



Digital Philanthropy in China: Activating the Individual Donor Base

Digital is unlocking new avenues for individual participation in philanthropy,
promising significant development of the sector.



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Digital Philanthropy in China: Activating the Individual Donor Base

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Embracing the digital revolution

Dear Colleague:

In life, we benefit when ability and opportunity meet. Having a skill is important, but more so if there is a productive way to use it. Similarly, if an opportunity presents itself but you don't have the capability to take advantage, the moment goes unrewarded.

The potential for philanthropic growth in China is a tremendous opportunity for organizations with the ability to seize the moment. As this report describes, China, a nation of about 1.4 billion people, possesses an untapped philanthropic market in an early stage of development. We need a tool—a way of working—to help philanthropic organizations take advantage, increase their impact and strengthen more communities.

China's potential philanthropic growth represents a tremendous opportunity for organizations with the ability to seize the moment.

Right now, in countries around the world, digital technology is reshaping society. To make a purchase, for instance, shoppers used to go to a store and choose from what was physically on the shelf. Today, with the Internet delivering knowledge right to our fingertips, data is plentiful. Shoppers can research any number of options at home, learn about brands and make a selection from the comfort of their sofa.

Digital technology is having a similar effect on philanthropy. Today, people don't have to rely on traditional charities to act on their behalf. Instead, when they identify an issue they care about, they can go online, donate, get involved and see the progress they're making. That's the growth opportunity for charities today.

The philanthropic opportunity in China aligns with our vision at United Way and the digital capabilities that we are developing. This report shows that while donor penetration in China is low, Internet penetration continues to rise—creating a pathway for philanthropies to connect with people more directly than ever.

Several years ago, I spoke with my board of directors about the importance of United Way embracing digital technology if we wanted to stay in business. That's why we have shifted our strategy to build tools to support today's empowered individuals. We are helping people find causes they care about, develop community partnerships and opportunities, and multiply their impact. We are helping them not only to volunteer, but also to engage their friends and family and to share stories and ideas that increase their reach.

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To be effective, philanthropic organizations in China must embrace this digital revolution. They must build connections, show people how they can make a difference and develop a culture of giving. That's what United Way is working to accomplish, and it is how charities in China and around the world will build trust and support across our collective sector. In China, these efforts must be aided by the establishment of a regulatory environment that keeps pace with today's technological innovations.

I encourage you to thoroughly review the data and conclusions in this report. The opportunity provided by digital technology to help build stronger communities at scale is right in front of us. In China, the opportunity is massive. Let's seize it.

A handwritten signature in black ink, reading "Brian A. Gallagher". The signature is fluid and cursive, with a long horizontal stroke at the end.

Brian A. Gallagher
President and CEO, United Way Worldwide

Digital Philanthropy in China: Activating the Individual Donor Base

At a glance

- ▶ China's RMB 156 billion philanthropy sector has been growing at a brisk pace, but donations from individuals comprise only about 20% of the total.
- ▶ Digital fund-raising accounts for slightly more than 2% of China's total donation value, but it is growing rapidly, driven by younger people attracted to supporting specific projects with compelling stories.
- ▶ Government regulations and self-reporting will also support continued development of the philanthropy sector, ensuring transparency and nurturing public trust.
- ▶ To capture the opportunities, stakeholders across the sector need to develop integrated digital strategies, including identifying potential ecosystem partners.

Philanthropy in China has grown rapidly over the past three decades, in tandem with the development of the economy as a whole. However, China's overall culture of philanthropy is still emerging as individual awareness and participation increase.

Total charitable donations in China reached RMB 156 billion in 2017, having grown at a compound annual rate of 11% from 2011 to 2016. China's philanthropic sector has developed primarily through corporate giving, which contributes approximately 60%–70% of total donation value, while donations from individuals make up about 20% of the total market. Although China has the fourth-largest number of individual donors in the world (91 million in 2016), this represents only 7% of the Chinese population, suggesting significant room for growth.

Individual participation in philanthropy has fluctuated over the past several years. The sector has been affected by natural disasters, which spur short-term donations, as well as by scandals, which deflate the public's trust and willingness to donate. Total donations from individuals fell by 60% from 2011 to 2014 but have since recovered, growing at a compound annual rate of more than 60% from 2014 to 2016. This trend is poised to continue as rising disposable income boosts donor participation and donation amounts, and as rapid development of digital infrastructure (e.g., Internet/mobile penetration, digital payments) increases individuals' access to charities.

Digital—and especially digital fund-raising—is set to transform China's philanthropy sector, bringing both unparalleled access and transparency. This shift presents meaningful opportunities for stakeholders with the resources and capabilities to take advantage of new digital channels. At the same time, the sector continues to face traditional challenges, such as finding and attracting top talent, which are only exacerbated in the new digital environment.

Rise of digital philanthropy

Digital technology is rapidly changing how China's philanthropy sector operates—from diversifying and engaging the sources of funds, to better promoting and enabling fund-raising, to driving improved fund utilization. This report focuses on the most developed of these areas: online fund-raising.

Over the past 15 years, online fund-raising has evolved through three distinct stages. During its period of emergence, from 2004 to 2013, the market saw the rise of new charities and online channels leveraging commercial platforms like Taobao. From 2013 to 2016, innovations by Alibaba and Tencent (including the 99 Charity Day campaign) marked a period of rapid development, ushering in exponential growth in online fund-raising. And from 2016 to the present, it has seen regulated but fast growth, with China's Charity Law—the first comprehensive legislation governing the sector—coming into effect. Online fund-raising has soared over the past five years, both in terms of participation and total donation value.

