

Welcome to

2020





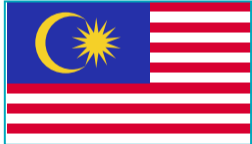





Annual Report

Who is SG Support?

SG Support exists to make fundraising easy for charities by working in partnership to acquire new donors, retain existing ones and win back those who have left. We do this through our complete suite of services that range from providing data-driven strategies, consultancy and ensuring the smooth running of the operational aspects of payment processing, contact centre and financial reporting.

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The first of our Annual Reports (and what a year we've chosen to launch this).

This report looks at the markets we operate in and examine how they have been impacted by the COVID pandemic.

With the unprecedented onset of the pandemic, the resilience of the Recurring Gift model has ensured our non-profit partners are able to continue giving back to those in need.

Comparisons to previous years are provided to observe the magnitude of the impact and the growth of the market throughout the years.

Foreword

Thank you for taking the time to explore our first Annual Report, I hope you find this summarised review useful. At SG Support, it is our job to make fundraising easy and hopefully, this Annual Report is an example of how we can utilise our data to help you drive better fundraising decisions.

I'm really pleased to say that Regular Give has proven itself to be a sustainable, long-term fundraising model for charities – despite a climate of unprecedented challenges driven by the pandemic. Whilst acquiring new donors this past year has been difficult, our charity partners were still able to continue their operations and fieldwork because of the loyalty of existing donors' support. Through Regular Give, SG Support has continued to contribute to the maintenance and in many cases, growth of our charities' donor bases. This is something that I am extremely proud of.

The charities we work with have gone above and beyond this year, in not only helping their beneficiaries, but also in trying to protect the fundraising industry overall. These past 12 months have seen a real sense of team spirit and a shared sense of responsibility throughout the industry and I'm certain this collective effort will place us in a better position as we move forward.

I'd like to thank my team for their hard work, diligence, innovation and positive spirit. At SG Support, we win when our charities win and I think each member of my team has shown their desire to consistently do better than we've ever done before throughout the past 12 months.

As we welcome 2021, we do so with a renewed focus and a brand new look to SG Support and with an expectation for growth.

We have some exciting new projects in the pipeline and I look forward to sharing these with you all in the coming months. In the meantime, please enjoy the SG Support Annual Report.

Stay safe.
RP



Richard Prentice
Chief Executive Officer
SG Support



2020 Overview

Active Base

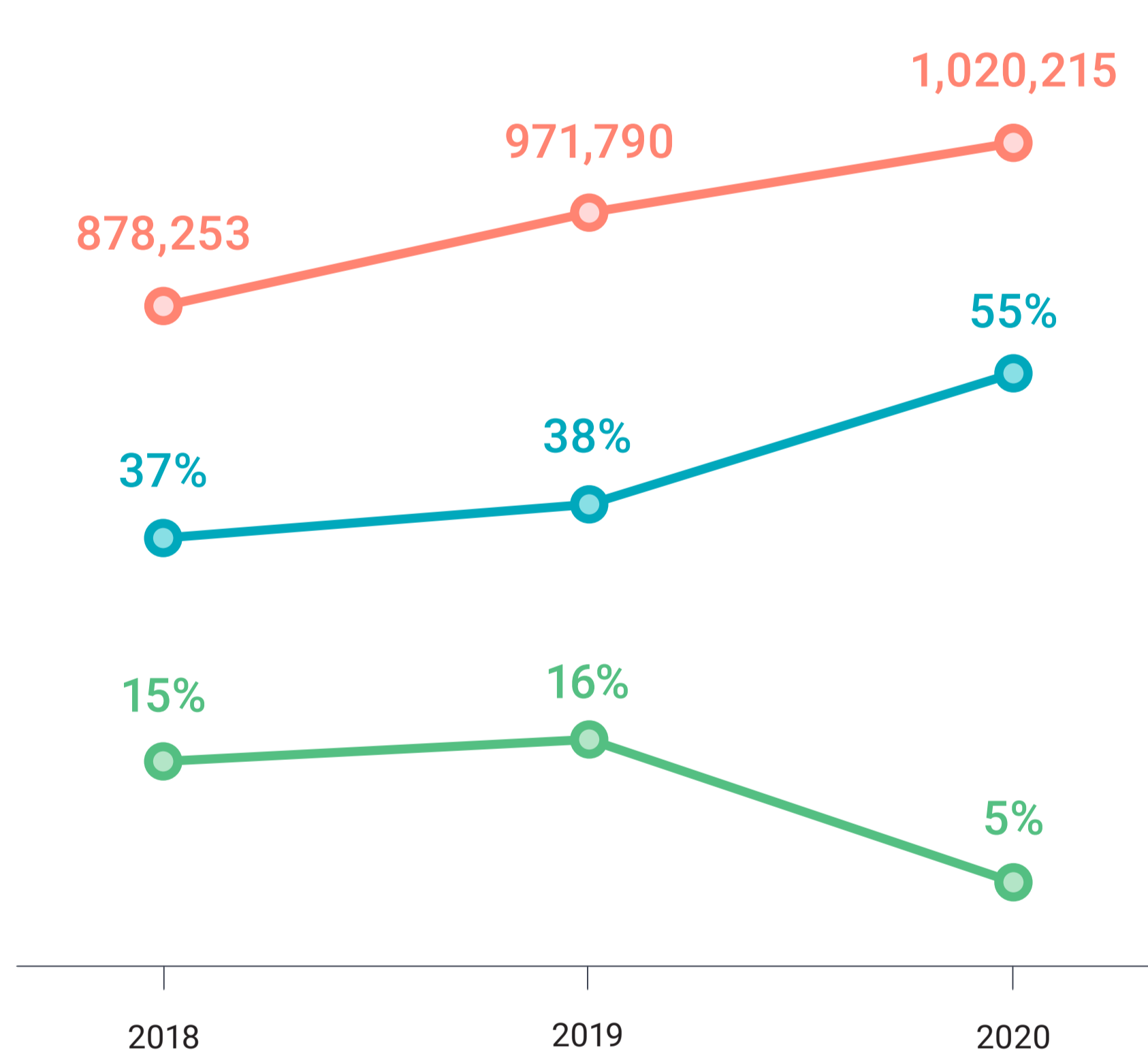
Number of donors actively contributing gifts as of Year-End

Donor Ratio

Percentage of Donors Cancelled over New Donors acquired

Net Growth

Donor base growth from the Start of the Year to Year-End



Rising to the challenges brought on in 2020, the year has illustrated and reaffirmed our commitment to our non-profit partners in supporting their Recurring Gift programmes, while highlighting the resilience of the Recurring Gift model. As the saying goes, there cannot be light without darkness.

The onset of the global pandemic has brought about multiple challenges, with the biggest obstacle to fundraising being the stop of Face-to-Face acquisition in multiple markets due to lockdowns. Comparative to 2019, the total acquisition volume dropped by ~41% across the donor bases we manage. However, our strong and proactive retention practices have ensured no surprises to the donors that choose to stop their monthly contribution. With acquisition plans challenged by the uncertainty of 2020, non-profits had to shift their fundraising strategies to alternative means and look towards creating engaging campaigns in a new space.

Looking at the impact of the year on SG Support and our ways of working, the advent of social distancing has also enforced remote working/fundraising, forcing quick assimilation of new operating procedures. Some steps we took early on that ensured the success of continued fundraising were:

- Ensuring that donor contributions continue to be processed in a secure and timely manner.
- Proactively solutioning on donor retention practices to cater for best to worst case scenarios.
- Renewed use of data analytics to support recruitment partners and non-profits in making data-driven decisions.

As we move into 2021, we are dedicated more than ever to provide new solutions to the fundamental shifts brought on by 2021.

Explore data by country

	2019	2020
Active Base	106,817	98,223
Donor Ratio	43%	70%
Donations Processed (USD)	19,490,712	19,237,788

	2019	2020
Active Base	22,317	28,777
Donor Ratio	36%	45%
Donations Processed (USD)	5,271,647	7,463,342

	2019	2020
Active Base	47,278	74,897
Donor Ratio	38%	37%
Donations Processed (USD)	5,711,567	9,604,096

	2019	2020
Active Base	94,535	84,354
Donor Ratio	30%	90%
Donations Processed (USD)	11,622,906	11,401,115

	2019	2020
Active Base	21,941	35,926
Donor Ratio	30%	42%
Donations Processed (USD)	4,076,608	8,363,306

	2019	2020
Active Base	180,542	186,540
Donor Ratio	53%	94%
Donations Processed (USD)	21,167,781	23,626,790

	2019	2020
Active Base	66,517	62,965
Donor Ratio	35%	81%
Donations Processed (USD)	29,857,663	28,490,757

	2019	2020
Active Base	38,028	37,281
Donor Ratio	44%	51%
Donations Processed (USD)	5,331,535	5,560,723

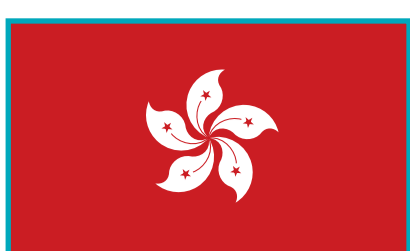
	2019	2020
Active Base	393,815	410,931
Donor Ratio	25%	40%
Donations Processed (USD)	46,596,273	50,671,368

Who is SG Support?

SG Support exists to make fundraising easy for charities by working in partnership to acquire new donors, retain existing ones and win back those who have left. We do this through our complete suite of services that range from providing data-driven strategies, consultancy and ensuring the smooth running of the operational aspects of payment processing, contact centre and financial reporting.

Since our establishment in 2002, we have grown to become the world's largest fundraising agency working with 70 charities in more than 14 countries, managing over 3 million donors.





SG Support Profile in Hong Kong

Hong Kong's operations started in April 2010, and 2020 marks our 10th anniversary of supporting non-profits in Hong Kong!

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Joanne Leong (joanne.leong@sgsupport.com)
Younsuk Nha (younsuk.nha@sgsupport.com)

At the start of the pandemic, Hong Kong reported low cases of COVID-19, which supported the continuation of fundraising activities in the market. As fundraising in the market continued throughout 2020, with minimal disruption, SG Support's non-profit partners did not see sharp or consistent drops in the recruitment of new donors. Coupled with a steady attrition rate, SG Support's non-profit partners in Hong Kong experienced some growth in 2020 (albeit lower than the originally projected growth pre-COVID-19).

Moving forward, non-profits in Hong Kong would need to look at the start of building alternative acquisition channels to mitigate potential disruptions to Face-to-Face acquisition activities in the future.

2020

Highlights

- One of the few SG supported markets that recorded a growth in donor base size in 2020.
Face-to-Face acquisition agencies are aplenty in Hong Kong. This allowed non-profits to work with several agencies as their Face-to-Face partners, securing donor acquisition growth.

Challenges

- High cost of new alternative acquisition channels makes it difficult to test new strategies.
Limited alternative acquisition channels could be set up, which may impact the coming years.

