

Individual Giving Study 2021

November 2021



Content Page

1. Research Overview
2. Executive summary
3. Key Findings
4. Further Analysis
5. Appendix



Research Overview and Objectives

Since 2000, the Individual Giving Study has guided non-profit organisations, government, community partners and the wider society to better understand the state of individual giving in Singapore. The following report is based on the 10th edition of the study.

Started in
2000

2004

2018

2021

Expansion of scope to understand donation behaviour

Initiated Silver V Study to understand the giving landscape for seniors

Refreshed content to understand giving landscape & motivations

IGS 2021 OBJECTIVES



GIVING BEHAVIOURS

What is the volunteering & donation rate in Singapore?



GIVING DRIVERS

Why are people motivated to give in Singapore?



GIVING CULTURE

Define opportunities to drive giving culture in Singapore

Research Design



PARTICIPANTS

n = 2,004

Singapore Citizens / PRs (15 years or older) & Employment Pass / Dependent Pass / Student Pass / Work Permit / S Pass Permit aged 15 years or older



INTERVIEW

Average length: 30 minutes

Survey questionnaire offered in 3 languages – English, Chinese and Malay.



SAMPLING

Department of Statistics Singapore

Stratified random sampling of dwellings in Singapore by geographic region



METHODOLOGY

Face-to-face interviews

Options to respond to the survey over Zoom (n = 87) or online questionnaire (n = 177) due to COVID-19 fears



FIELDWORK

8 April to 17 September 2021

Temporary halt due to phase 2 heightened alert (P2HA) between 18 May to 16 June 2021



ASSESSMENT

Valid & Reliable for use in Singapore

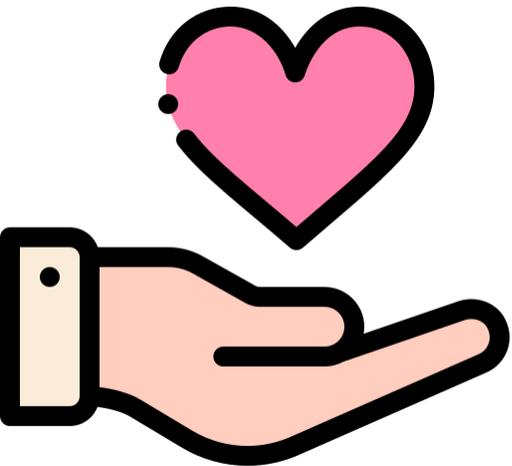
Cronbach Alpha > .7
Confirmatory Factor Analyses to prove tools are valid for use in Singapore's context and culture

Volunteer Definition

Volunteering

can be defined as

activities you do out of your own free will, without expecting financial payment, to help others outside of your household, family, relatives or friends



Formal

Volunteering with registered organisations.

For example, helping through places of worship or charities (e.g. The Salvation Army, Thye Hua Kwan Moral Charities).

Informal

Helping directly, without going through any registered organisation.

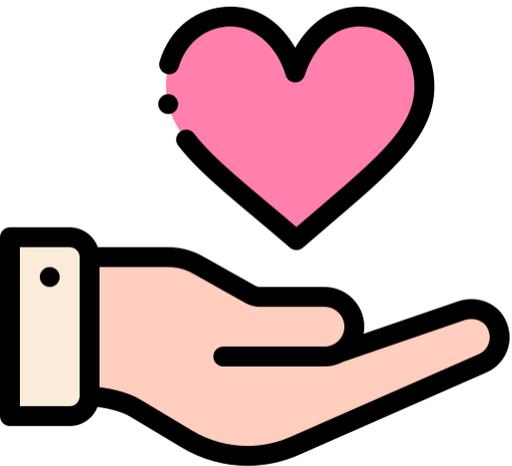
For example, delivering food to homeless people or setting up a group to help others

Excludes

Compulsory community work such as Values In Action (VIA), Community Involvement Programme (CIP) in schools and Corrective Work Order (CWO), unless compulsory volunteer hours are exceeded.

Acts such as giving up your seat on public transport

Donor Definition



Donating

can be defined as

giving money out of your own free will, without expecting financial payment, to help others outside of your household, family, relatives or friends

Formal

Donating through registered organisations.

For example, donating to places of worship or charities (e.g The Salvation Army, Thye Hua Kwan Moral Charities).

Informal

Helping directly, without going through any registered organisation.

For example, donated directly to others (e.g homeless).

Excludes

Compulsory payment of payment such as paying fines or taxes

Payroll deductions which are automatically set up to self-help groups (i.e CDAC, Eurasian Association, Mendaki, SINDA).

Executive Summary

- 1** While there was a decline in volunteerism and donation rate, the giving landscape is showing promise despite of the COVID-19 pandemic. Over 1 in 2 individuals state that they were likely to donate or volunteer in the future. There were also more frequent and consistent donations.
- 2** While offline channels remain the main method to give, online giving has seen a substantial increase. There is a need to cater to digital giving by enhancing virtual volunteering and online donation channels. There is opportunity to boost digital giving and anticipate shift towards hybrid giving.
- 3** Acceleration in informal individual and community-led giving initiatives. There is a need to sustain informal giving while exploring opportunities to encourage other ways of giving.
- 4** Givers are more welfare-focused than before with a 10% increase in donations and volunteerism to the social service sector. It is important to aid in the recovery of less-supported sectors.

