

Benchmarking

Bequests
19/20



**INCLUDE
A CHARITY**



**Fundraising
Institute
Australia**

Overview

Participants
47

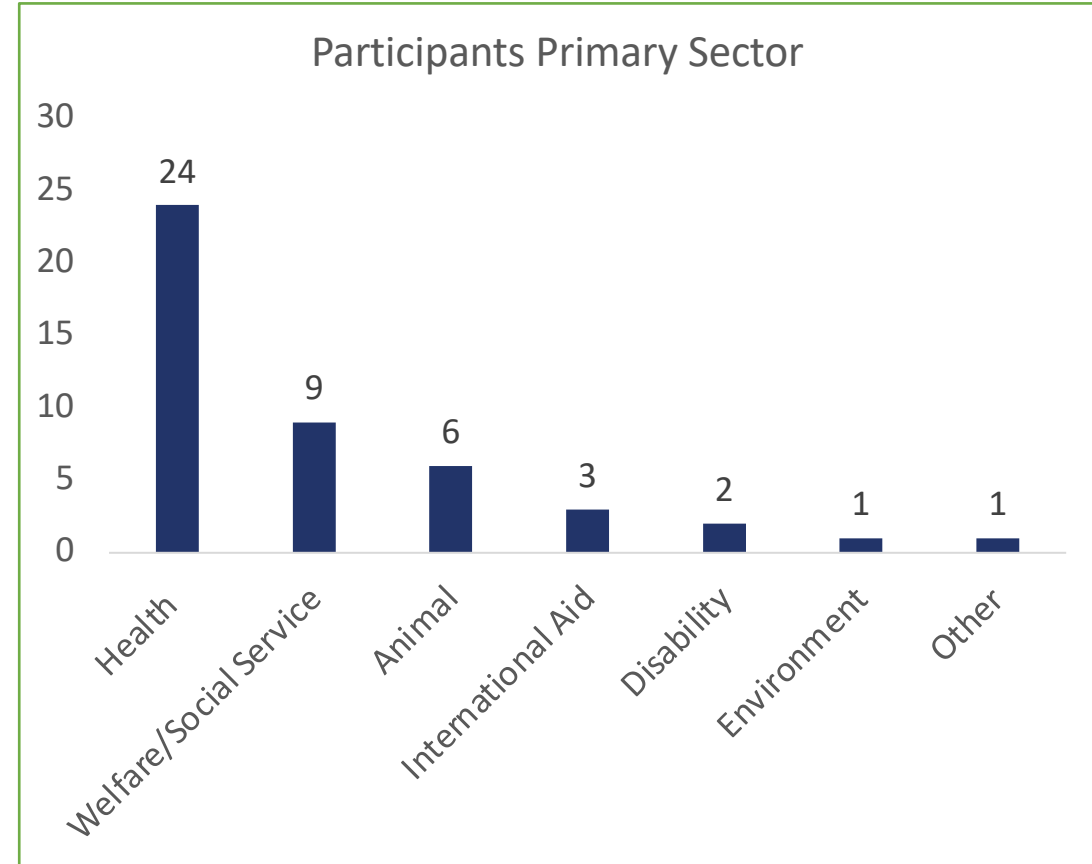
Avg giW Amount
Residuary
\$5,325,117

Total giW Income
\$292,321,506

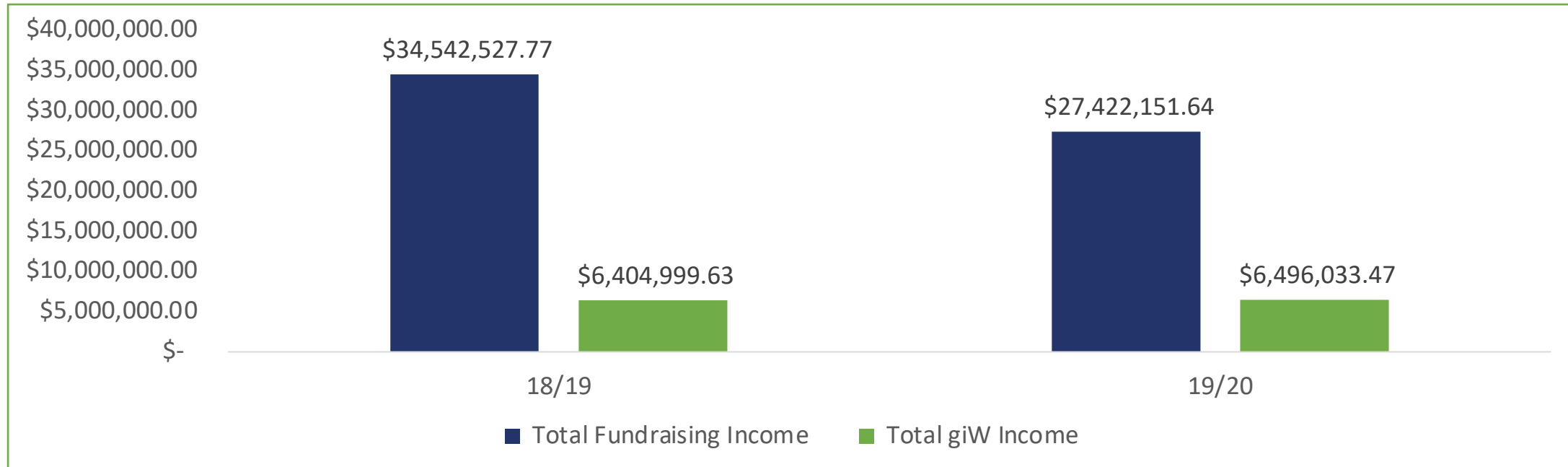
Avg giW Amount
Pecuniary
\$1,939,585

Average giW Income
\$6,496,033

Known vs Unknown giW
Income
63% vs 37%



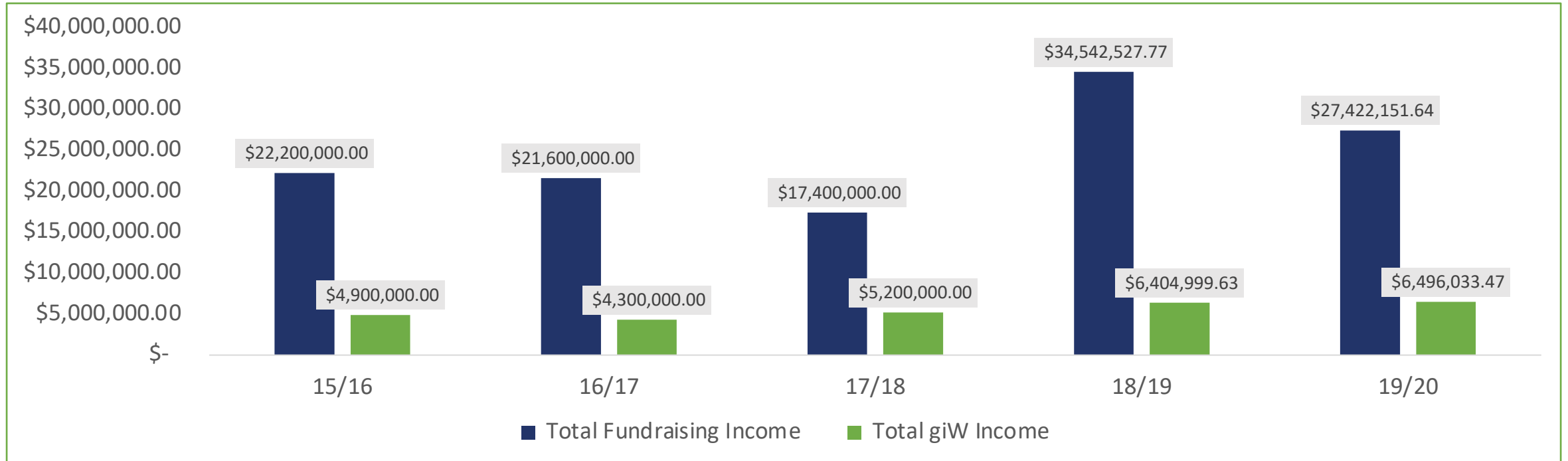