Growth over the years

Active Base

Number of donors actively contributing gifts as of Year-End

Net Growth

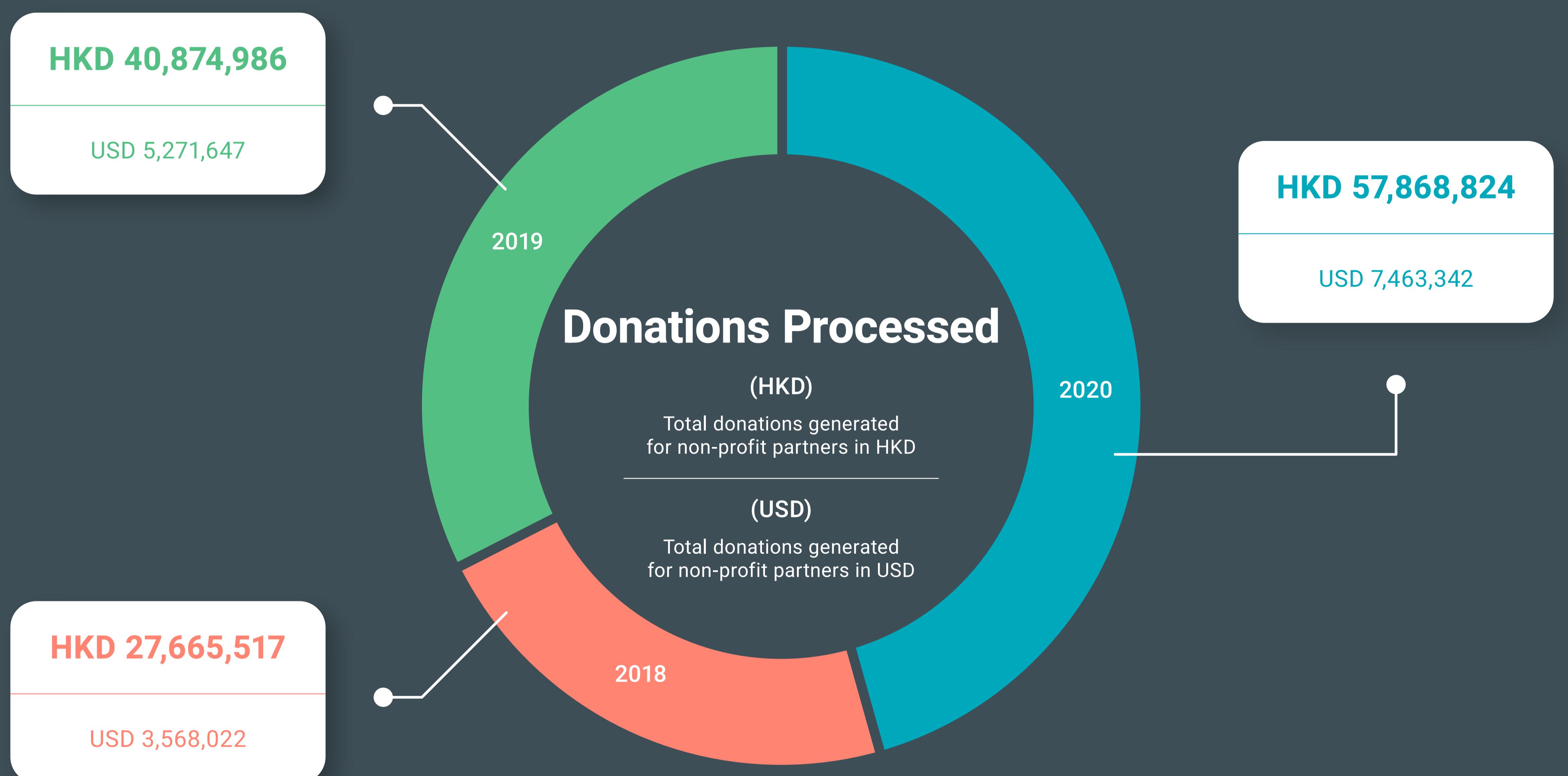
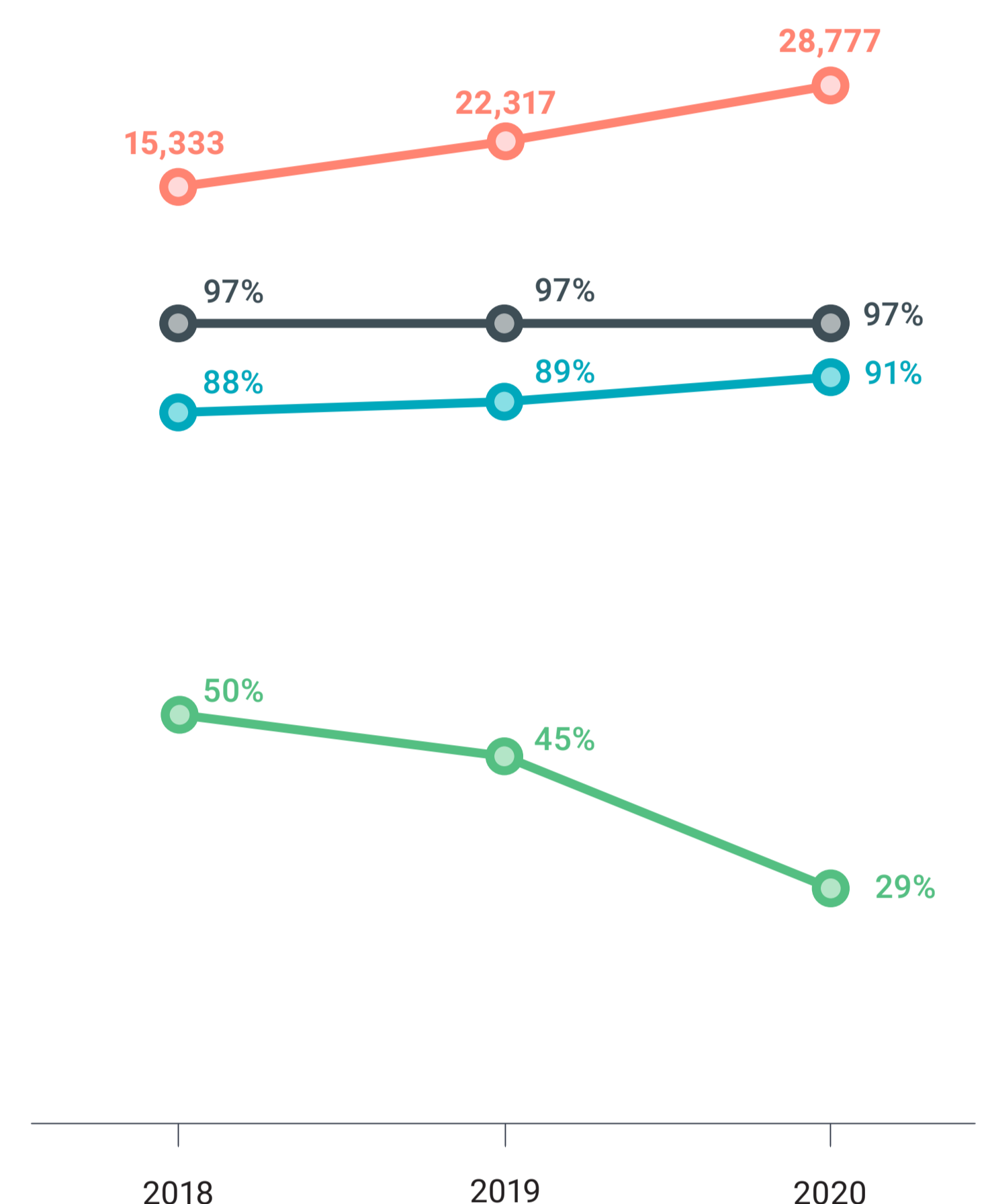
Donor base growth from the Start of the Year to Year-End

Approval Rate by First Debit

Percentage of donors successfully transacted on their first debit

Approval Rate by Anniversary

Percentage of donors successfully transacted on their second debit and onwards



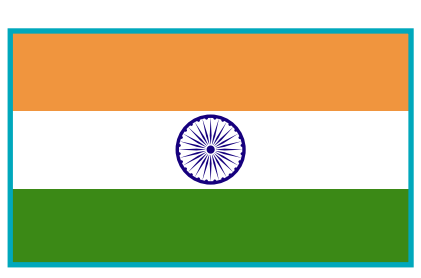
2020 in Numbers

45% Donor Ratio
HKD 187 / USD 24 Average Gift
26 months Average Lifespan
HKD 4,674 / USD 603 Lifetime Value (LTV)

2021 Outlook

Moving into 2021, it is suggested for non-profits in Hong Kong to optimise resources in increasing acquisition. Some efforts we could look at (but are not limited to):

- Active reactivation of lapsed donors and conversion campaigns can be cost-effective ways to test new acquisition channels.
Alternative acquisition channels are to be seen as a long-term investment as there needs to be a foundation in place, in the case Face-to-Face halts as an impact from COVID-19 (e.g. building a hybrid team within the contact centre and your own capabilities)
Applying data-driven decisions to donor acquisitions and refining current knowledge to focus on greater yield returns. For example, refining Direct Mailing (an alternative acquisition channel that is used in the Hong Kong market) may assist acquisitions greatly.



SG Support Profile in India

SG India started in 2015, and has rapidly grown to become one of SG Support's largest managed donor base.

Suite 607 & 608, Level 6, DLF South Court, Saket District Centre, New Delhi 110017, India.

+91 11 4208 8899 Rinky Singh (rinky.singh@sgsupport.com)

India has been no exception to the impact of COVID-19 on fundraising activities. With a high growth mindset, our non-profit partners in India did not let the challenging year ahead stop them. In face of multiple lockdowns, agencies continued to fundraise for non-profit partners and were fast in seizing fundraising opportunities.

Although SG Support's combined non-profit partners in India recorded an overall donor base growth in 2020 (comparative to 2019), this still fell short of the original projected growth. However, actions in 2020 have set up non-profits in India for success moving into 2021, as we look into a greater utilisation of alternative acquisition channels, coupled with quick and decisive actions in the face of uncertainty.

2020

Highlights

- Pledges continued to give throughout the year, with no unexpected drops in their debits (i.e. approval rates have held steady).
- No disruptions experienced in operations and debiting of donors as we moved into the digitisation of manual processes, in face of work from home orders.
- Our SG Support client portfolio increased and we welcomed a new partner to our SG Support family.

Challenges

- Setbacks in Face-to-Face acquisition due to strict country-wide quarantines.
- Limited alternative acquisition set up. This may have a longer-term impact as we look into more contact-free methods of acquisition.