By making philanthropy increasingly accessible, digital has activated giving by individuals, which represented more than 60% of online donations in the past three years, vs. about 20% of donations overall. Online donations come primarily from younger donors, who have a growing interest in philanthropy and ability to donate. Engaging this population is becoming a must-win battle for all stakeholders. Health, poverty alleviation and education are the most popular themes of online projects, driven both by platforms' push and by donors' pull.

Across the sector, online giants Tencent and Alibaba dominate the market today, but the competitive landscape will continue to evolve as more platforms are approved to engage in public fund-raising. The ability to generate and drive traffic is a key differentiator within the overall online fund-raising ecosystem. Departing from the traditional model, where public foundations are by far the largest players, these platforms empower NGOs and individuals to raise funds and enhance their profiles online. Thus far, however, funding distribution for online projects reflects the Pareto principle, with the top 20% of projects absorbing most of the donation value.

Digital fund-raising's potential growth is significant, as online donations still account for less than 6% of donations from individuals. On the demand side, charitable organizations with public fund-raising qualifications (abbreviated as COPFQs in this report) and nongovernmental organizations (NGOs) also have a relatively limited online presence; only about 40% of COPFQs and 2% of NGOs were represented on Tencent's charity platform in 2017.

Implications for industry stakeholders

The rapid rise of digital philanthropy in China creates significant opportunity for stakeholders to make a mark in the sector. At the same time, foundations and NGOs need to conquer some key challenges, including gaining and maintaining the public's trust through more efficient operations and established, transparent reporting standards. The Chinese government is actively providing the philanthropy industry with guidelines and policies to manage fraud, as well as drafting clear guidance on charitable

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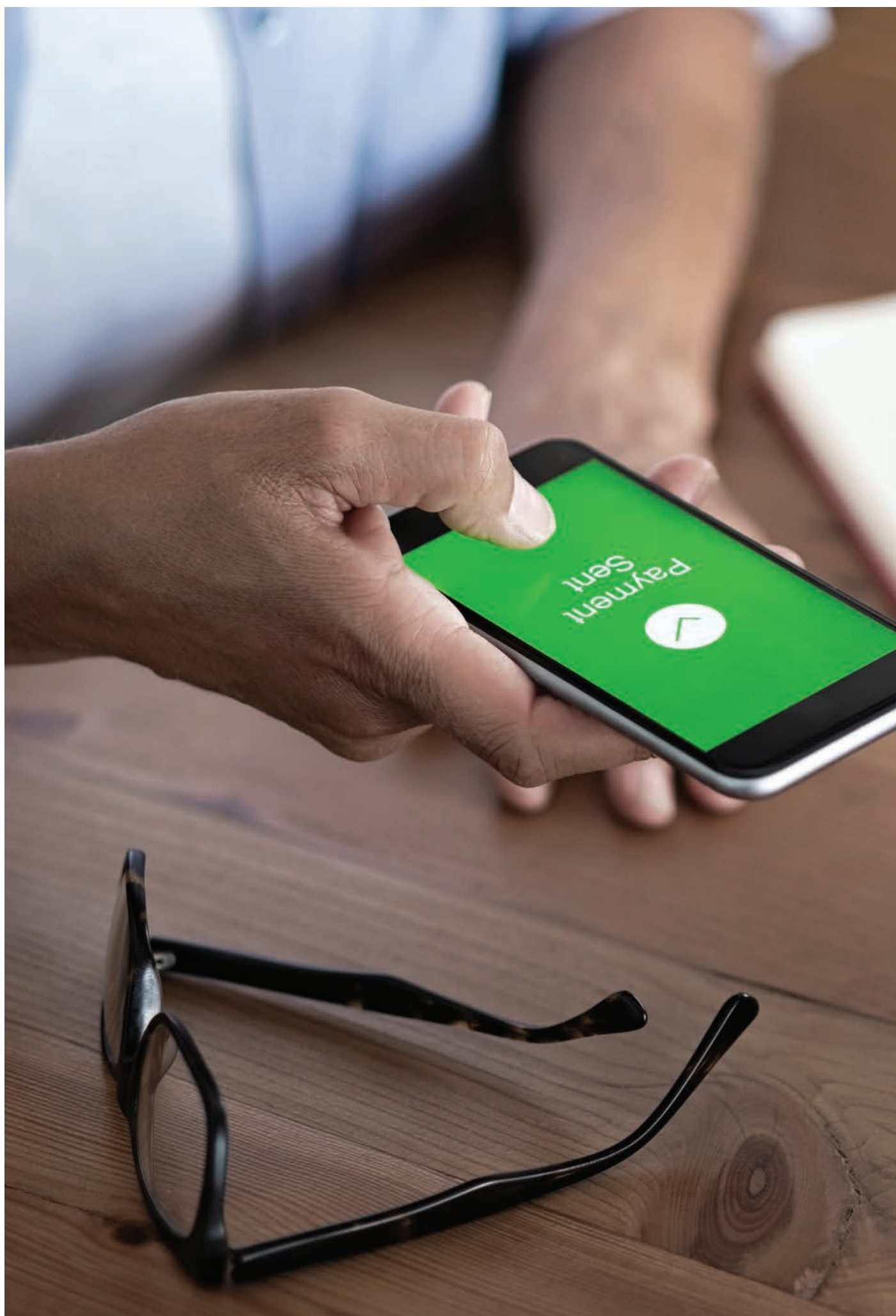
organization reporting. However, the overall regulatory environment is still in a nascent stage and must continue evolving to keep pace with innovation.