Average Income – 18/19 – 19/20



**45 Participants were able to provide data for 19/20. 24 Participants were able to provide data for 18/19.*

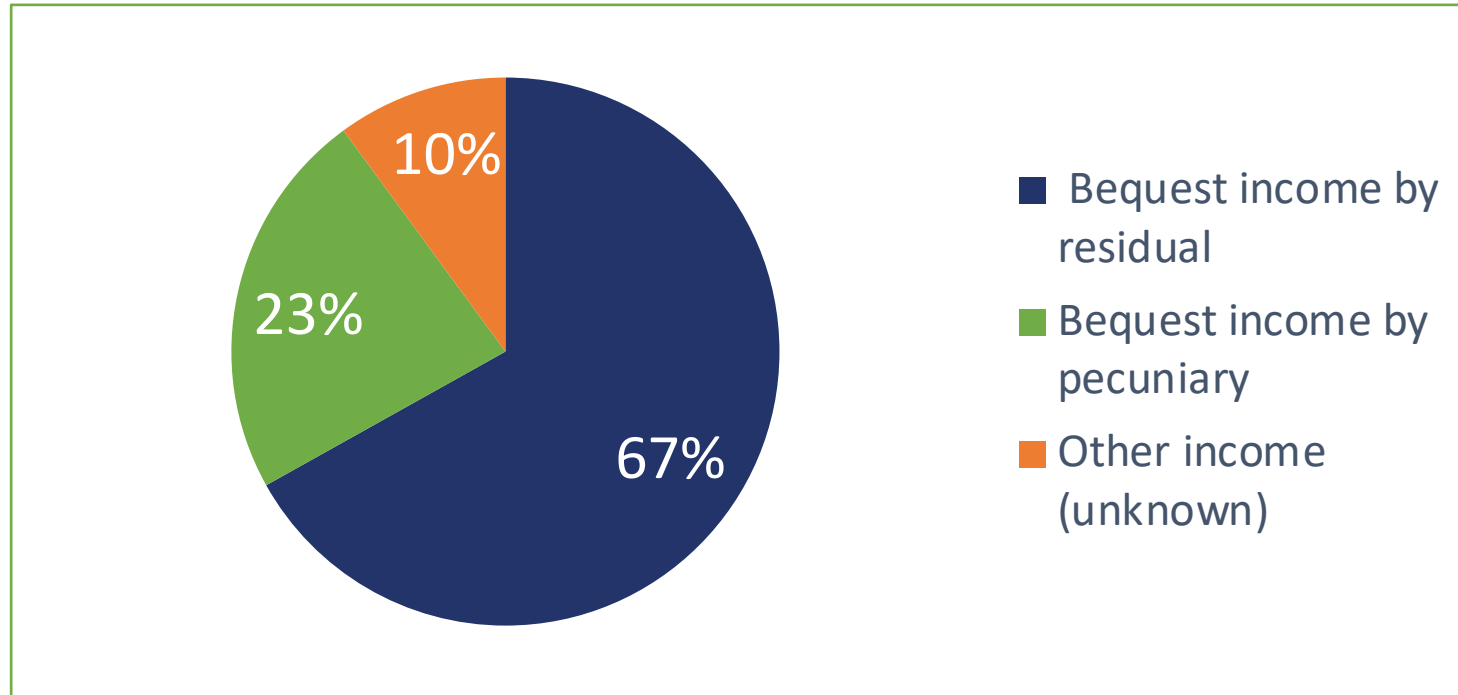
Average total fundraising income has declined between 18/19 and 19/20.
giW average income has remained steady, increasing slightly in 19/20.

Average Income – Past 5 years