Growth over the years

Active Base

Number of donors actively contributing gifts as of Year-End

Net Growth

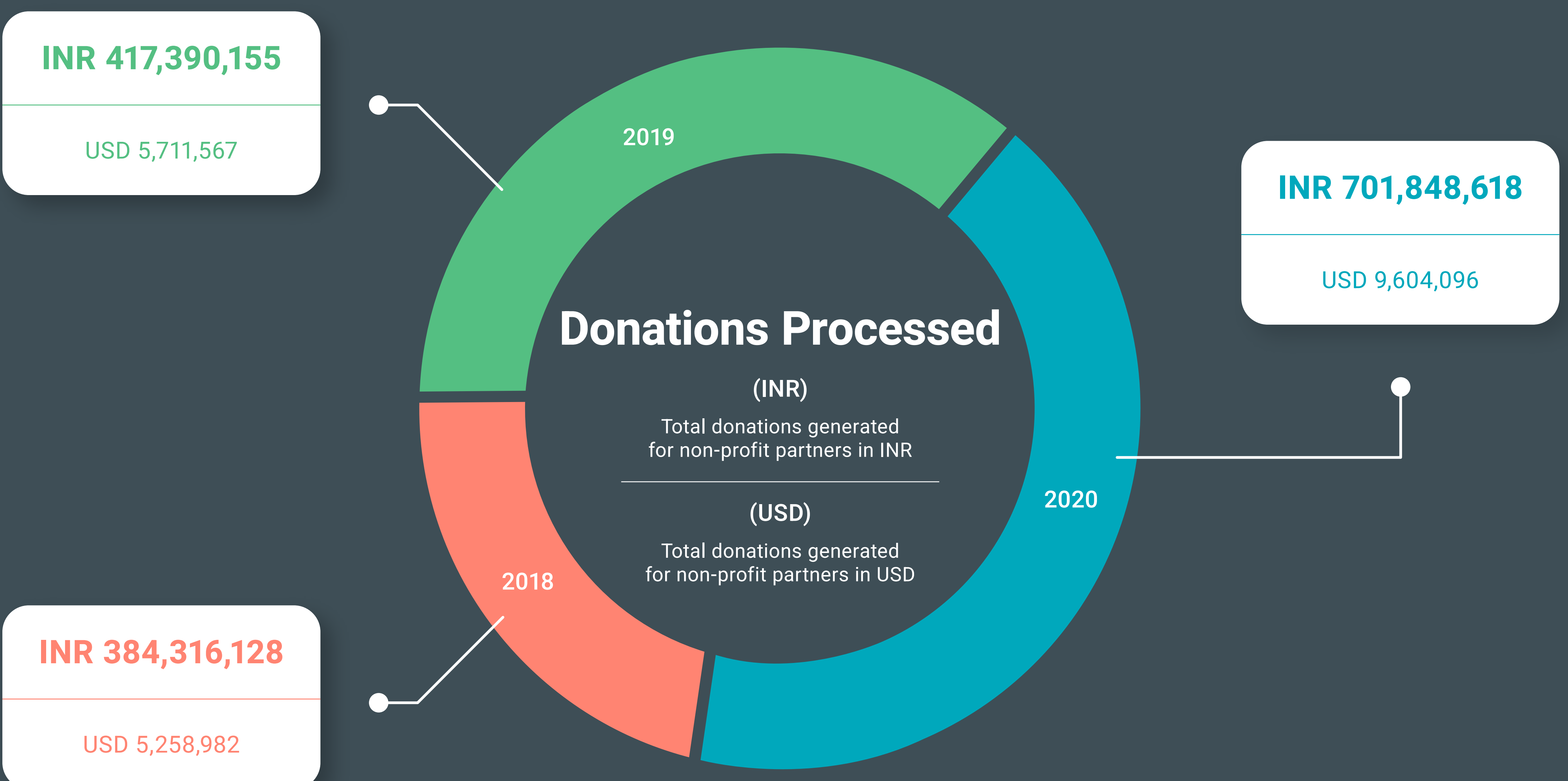
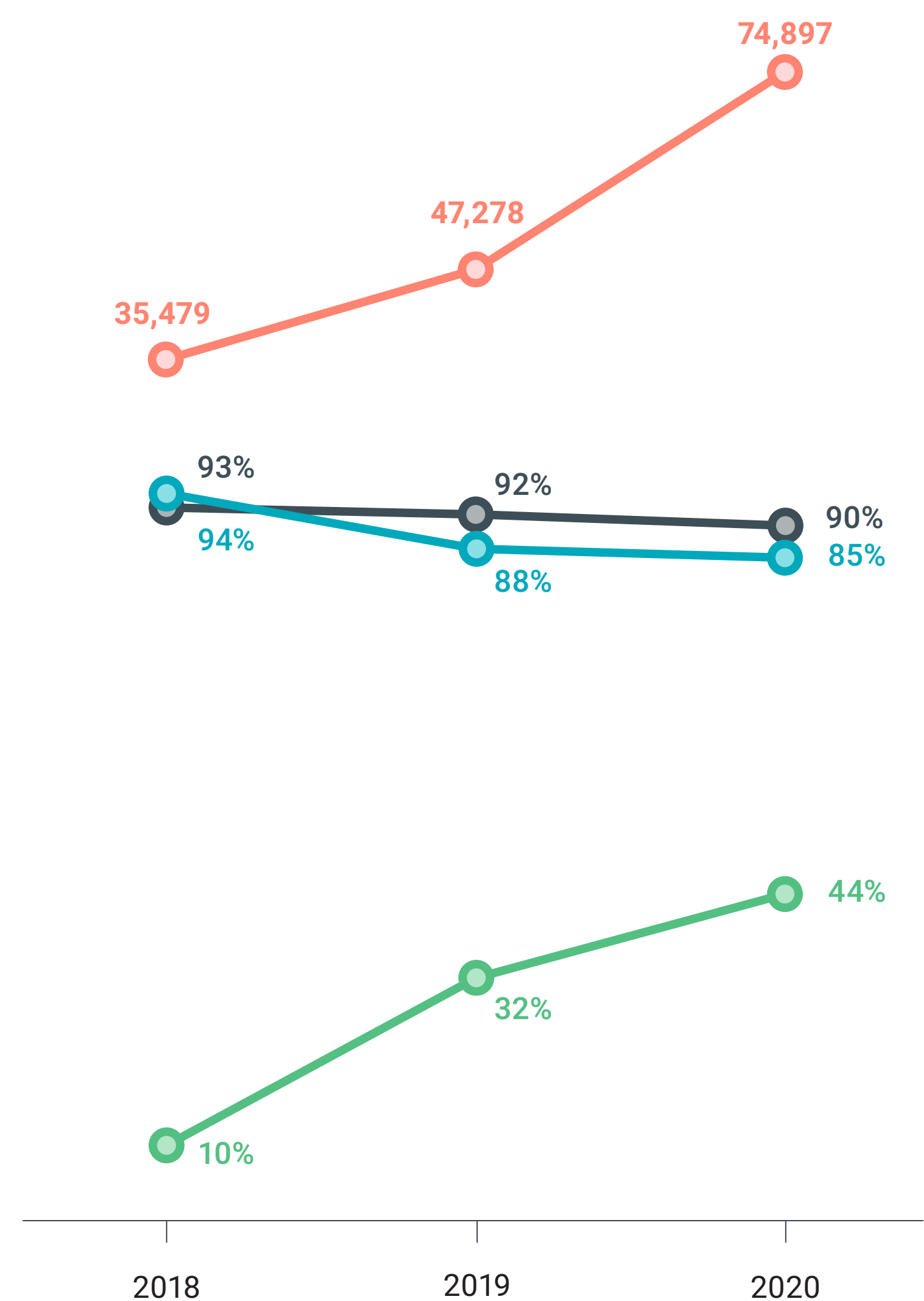
Donor base growth from the Start of the Year to Year-End

Approval Rate by First Debit

Percentage of donors successfully transacted on their first debit

Approval Rate by Anniversary

Percentage of donors successfully transacted on their second debit and onwards



2020 in Numbers

<p>37%</p> <p>Donor Ratio</p> <p>Percentage of Donors Cancelled over New Donors acquired</p>	<p>INR 747 USD 10</p> <p>Average Gift INR / USD</p> <p>Average monthly contribution (gift) per donor</p>	<p>17 months</p> <p>Average Lifespan</p> <p>Average number of months a donor will give to a cause they love</p>	<p>INR 10,569 USD 145</p> <p>Lifetime Value (LTV) INR / USD</p> <p>Estimated total contribution of a donor to their chosen cause</p>
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2021 Outlook

Moving into 2021, non-profits in India would need to consider their long-term fundraising goals. What is required to support its operations in the short vs. long term? This will support in moving forward with a coherent approach.

Some ways that non-profits might consider (not limited to), as we look towards continued growth:

- Long-term conversion strategies that support Regular Give, whilst meeting the market regulations on fundraising.
- Reactivation of existing donors.
- Support acquisition partners in the restart of Face-to-Face activities.
- Data-driven decisions to optimise the retention and fundraising processes.



SG Support Profile in Indonesia

SG Support in Indonesia was established in August 2006, the same year as our operations started in Singapore, which made it the third country we expanded into.



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Ellen Chua We-Wen (ellen.chua@sgsupport.com)

The donor bases SG Support manages in Indonesia have been arguably one of the hardest hits in 2020 with the impact of COVID-19 on fundraising and further exacerbated by student protests.

Historically, Indonesia has been predominately recruiting donors via Face-to-Face agencies, meaning that any switch to in-house or alternative acquisition channels will be relatively slower as they would need to build these from the ground up.

For our partners in Indonesia, the way forward from COVID-19 will arguably be a harder road than that of their neighbours. With the long-term halt of Face-to-Face activities, agencies will struggle to get back to acquire a substantial volume of donors, fast. Moving forward, non-profits in Indonesia will need to look at alternative acquisition strategies to support a long-term view of donor base growth.

2020

Highlights

- Refinement of donor retention practices and the creation of targeted communication contributed to lower cancellation rates.
One-time upgrade and additional appeal campaigns were successful.
Further improvements in data security and data transmission methods, ensuring better compliance with Payment Card Industry (PCI) Standards.

Challenges

- Halt of Face-to-Face activities means that agencies will be slower to restart fundraising, when macro conditions allow for it.
Alternative acquisition channel activities were slower to start up as these were not explored actively prior to 2020.
Falling approval rates as a result of increasing financial pressures on existing donors due to macroeconomic conditions.