Key Finding # 1

While there was a decline in volunteerism and donation rate, the giving landscape is showing promise despite of the COVID-19 pandemic.

Over 1 in 2 individuals state that they were likely to donate or volunteer in the future. There were also more frequent and consistent donations.

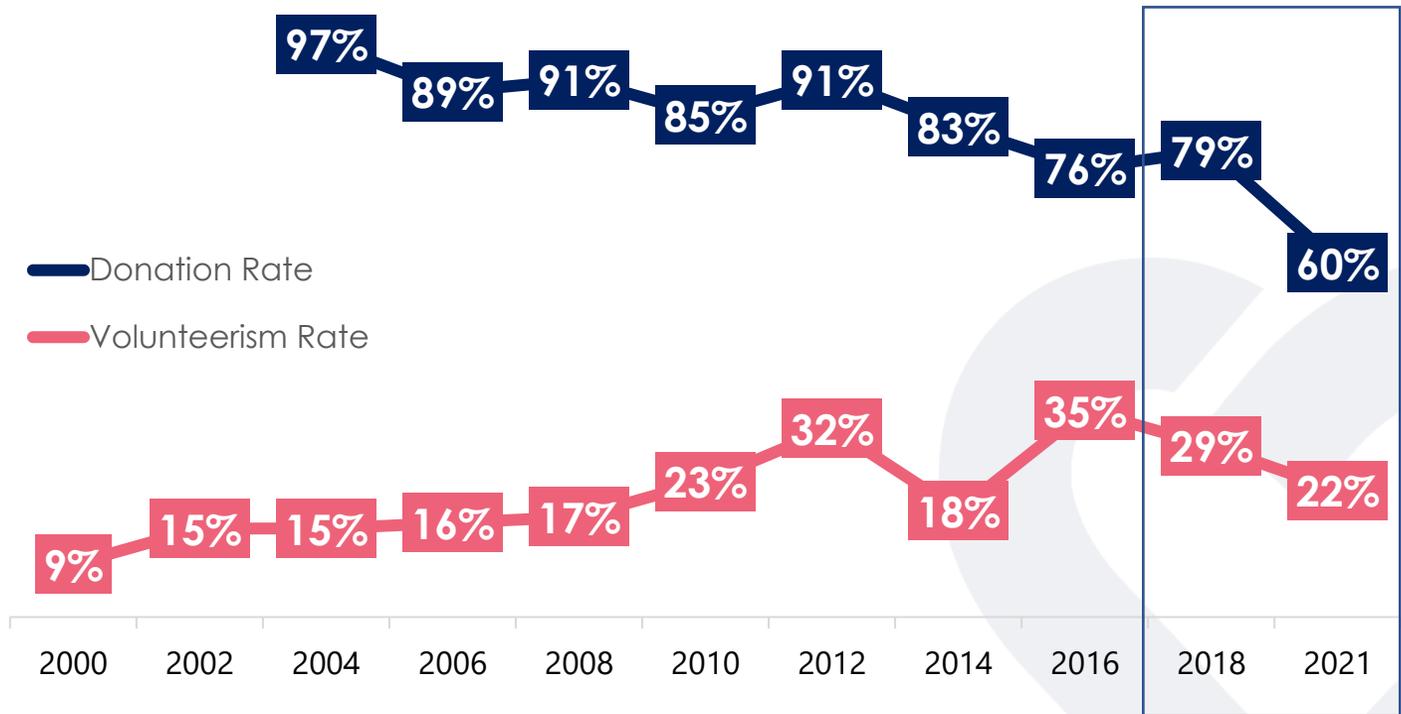


Decline in donation & volunteerism rate but increase in median amount donated

In the past 12 months, 60 percent donated (-19% vs 2018) while 22 percent volunteered (-7% vs 2018).

Nearly half (48%) of volunteers reported to have volunteered less since DORSCON Orange (7 Feb 2020). 20% of ex-volunteers stated COVID-19 as a barrier.