Digital can accelerate the development of China's overall philanthropy culture, but this requires stakeholders to define their objectives and develop corresponding strategies. Common digital objectives include creating a positive and targeted impact, building a trusted brand and broadening the scope of influence. Still, individual stakeholders have different objectives and need to develop their own differentiated perspectives on how to participate in the market. Even digital philanthropy leaders like Tencent and Alibaba are improving their operations along these lines, developing clear and unique value propositions, and focusing their digital efforts on key areas in order to achieve their objectives.

There is no single path to success, but based on our study and the Bain Radar 360SM framework, philanthropy stakeholders should ask themselves a set of key questions as they begin to develop their digital strategies.

- **Customer and channel engagement:** How do we leverage digital infrastructure to maximize donor engagement?
- **Products and services:** What donation options and donor services can we develop for digital platforms?
- **Operations:** How do we improve our internal operations by leveraging new digital tools and capabilities?
- **Data and analytics:** What analytics do we use to measure and track key activities, and how can we apply digital tools to manage them?
- **Operating model and partnerships:** How do we tailor our operating model to cater to digital needs? Do we need ecosystem partners?
- **Talent and culture:** Do we have the right talent and culture to make our digital plan work? If not, how can we practically close the gaps?

Not all of these challenges and opportunities can be met by individual stakeholders alone; the need for true partnerships in various forms will increase. However, given the trajectory of the market and the potential to make a meaningful impact, philanthropic organizations must prioritize their digital strategies if they want to stay relevant and engaged with an increasingly active population of individual donors.



1.

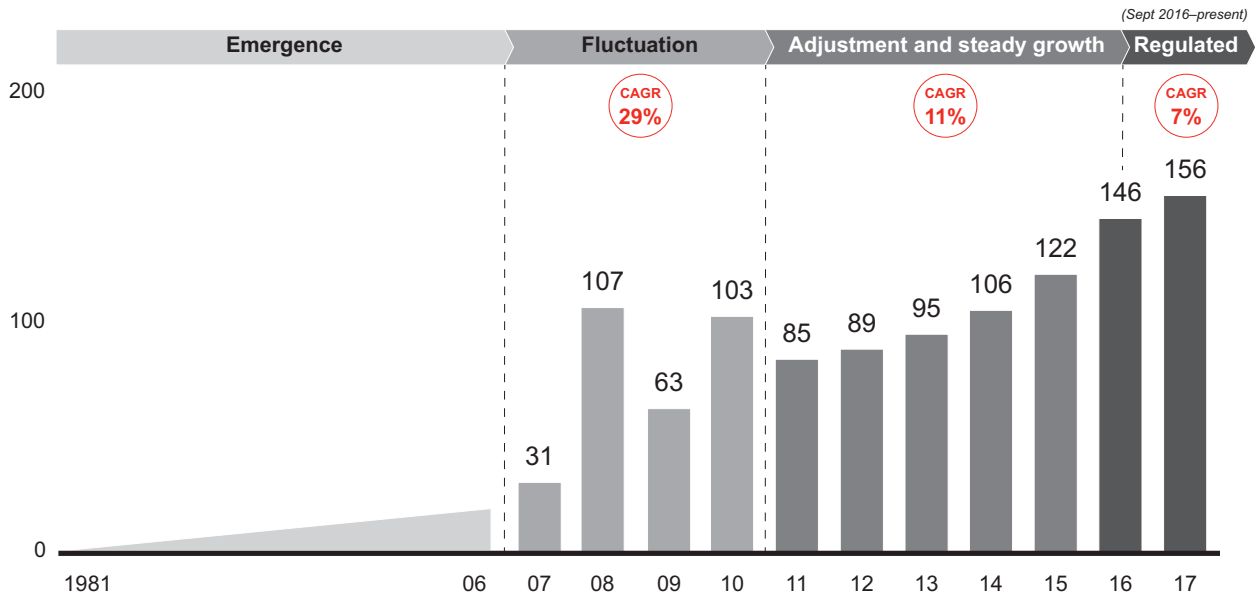
China's philanthropy sector: Potential and challenges

- China's philanthropy sector has emerged over the past 30 years, with significant fluctuation between 2007 and 2011 as a result of major natural disasters and scandals. Thanks to increasing transparency and government regulation, the sector is now entering a phase of steady growth.
- Despite its rapid rise, philanthropy in China has not kept pace with the overall economy. China's total donation value currently accounts for only 0.2% of its GDP.
- Individual donor penetration is relatively low at only 7% of the total population, but participation continues to grow rapidly as the younger generation slowly embraces the concept of giving back through charity.
- The sector is ripe for continued growth as disposable income increases, digital infrastructure enables easier access to charities, and the government actively participates by creating guidelines and policies.
- However, the industry also needs to tackle a set of challenges, including winning and maintaining public trust, establishing efficient operations and transparent reporting standards, and recruiting and retaining top talent.

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Figure 1: After periods of fluctuation and adjustment, China's philanthropy sector is steadily becoming a powerful force for good

Total charitable donation value (RMB billions)