Average total fundraising income declined between 15/16 and 17/18, however it peaked in 18/19, followed by a slight dip in 19/20. giW average income has steadily increased across 15/16 – 19/20, increasing by a total of 32% over 5 years.

Bequest Income by Type



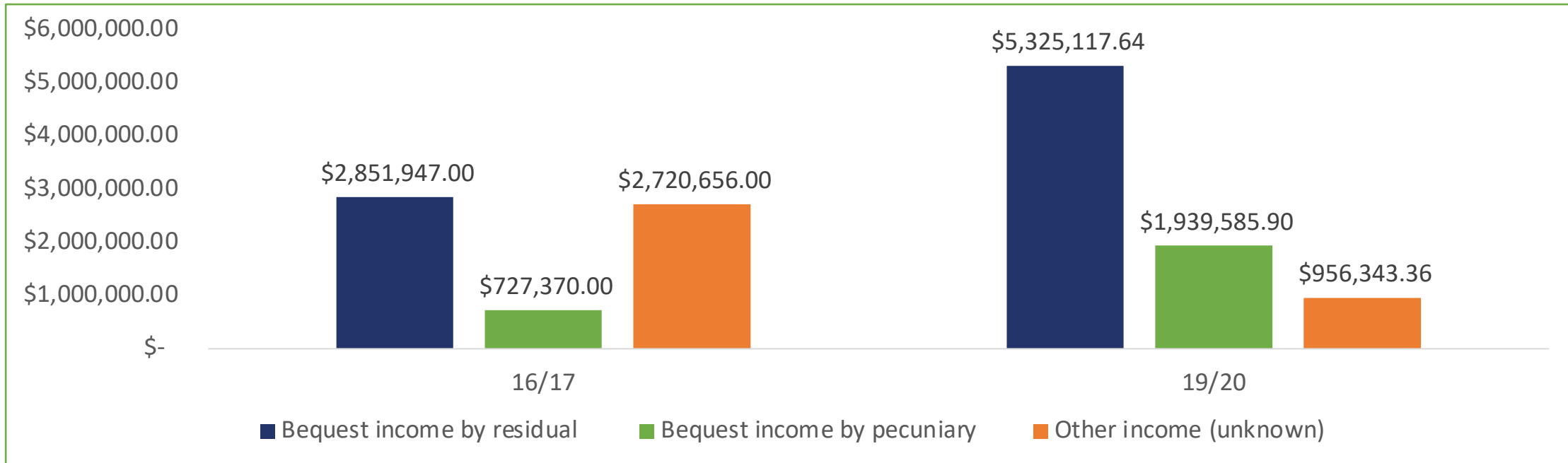
Residual income makes up over two thirds (67%) of the bequest income amongst charities, followed by pecuniary and other (unknown) income.