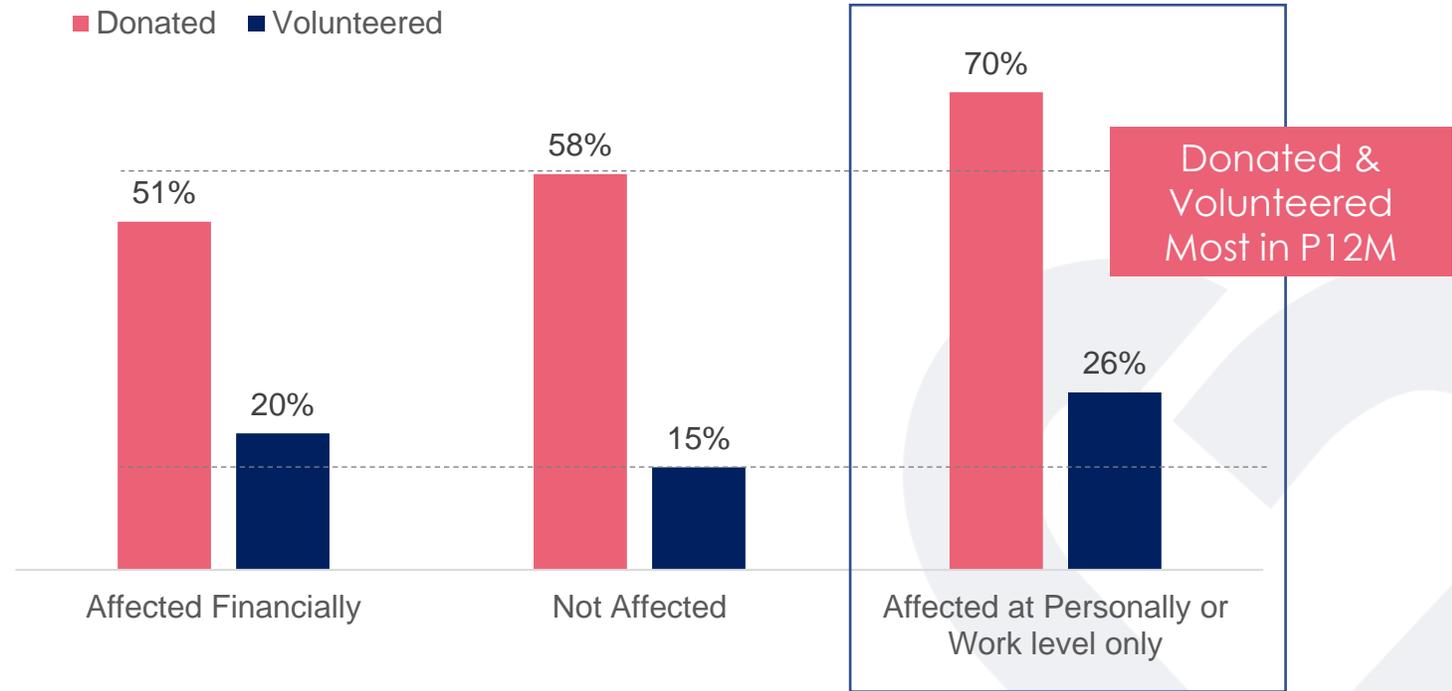
72% of donors reported no change in their amount donated in 2021. Ex-donors reported financial constraints as the key barrier.



Yet, individual giving landscape shows promise and is expected to recover

While financial implications affected giving, individuals who were only affected personally or at work by COVID-19 have donated and volunteered more often compared to those not affected (negatively).

In the longer term, 70% shared they were likely to donate and 56% were likely to volunteer.



Looking ahead, over 1 in 2 individuals stated that they were likely to donate or volunteer

70% Likely to donate in the future

56% Likely to volunteer in the future

While donations and volunteering remain largely occasional, there is an increase in more committed and consistent donations.

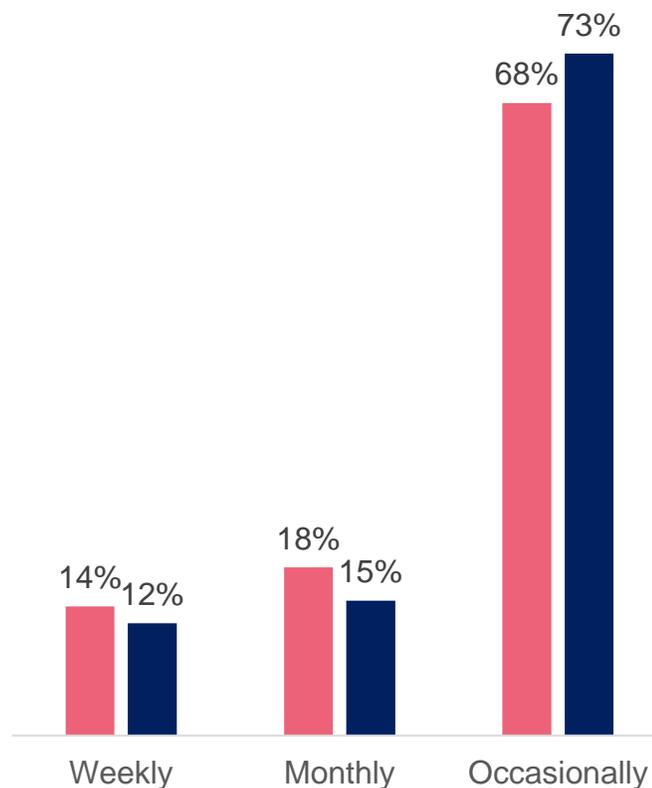
There was an increase in occasional volunteering (5%) while weekly and monthly volunteering saw a dip.

