

# **ANNUAL REPORT 2021**

**Reimagining  
How We Make  
Fundraising Easy**



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# Message from the CEO

Richard Prentice



2021 was another challenging year for most industries and the fundraising sector was certainly not exempt from this. Unfortunately, many of the recruitment channels that underpin charities' sustainability and growth were again massively hampered by the ongoing restrictions of the pandemic. That said, there are many positives to be grateful for and the resilience of regular give donors is very much one of these.

Despite obvious challenges, we've seen approval rates (payment success rates) remain strong in all markets, we've seen no significant uplift in attrition rates for those donors who are already giving and in general we've seen average gifts increase slightly throughout the year. All of these factors again highlight the importance of charities building their own regular give donor bases. Our experience is that those charities who already have these bases have seen income levels remain far more stable and, in some cases, still continue to grow.

At SG Support, as we look towards 2022, our focus will be to provide charity partners with more options, more flexibility. Historically, we've focused on developing a holistic approach to donor stewardship – owning all aspects of the donor journey to maximise the opportunities for continuity and leverage the benefits of seeing the whole giving picture. Whilst we still see this approach as optimal, we recognise that for some charities, having the flexibility to choose the services most essential to them and being able to integrate SG in a more modular approach, may be beneficial to them. This new approach will see SG work in partnership with more third-party CRMs, payment providers and communication platforms. In doing so, it is my hope that SG will be able to allow even more charities to benefit from our unique market position, fundraising products and experience.

Hope to see you all soon.

RP

**We Listen.**  
**We Analyse.**  
**We Communicate.**  
**We Make**  
**Fundraising**  
**Easy.**

Since our founding in 2008, SG Support has been guided by a belief in the power of collaboration and the idea that working in partnership with charities to grow their regular give campaigns will bring about lasting change.

In the past year, we were inspired by those who continued to advocate for accountability and change in the world, while grappling with the effects of the pandemic. We witnessed the relentless effort and commitment from our charity partners to ensure that aid continued to be channelled to those in our communities who were in need, despite the unexpected challenges the year brought.

Our values guide our actions, which is why we are constantly looking for ways to provide new and better fundraising solutions, and improve our existing offerings, so our charity partners can focus on their missions. We are proud and honoured to have been able to support these great organisations to meet their fundraising goals with our end-to-end donor acquisition and retention programmes.

While we are proud of what we have achieved, our work is not done. We are committed to continually innovating solutions to make fundraising easy in a post-covid world for non-profits everywhere.



# 2021 At A Glance

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**\$156,011,558**

Donations Collected

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**9,678,745**

Transactions Processed

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**290,741**

New Recurring Donors

# A Year Of Making Fundraising Easy

Never has our purpose been so pivotal than in the past year, with the continued disruption of face-to-face acquisition in many markets, coupled with natural disasters, political unrest, and regulatory changes putting additional pressures on donor base retention.

Fortunately, we were better prepared this time around, not just to respond to unexpected situations but to be one step ahead. The strength of our operating processes and the resilience of our teams ensured that donations could continue to be processed in a secure and timely manner from any remote location. In 2021, we collected \$156 million worth of donations and processed more than 9 million charitable transactions for over 60 charities across 14 countries.

Mobilising alternative acquisition and retention strategies meant reimagining what it means to be “hands-on” at a time that required flexibility and innovation. In the past year, we challenged ourselves to think out of the box to find new ways to reach donors and help them support the causes they love. We provided our non-profit partners with timely, data-driven insights to help with reactivating face-to-face campaigns, setting up alternative fundraising channels, and making sense of individual giving trends in their respective markets. No matter the method, our aim is to bring charities and donors a little closer using a donor-focused programme in support of our broader fundraising engagement initiatives.



## Seamless Payments

Payment processing is at the heart of every regular give programme, and at SG Support, we are constantly looking for new ways to optimise billing cycles and increase approval rates. With Project Phoenix, we set out to test non-intrusive changes to the billing process which aimed to improve long-term approval rates and, by extension, donors' giving lifecycles.

Spanning three markets and twelve months, the tests yielded valuable insights on payment card approvals, recovery rates after donation lapses, intelligence on failed collections and the potential for incremental LTV from selected donor segments.



## Digital Expansion

The fundraising sector has been on a journey of digital transformation in recent years, and we are committed to supporting charities in seamlessly adapting to digital technologies. SG Support's new digital donor acquisition platform, signUP, is a cloud-based contactless tool which allows fundraisers to use QR codes to sign up new donors. In the past year, we've completed successful tests in Malaysia and Korea.

signUP has the potential to increase piece rates for face-to-face fundraisers, allow charities to receive donations faster, provide better cash-flow, and reduce cancellation before first debits. In an environment where donors were sheltering at home and face-to-face acquisition was disrupted, we enabled charities to pivot to a hybrid model of digital acquisition. In the past year, we have helped charities test and optimise digital-led donor acquisition campaigns, providing the starting point for additional revenue streams.



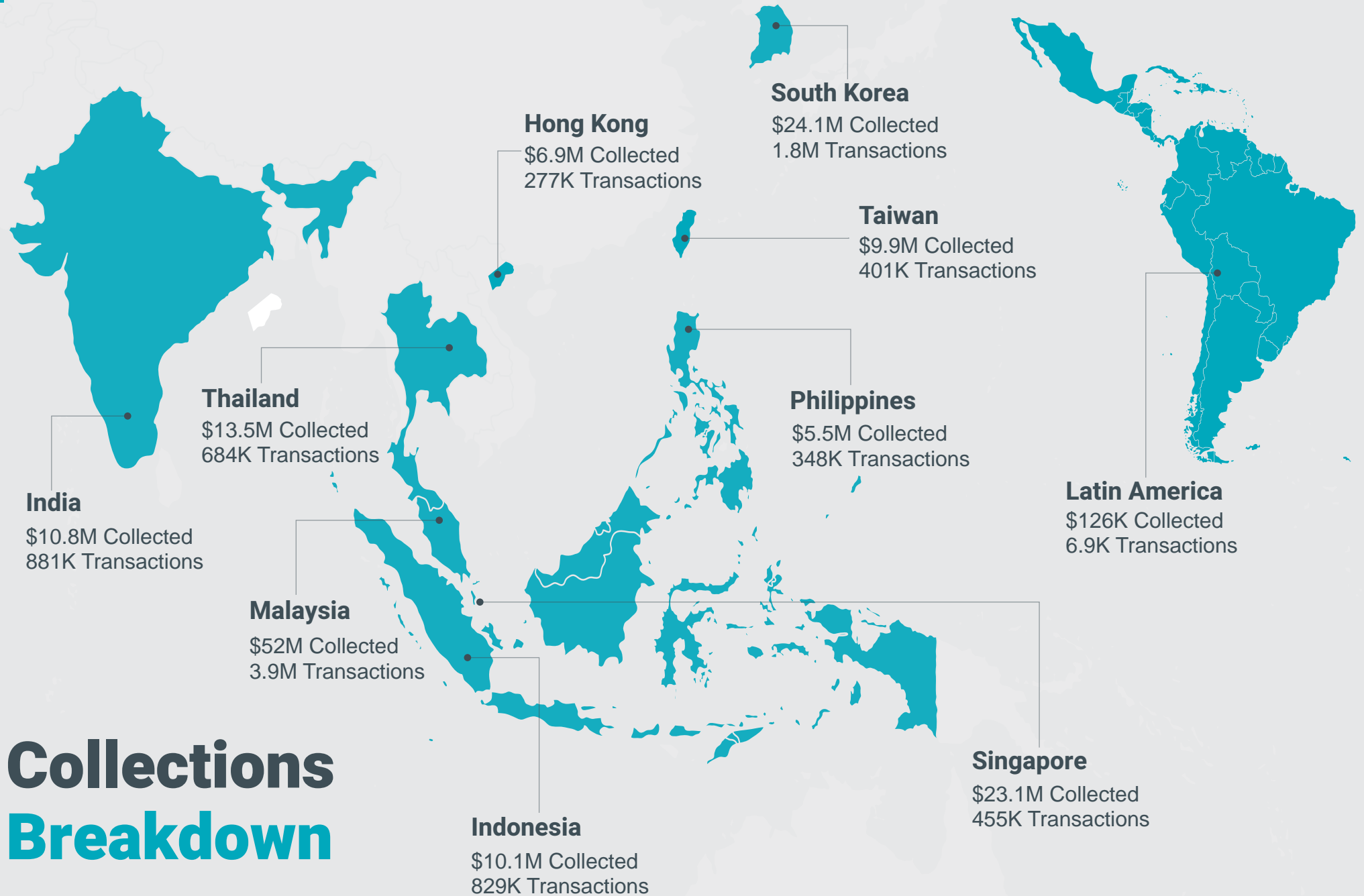
SURVIVAL RATES OF REGULAR GIVE DONORS  
(MALAYSIA)

	Volume of Donors	Year 1	Year 2	Year 3	Year 4	Year 5
2015	66,215	83%	69%	60%	54%	48%
2016	66,264	82%	68%	59%	52%	47%
2017	63,722	86%	72%	63%	56%	48%
2018	74,109	85%	72%	63%	54%	
2019	87,666	82%	69%	59%		
2020	70,629	79%	65%			

## Data Excellence Model

We believe that localised, data-driven fundraising decisions drive results. Our data experts are constantly developing a variety of data models to improve fundraising decision-making and ultimately increase campaign ROIs. Our newly developed retrospective cohort analysis for retention, Donor Survival Rate, helps charities understand the percentage of donors that can be expected to continue to be active givers in the years following their first gift.