Average Bequest Income by Type



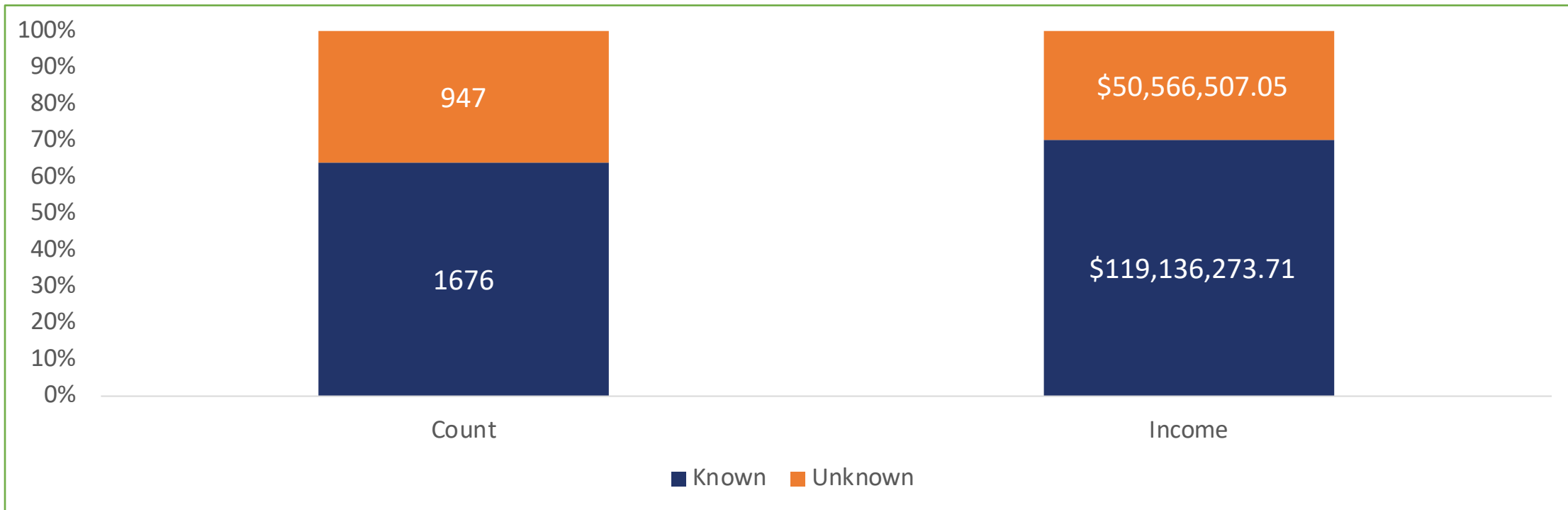
Residual bequest income is the greatest source of income. It is 2.7 times higher than pecuniary, and 5.5 times higher than other/unknown income.

Average Bequest Income by Type 16/17 – 20/19



Average residual bequest income has almost doubled from 16/17 to 20/19.
Average unknown income has more than halved from 16/17 to 19/20.