There was an increase in weekly donations (3%) and monthly donations (20%), indicating a rise in more committed and consistent donations.

Volunteering could have become a challenge amidst physical COVID-19 restrictions, but individuals have donated more frequently.

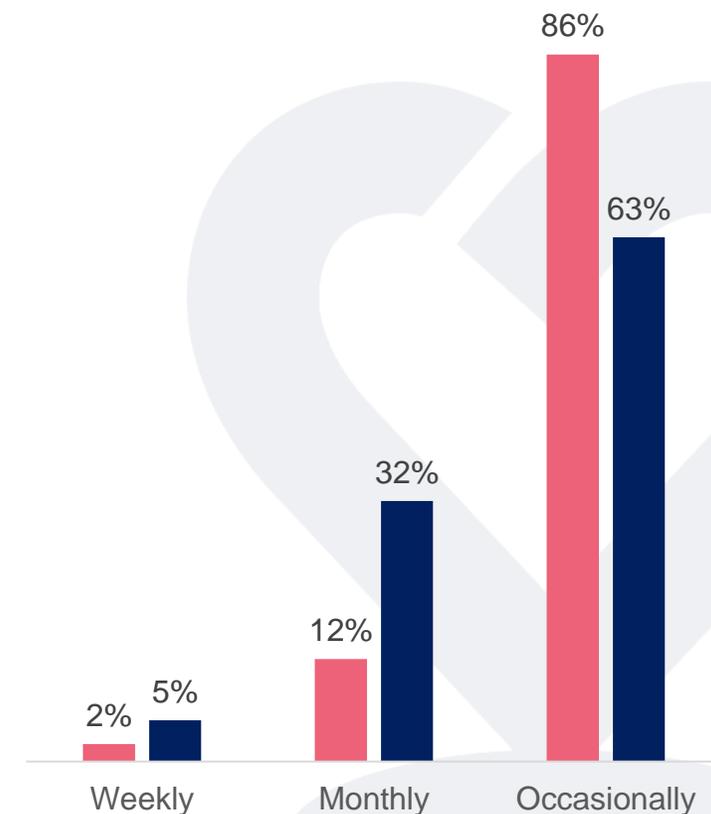
Volunteering Frequency

■ 2018 ■ 2021



Donation Frequency

■ 2018 ■ 2021



Key Finding #2

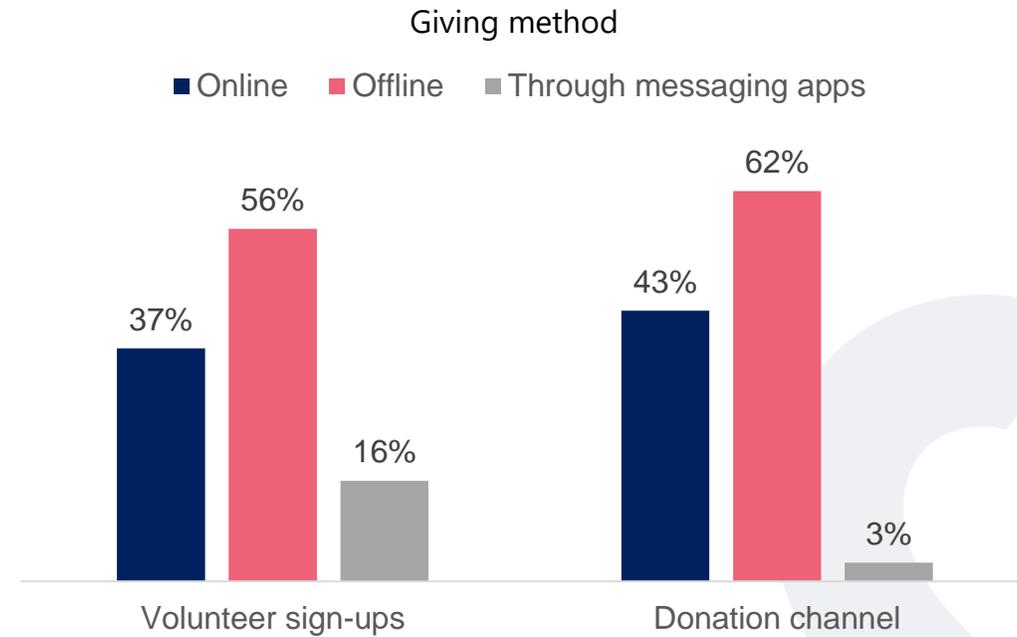
While offline channels remain the main method to give, online giving has seen a substantial increase.

There is a need to cater to digital giving by enhancing virtual volunteering and online donation channels. There is opportunity to boost digital giving and anticipate shift towards hybrid giving.



While offline methods remain the main channel to give, online giving saw an increase.

Charities Aid Foundation [study](#) has also found that while cash giving has declined, web and debit card giving increased



IGS 2021 Giving through online means saw a large increase vs IGS 2018

+29%

Online Volunteering
Sign Ups

+37%

Online Donations

While downward giving trend may reverse naturally, navigating a post-COVID world will require supplementary efforts to **boost digital giving.**

Context

Charitable giving is categorized as a 'normal good' ([Almunia et al., 2020](#)), meaning when income falls, donations will also fall. The decrease in donation rate could be due to a [fall in Singapore's median income](#) for the first time since 2004.