Our showcase study of the Malaysian donor base highlighted that donor cohorts acquired in pre-pandemic years remained largely loyal in 2020 (the pandemic onset). The Donor Survival Rate model could shed light on whether donor cohorts acquired during the pandemic (2020 and 2021) may exhibit lower retention rates in years to come. These insights could help charities better predict long-term campaign ROIs and devise targeted retention strategies.



**Together,  
We Learn,  
Adapt and  
Evolve**



# An Unwavering Commitment

No matter the challenges the year presented, we held firm to our core promises.

## Customer-Focused

We understand the challenges in fundraising and strive to provide solutions so our charity partners can go out and change the world.

## Expertise

Knowledge is power. And we are passionate about sharing what we know with others, because together, we are so much stronger.

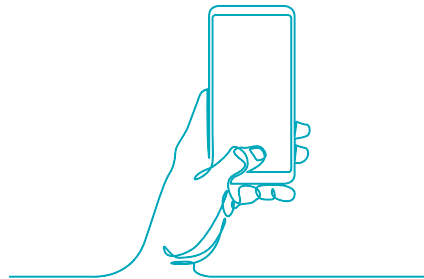
## Results

In banner years and through difficult times, our charity partners can trust us to take care of the operational nitty gritty and deliver on goals.



# Breaking It Down

We are constantly evolving our donor retention practices to respond to changing donor profiles, giving trends, as well as technological and environmental advances. However, the overarching purpose is always to provide every donor with the best possible giving experience so they can continue to support the causes they care about. This means communicating clearly and accurately about how their gifts are making a difference, using the right channels, at the right time. In 2021, across 14 countries, we reached out to donors via:



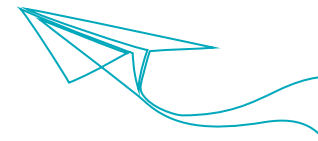
**880,667**

SMS



**543,588**

Calls

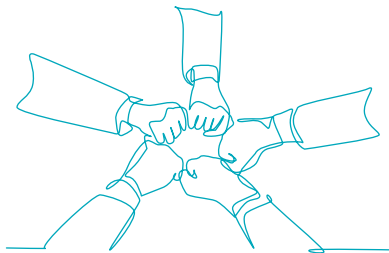


**9,827,979**

Emails

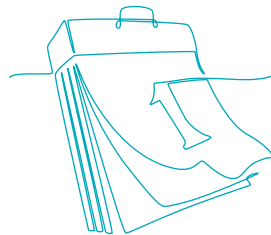
# Lift Others **As We Grow**

Our mission is to make fundraising easy for our charity partners so they can do their best work, helping those in need. And it is our talented, dedicated employees who make this happen, day after day. People are at the centre of everything we do. We believe that our people are our best asset and we strive to ensure we remain a dynamic, inclusive and fun place to work.



**40**

New Staff Joined the Fold



**17**

Staff Celebrated 10 Years & Above



**653**

Days in a Hybrid Work Environment

# Making Fundraising Easy... And Accessible to All

As we emerge from the pandemic and look to the future, our focus will be to provide enhanced, modular fundraising solutions which address the needs of the 21st century non-profit. The age of the digital-first donor requires integrated systems and data-driven strategies. In addition, as the donor giving cycle matures, it is imperative that we look for ways to optimise the results of retention interventions through rapid test-and-learn models.

Key developments in the pipeline for 2022 include:

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API integration with third-party platforms such as Salesforce to allow for seamless and rapid data exchange between SG and charities

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Integrated donor acquisition solutions including QR code sign-up and POS debit capabilities

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Contact centre optimisation including advanced data segmentation and standardisation of reporting metrics.

We are immensely grateful for the continued trust our charity partners put in us and for the spirit of partnership that fuels the good work we do together. The fundraising sector is at the cusp of an exciting new era and we are hopeful that our commitment to innovate and adapt will help power non-profits into the next level.

# MALAYSIA

**Population size: 33.1 million**  
**GDP: USD 337 billion**



# 2021 Summary

In 2021, there were two major lockdowns imposed in Malaysia, causing face-to-face fundraising activities to halt for extended periods of time. Coronavirus-driven macroeconomic factors and the country's worst flooding in years impacted donors' propensity to give, resulting in steady but low donor acquisition numbers for most of the year. Although the acquisition rate was sedate, our telemarketing campaigns provided Malaysian charities with additional first-time donors.

On the upside, Malaysia's stable approval rates, coupled with attrition that was constant, helped drive an overall positive donor base growth. Additionally, the average gift value increased from RM57 in 2020 to RM60 in 2021, which directly increased the total donations collected for charities. Donor acquisition also looked to be bouncing back with strong showings in the final months leaving room for some optimism going into 2022.

# Payment Success Rates

## 2021



## 2020



## 2019



### First Debit Approval Rate

Percentage of Donors Successfully  
Transacted on their first debit

### Anniversary Approval Rate

Percentage of Donors Successfully  
Transacted on their second debit  
and onward

# Total Donations Processed

**2021**

MYR 216,434,284

USD 51,952,020

**2020**

MYR 204,515,478

USD 50,671,368

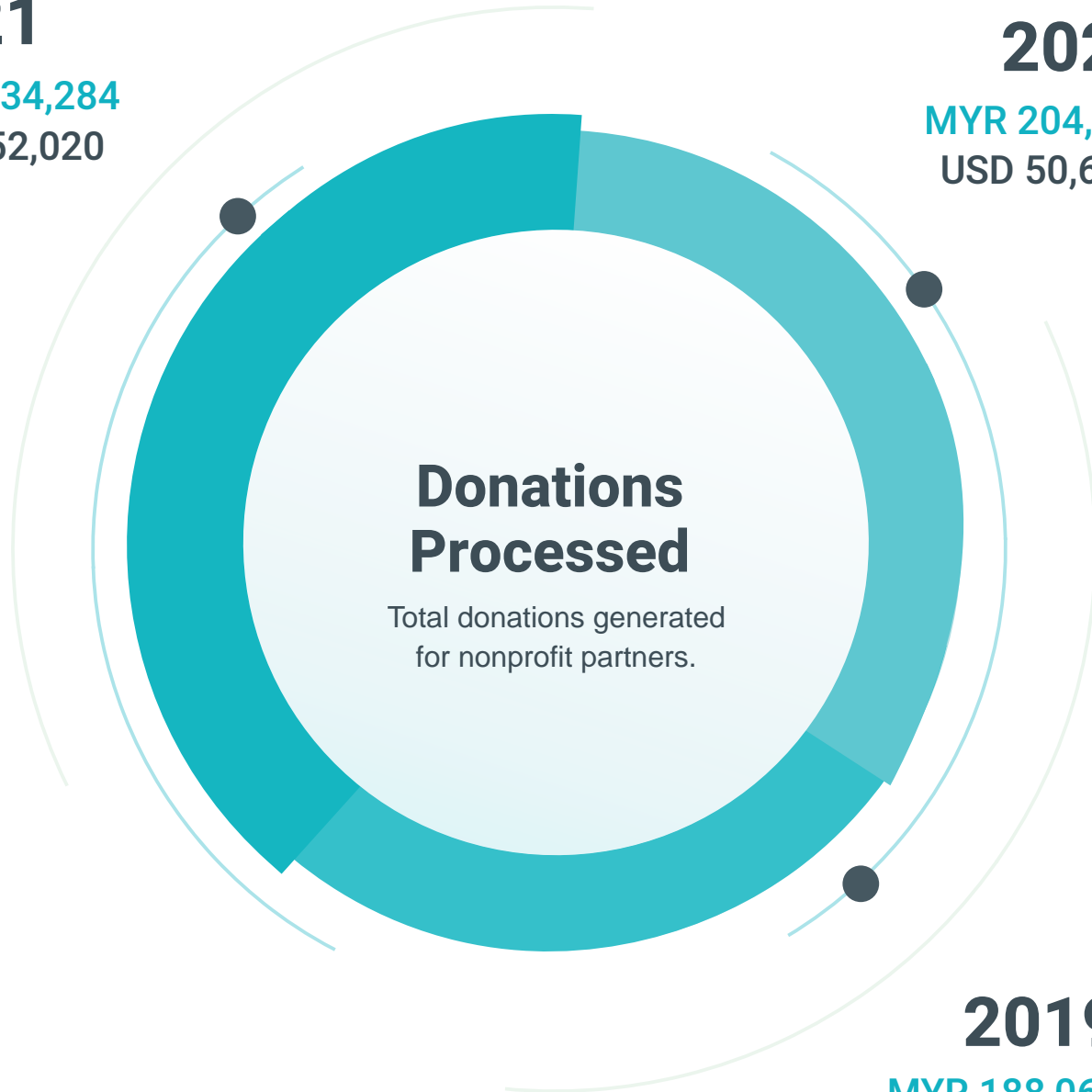
## Donations Processed

Total donations generated  
for nonprofit partners.