Growth over the years

Active Base

Number of donors actively contributing gifts as of Year-End

Net Growth

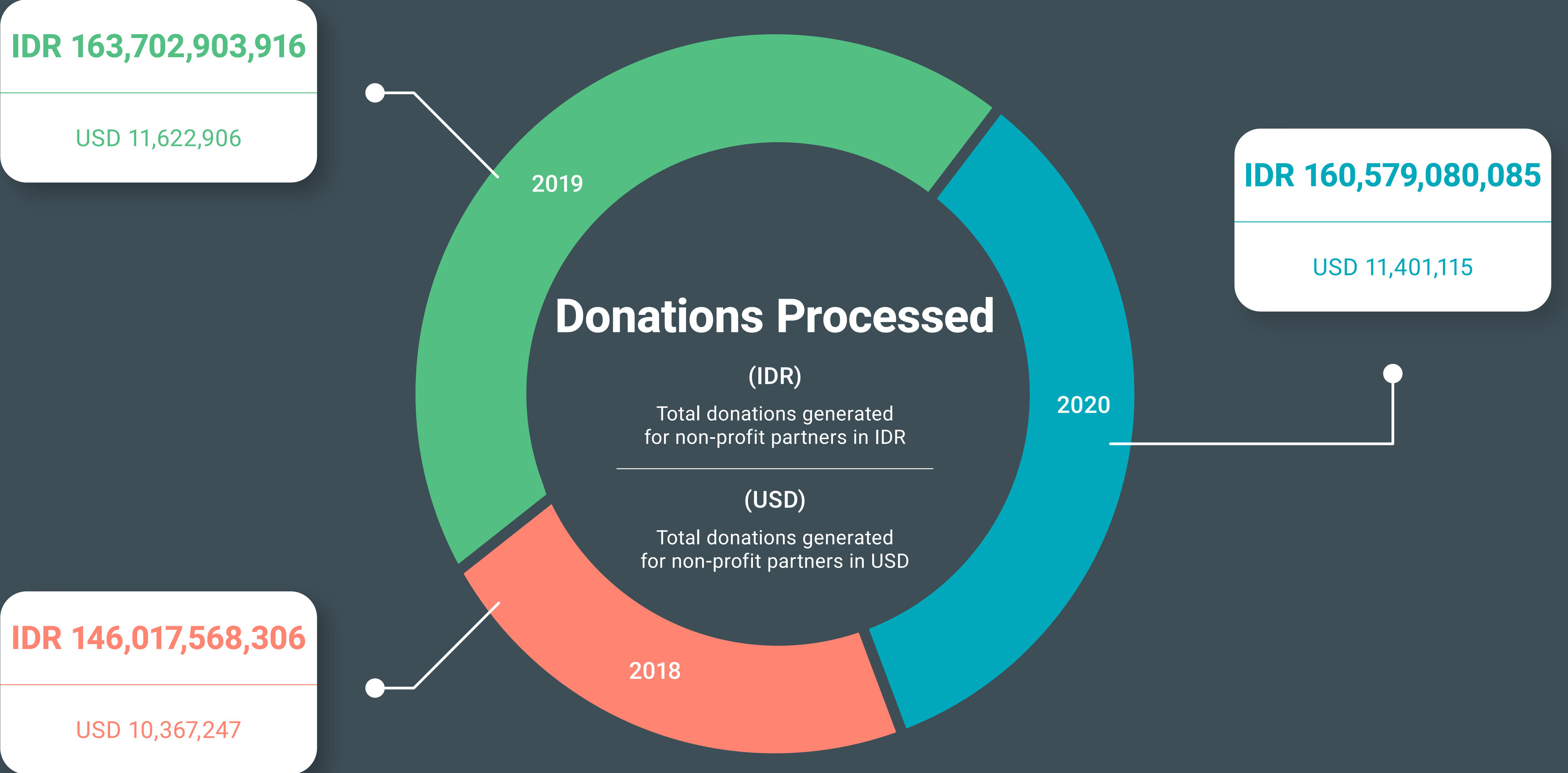
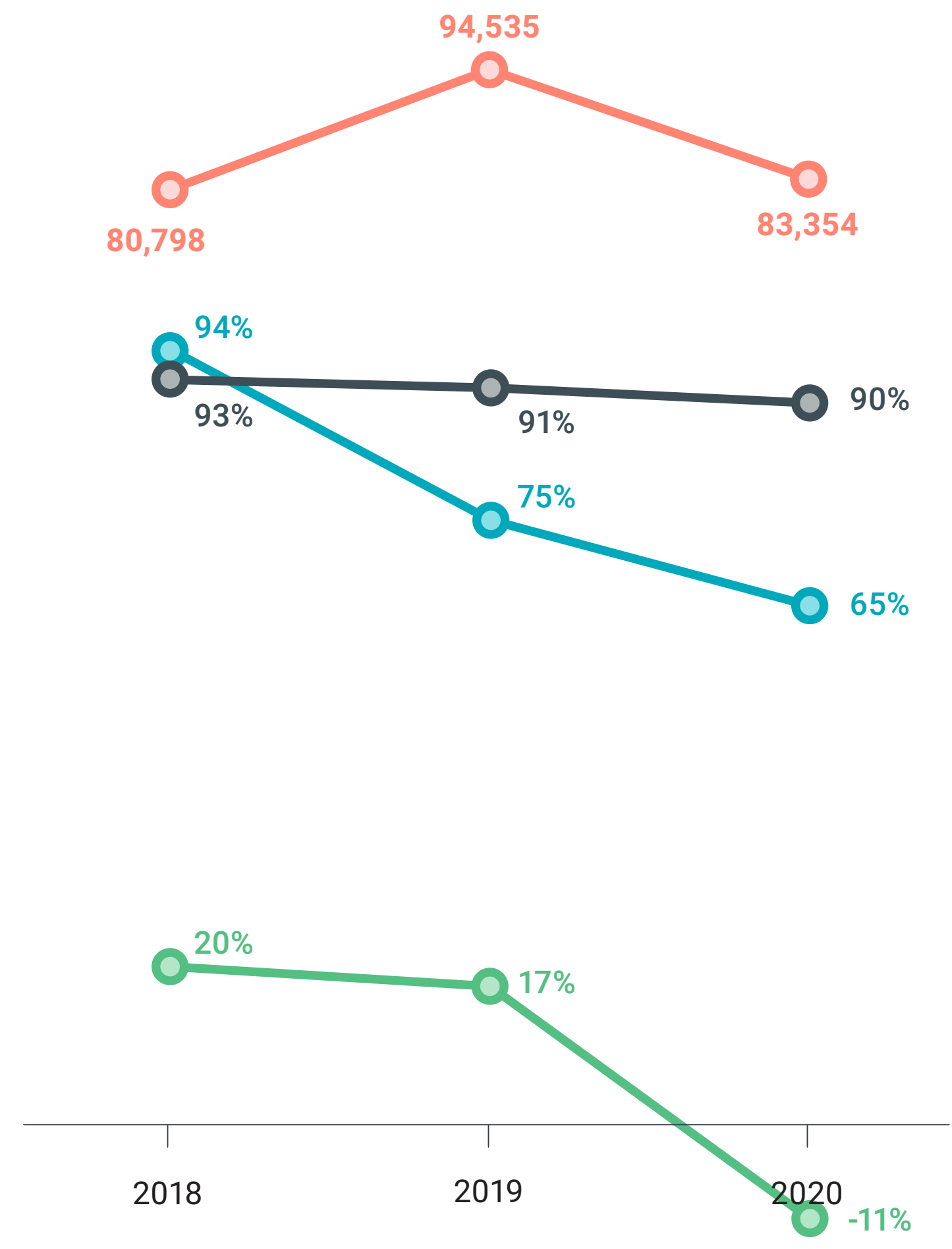
Donor base growth from the Start of the Year to Year-End

Approval Rate by First Debit

Percentage of donors successfully transacted on their first debit

Approval Rate by Anniversary

Percentage of donors successfully transacted on their second debit and onwards



2020 in Numbers

Infographic showing 2020 metrics: Donor Ratio (90%), Average Gift (IDR 143,081 / USD 10), Average Lifespan (29 months), and Lifetime Value (LTV) (IDR 3,491,560 / USD 248).

2021 Outlook

Having faced the challenges of 2020 with positivity, 2021 will be the real test for non-profits in Indonesia as we assume prolonged COVID-19 measures and restrictions.

To support a boost on acquisition in 2021 for Indonesia, consider the following (but not limited to):

- Look into alternative solutions to fill the gap from Face-to-Face agencies (such as building your own in-house team).
Plan long-term conversion campaigns to help build up a bank of potential donors.
Be flexible in your donation asks.
Consider what is important to your non-profit in the long run (volume or value of donors) - consider short term sacrifices in KPIs for long-term gain.

SG Support Profile in Latin America

Established in Q3 of 2019, SG Support expanded our footprint to 5 countries across Latin America, namely; Panama, Guatemala, Costa Rica, Dominican Republic and Paraguay.



Panama Branch (LATAM), 50th Street and Elvira Mendez, Towerbank Tower, 35th Floor, Office #36, Panama City, Panama



Michael Gearing (Michael.Gearing@sgsupport.com)

In 2019, SG Support expanded our presence towards Panama, Guatemala, Costa Rica, Dominican Republic and Paraguay. Establishing Regular Give in new markets is never an easy feat and 2020 challenged the growth opportunities of starting in a new market.

Keeping true to our motto of making fundraising easy for our non-profit partners, we have tackled the new challenges with a positive attitude and a mindset focused on growth.

2020

Highlights

- Set up of Regular Give mechanisms across multiple markets in Latin America.
- Began digital fundraising in majority of these markets (given the absence of active Face-to-Face abilities due to the pandemic).
- Set up and start of fundraising via telemarketing.

Challenges

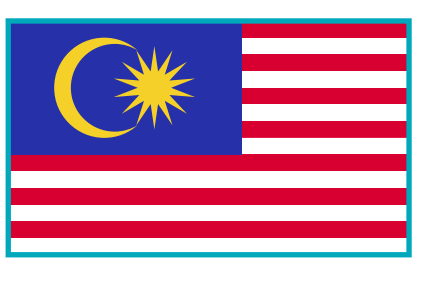
- Limited start dates of Face-to-Face acquisition which support donor volumes.
- Adjustment of growth expectations and acquisition strategies.

2021 Outlook

As more non-profits look forward to benefitting from the resilience of the Regular Give model, SG Support looks forward to continuing the growth momentum set across our partners in Latin America.

Moving into 2021, non-profits might consider:

- Using this time to set up foundations for Face-to-Face (so that when market conditions allow, a fast mobilisation can take place).
- Further testing and exploring telemarketing and digital fundraising strategies to utilise a variety of acquisition channels.
- Define acquisition milestones.



SG Support Profile in Malaysia

Starting operations in September 2002, SG Support is headquartered in Malaysia. As of 2020, SG Support is partnered with 11 great causes.

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Zander Liew (zander.liew@sgsupport.com)

Despite the challenges brought on with the various lockdowns and the impact of COVID-19 on Face-to-Face acquisitions, the overall SG Support-managed donor bases in Malaysia managed to grow. Benefitting from a historically continuous low attrition rate, our Malaysian charity partners were also quick and united in their approach to the challenges brought on by COVID-19. These factors combined allowed for a cushioning of the COVID-19 impact, ultimately allowing for the growth across the overall donor bases managed by SG Support in Malaysia.

As we move into 2021, Malaysian non-profits would need to look at acquisition-focused methods to continue growth/fundraising expectations.