Barriers to fundraising efforts (i.e lack of physical flag days) have contributed to the decline in giving and [plunge](#) in volunteer numbers due to COVID-19 restrictions.

Action

Need to boost availability and variety of digital giving.

- [Nonprofit Trend Report](#) published by Salesforce.org reported that 71% of NPOs that were highly digitally mature in 2020 met or exceeded their program delivery goals, while only 44% of those with low digital maturity did.

Examples locally and abroad:

1. NVPC [Stay Home Giving Guide](#)
2. Stanford Social Innovation Review [article](#) on leveraging on virtual skills-based volunteering among employees
3. [UN website with global online volunteering opportunities](#) – largely skills-based but wide variety from translation to fundraising to writing articles
4. [Virtual volunteering opportunities](#) and conducting [e-flag days](#) on Giving.sg

Strategies could lead the sector to adopt Hybrid Giving and sync both online & offline platforms to accelerate recovery of giving.

PHYSICAL ENGAGEMENT

Fundraising Events/Galas

Flag-Day

Word-of-Mouth

Agency Visits

DIGITAL ENGAGEMENT

Virtual Events/Galas

E-Flag Day

Peer-2-Peer Fundraising

Augmented Reality (AR)

POTENTIAL INITIATIVES

- Singapore Children Society (SCS) held their Walk for Our Children 2021 event throughout the whole of September. Participants were encouraged to rally their family & friends to **pledge a donation online**, while **completing 8,000 steps (offline) with friends and families** each day anytime, anywhere to support their cause.
- With the resumption of **offline Flag Day** applications under NCSS (Sep/Oct 2021), agencies can conduct accompanying **online E-Flag Day** at Giving.sg.
- In conjunction with word-of-mouth fundraising, online peer-2-peer fundraising would widen outreach and multiply potential givers and can lead up to an in-person or virtual event.
- The Great Singapore Give (GSG) allows organisations and people to select a charity and create a GSG sub-campaign to rally their friends and families to contribute. This enables a multiplier effect and growth of new donors.
- To help people empathise with the problem, augmented reality can help to raise awareness and understand the problems NPOs are attempting to resolve.
- World Wildlife Fund (WWF) organized an AR campaign to draw more public attention to the problem of endangered species. It allowed the public to “interact” in AR with the endangered species and learn more about them.

Key Finding #3

Acceleration in informal individual and community-led giving initiatives. There is a need to sustain informal giving while exploring opportunities to encourage other ways of giving.