**2019**

MYR 188,067,922

USD 46,596,273



# 2021 In Numbers

**MYR 60**  
**USD 14**

Average Gift  
MYR/USD

Average monthly  
contribution (gift) per donor

**MYR 1,921**  
**USD 461**

Lifetime Value (LTV)  
MYR/USD

Estimated total contribution of a  
donor to their chosen cause

**44**

Average Lifespan  
(Months)

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

**59,717**

New Donors

Number of new recurring  
donors acquired



# 2022 Outlook

The focus of Malaysian charities will be on bouncing back strong with face-to-face acquisition in 2022 as agencies continue scaling up field operations. Charities that heavily rely on single-channel donor recruitment will need to look into channel diversification. Given the possibility of another coronavirus wave, it is critical to consider implementing an omnichannel fundraising model to mitigate the potential impact of face-to-face being halted again.

Moreover, we observed that non-profits that embraced the diversification of donor recruitment channels achieved an overall positive growth despite the difficult year. In sum, strong approval rates and positive macroeconomic indicators point toward a year of recovery for our flagship market.



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Prashanth Ashok



# INDONESIA

Population size: 278.5 million  
GDP: USD 1 trillion



# 2021 Summary

In 2021, we saw charities ramping up in-house donor acquisition as a response to the continued absence of donor recruitment agencies in the country due to border restrictions. Although the volume of donor acquisition improved in 2021 compared to the previous year, other key metrics such as average gift and first debit approval rates were still under pressure as new in-house teams adapted to the steep learning curve. Despite this, overall first debit approvals improved, largely driven by the more established face-to-face campaigns. Recruitment pressures in 2020 and 2021 also limited opportunities for investing into other acquisition channels.

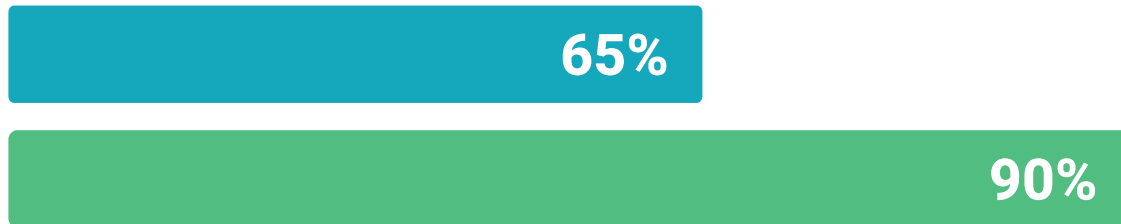
Attrition remained constant throughout the year, narrowing the donor base negative growth gap, with several months of growth leading into the new year. In addition, the donor ratio (the ratio of cancellations to newly approved donors) and recurring debit approval rates held constant, primarily driven by an overall economic recovery, as well as the impact of process optimisation in the contact centre and debit processing spaces.

# Payment Success Rates

## 2021



## 2020



## 2019



### First Debit Approval Rate

Percentage of Donors Successfully  
Transacted on their first debit

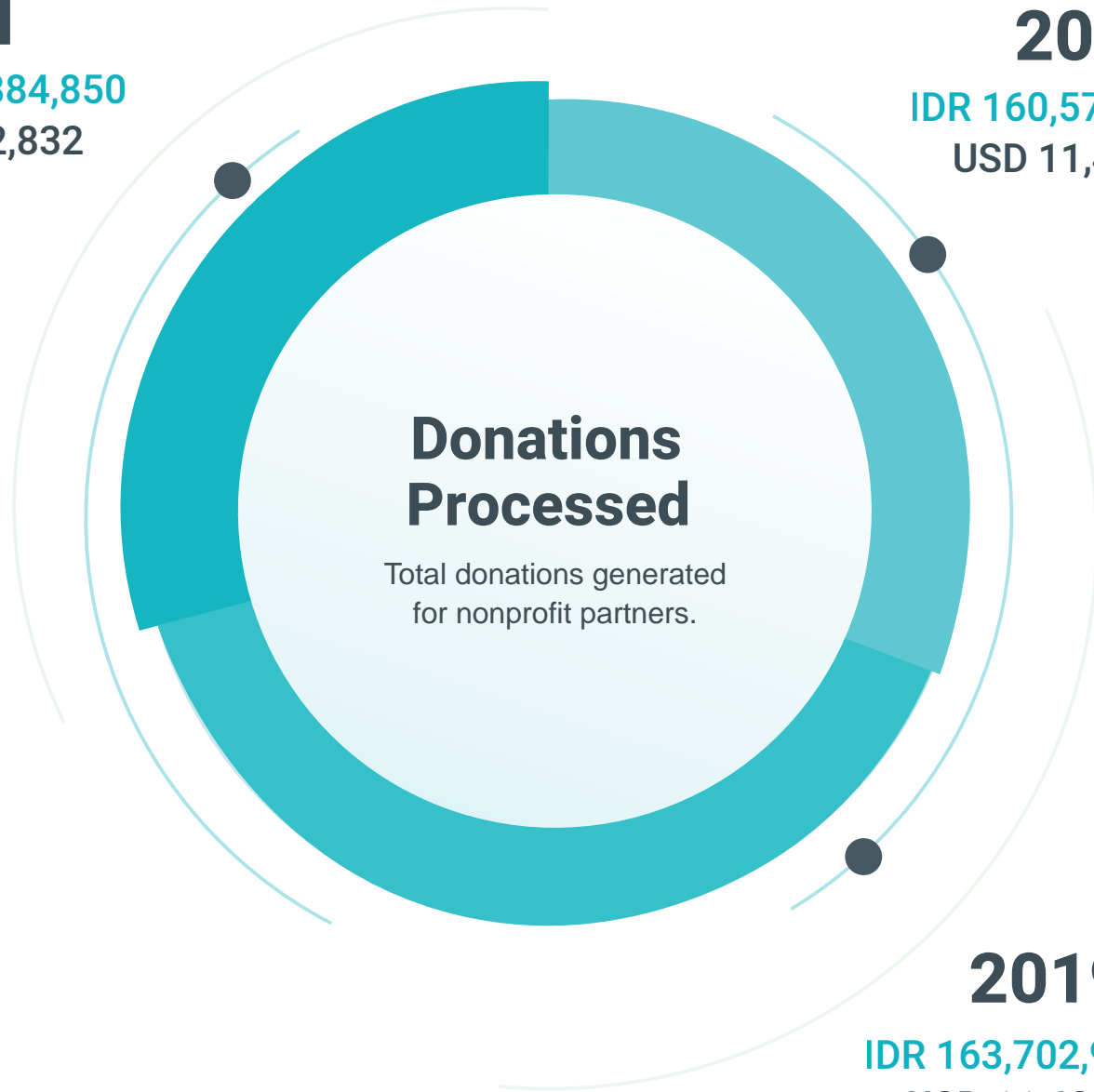
### Anniversary Approval Rate

Percentage of Donors Successfully  
Transacted on their second debit  
and onward

# Total Donations Processed

**2021**  
IDR 143,611,884,850  
USD 10,052,832

**2020**  
IDR 160,579,080,085  
USD 11,401,115



**2019**  
IDR 163,702,903,916  
USD 11,622,906

# 2021 In Numbers

**IDR 142,956**  
**USD 10**

Average Gift  
IDR/USD

Average monthly  
contribution (gift) per donor

**IDR 3,108,251**  
**USD 218**

Lifetime Value (LTV)  
IDR/USD

Estimated total contribution of a  
donor to their chosen cause

**31**

Average Lifespan  
(Months)

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

**17,067**

New Donors

Number of new recurring  
donors acquired



# 2022 Outlook

The return of recruitment agencies is still uncertain in 2022 but we expect to see more recruitment upside as long as there are no further lockdowns. Further analysis is key for in-house recruitment teams as they graduate out of the startup phase. Given some room for budget, charities are likely to start taking on some risk with testing new retention treatments, as well as investing in alternative recruitment channels.



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Ellen Chua We-Wen



# PHILIPPINES

Population size: 112 million  
GDP: USD 361.4 billion

# 2021 Summary

Charities in the Philippines had to work hard to stand still in 2021 due to the relatively flat donor acquisition and attrition rate. Underwhelming donor acquisition was driven by some of the strictest lockdowns in the region, as well as a reshuffling of agencies within the acquisition space.

On the upside, charities and recruiters were quick to adapt to the increasing alert levels in Metro Manila by moving into provincial areas. Surprisingly, the expected decline in average gift from this move did not materialise. This opened more possibilities in the context of future face-to-face sites and their growth prospects. Moreover, charities with existing face-to-face acquisition channels managed to grow their donor bases despite the challenging fundraising environment.