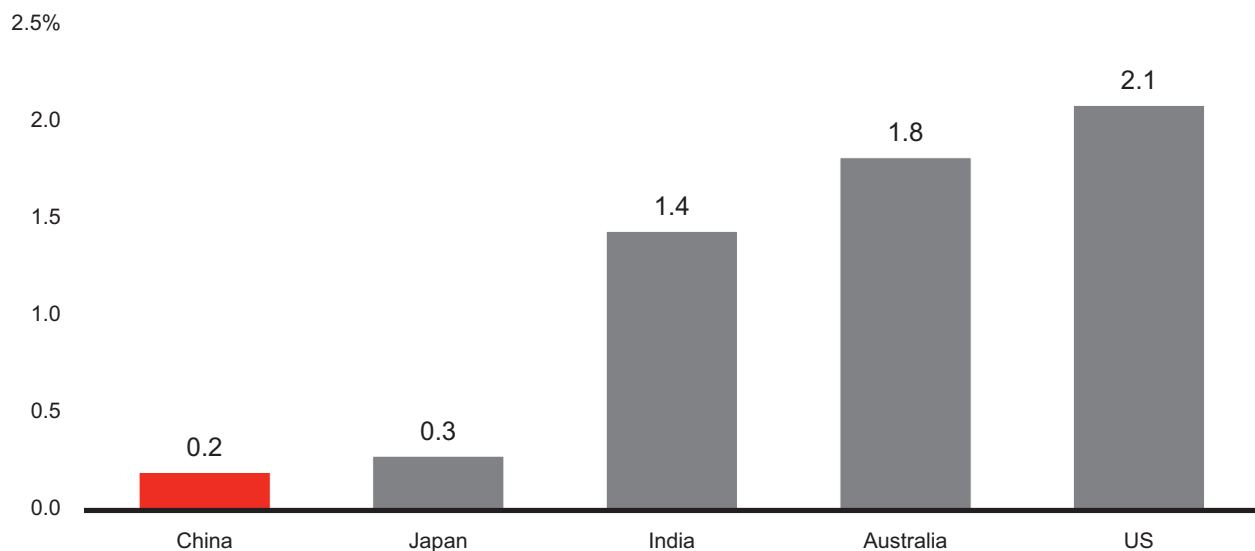


Notes: Incomplete record of data before 2007; China's Charity Law took effect in September 2016

Sources: China Philanthropic Donation Report, Ministry of Civil Affairs, 2012; Annual Report on China's Philanthropy Development, 2018; Bain analysis

Figure 2: Charitable donations account for a very small share of China's GDP, indicating future growth potential

Total donation value as percentage of GDP, 2016



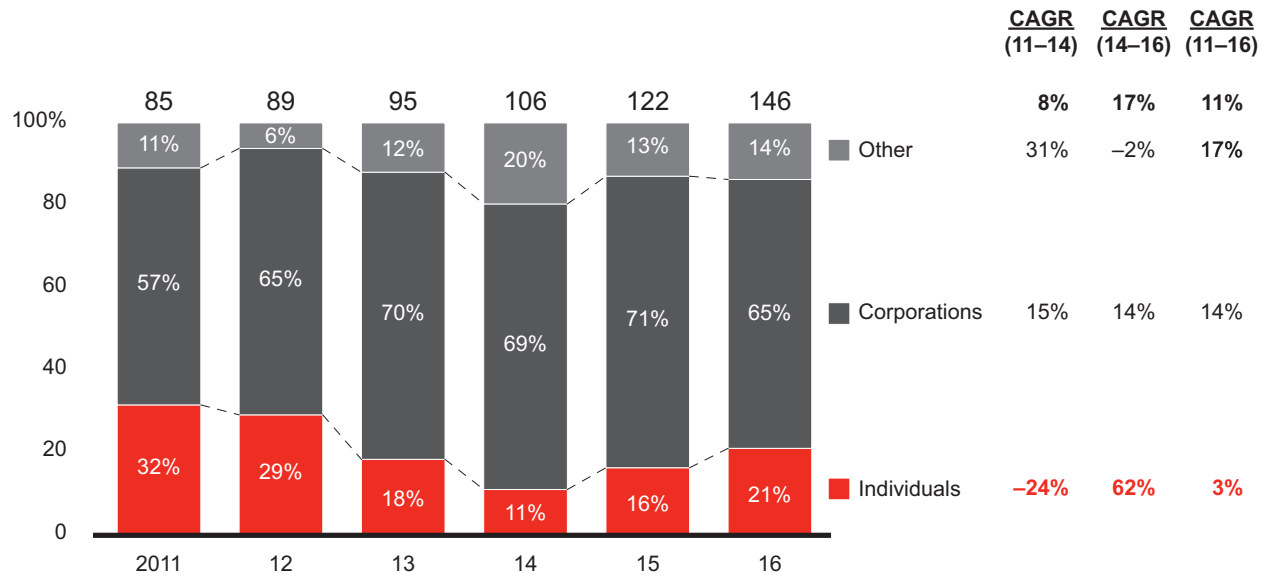
Notes: Exchange rate calculated at 1 USD=RMB 6.7; due to limited data availability, Japan's giving data estimated as the sum of 2016 individual giving and 2015 giving by corporations and foundations; Australia's giving data is for 2015-16

Sources: Giving Japan, Japan Fundraising Association, 2017; Federal Reserve Economic Data (FRED) database; Open Government Data Platform India; Philanthropy Australia; Euromonitor; World Bank; Annual Report on China's Philanthropy Development, 2018; Philanthropy Roundtable; Bain analysis

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Figure 3: Corporations have been the major source of funding, but donations from individuals are on the rise

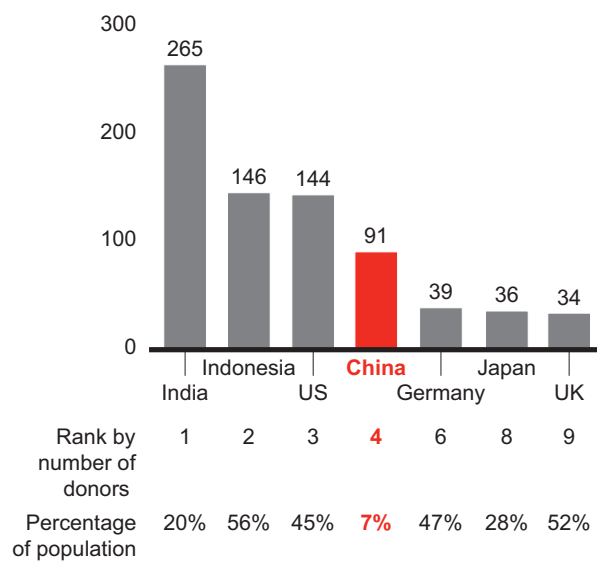
Total donation value and sources (RMB billions)