2020

Highlights

- Resilience of donor retention practices as evidenced with continued low attrition rates.
- Quick redeployment of Face-to-Face fundraising with safety protocols in place, when conditions allowed.
- Approval rates have held steady throughout the lockdown period.

Challenges

- Driving alternative acquisition channels to supplement reduced acquisition volumes from Face-to-Face (value over volume).
- Macroeconomic factors beyond our control could alter donor performance.
- Acquisition of donors with the preferential payment type.

Growth over the years

Active Base

Number of donors actively contributing gifts as of Year-End

Net Growth

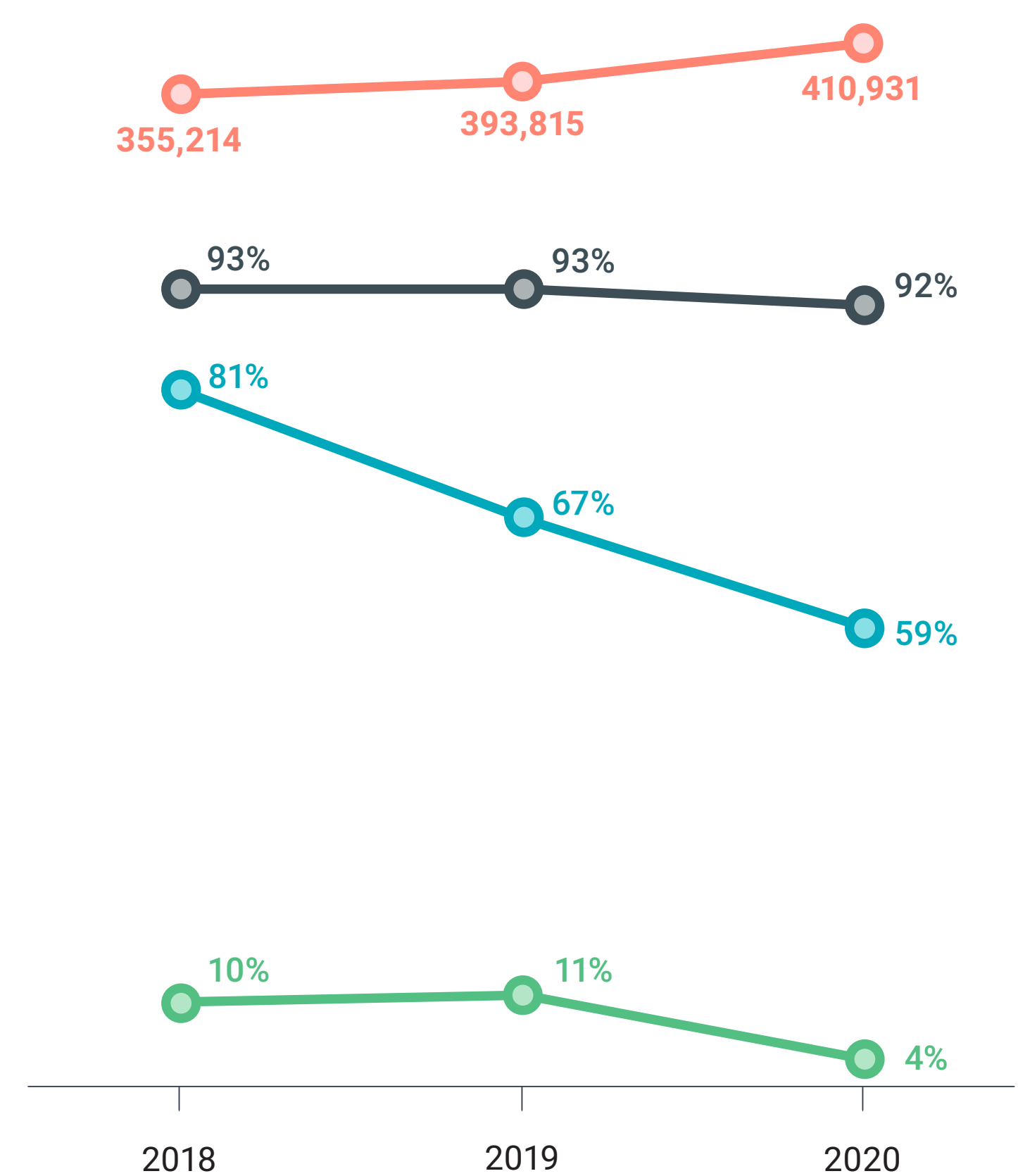
Donor base growth from the Start of the Year to Year-End

Approval Rate by First Debit

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Percentage of donors successfully transacted on their second debit and onwards



MYR 188,067,922

USD 46,596,273

Donations Processed

(MYR)

Total donations generated for non-profit partners in MYR

(USD)

Total donations generated for non-profit partners in USD

MYR 204,515,478

USD 50,671,368

MYR 164,691,087

USD 40,804,358

2020 in Numbers

40%

Donor Ratio

Percentage of Donors Cancelled over New Donors acquired

MYR 57

USD 14

Average Gift MYR / USD

Average monthly contribution (gift) per donor

45 months

Average Lifespan

Average number of months a donor will give to a cause they love

MYR 2,228

USD 552

Lifetime Value (LTV) MYR / USD

Estimated total contribution of a donor to their chosen cause

2021 Outlook

With acquisition rebounding strongly after the first MCO, this allows for an in-depth contingency plan to account for possible future MCOs of varying degrees.

While planning so, consider the following:

- Look at bringing into play one-time donors to build up a list which can be called should another MCO happens.
- Further mobilisation of alternative acquisition channels (these are no longer nice-to-haves, but necessary).
- Focus on reactivation works, further and beyond the current scope, if not done so already.



SG Support Profile in Philippines

Operations in the Philippines began in March 2018 and SG Support is partnered with 6 great causes as of December 2020.

Unit 1502, 15th Floor, Antel 2000 Corporate Center, 121 Valero Street, Salcedo Village Makati City, 1227 Philippines

+63 28 672 7893 Wilbur Chin (wilbur.chin@sgsupport.com)

With one of the strictest lockdowns across our South East Asian markets, our non-profit partners in the Philippines have had some success in maintaining their overall base. With minimal loss of donors through the lockdown periods, our non-profit partners in the Philippines were decisive in their next steps and those with active Face-to-Face agencies were able to restart the search for new donors faster.

Throughout the course of the year, the attrition rate of donors choosing to stop their donation held stable, which allowed for non-profits to understand the quantum difference required to maintain their donor bases against the backdrop of the pandemic.

Moving into 2021, non-profits in the Philippines would need to consider their short term vs. long term donor base requirements in order to focus efforts.

2020

Highlights

- Agility of charities in embracing alternative acquisition channels, such as Telemarketing and Digital.
- Resilience of the donor bases, as there was no mass exodus of donors via cancellations against the backdrop of the pandemic.
- Our SG Support client portfolio increased and we welcomed a new partner to our SG Support family.

Challenges

- Disruption to contact centre operations at the start of the quarantine, too sudden and very strict rules in place.
- Economic pressures caused by the pandemic increased the difficulty of acquiring new pledges.
- Disruption to transaction processing due to banking infrastructure brought on by strict and sudden quarantine.

Growth over the years

Active Base

Number of donors actively contributing gifts as of Year-End

Net Growth

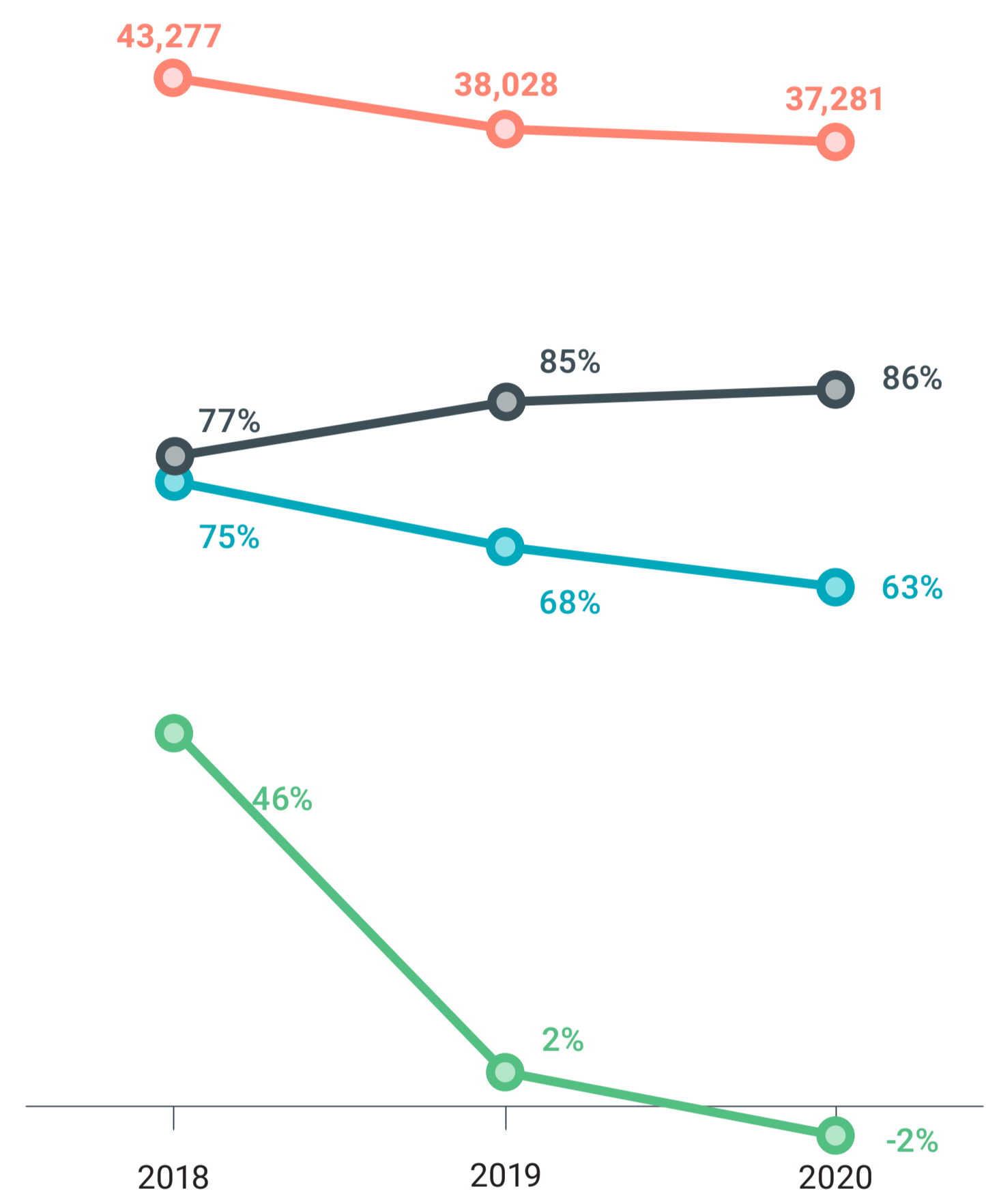
Donor base growth from the Start of the Year to Year-End

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Percentage of donors successfully transacted on their second debit and onwards



PHP 256,040,665

USD 5,331,535

Donations Processed

(PHP) Total donations generated for non-profit partners in PHP

(USD) Total donations generated for non-profit partners in USD

PHP 267,047,161

USD 5,560,723

PHP 242,441,247

USD 5,048,354

2020 in Numbers

51%

Donor Ratio

Percentage of Donors Cancelled over New Donors acquired

PHP 755

USD 16

Average Gift PHP / USD

Average monthly contribution (gift) per donor

30 months

Average Lifespan

Average number of months a donor will give to a cause they love

PHP 19,818

USD 413

Lifetime Value (LTV) PHP / USD

Estimated total contribution of a donor to their chosen cause

2021 Outlook

Moving into 2021, non-profits in the Philippines would need to consider their acquisition goals in terms of short-term vs. long-term gains, whilst making room for further refinement in retention activities.