On the other hand, Typhoon Rai (local name: Odette), which caused widespread destruction towards the end of 2021, contributed towards lower face-to-face acquisition as key territories were rendered inaccessible. It also hindered telemarketing efforts as donors were either affected by the typhoon or fundraising for the victims themselves. Re-strategising elements of the campaigns, such as database segmentation, proved to be key towards managing performance through this difficult period.

# Payment Success Rates

## 2021



## 2020



## 2019



### First Debit Approval Rate

Percentage of Donors Successfully  
Transacted on their first debit

### Anniversary Approval Rate

Percentage of Donors Successfully  
Transacted on their second debit  
and onward

# Total Donations Processed

**2021**

PHP 278,391,516

USD 5,451,463

**2020**

PHP 267,047,161

USD 5,560,723

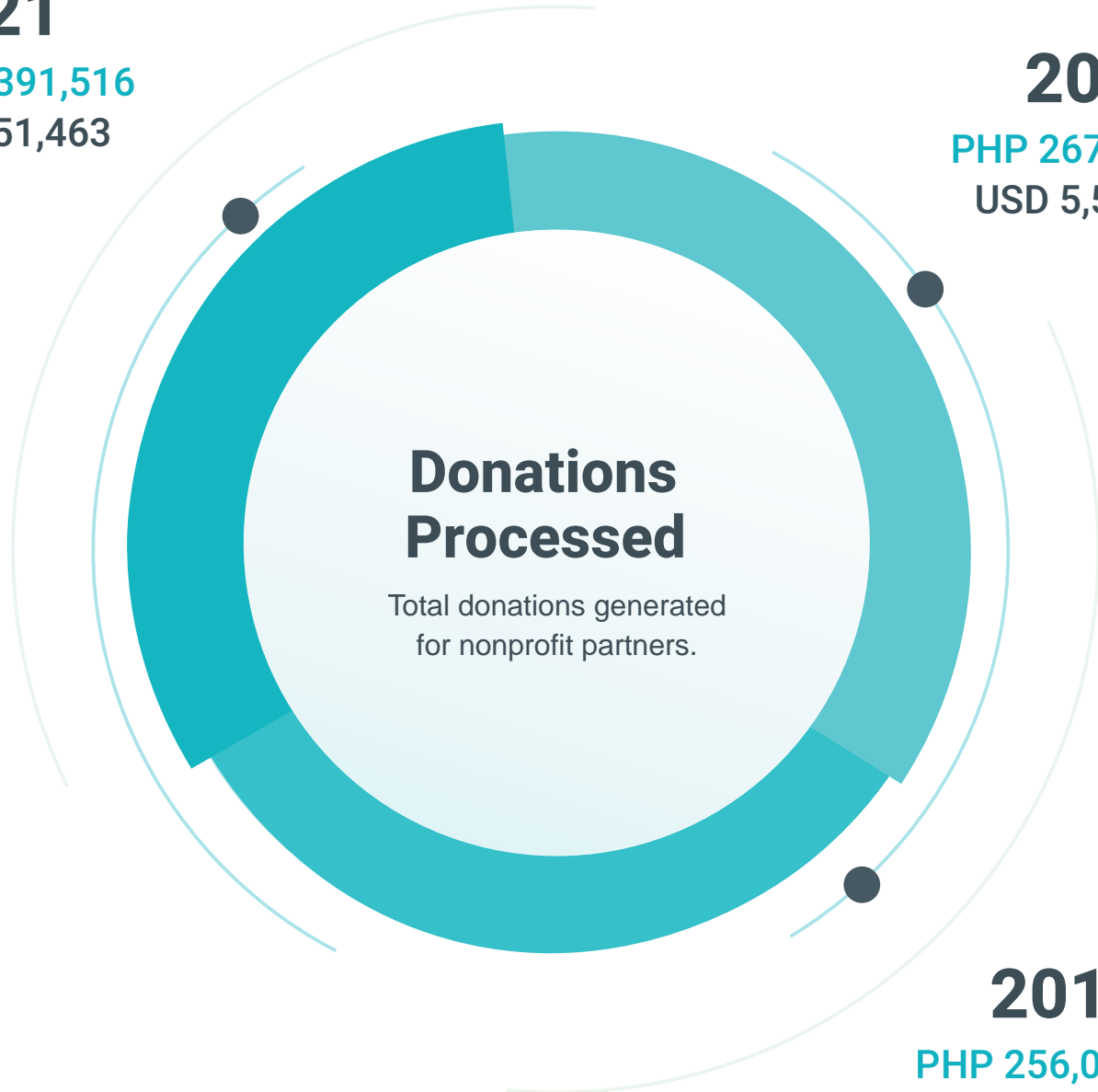
## Donations Processed

Total donations generated  
for nonprofit partners.

**2019**

PHP 256,040,665

USD 5,331,535



# 2021 In Numbers

**PHP 874**  
**USD 17**

**Average Gift**  
**PHP/USD**

Average monthly  
contribution (gift) per donor

**PHP 18,651**  
**USD 365**

**Lifetime Value (LTV)**  
**PHP/USD**

Estimated total contribution of a  
donor to their chosen cause

**28**

**Average Lifespan**  
**(Months)**

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

**14,827**

**New Donors**

Number of new recurring  
donors acquired



# 2022 Outlook

In 2022, charities that do not have an existing face-to-face campaign are urged to strongly consider activating this acquisition channel as it is by far the most effective method for bringing in new donors. Given the cessation of key recruitment partners in the Philippines, it is critical for charities to build up in-house donor recruitment capability and optimise retention practices to avoid suffering from a “leaky bucket.” Nonprofits and recruiters can also look to leverage SG Support’s contactless digital acquisition tool, signUP, to improve face-to-face donor recruitment capabilities, including the potential for the first debit at the point of sale.



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Wilbur Chin



# HONG KONG

Population size: 7.6 million  
GDP: USD 363 billion

# 2021 Summary

Fundraising activities in Hong Kong were among the least impacted by the coronavirus pandemic, a trend that continued from 2020 into 2021. Hong Kong had the highest recurring debit approval rates and one of the highest first debit approval rates among SG-partnered markets. However, disruption came in the form of political unrest. In spite of this, charities were able to continue with face-to-face fundraising consistently. Relatively consistent donor acquisition numbers, coupled with a steady attrition rate, meant our Hong Kong nonprofit partners were able to maintain a positive donor base growth throughout the year.