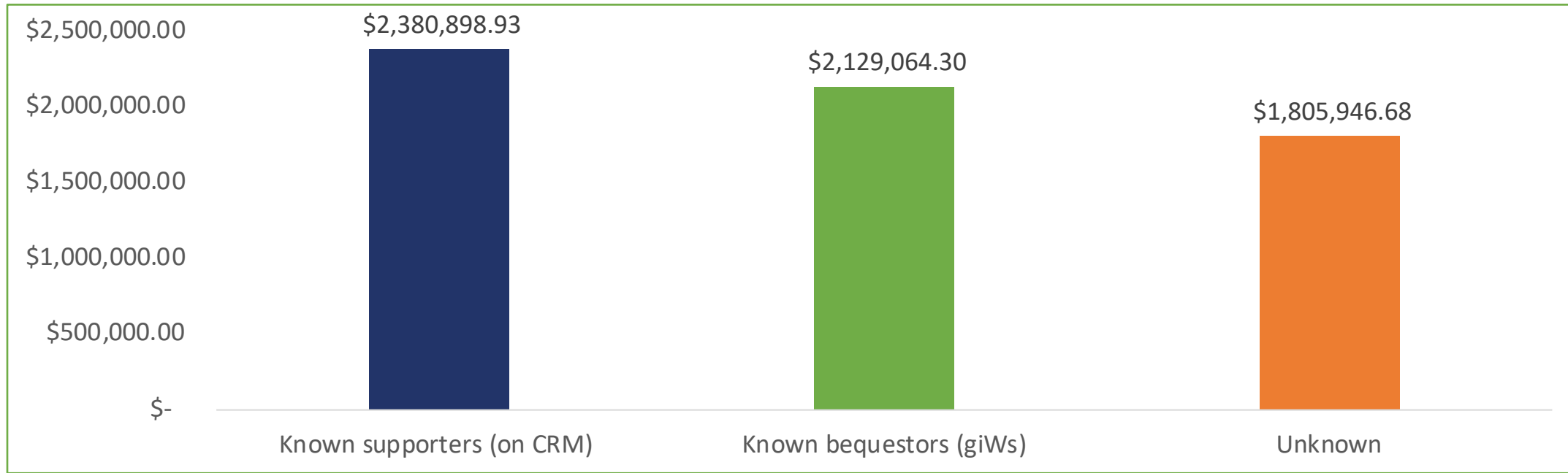
Known vs Unknown



**30 Participants were able to provide data.*

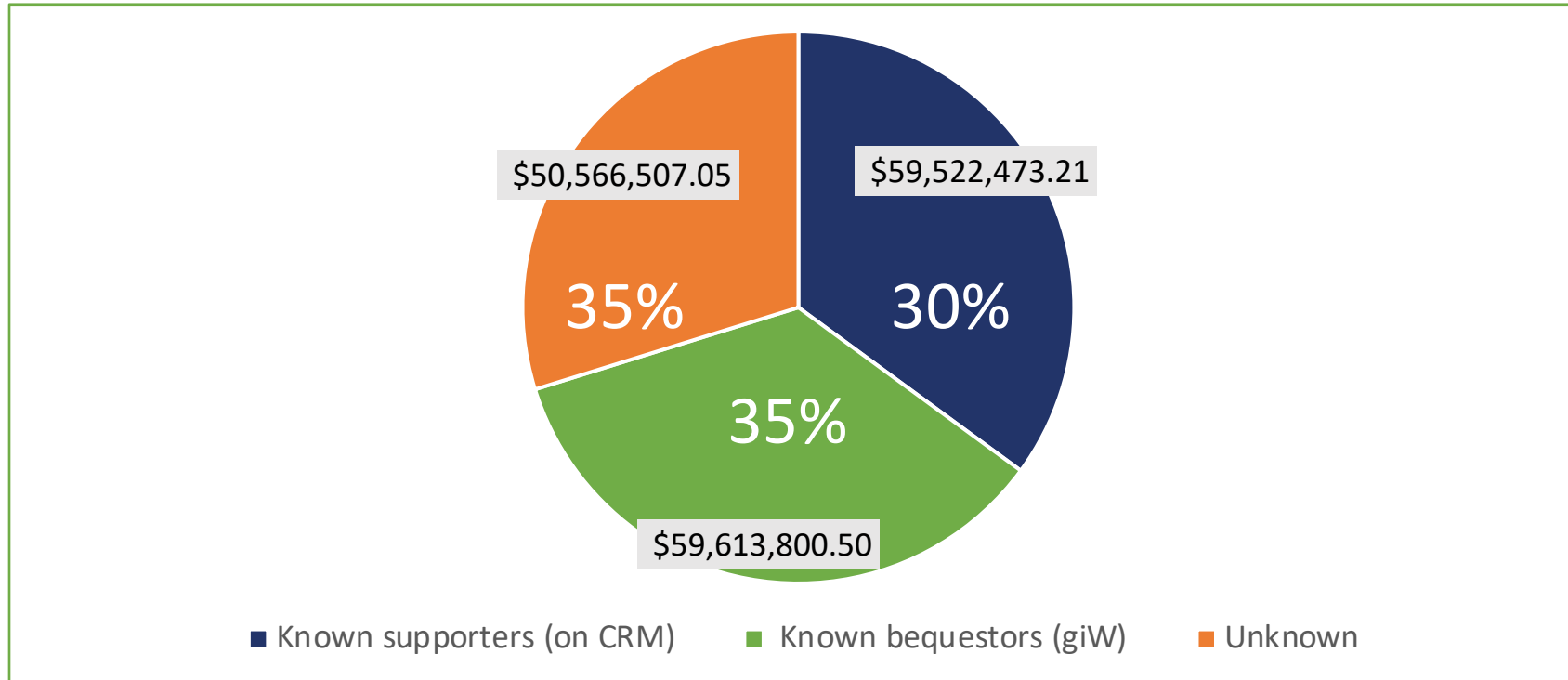
Number of known supporters is nearly double the number of unknown supporters.
Known income is more than double unknown income.