Some activities that non-profits in the Philippines might consider (not limited to) when looking at both acquisition and retention activities:

- Review recruitment policies of younger donors and different payment methods (volume vs. value).
- Support recruitment channels in optimising their sign-up sites.
- Look into additional gift campaigns to make up for missed donations.
- Continuous/further testing of alternative fundraising channels.



SG Support Profile in Singapore

Singapore was the first SG Support expansion away from HQ, with operations beginning in March 2006.

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Joanne Leong (joanne.leong@sgsupport.com)

Singapore has been no exception to the challenges brought on by COVID-19. Having historically relied on Face-to-Face acquisition channels, the cease of Face-to-Face donor recruitment in 2020 has meant that non-profits in Singapore needed to make active decisions in alternative fundraising methods.

Donor bases in Singapore are further challenged as alternative fundraising channels have not been previously actively explored, limiting the ability to fill in the fundraising gaps through other means. However, with a relatively low attrition rate, donor bases managed in Singapore remain stable throughout 2020.

In 2021, non-profits in Singapore would need to decide if they would look towards maintenance of their current donors, or look towards utilising alternative channels to push growth.

2020

Highlights

- Further optimisation of retention practices put into place to ensure minimal donor churn.
- Operational improvements to counter attrition from COVID-19, bringing non-profits' funds to a plateau cycle instead of a sharp slump in the absence of Face-to-Face fundraising in the market.
- Building the foundation for exploring non-conventional ways of getting new donations.

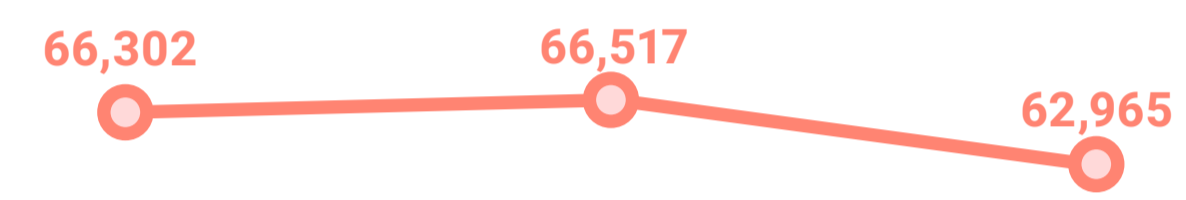
Challenges

- Absence of alternative acquisition channels to cushion the impact of the removal of Face-to-Face fundraising.
- Uncertainty of the times led non-profits in Singapore to be more reactive in their acquisition and retention practices, focusing on maintenance of the current base.
- Risk of donor cancellations outweighed the potentials of exploring further donor optimisation.

Growth over the years

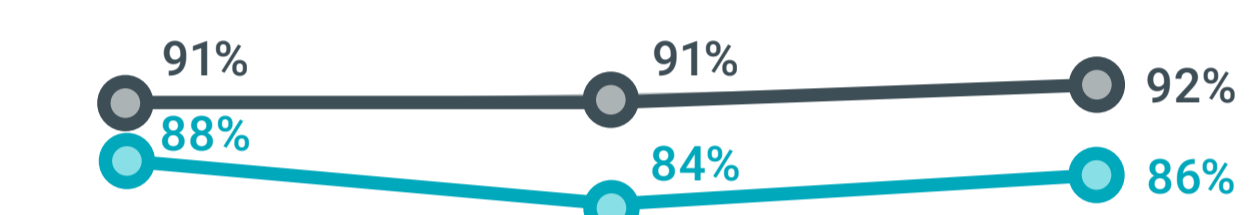
Active Base

Number of donors actively contributing gifts as of Year-End



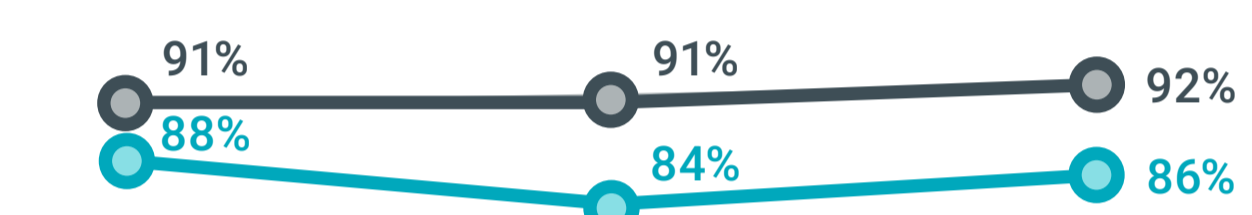
Net Growth

Donor base growth from the Start of the Year to Year-End



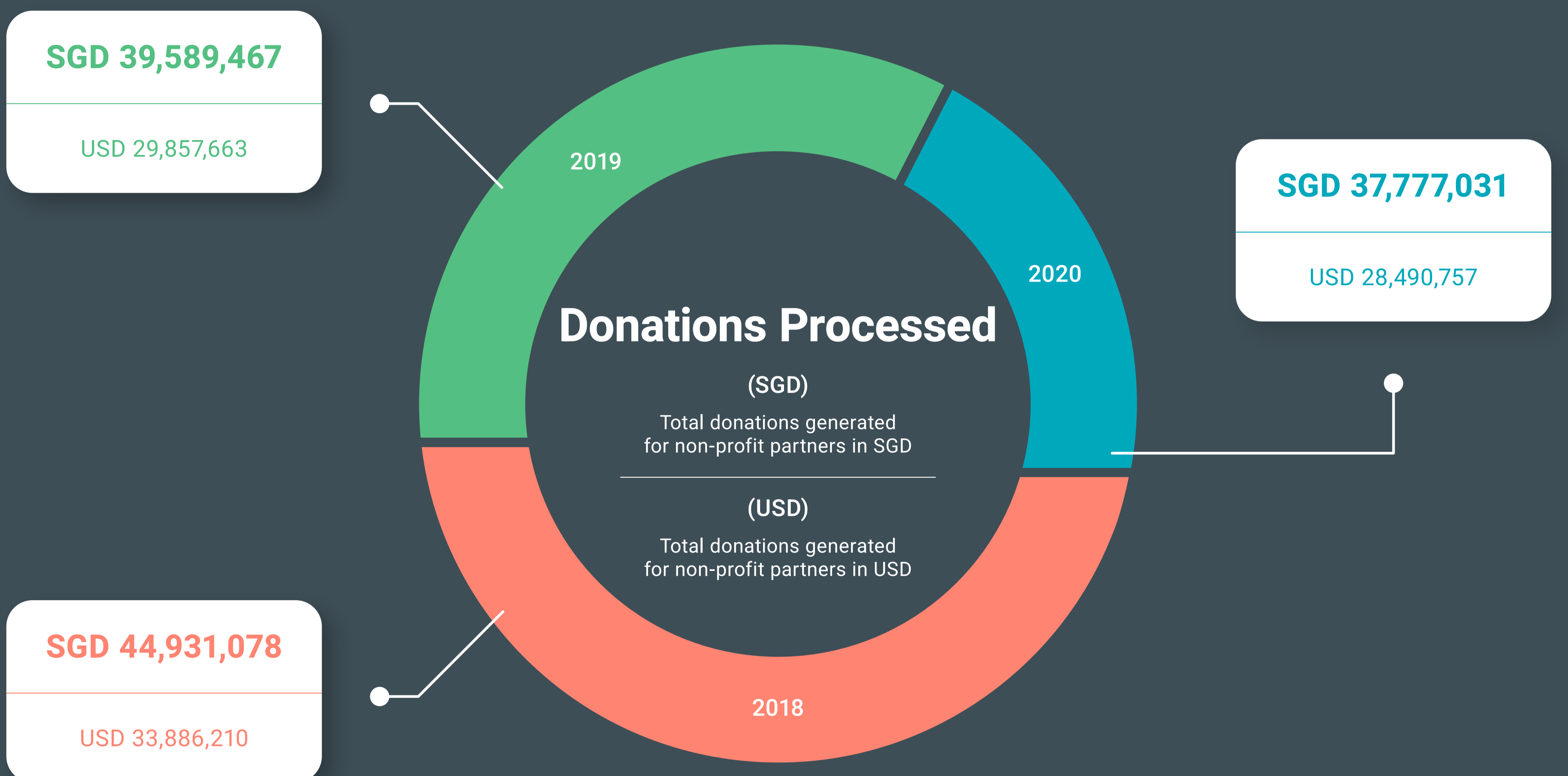
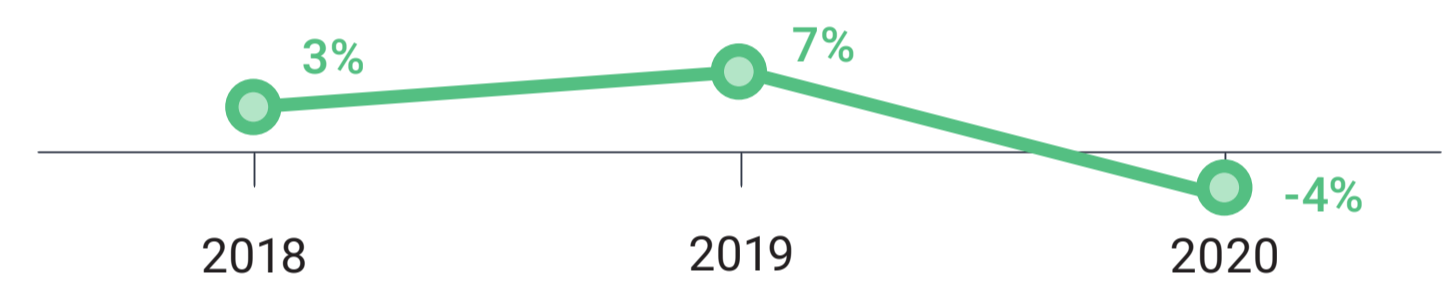
Approval Rate by First Debit

Percentage of donors successfully transacted on their first debit



Approval Rate by Anniversary

Percentage of donors successfully transacted on their second debit and onwards



2020 in Numbers

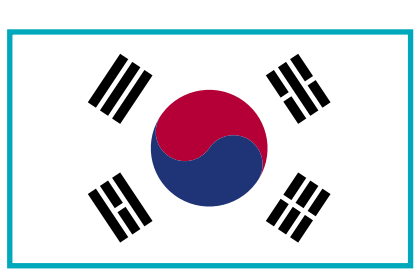
- 81%** Donor Ratio: Percentage of Donors Cancelled over New Donors acquired
- SGD 57 / USD 43** Average Gift: Average monthly contribution (gift) per donor
- 32 months** Average Lifespan: Average number of months a donor will give to a cause they love
- SGD 1,753 / USD 1,322** Lifetime Value (LTV): Estimated total contribution of a donor to their chosen cause

2021 Outlook

Moving into 2021, non-profits in Singapore would need to consider their long-term fundraising goals, focusing on what is required to support their operations in the short and long run, in order to move forward with a coherent approach.