# Payment Success Rates

## 2021



## 2020



## 2019



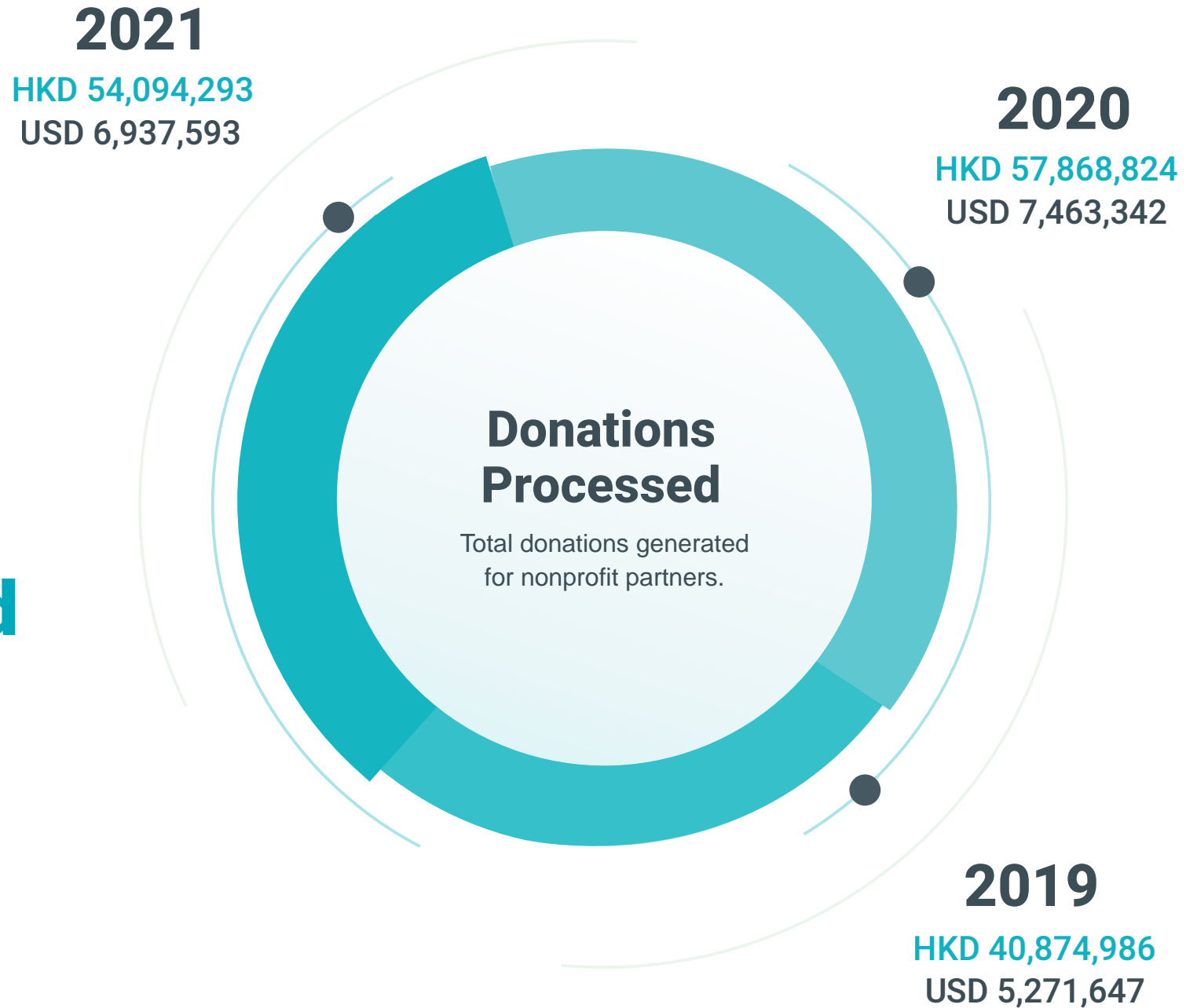
### First Debit Approval Rate

Percentage of Donors Successfully  
Transacted on their first debit

### Anniversary Approval Rate

Percentage of Donors Successfully  
Transacted on their second debit  
and onward

# Total Donations Processed



# 2021 In Numbers

**HKD 180**  
**USD 23**

**Average Gift**  
**HKD/USD**

Average monthly  
contribution (gift) per donor

**HKD 4,217**  
**USD 541**

**Lifetime Value (LTV)**  
**HKD/USD**

Estimated total contribution of a  
donor to their chosen cause

**34**

**Average Lifespan**  
**(Months)**

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

**10,441**

**New Donors**

Number of new recurring  
donors acquired



# 2022 Outlook

Political unrest, perhaps more so than the coronavirus pandemic, posed a significant challenge for Hong Kong nonprofits, which curtailed budgets and halted street fundraising from time to time. Strong partnerships with new face-to-face recruitment agencies played an important role in contributing to new donor acquisition numbers. In 2022, charities in Hong Kong can focus on building alternative acquisition channels to supplement face-to-face donor recruitment in the event of any further halts. In addition, they can look to strengthen donor loyalty programmes and activate donor reactivation campaigns to revive lapsed donors through an omnichannel approach, combining digital acquisition and telemarketing.



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Younsuk Nha

# **SOUTH KOREA**

**Population size: 51.3 million**  
**GDP: USD 1.6 trillion**

# 2021 Summary

Korea had a strong donor acquisition year and achieved its highest donor acquisition month of the coronavirus pandemic era in the second half of 2021. In addition, our Korean charity partners committed to managing diversified fundraising strategies, including telemarketing and digital, that helped shore up acquisition and drive donor base growth. First debit approvals improved considerably, buoyed by the performance of TM and digital donors, while recurring debit approval rates remained constant. Moreover, there was a significant improvement in the donor ratio, which implies that fewer donors were cancelling relative to new donors signing up in Korea.

# Payment Success Rates

## 2021



## 2020



## 2019



### First Debit Approval Rate

Percentage of Donors Successfully  
Transacted on their first debit

### Anniversary Approval Rate

Percentage of Donors Successfully  
Transacted on their second debit  
and onward



# Total Donations Processed

**2021**

KRW 28,691,382,866  
USD 24,100,762

**2020**

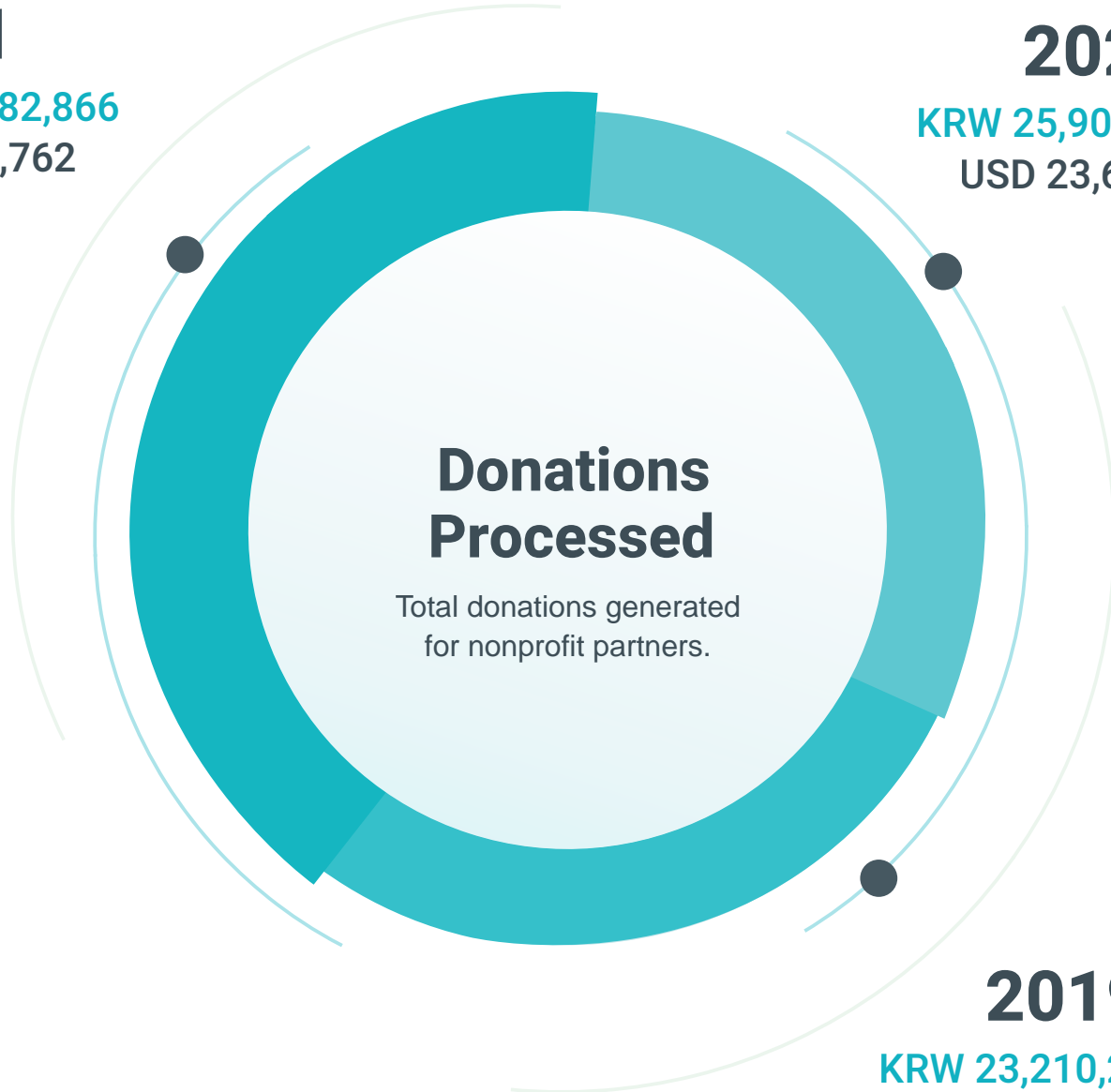
KRW 25,906,568,130  
USD 23,626,790

## Donations Processed

Total donations generated  
for nonprofit partners.

**2019**

KRW 23,210,286,490  
USD 21,167,781





# 2021 In Numbers

**KRW 23,914**  
**USD 20**

Average Gift  
KRW/USD

Average monthly contribution  
(gift) per donor

**KRW 617,856**  
**USD 519**

Lifetime Value (LTV)  
KRW/USD

Estimated total contribution of a  
donor to their chosen cause

**36**

Average Lifespan  
(Months)

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

**49,666**

New Donors

Number of new recurring  
donors acquired

# 2022 Outlook

Fundraising in Korea seems to be on the road to recovery, and new donor acquisition should be picking up in 2022. We expect the trend of setting up multichannel donor acquisition to continue growing in Korea in 2022 as more charities look to the opportunities in acquiring donors besides face-to-face recruitment.

For the shorter term, our nonprofit partners could consider taking advantage of our contactless and digital acquisition tool, signUP, to improve face-to-face recruitment capabilities and the donor experience. Charities could also look to optimise their omnichannel acquisition and retention strategies, specifically leveraging on telemarketing and digital fundraising.