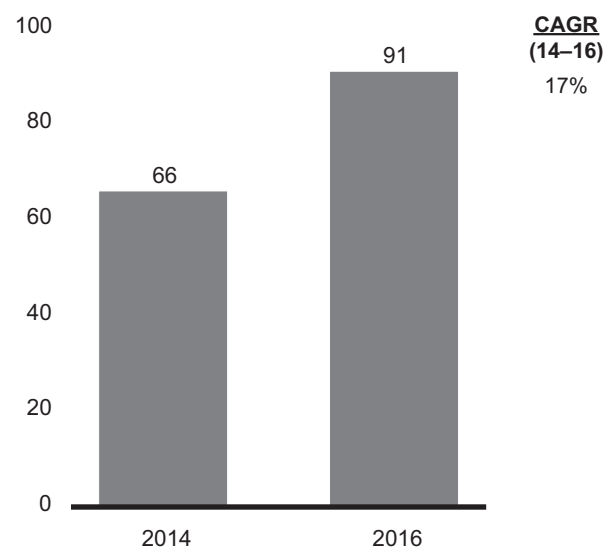
Notes: Other includes government, foundations, social organizations, etc.; 2016 data is through September 2016
Sources: Annual Report on China's Philanthropy Development, 2018; Bain analysis

Figure 4: Chinese donor penetration is relatively low but increasing rapidly

Total donors, 2016 (millions)



Total donors in China (millions)

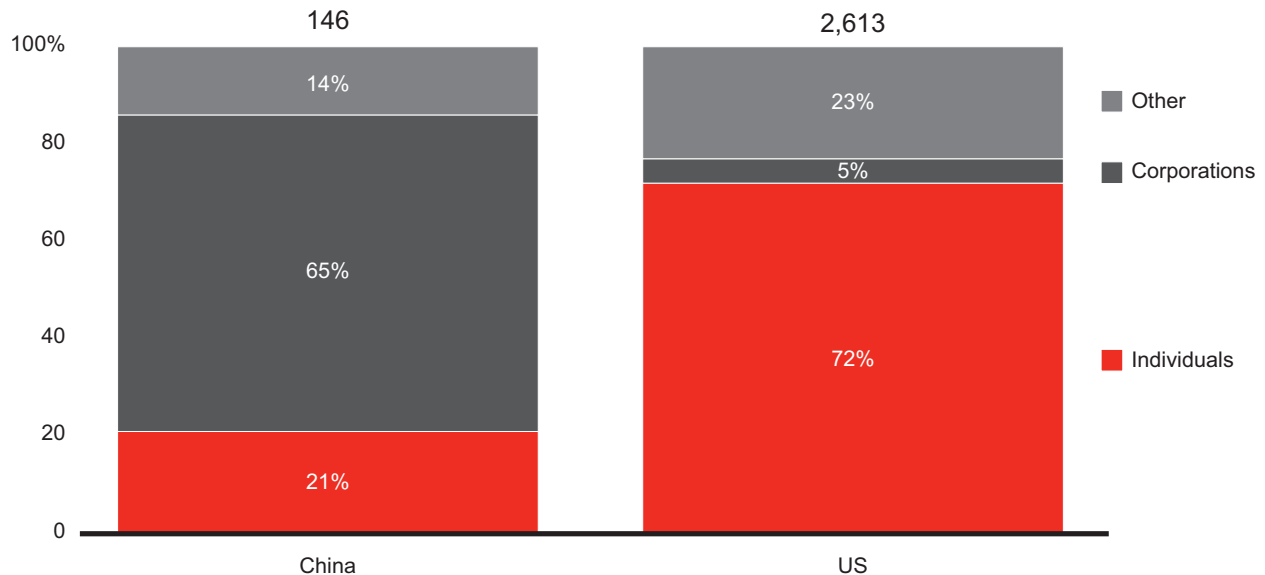


Notes: Number of donors estimated based on Charities Aid Foundation (CAF) research; donors defined as those who donated money during the one-month period prior to the interview; Pakistan ranked fifth and Thailand ranked seventh in number of donors
Sources: CAF World Giving Index, 2016–17; Giving USA 2017; World Bank; Bain analysis

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Figure 5: Based on a comparison with the US philanthropy market, donations from individuals could grow significantly

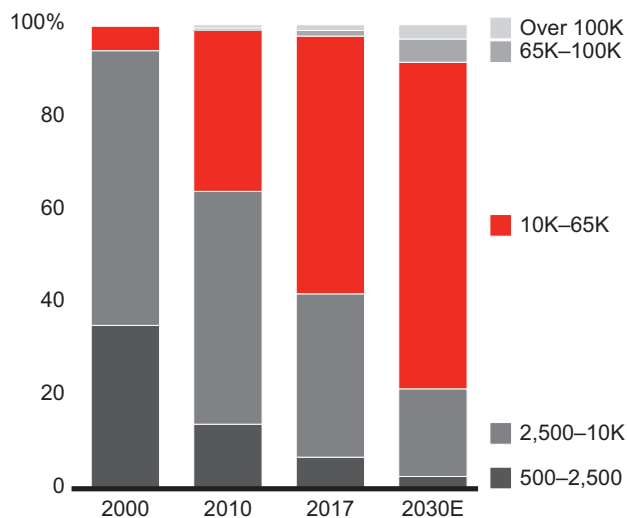
Total donation value and sources, 2016 (RMB billions)