Some items non-profits in Singapore might consider (not limited to), if looking at growth:

- Long-term conversion strategies that support Regular Give, whilst meeting the market regulations on fundraising.
- Conduct reactivation calls for existing donors.
- Support acquisition partners in the restart of Face-to-Face activities.
- Leverage on donors acquired through online channels to reap long-term fundraising benefits.
- Look into virtual events with long-term fundraising goals.



SG Support Profile in South Korea

South Korea is currently SG Support's second largest market after Malaysia since its launch in July 2014.

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The trend of new donors closely followed the number of COVID-19 cases reported in Korea (more so than any other market SG Support operates in). As high reported figures saw the removal of Face-to-Face acquisition activities, limited new donor numbers followed. These Face-to-Face acquisition activities are quick to pick back up as COVID-19 cases dropped, thanks to the dedication of recruitment channels in ensuring new donor volumes.

SG Support's non-profit partners in Korea have benefitted from knowing that their Approval Rates are steady in the face of the pandemic, and that donors are continuing to contribute to the causes they care about.

2020

Highlights

- Strengthened data-decision making with greater partnerships with Face-to-Face agencies in Korea (e.g. using data to drive higher average gifts in moving donation asks from KRW20,000 to KRW 30,000).
Strengthened relationship with our non-profit partners as we faced the pandemic together.
Non-profit partners were fast to switch to alternative acquisition channels to support donor volumes from Face-to-Face agencies.

Challenges

- Impact of COVID-19 on Face-to-Face acquisition, causing an issue with the growth of donor base for the long term.
Restricted budgets for non-profits limited the ability to benefit from the resilience of the Regular Give model.

Growth over the years

Active Base

Number of donors actively contributing gifts as of Year-End

Net Growth

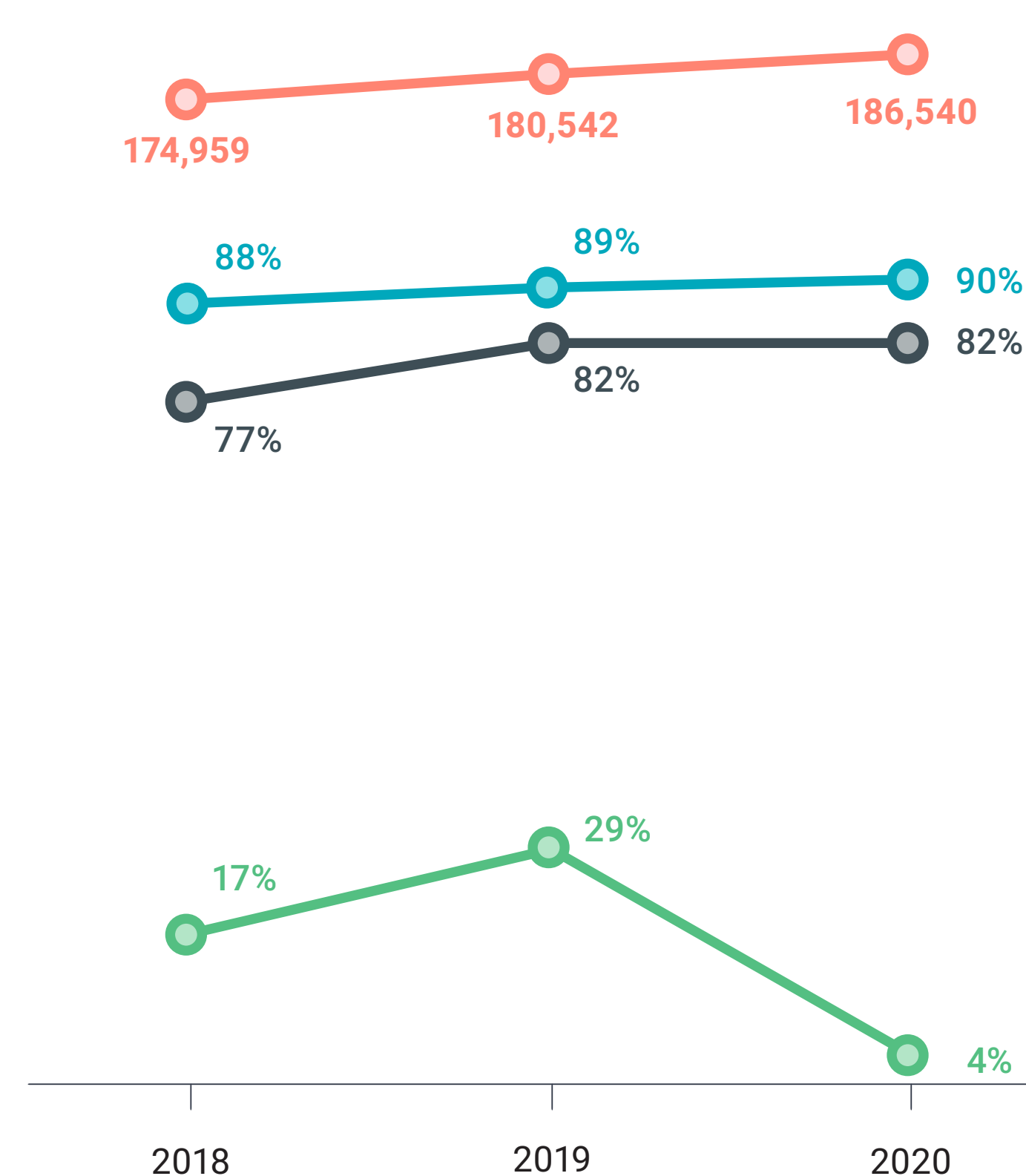
Donor base growth from the Start of the Year to Year-End

Approval Rate by First Debit

Percentage of donors successfully transacted on their first debit

Approval Rate by Anniversary

Percentage of donors successfully transacted on their second debit and onwards



KRW 23,210,286,490

USD 21,167,781

Donations Processed

(KRW) Total donations generated for non-profit partners in KRW
(USD) Total donations generated for non-profit partners in USD

KRW 25,906,568,130

USD 23,626,790

KRW 14,045,348,913

USD 12,809,358

2020 in Numbers

94%

Donor Ratio

Percentage of Donors Cancelled over New Donors acquired

KRW 24,379
USD 22

Average Gift KRW / USD

Average monthly contribution (gift) per donor

27 months

Average Lifespan

Average number of months a donor will give to a cause they love

KRW 538,878
USD 491

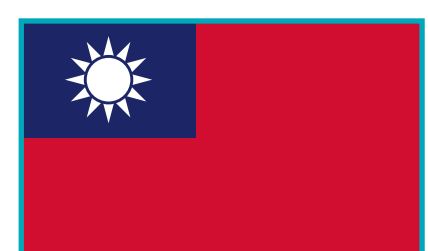
Lifetime Value (LTV) KRW / USD

Estimated total contribution of a donor to their chosen cause

2021 Outlook

Moving into 2021, non-profits in Korea should look into optimising resources allocated to both Acquisition and Retention activities. These can take the form of (but not limited to):

- Using existing data to inform on the best acquisition sites (e.g. an overlay of your location data to retention data to see where your highest value donors are).
Further finetuning of retention practices to minimise leakages (marginal gains).
Active building of alternative fundraising channels that do not rely on Face-to-Face agencies, allowing for quick shifts in resources to follow the trend of COVID-19 reported cases.
Exploring ways to extend the contributions of lapsed donors through reactivation.



SG Support Profile in Taiwan

Operations in Taiwan started in October 2017, and has had continuous growth, even through the COVID-19 period.

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At the start of the pandemic, Taiwan was ahead of the curve, reporting low volumes of COVID-19 cases. As a result, our non-profit partners in Taiwan have managed to consistently continue the acquisition of new donors, as evidenced by the management of a healthy Donor Ratio.

With steady approval rates, our non-profit partners in Taiwan should look into venturing into more alternative forms of fundraising to support future growth.

2020

Highlights

- SG Support's overall transactions of donations for our non-profit partners increased by 27% from the previous year.
- Our SG Support client portfolio increased and we welcomed a new partner to our SG Support family.
- Began venturing alternative fundraising avenues, utilising digital and telemarketing opportunities.

Challenges

- Setbacks in the renewal of fundraising licenses for some of our non-profit partners, impacting the ability to recruit new donors.