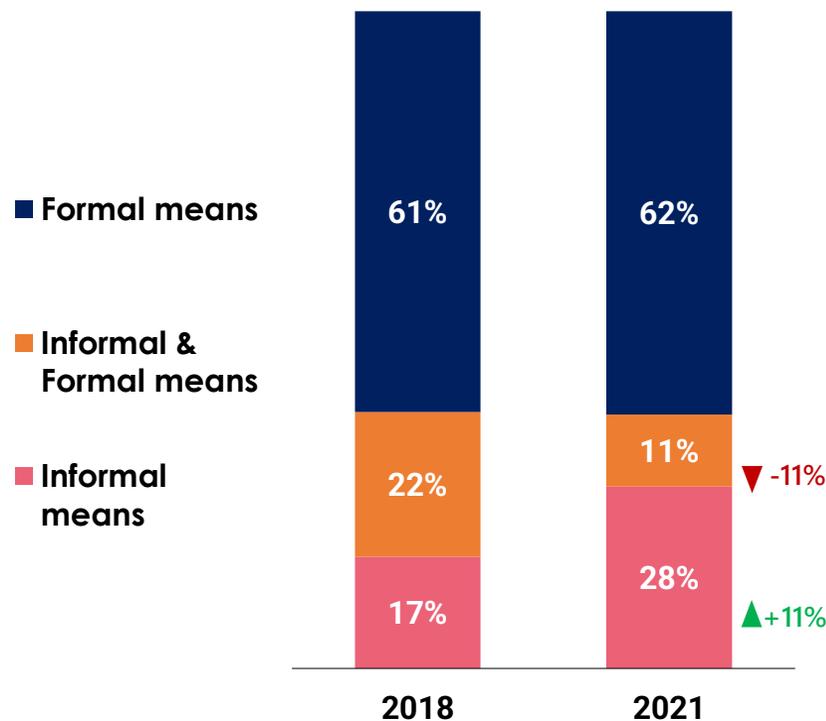


Acceleration in informal individual donations & volunteerism

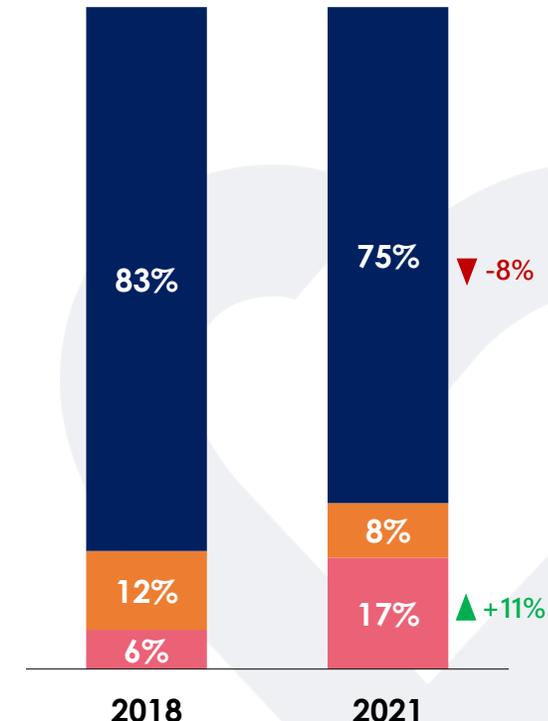
Both volunteerism and donations, saw an **11% increase in informal giving** – A 1.6x increase in informal volunteerism and 2.8x increase in informal donations.

Informal giving and formal giving was found to be significantly inversely correlated. Efforts could be taken to ensure formal giving would be sustained alongside increase in informal giving.

Volunteerism



Donation



Most popular touchpoints

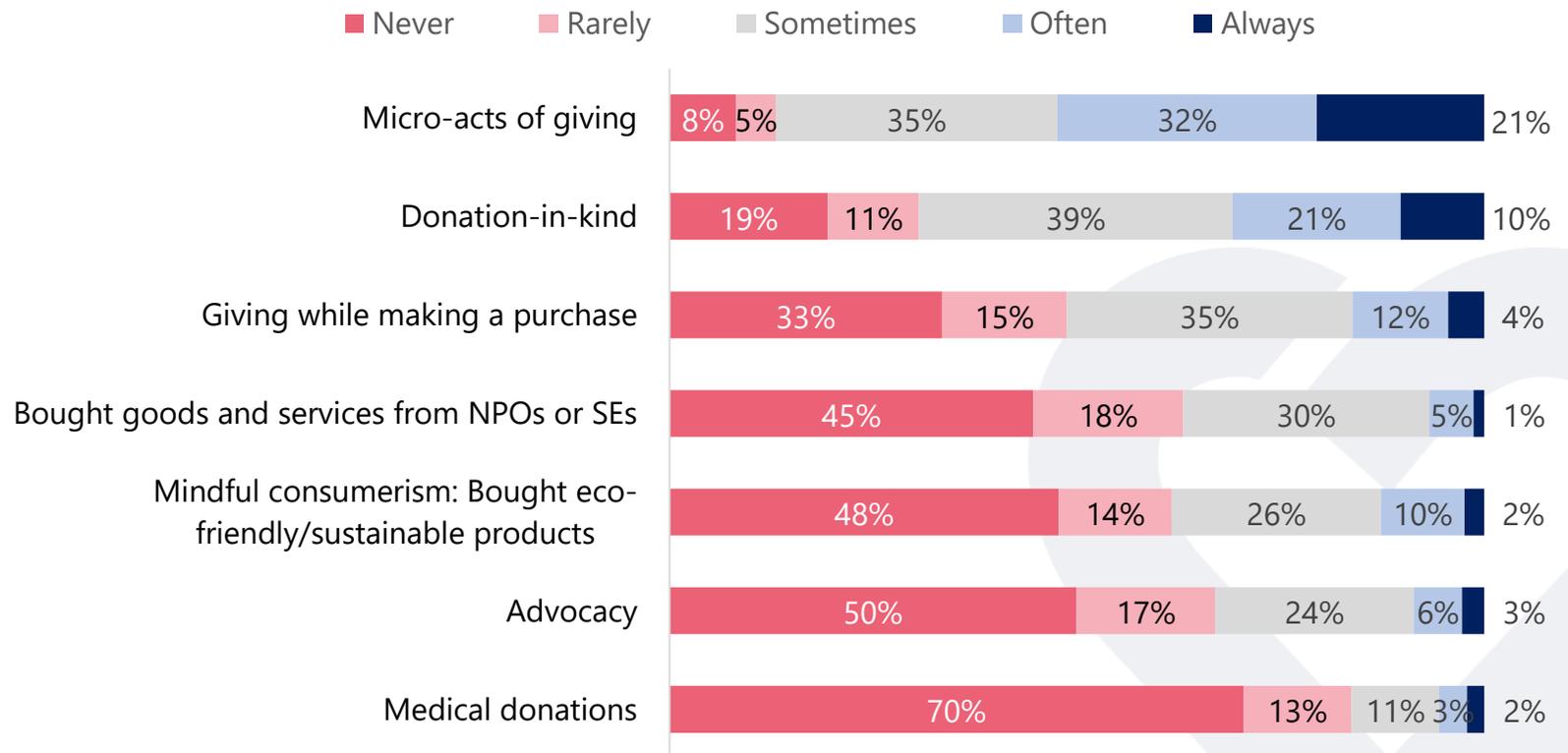
- 38% Informally / Self-Interest Groups
- 23% Charitable NPOs or Foundations

- 32% Charitable NPOs or Foundations
- 32% Religious Organisations

Opportunity to further adopt other ways of giving

7 in 8 respondents reported performing micro-acts of giving at least sometimes.