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Younsuk Nha



# THAILAND

Population size: 70.1 million  
GDP: USD 501.6 billion

# 2021 Summary

Compared to other markets in SG Support's portfolio, Thailand was the most severely pandemic-affected in 2021, and new donor acquisition proved to be a real challenge, being outpaced by donor attrition for the better part of the year. To mitigate the low signups in urban areas, face-to-face fundraisers explored upcountry regions of Thailand that were traditionally low-footfall areas. Dealing with a relatively different donor profile and limited knowledge of regular giving programmes, fundraisers were kept on their toes by having to build social awareness and educate the public about the value of regular giving.

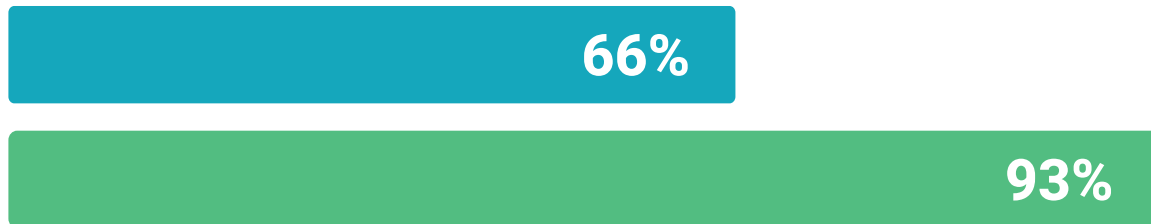
On a positive note, we saw a donor acquisition uptrend in the last quarter of 2021, which was expected to continue into 2022. In fact, donor acquisition increased in December 2021 compared to December 2020. Charities in Thailand were quick to explore alternative fundraising methods and channels in the early days of the coronavirus pandemic, which put them in good stead towards re-establishing consistency in donor acquisition and rebuilding their donor bases in the months to come.

# Payment Success Rates

## 2021



## 2020



## 2019



### First Debit Approval Rate

Percentage of Donors Successfully Transacted on their first debit

### Anniversary Approval Rate

Percentage of Donors Successfully Transacted on their second debit and onward

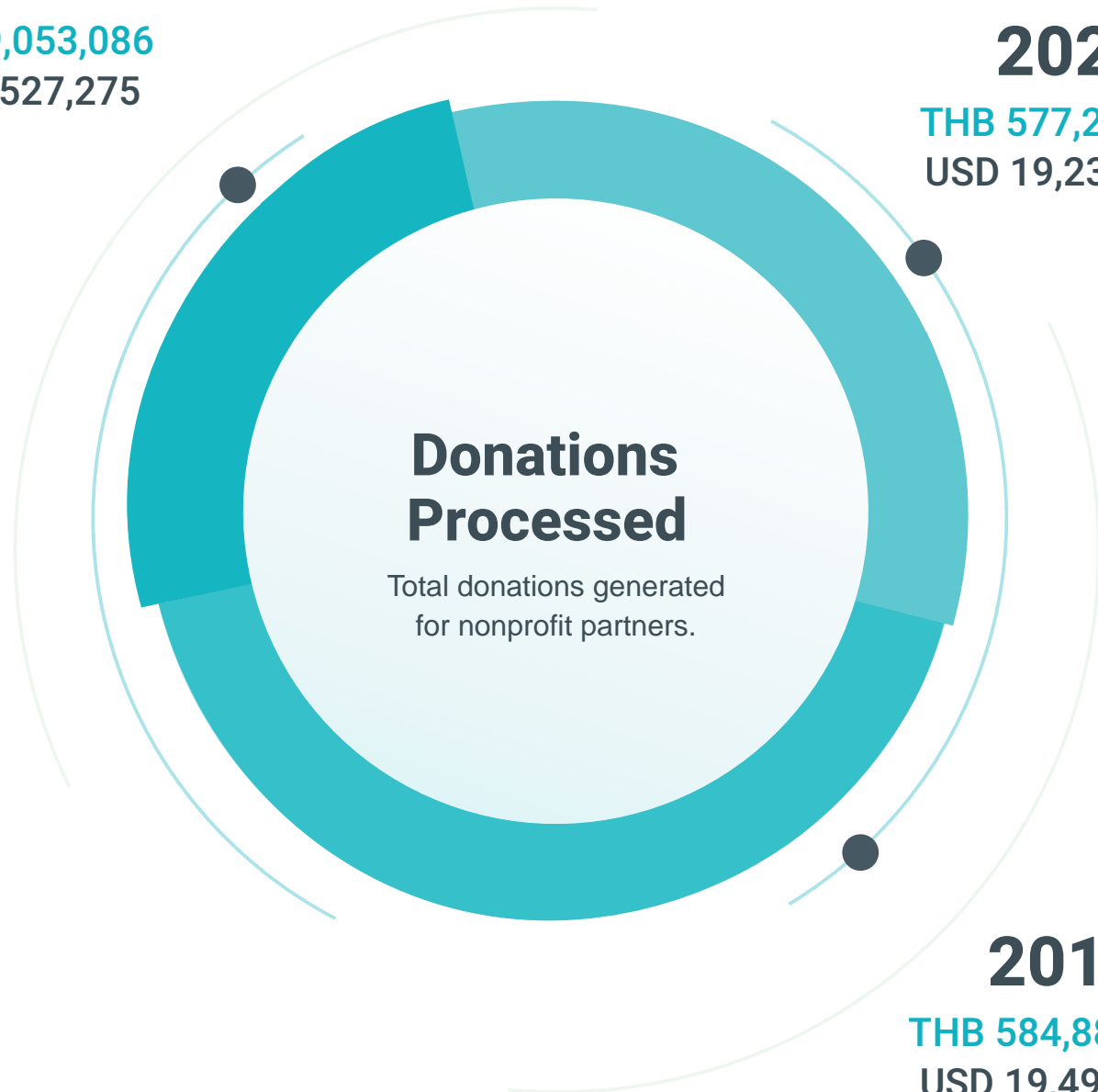


# Total Donations Processed

**2021**  
THB 449,053,086  
USD 13,527,275

**2020**  
THB 577,295,297  
USD 19,237,788

**2019**  
THB 584,885,134  
USD 19,490,712



# 2021 In Numbers

**THB 578**  
**USD 17**

Average Gift  
THB/USD

Average monthly  
contribution (gift) per donor

**THB 12,052**  
**USD 363**

Lifetime Value (LTV)  
THB/USD

Estimated total contribution of a  
donor to their chosen cause

**27**

Average Lifespan  
(Months)

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

**23,420**

New Donors

Number of new recurring  
donors acquired

# 2022 Outlook

In 2022, charities in Thailand should consider looking into strategies that strengthen their abilities to rebuild and retain their donor bases with a view to longer-term growth. This could include supporting recruitment channels in optimising acquisition practices, adopting contactless face-to-face signup methods, as well as strengthening donor journeys and interventions to retain the most valued donor segments. In addition, the Personal Data Protection Act will be coming into force in Thailand on 1 June 2022. Hence, our nonprofit partners should expect to allocate resources towards auditing and complying with data security rules.



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Ellen Chua We-Wen



# SINGAPORE

Population size: 5.9 million  
GDP: USD 339.9 billion

# 2021 Summary

Close to non-existent face-to-face donor acquisition since mid-2020 continued through much of 2021 in Singapore. Stop-gap acquisition campaigns were predominantly through telemarketing although the volumes were low. There were still some positive trends – first debit and recurring donation approval rates improved, which implies the success of the 6-month reject window rule that was implemented since 2020. In addition, charities that implemented telemarketing conversion programmes ended the year strongly after a quiet first half.

There were also some major efforts towards donor retention and recovery, including redialling uncontacted donors for conversion, testing new telephony software and solutions to improve calling success, and mapping a seamless donor journey for the one-off donor segment to increase conversion rates.

On the other hand, the lack of channel diversification primarily caused charities a significant acquisition gap sans face-to-face fundraising. The need to set aside funds for operational and programmatic continuity diverted resources away from testing new channels.