Average Income by Known Supporters, Bequestors & Unknown



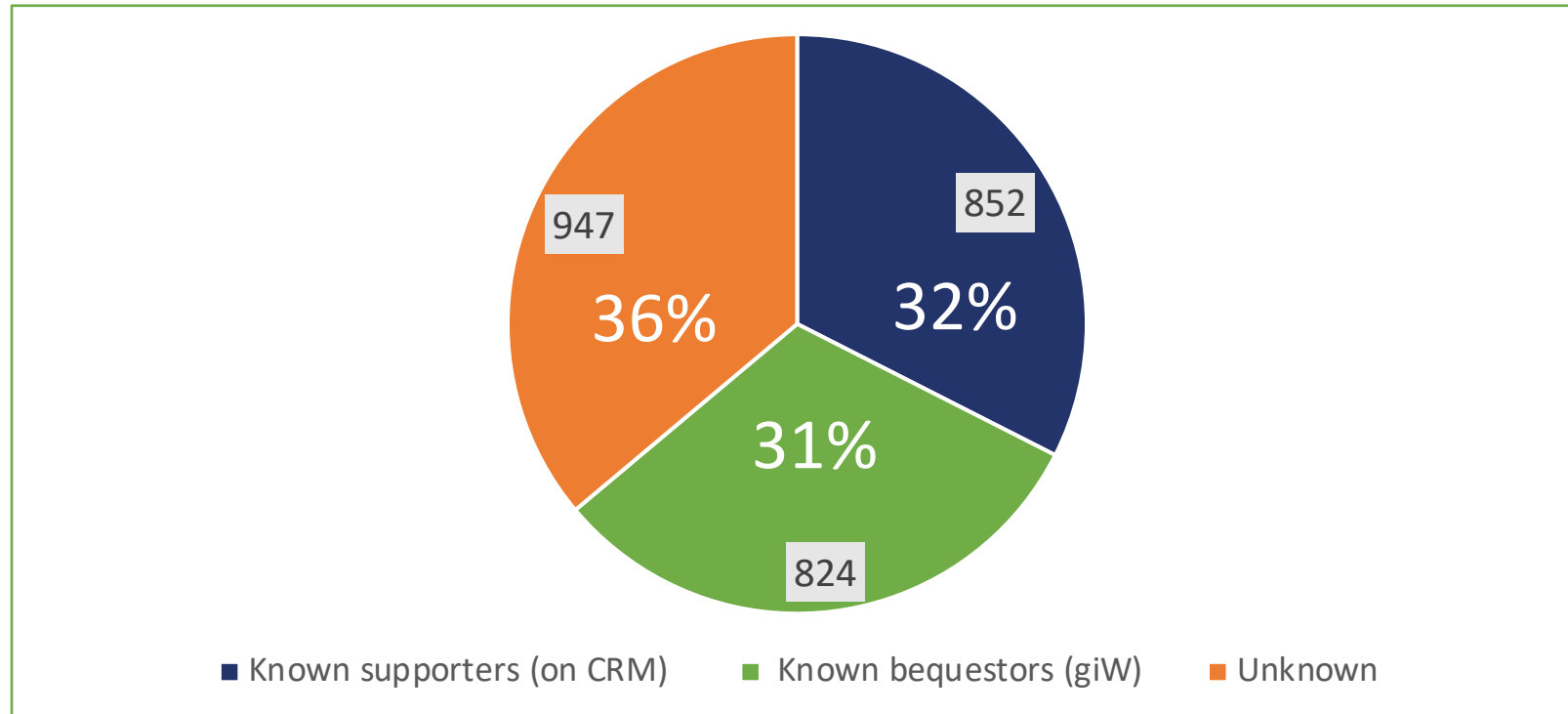
Average income for known supporters (on CRM) is the highest, followed by known bequestors (giWs), then unknown.

Income by Known Supporters, Bequestors & Unknown



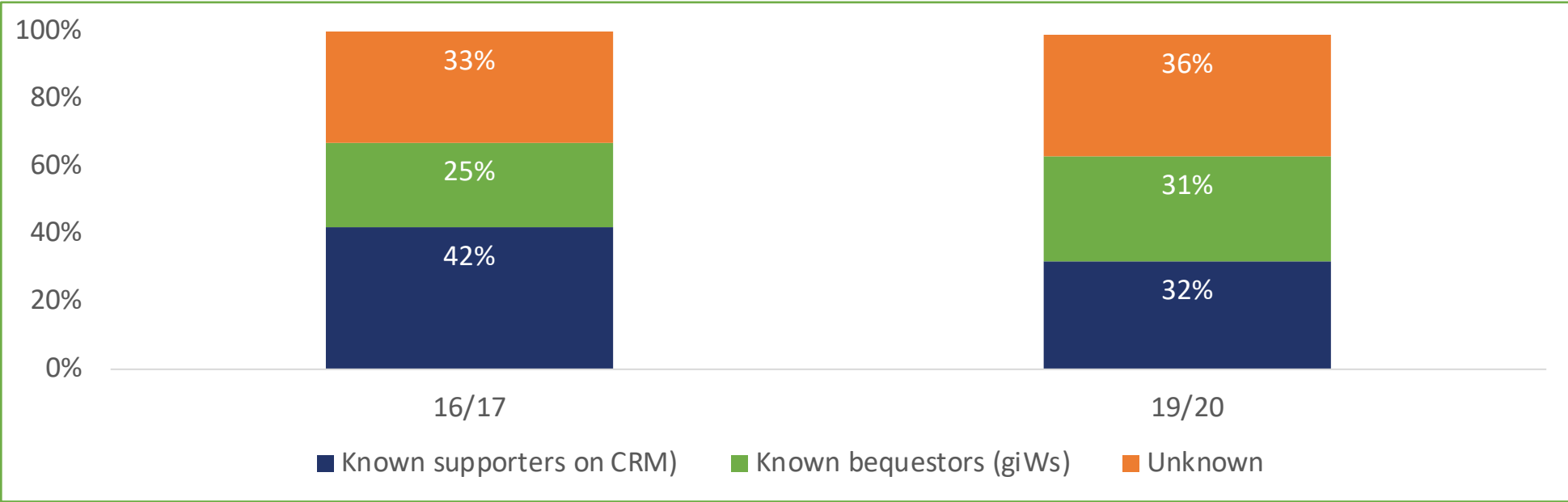
% giW Income is similar across known supporters (on CRM), known bequestors (giW) and unknown.