Growth over the years

Active Base

Number of donors actively contributing gifts as of Year-End

Net Growth

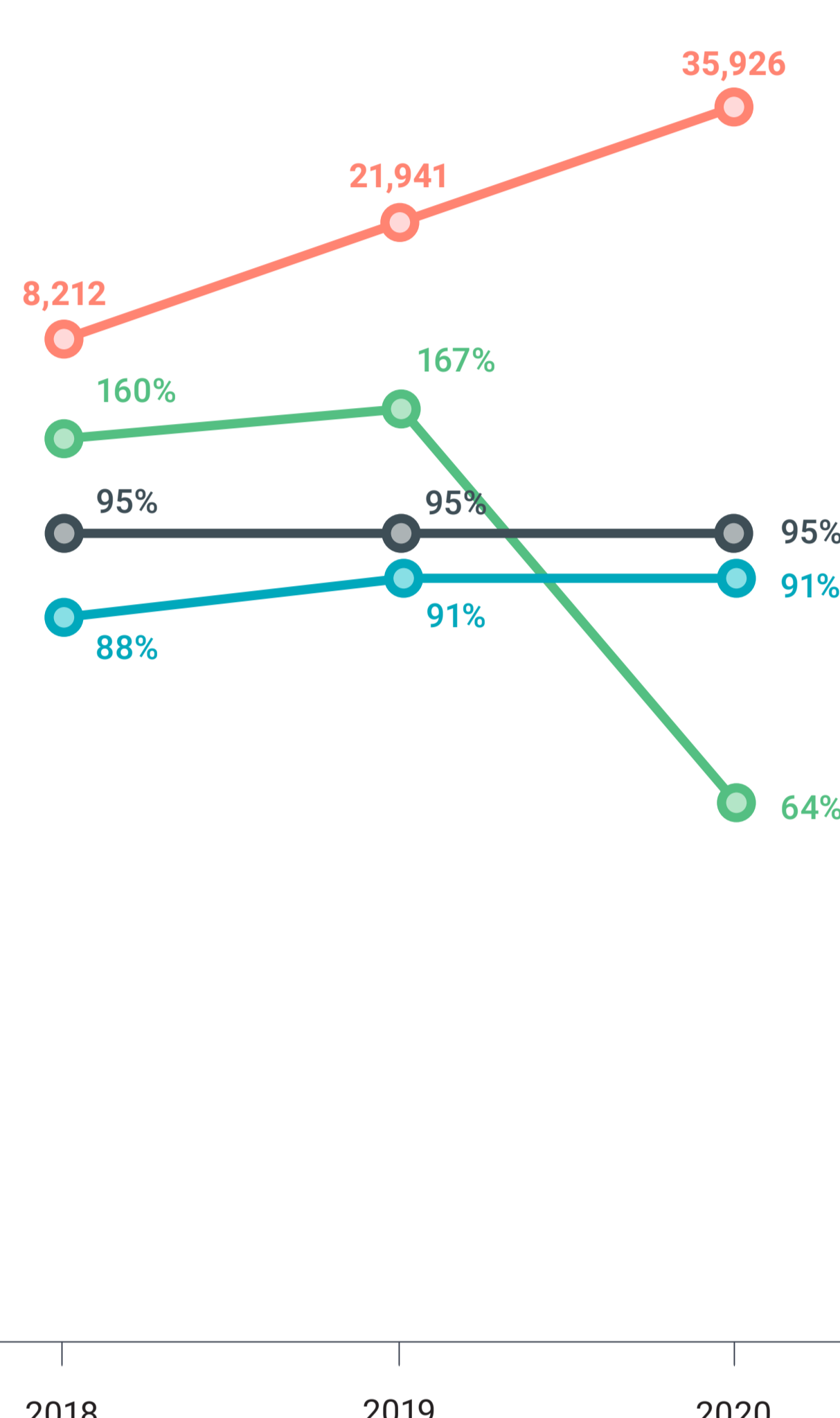
Donor base growth from the Start of the Year to Year-End

Approval Rate by First Debit

Percentage of donors successfully transacted on their first debit

Approval Rate by Anniversary

Percentage of donors successfully transacted on their second debit and onwards



TWD 114,222,695

USD 4,076,608

Donations Processed

(TWD)
Total donations generated for non-profit partners in TWD

(USD)
Total donations generated for non-profit partners in USD

2018

2019

2020

TWD 26,473,730

USD 944,847

TWD 234,331,901

USD 8,363,306

2020 in Numbers

42%

Donor Ratio

Percentage of Donors Cancelled over New Donors acquired

TWD 662
USD 24

Average Gift TWD / USD

Average monthly contribution (gift) per donor

24 months

Average Lifespan

Average number of months a donor will give to a cause they love

TWD 15,234
USD 544

Lifetime Value (LTV) TWD / USD

Estimated total contribution of a donor to their chosen cause

2021 Outlook

Our non-profit partners in Taiwan should look into the continued growth of their donor base and prioritise the next steps based on short-term goals vs. long-term goals to support strategic acquisitions. Is the short-term goal supportive of a low volume but high-valued donor?

In maintaining the Donor Ratio, non-profits in Taiwan should look into:

- Review of retention practices to minimise leakages (marginal gains).
- Layered acquisition strategy, allowing Taiwan to learn from others navigating fundraising through COVID-19.
- Consider what is important to your non-profit in the long run (volume or value of donors) - consider short term sacrifices in KPI's for long-term gain.



SG Support Profile in Thailand

SG Support Thailand was launched in August 2007 and is currently SG Support's third-biggest market in terms of donor base, with 8 charity partners as of 2020.

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As one of SG Support's top three markets, the challenges brought on by the pandemic were further exacerbated in Thailand with public unrest and declarations of State of Emergency. With the placement of movement restrictions in Bangkok; the closure of malls and key sites led to a halt on Face-to-Face fundraising activity and non-profits needed to get creative to continue the supply of new donors. As a consequence, some non-profits explored fundraising road trips to upcountry areas of Thailand to help add to their donor base although, it was not enough to outpace a growing attrition rate.

However, as a result of the limited Face-to-Face fundraising that could take place, charities in Thailand were quick to move resources into alternative fundraising channels, which supported cushioning the impacts of COVID-19 on fundraising efforts.

In ensuring a healthy pipeline of new donors, non-profits in Thailand would need to look into further supporting the optimisation of Face-to-Face acquisition (when they can take place), to support pushing numbers beyond the capacity of alternative fundraising channels, such as (but not limited to):

- 1. Supporting recruiter negotiations at high-value acquisition sites.
2. Prioritising sites that have provided the best long-term ROI (value over volume).
3. Looking into contact-free Face-to-Face sign-up processes.

2020

Highlights

- Non-profits in Thailand managed to successfully diversify their channels of acquisition to provide contingency in these unprecedented times.
Non-profits in Thailand secured new media partnerships to help elevate their presence in the fight against COVID-19.
Telemarketing proves itself as a channel worth growing (true for in-house teams and external partners).

Challenges

- Acquisition struggles to outpace the number of donors stopping their donation (Attrition).
Acquisition agencies struggle with momentum to recruit donors in Bangkok (previously a key province for donor recruitment). This results in recruitment now coming from other provinces where the donor profiles look slightly different.
The year of 2020 has seen a decrease in the overall average lifespan of a donor as part of the economic impact of COVID-19.

Growth over the years

Active Base

Number of donors actively contributing gifts as of Year-End

Net Growth

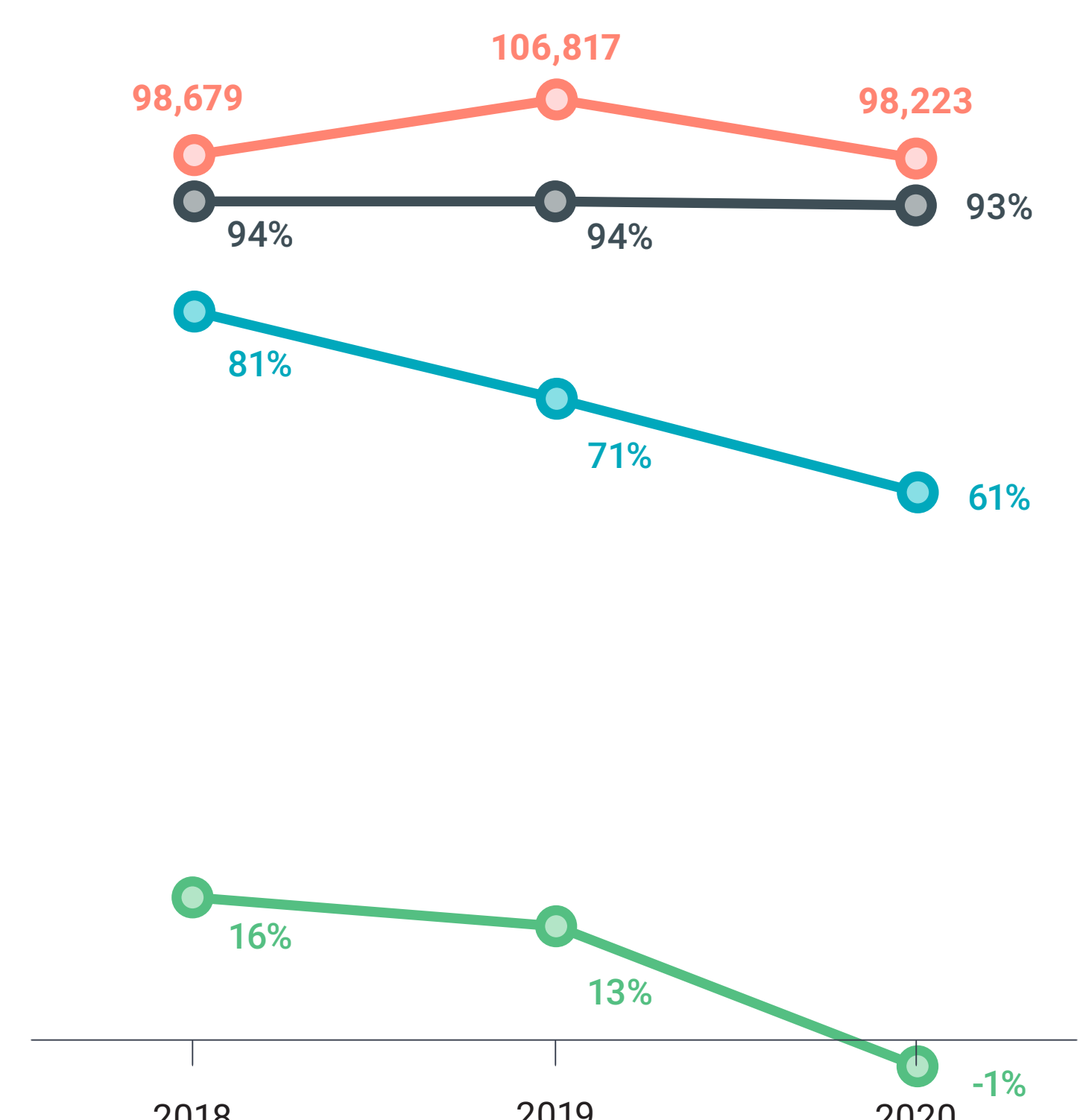
Donor base growth from the Start of the Year to Year-End

Approval Rate by First Debit

Percentage of donors successfully transacted on their first debit

Approval Rate by Anniversary

Percentage of donors successfully transacted on their second debit and onwards



THB 584,885,134

USD 19,490,712

Donations Processed

(THB) Total donations generated for non-profit partners in THB
(USD) Total donations generated for non-profit partners in USD

THB 577,295,297

USD 19,237,788

THB 522,620,088

USD 17,415,792

2020 in Numbers

70%

Donor Ratio

Percentage of Donors Cancelled over New Donors acquired

THB 546
USD 18

Average Gift THB / USD

Average monthly contribution (gift) per donor

24 months

Average Lifespan

Average number of months a donor will give to a cause they love

THB 11,591
USD 386

Lifetime Value (LTV) THB / USD

Estimated total contribution of a donor to their chosen cause

2021 Outlook

Moving into 2021, charities in Thailand should look into maintaining the donor base and positioning for the longer-term view of growth. This may require a review of current business rules to optimise current acquisition practices, such as (but not limited to):

- Reviewing recruitment of younger donors and different payment methods.
Supporting recruitment channels in optimising their sign-up sites.
Looking at more contact-free Face-to-Face sign-up methods.

Thank you