# Payment Success Rates

## 2021



## 2020



## 2019



### First Debit Approval Rate

Percentage of Donors Successfully  
Transacted on their first debit

### Anniversary Approval Rate

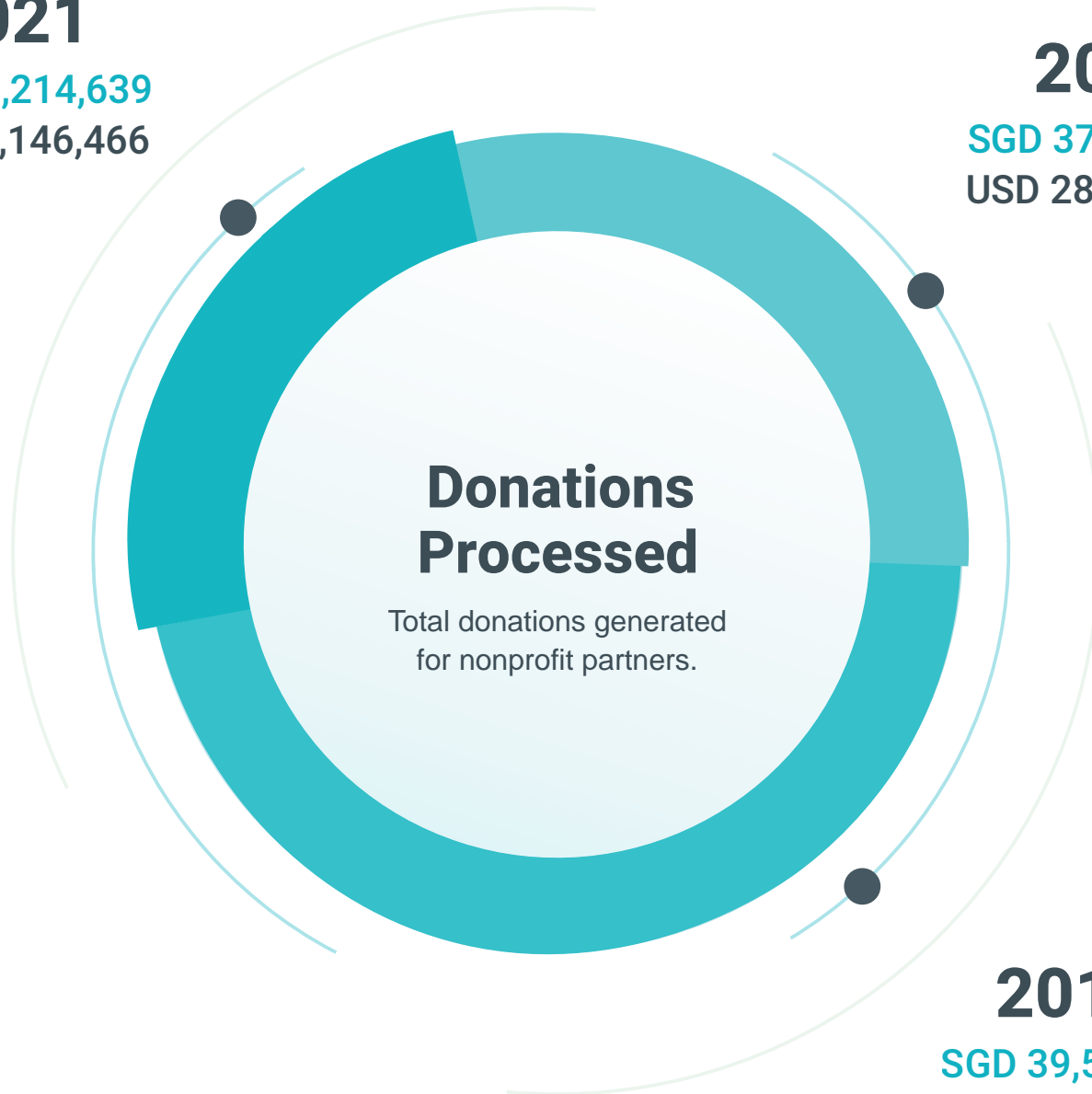
Percentage of Donors Successfully  
Transacted on their second debit  
and onward

# Total Donations Processed

**2021**  
SGD 31,214,639  
USD 23,146,466

**2020**  
SGD 37,777,031  
USD 28,490,757

**2019**  
SGD 39,589,467  
USD 29,857,663



# 2021 In Numbers

**SGD 33**  
**USD 24**

Average Gift  
SGD/USD

Average monthly  
contribution (gift) per donor

**SGD 2,065**  
**USD 1,531**

Lifetime Value (LTV)  
SGD/USD

Estimated total contribution of a  
donor to their chosen cause

**42**

Average Lifespan  
(Months)

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

**1,302**

New Donors

Number of new recurring  
donors acquired

\*Average donation, LTV and average lifespan have been aggregated  
over 2020-2021 to normalise for the period of low acquisition.

# 2022 Outlook

In 2022, a long-term donor acquisition strategy should therefore be a strategic priority for Singaporean charities. Charities will need to work closely with recruiters and fundraisers to drive donor acquisition, implement new test-and-learn initiatives, and secure donations from their existing donor bases.

Some recommended activities include:

- Conversion programmes to leverage on one-time donors to support regular giving.
- Reactivation of past donors through telemarketing and digital marketing campaigns.
- Improvement of omnichannel donor experience and retention programmes to retain existing donors.

Our past tests have shown that one-off donors are reacting positively towards long-term giving and display a willingness to donate more. Therefore, devising a strategy around a higher gift value is also worth considering in 2022.



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# TAIWAN

**Population size: 23.9 million**  
**GDP: USD 668 billion**

# 2021 Summary

Face-to-face recruitment was brought to a near halt in Taiwan due to a partial lockdown in mid-2021. However, donor acquisition seemed to recuperate, albeit slowly, ending the year on an uptrend.

Despite the setback, Taiwan's first debit and recurring approval rates, which are among the highest in the region, remained steady throughout the year. Given this, it helped hold donor base and income streams steady. In addition, we welcomed MSF, also known as Doctors Without Borders, into SG's fold, where we will be supporting them with telemarketing and DRTV campaigns to drive regular giving.

# Payment Success Rates

## 2021



## 2020



## 2019



### First Debit Approval Rate

Percentage of Donors Successfully  
Transacted on their first debit

### Anniversary Approval Rate

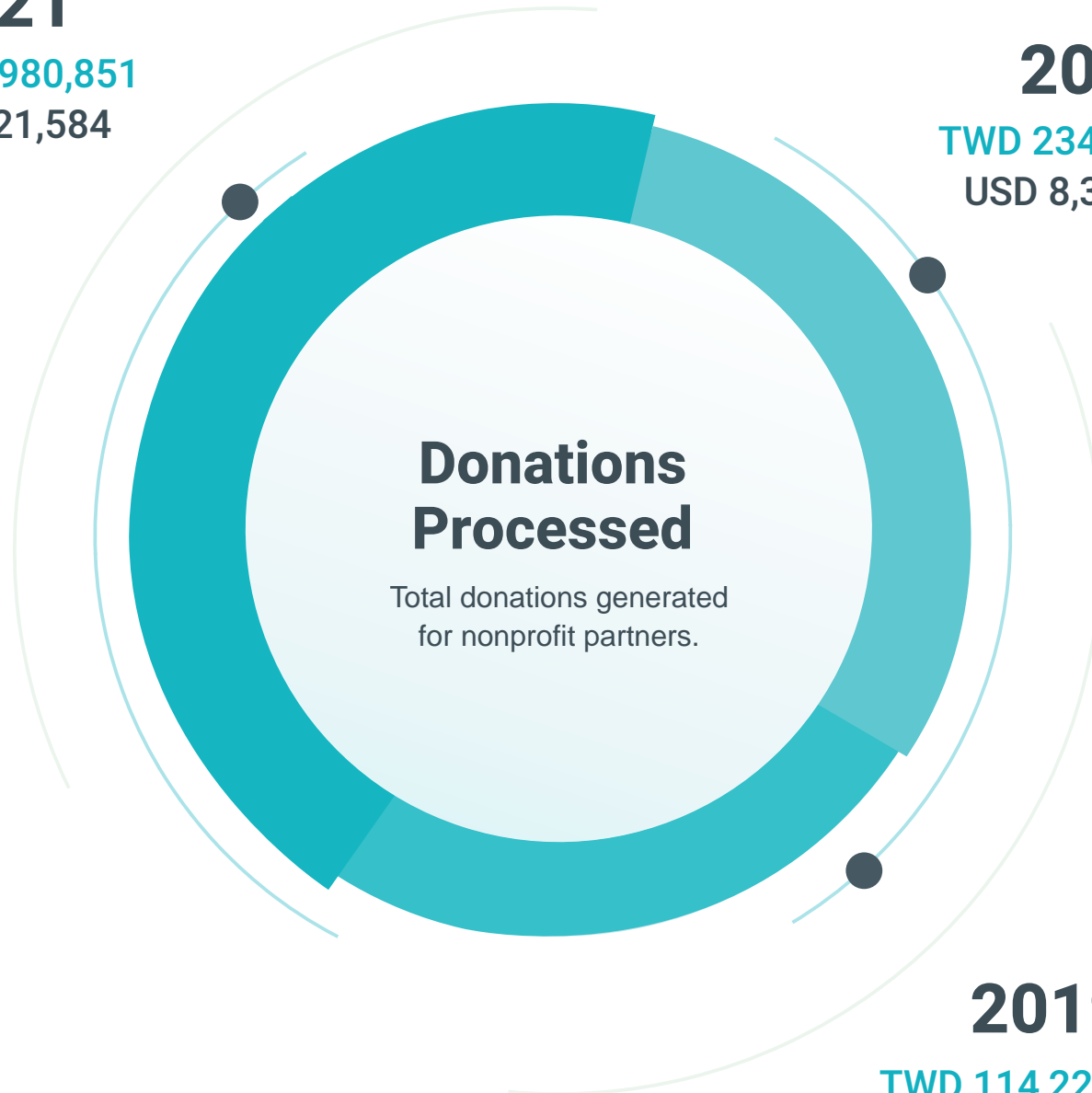
Percentage of Donors Successfully  
Transacted on their second debit  
and onward

# Total Donations Processed

**2021**  
TWD 274,980,851  
USD 9,921,584

**2020**  
TWD 234,331,901  
USD 8,363,306

**2019**  
TWD 114,222,695  
USD 4,076,608





# 2021 In Numbers

**TWD 661**  
**USD 24**

Average Gift  
TWD/USD

Average monthly  
contribution (gift) per donor

**TWD 12,999**  
**USD 444**

Lifetime Value (LTV)  
TWD/USD

Estimated total contribution of a  
donor to their chosen cause

**22**

Average Lifespan  
(Months)

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

**12,808**

New Donors

Number of new recurring  
donors acquired

# 2022 Outlook

In 2022, our nonprofit partners in Taiwan will be looking to support their face-to-face acquisition partners in scaling up recruitment to pre-lockdown levels. With robust donor acquisition prospects and excellent approval rates driving optimism in the acquisition space, charities in Taiwan can look to focus on optimising retention strategies to increase donor loyalty and realise incremental gains from their existing databases. Charities can also consider allocating some budget towards testing alternative acquisition channels, such as telemarketing and digital fundraising.