Count of Known Supporters, Bequestors & Unknown



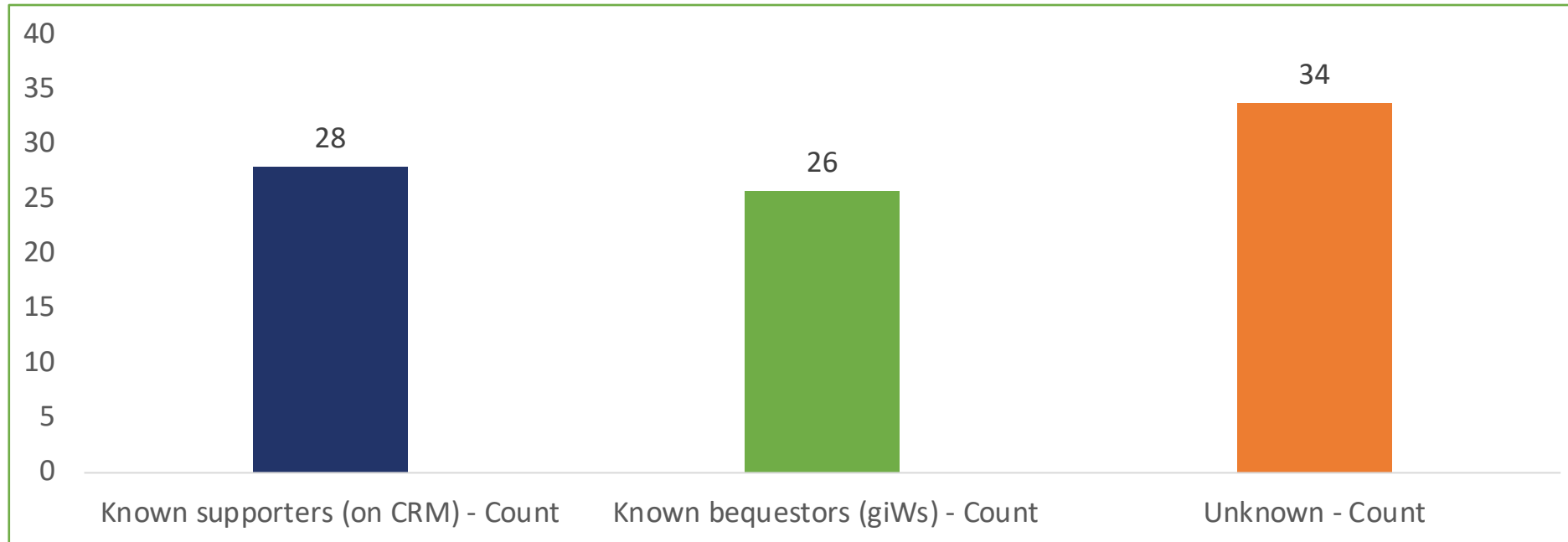
The percentage split of known supporters (on CRM), known bequestors (giW) and unknown estates were similar in 19/20.

Count of Known Supporters, Bequestors & Unknown 16/17 – 19/20



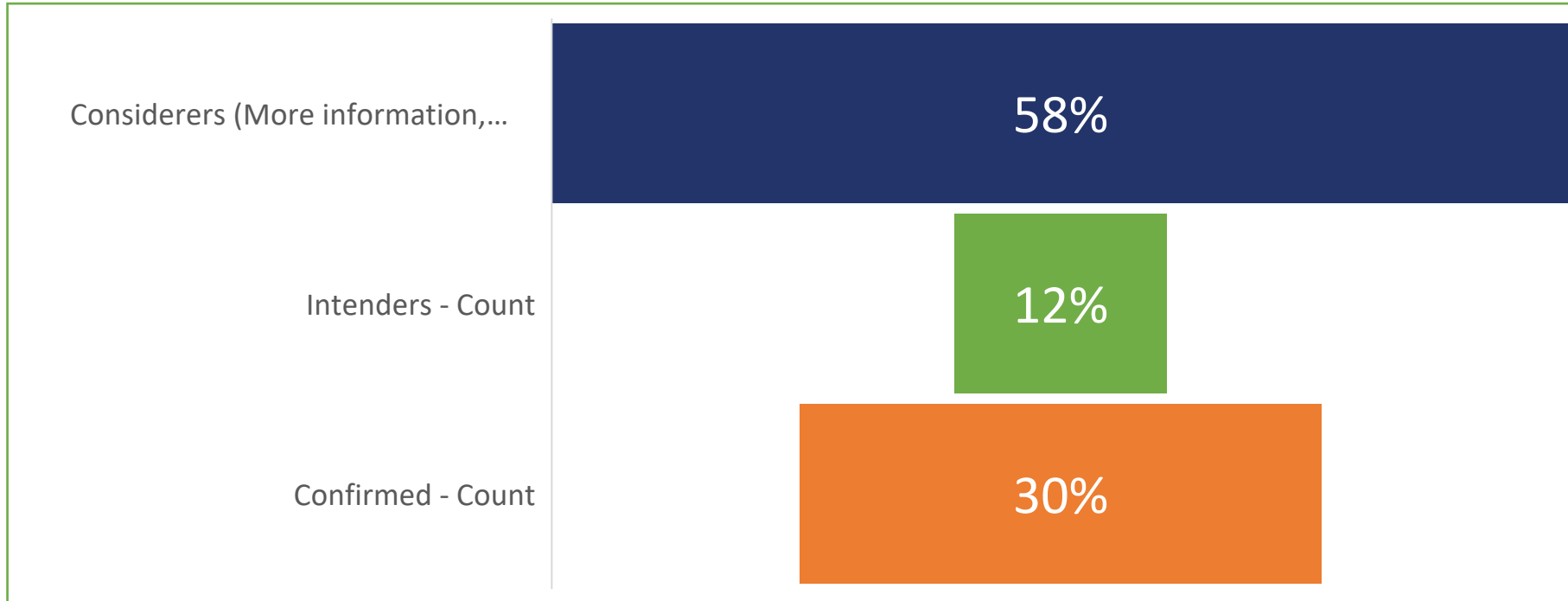
Known bequestors has grown by 6% from 16/17 to 19/20.