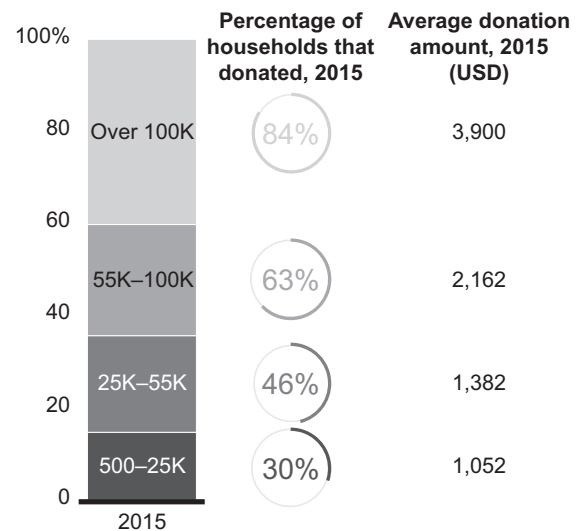
Notes: Other includes government, foundations, social organizations, etc.; exchange rate calculated at 1 USD=RMB 6.7
Sources: Giving USA 2017; Annual Report on China's Philanthropy Development, 2018; Bain analysis

Figure 6: Rising income levels in China could help boost charitable donations and philanthropy participation

Distribution of Chinese households by disposable income (USD)



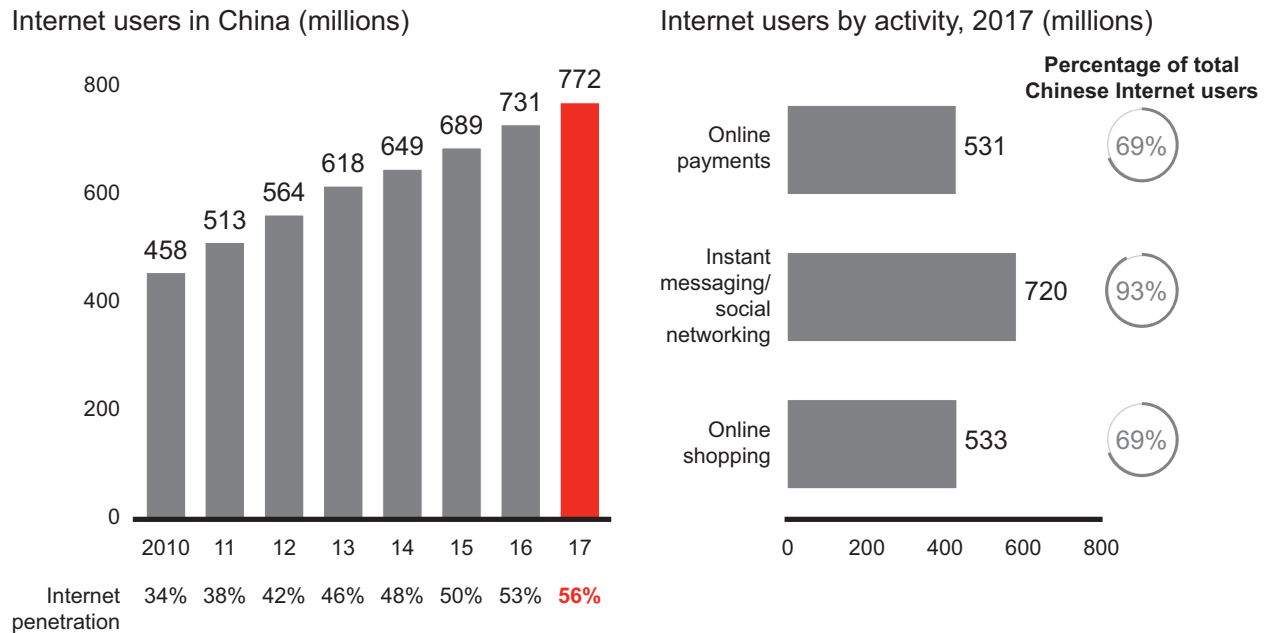
Distribution of US households by disposable income (USD)



Notes: Average donation amount is among households that donated; the Philanthropy Panel Study segmented income by 25K, 50K, 100K and over 100K; for consistency with the US national household income data, we grouped the percentage of households that donated and the average donation amount for 25K-50K into the 25K-55K category, and data for 50K-100K into the 55K-100K category
Sources: Philanthropy Panel Study, Indiana University Lilly Family School of Philanthropy, 2015; Euromonitor; Bain analysis

