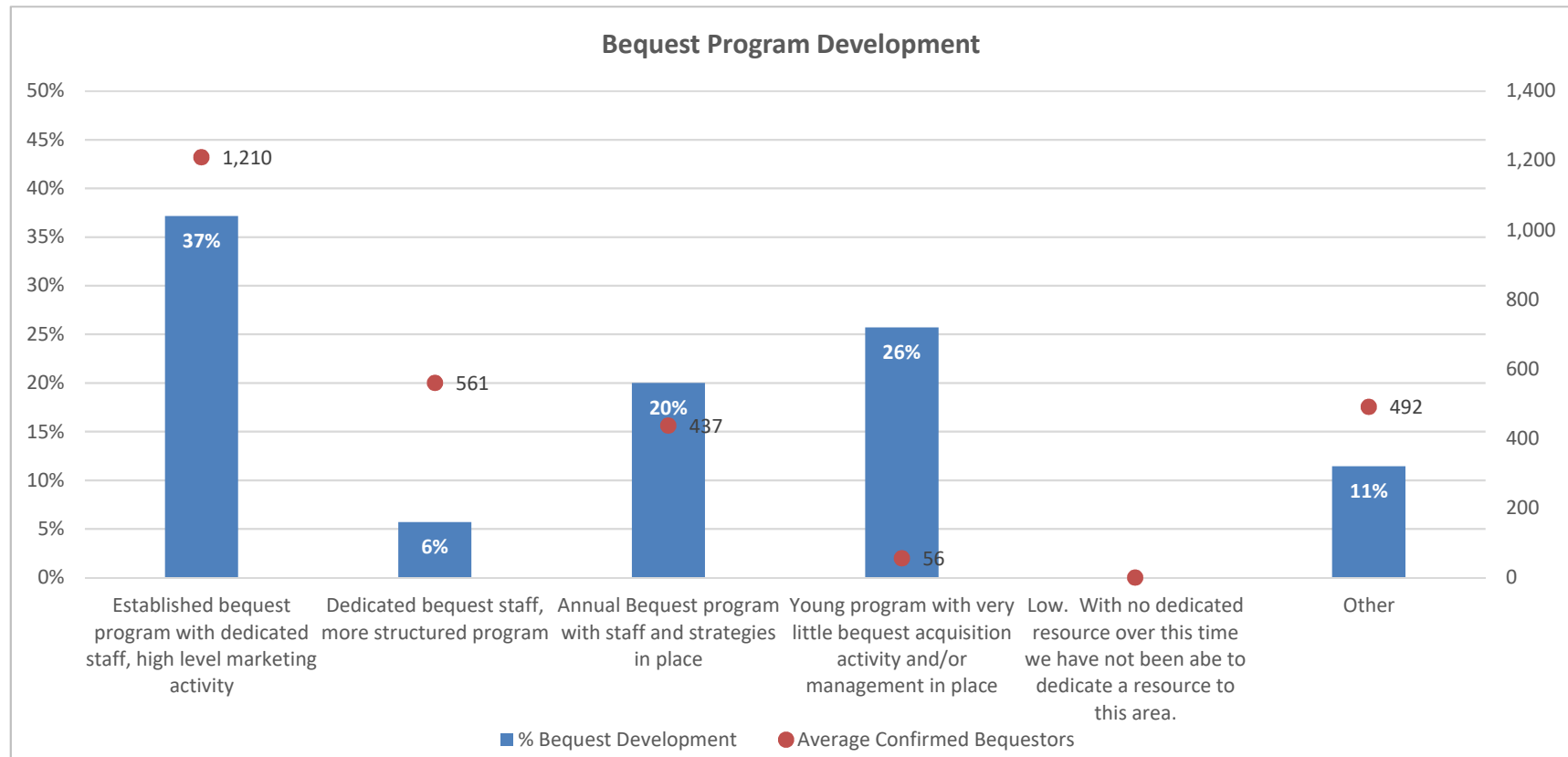
- Of the 35 Responders, 5 charities do not have an active Bequest Program.
- The most common Bequest activity amongst the responders was to send out Donor Surveys, this was followed by Direct Mail and a Bequest Club.

Bequest Activities – Program Summary Trend



- For all Charities across all 5 surveys, Donor Surveys and Direct Mail are still the most common Bequest Activity.

Bequest Activities – Program Development



- Of all responders 63% have a Dedicated Bequest Team/Person, thus have on average a higher number of Confirmed Bequestors.
- For those who did not have a Dedicated Bequest Team/Person they described themselves as having a young bequest program with little bequest activities in place or did not elaborate.

Summary Data

Summary Data

Measures	FY 16/17
Average Confirmed-to-Realised Ratio	24.07
Median Confirmed-to-Realised Ratio	11.92
Average % Bequest Income of Total	20.7%
Median % Bequest Income of Total	9.8%
Known vs Unknown BQ Income	80% vs 20%
% Residual Bequests	42.5%
Average BQ Amount - Residuary *	\$120,197
Average BQ Amount - Pecuniary *	\$36,527
Average BQ Amount - Perpetual Trusts *	\$11,975

* Responses adjusted for outliers and erroneous responses