Singaporeans in general were open to giving through donations-in-kind, purchase of goods and services from Non-profit organisations/Social Enterprises, and point-of-sale giving.



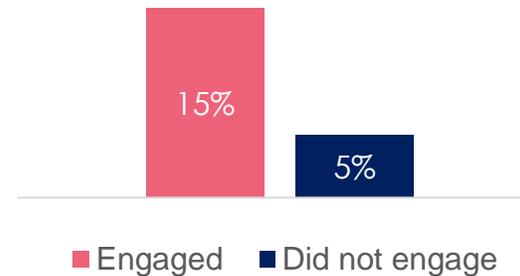
% likely to perform these activities in future	82%	Micro-acts of Giving	52%	Buying goods/ services
	77%	Donations-in-kind	51%	Giving while making a purchase

Driving micro-acts of giving to sustain formal giving

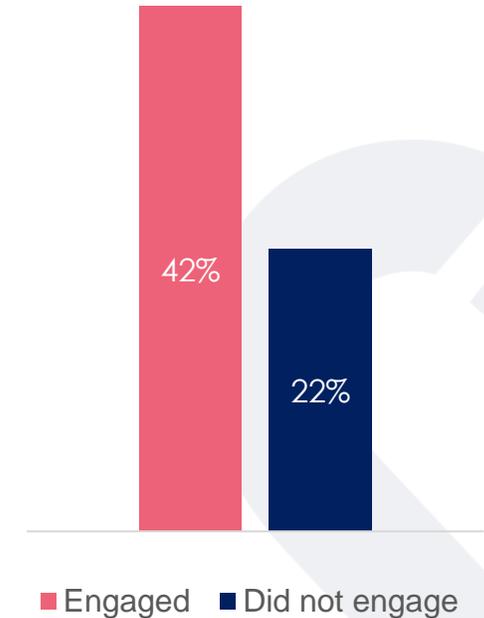
Individuals who engaged in micro-acts of giving were significantly more likely to also be formal givers.

It is important to highlight and drive the narrative of doing good.

Formal volunteers



Formal donors



- 1 in 6 respondents who engaged in micro-acts of giving were also formal volunteers.
- 2 in 5 respondents who engaged in micro-acts of giving were also formal donors.

The social and economic impact of informal giving is substantial. Efforts should be made to sustain the momentum of informal post-pandemic.

Context

Social impact

Rise in [mutual aid groups](#) that facilitate informal giving seen as a response to crises that promotes solidarity within communities.

Social network theory sees informal volunteering as a type of social capital that helps establish networks, norms and trust that facilitates cooperation within communities.

Economic impact

The [UK National Office of Statistics](#) estimated the value of informal volunteering to be 18.6 billion euros in 2012/13.

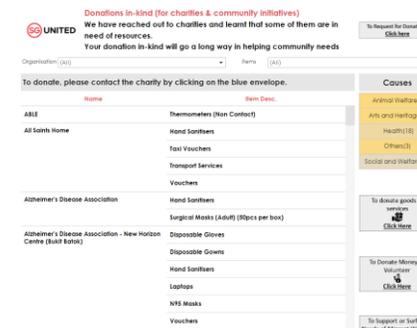
Action

There is room to promote partnerships between NPOs and community-led/informal groups – to foster a culture of collaboration between both parties.

Explore untapped opportunities to increase giving through donations-in-kind, point-of-sale (POS) giving & product marketplace.



The #Blessings campaign will bring greater awareness to the public to support local communities in need. From now to December 31, interested donors can log on to Carousell and browse listings from over 20 charities and non-profit organisations.



During the height of the pandemic, there was a surge in donations and requests for DIK. NVPC together with our partners set up the [Donation-in-Kind platform](#) to match givers and receivers

Other Giving Examples – PVPA 2021 Award Winners

Paediatric Emergency & Neonatal Care Project (City of Good Award Category)



- Cross sector collaboration with SingHealth, Singapore International Foundation, East Java Province Government and Surabaya Haji General Hospital on knowledge transfer and upskilling to reduce infant mortality rate.
- In the three-year project, the infant mortality rate in Surabaya Haji General Hospital significantly reduced to less than a third of what it used to be.

Ms Lydia Tan (People of Good Award (Senior) Category)



- Lydia is a volunteer with Assisi Hospice where she is also the ward lead for their No One Dies Alone (NODA) programme, who is also the first responder when a vigil is needed.
- She provides companionship to dying patients who have limited/no family support.
- Till date, she has journey with 48 NODA patients and participated in 40 vigils.

Key Finding #4

Givers are more welfare-focused than before with a 10% increase in donations and volunteerism to the social service sector. It is important to aid in the recovery of less-supported sectors.