Average Count of Known Supporters, Bequestors & Unknown



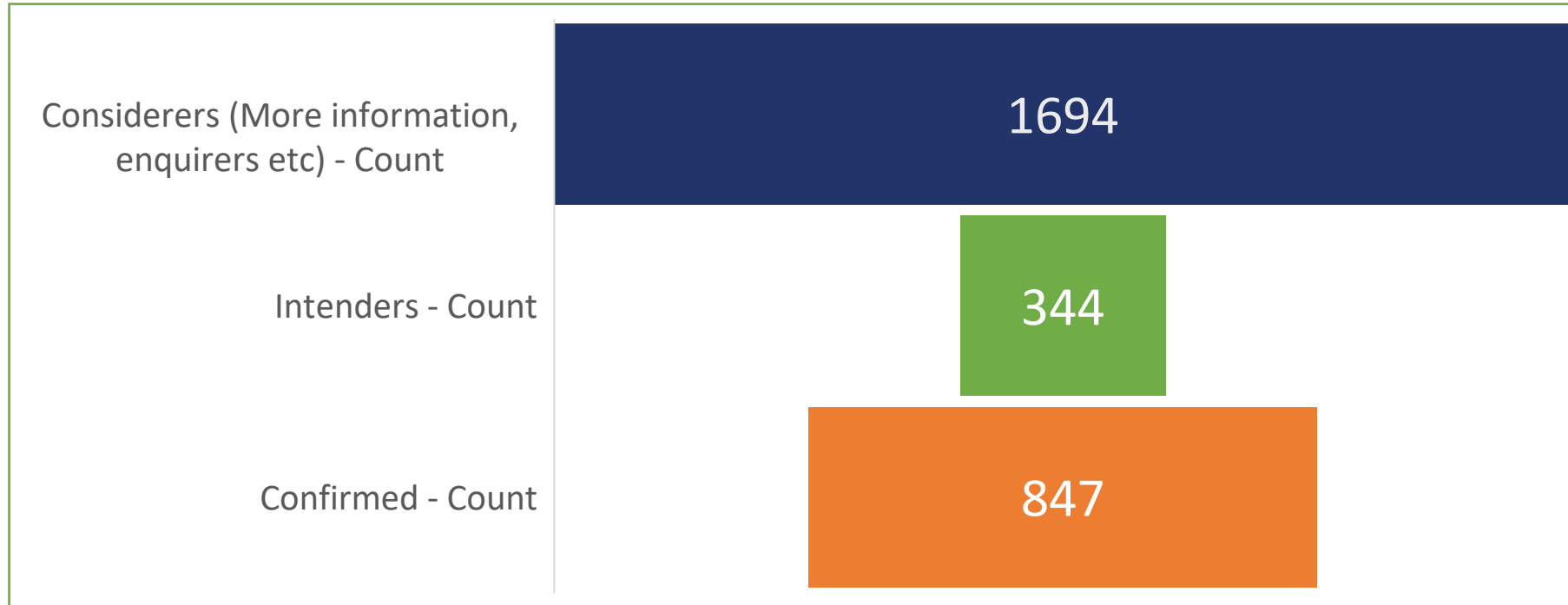
The average count of estates in 19/20 was the greatest for unknown, followed by known supporters and then known bequestors.

Bequest Funnel



Considerers make up the largest proportion of the bequest funnel (58%), followed by confirmed (30%) and lastly intenders (12%).

Bequest Funnel Average Count



Considerers make up the largest proportion of the bequest funnel (1692) followed by confirmed (344) and lastly intenders (847).

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