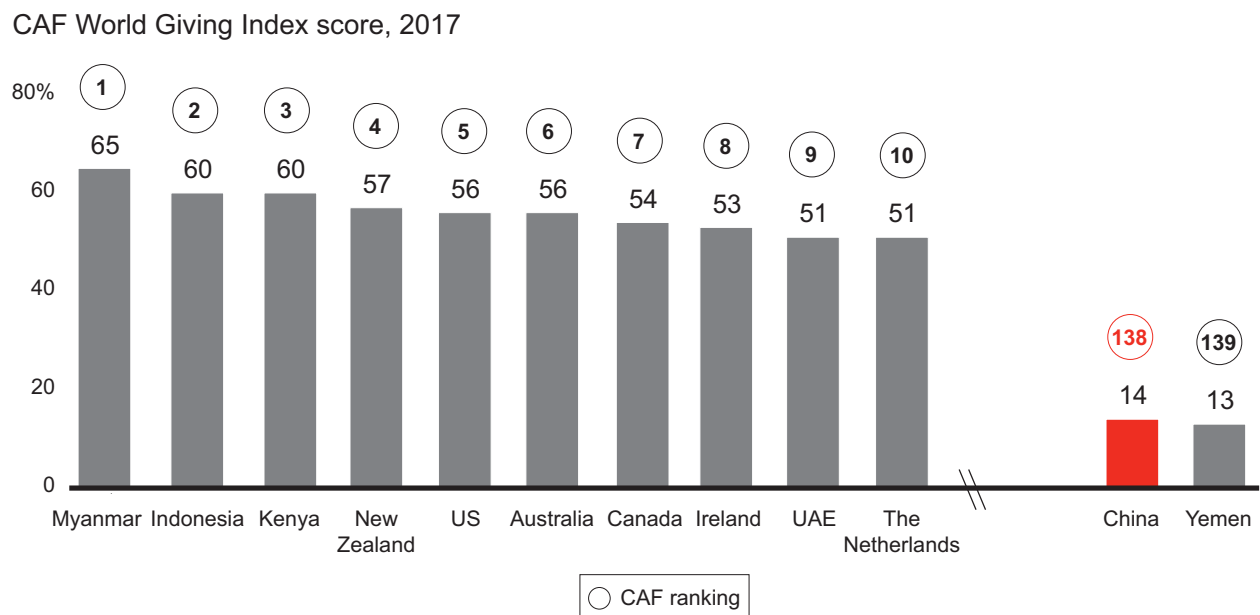
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Figure 7: Tapping China's huge base of Internet users represents a major opportunity for charities



Note: Internet users defined as individuals over six years old who have used the Internet in the past six months
Sources: Statistical Report on Internet Development in China, CNNIC, January 2018; Bain analysis

Figure 8: Despite its spectacular growth, China's philanthropy culture is still in a very early stage

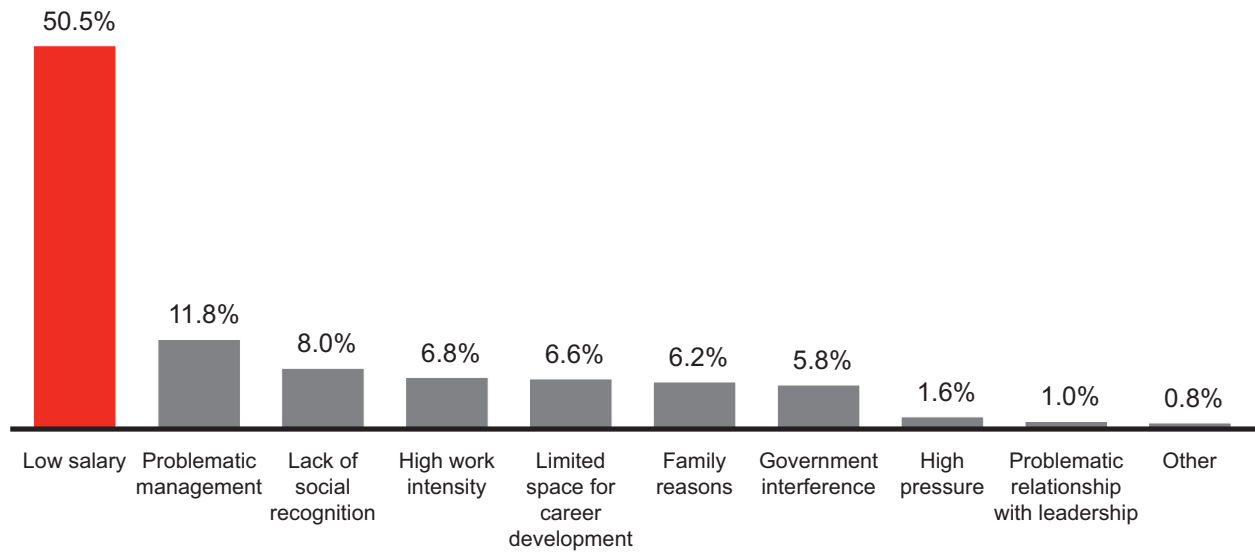


Notes: Scores calculated as a combined average of the percentage of people who reported one or more of the following in the month prior to the interview: helping a stranger, donating money and volunteering time; China's score based on 4,373 interviews
Sources: CAF World Giving Index, 2017; Bain analysis

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Figure 9: Low salary is the biggest talent-retention challenge that China's charities face

Reasons for leaving a job with a charitable organization



Sources: China's NGOs Salary Survey Report, China Development Brief, 2016 (n=489); Bain analysis

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2.