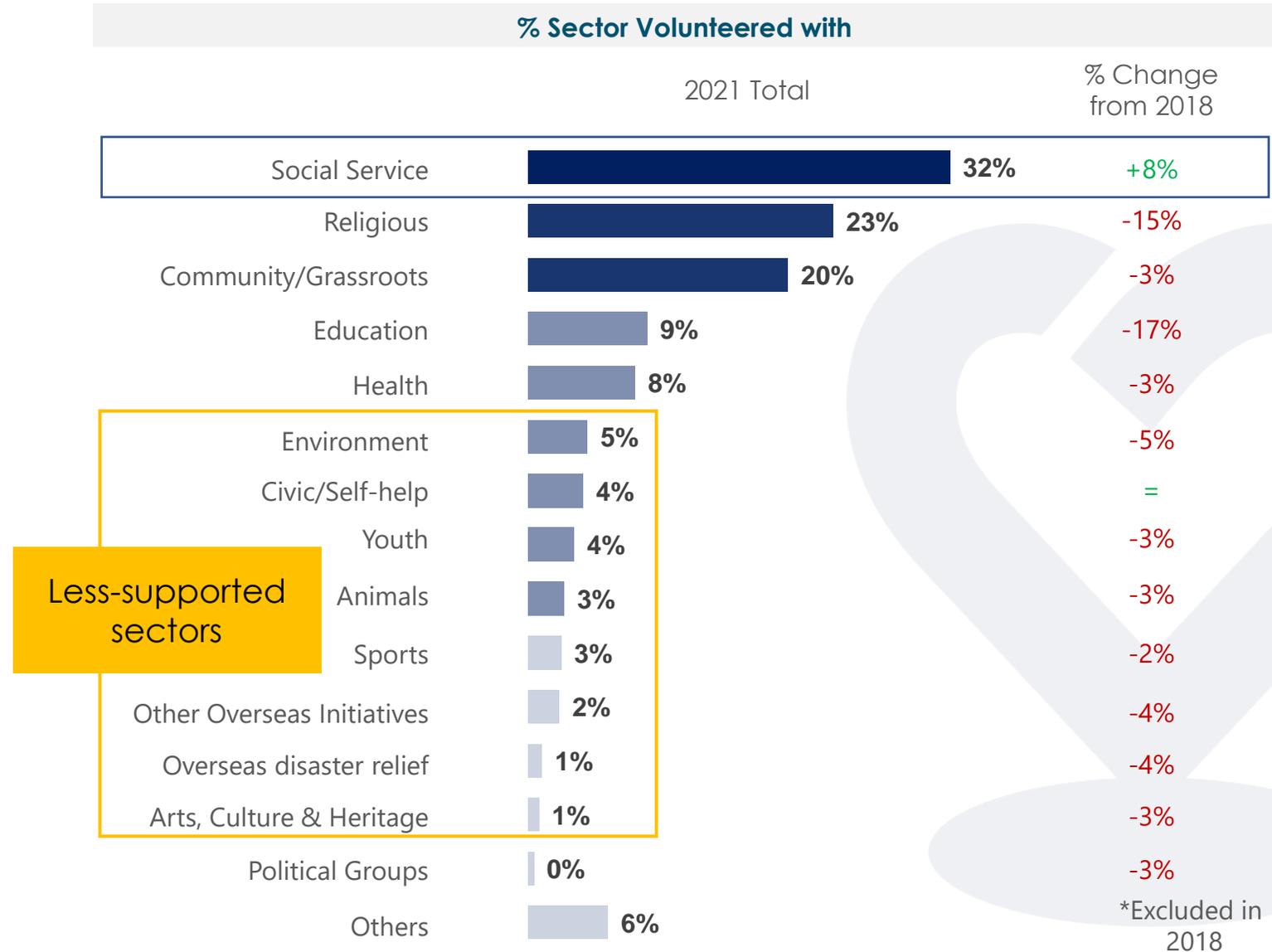


Potential risks to less-supported causes

Causes preference and giving behaviours have shifted towards familiar and basic needs.

- **Social Service sector saw an 8% increase** despite of the decline in giving.
- Education and Religious sector saw the largest decline of 17% and 15% respectively

Potential concerns on recovery of less-supported sectors in the longer term.



As we recover from COVID-19, it is important to ensure efforts are made to aid with the recovery of less supported sectors.

Promote needs of less popular causes

- Highlight decline in support for under-supported causes to raise awareness of needs
- For example: Arts, Culture and Heritage sector suffering [huge hit](#) from COVID-19 due to cut in live performances and events.

Manage donor & volunteer flows

- Intermediaries can play the role of ensuring donor & volunteerism continuity and recovery of these causes in the wake of COVID-19.
- For example: Through cause listing on Giving.sg, digital marketing efforts to previous donors/volunteers of respective sectors.

Engage communities

Collaboration initiatives with communities of respective causes to ensure sustainability for the long term.

**Together, Let Us Become
The City of Good**