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Tang Chin Shuo



# INDIA

Population size: 1.4 billion  
GDP: USD 2.66 trillion

# 2021 Summary

Despite a severe and prolonged lockdown as well as banking regulation changes by the Reserve Bank of India (RBI), India had the highest donor base growth among SG-partnered countries in 2021. Logging impressive new donor acquisition numbers and some best-in-class regular giving approval rates, India remained a crucial and dynamic fundraising market. Our charity partners were quick to respond to environmental challenges and coupled with committed third-party fundraisers and retention support from SG Support, 2021 proved to be a challenging yet surprising year in India.

However, attrition remains a challenge that was exacerbated by the economic impact of the coronavirus pandemic as donors diverted their disposable incomes towards savings. Additionally, RBI rule changes, which require platform compliance and multiple pre-and post-transaction notifications, resulted in a significant and ongoing disruption to the processing of card-based monthly pledges.



# Payment Success Rates

## 2021



## 2020



## 2019



### First Debit Approval Rate

Percentage of Donors Successfully  
Transacted on their first debit

### Anniversary Approval Rate

Percentage of Donors Successfully  
Transacted on their second debit  
and onward

# Total Donations Processed

**2021**

INR 804,254,198  
USD 10,795,504

**2020**

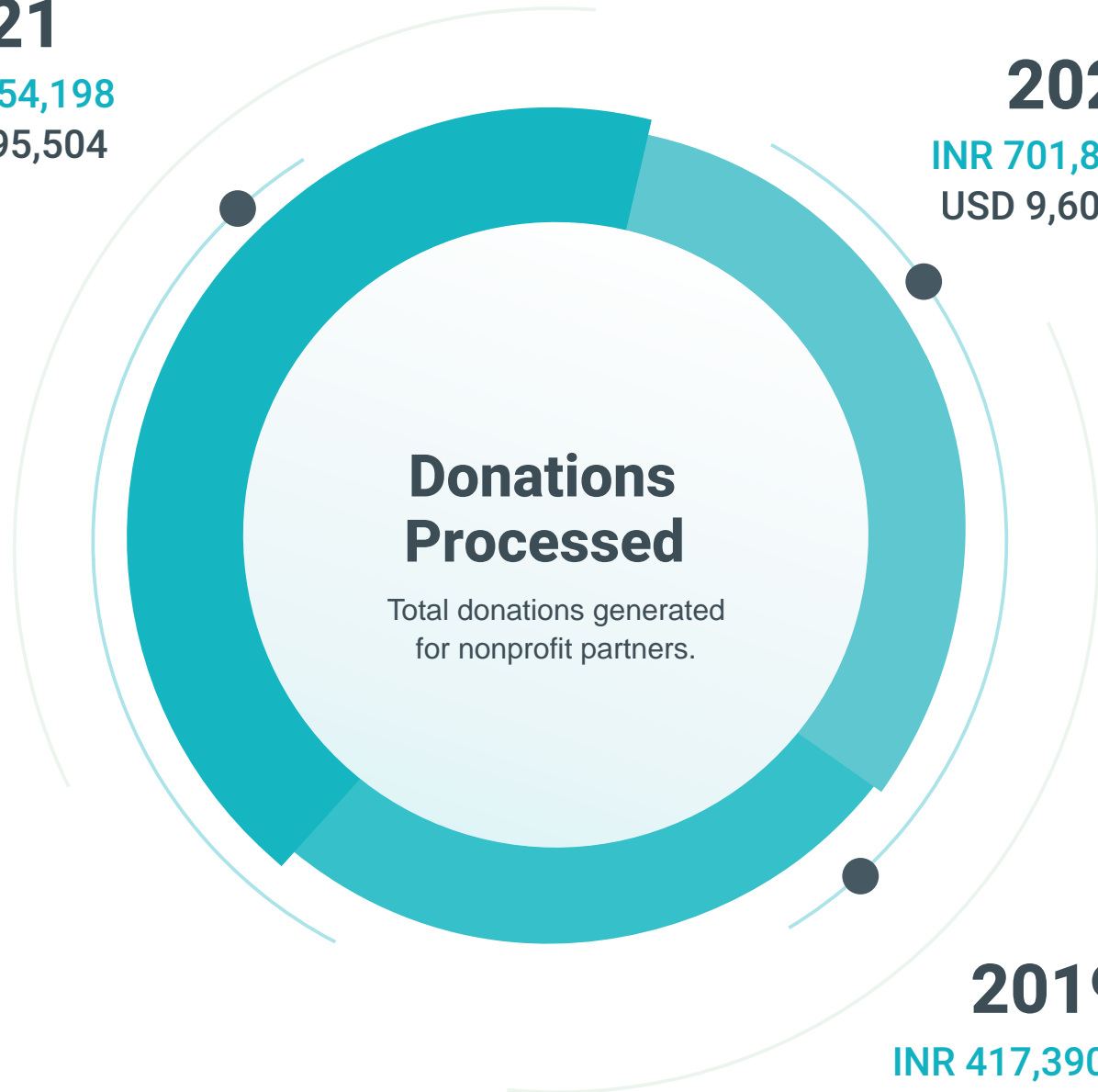
INR 701,848,618  
USD 9,604,096

## Donations Processed

Total donations generated  
for nonprofit partners.

**2019**

INR 417,390,155  
USD 5,711,567



# 2021 In Numbers

**INR 767**  
**USD 10**

**Average Gift**  
**INR/USD**

Average monthly  
contribution (gift) per donor

**INR 12,212**  
**USD 164**

**Lifetime Value (LTV)**  
**INR/USD**

Estimated total contribution of a  
donor to their chosen cause

**24**

**Average Lifespan**  
**(Months)**

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

**99,148**

**New Donors**

Number of new recurring  
donors acquired

# 2022 Outlook

In 2022, charities will start to feel the pinch as the impact of the banking rule changes on donor attrition, specifically card-based recurring donors, becomes more evident. The development sector is resting the prospect of acquiring card-based pledges temporarily until there is more clarity around credit cards as a channel for setting up standing instructions. Our nonprofit partners will then need to focus on adapting donor acquisition and retention practices that comply with these changes. Charities will have to consider looking into dedicating resources towards acquiring bank account donors, retaining existing donors, and recovering those who have lapsed or opted out.



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Rinky Singh



# LATIN AMERICA

Population size: 664 million  
GDP: USD 4.7 trillion

# 2021 Summary

In the past year, we continued to support key non-profit partners' expansion of their regular give programmes in Latin America, with the activation of face-to-face fundraising in the Dominican Republic leading to a clear inflection point in donor acquisition around August 2021. Major milestones included successfully completing a legacy base migration project which had been ongoing since 2020 and launching a localised online donation page.

Telemarketing campaigns provided another acquisition stream in the region, albeit at lower volumes than face-to-face. In addition, we welcomed Special Olympics Guatemala to the SG fold.

# 2021 In Numbers

**USD 14**

Average Gift  
USD

Average monthly  
contribution (gift) per  
donor in USD

**USD 555**

Lifetime Value (LTV)  
USD

Estimated total contribution of a  
donor to their chosen cause in USD

**61**

Average Lifespan  
(Months)

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

**2,345**

New Donors

Number of new recurring  
donors acquired



# 2022 Outlook

While it is too early to predict long-term trends, our charity partners in Latin America will be focusing on scaling up their face-to-face fundraising activities, telemarketing and digital acquisition campaigns across 2022. As with any new activation, they would look to focus resources on optimising bank processing rules, as well as donor loyalty programs to anchor their donor retention strategies. We will be closely monitoring the results of one such effort, specifically around debit processing rules to optimise the time between a successful transaction and the next attempt, aimed at improving overall approval rates and providing a better donor experience. As with any new market entry, we are committed to working with our charity partners to identify and provide solutions to operational and strategic challenges to ensure they meet their fundraising goals.



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# Together, We Can Make Fundraising Easy.

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