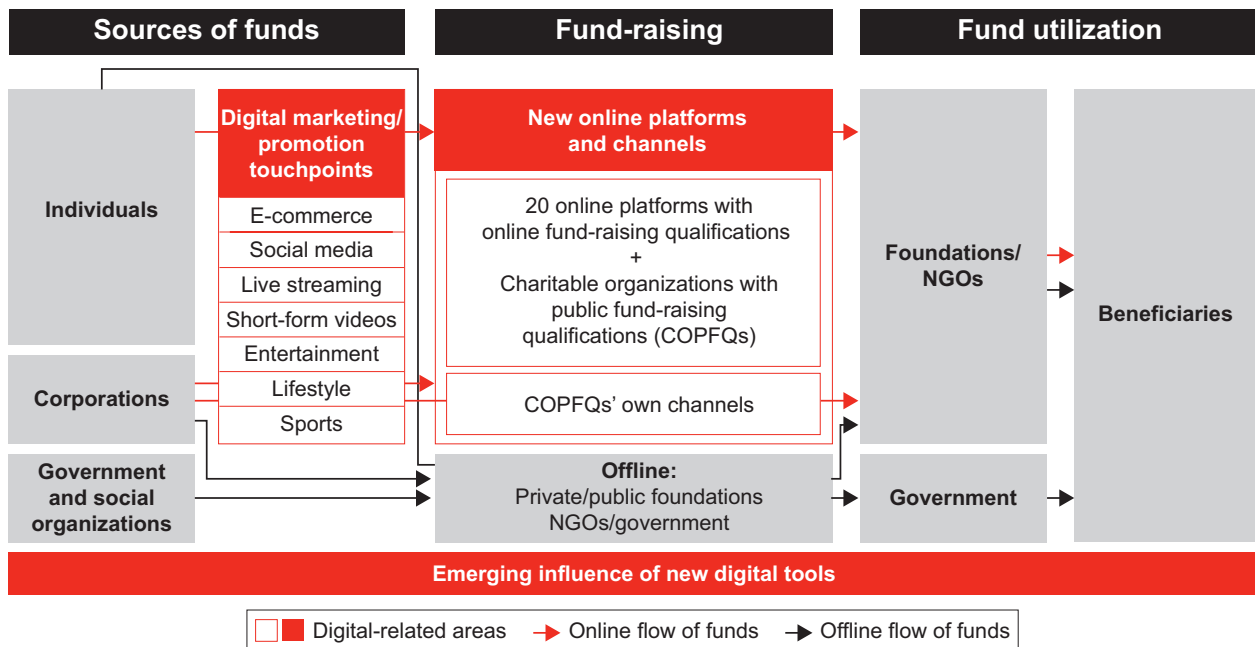
Digital philanthropy:

Evolution and
characteristics

- Digital technology is rapidly changing how China's philanthropy sector operates—creating new bridges between stakeholders, and closing the distance between donors and specific projects.
- Overall donation value and participation have both soared over the past five years. Still, given the popularity of online donations and increasing confidence among individual donors, there is significant room for growth.
- Currently, the landscape is highly concentrated; 20 online platforms are licensed to link individual donors to projects, but 90% of total donation value goes through Alibaba and Tencent. However, competition may intensify as other players apply for licenses to participate.
- Overall, digital philanthropy in China today is characterized by a few key attributes. Young people are the major donor group online, and engaging young donors will be an important battle for all stakeholders. We also find that platforms are encouraging NGOs and individuals to fund-raise online, and that a relatively small percentage of projects are capturing the bulk of the donation value. In addition, health, poverty alleviation and education are the most popular themes of online projects.

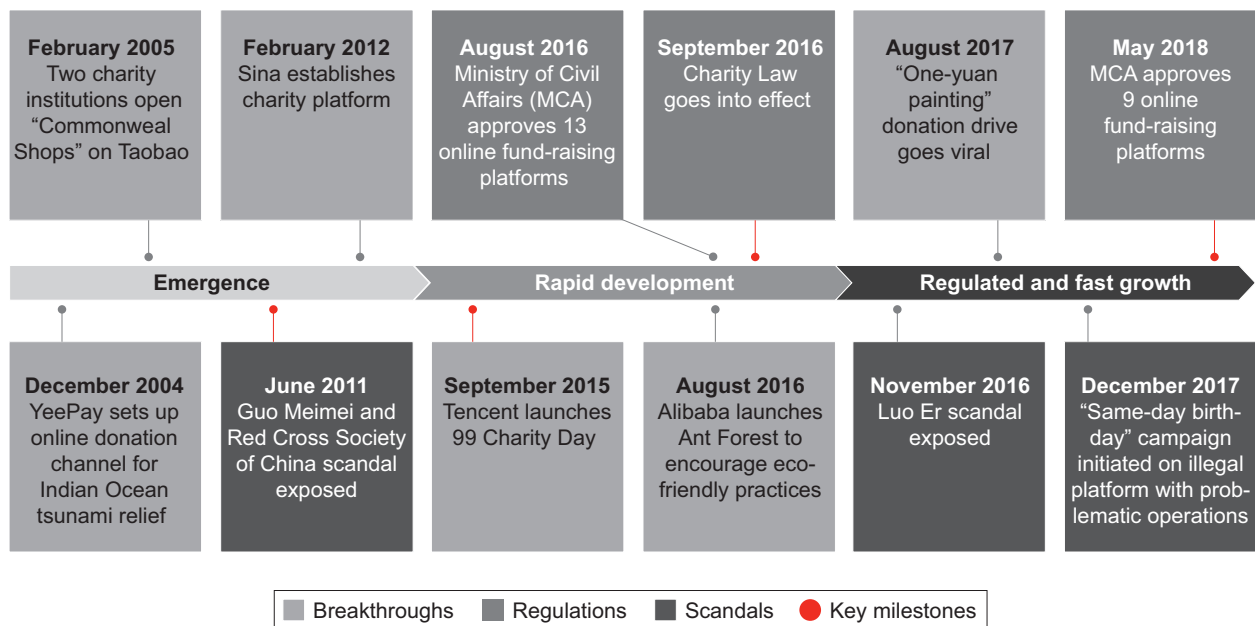
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Figure 10: Digital is changing how China's philanthropy sector operates



Notes: Number of online platforms as of August 2018; some individuals and organizations that are not registered as foundations or NGOs can still initiate projects
Sources: Expert interviews; Bain analysis

Figure 11: Online fund-raising in China has developed in three stages

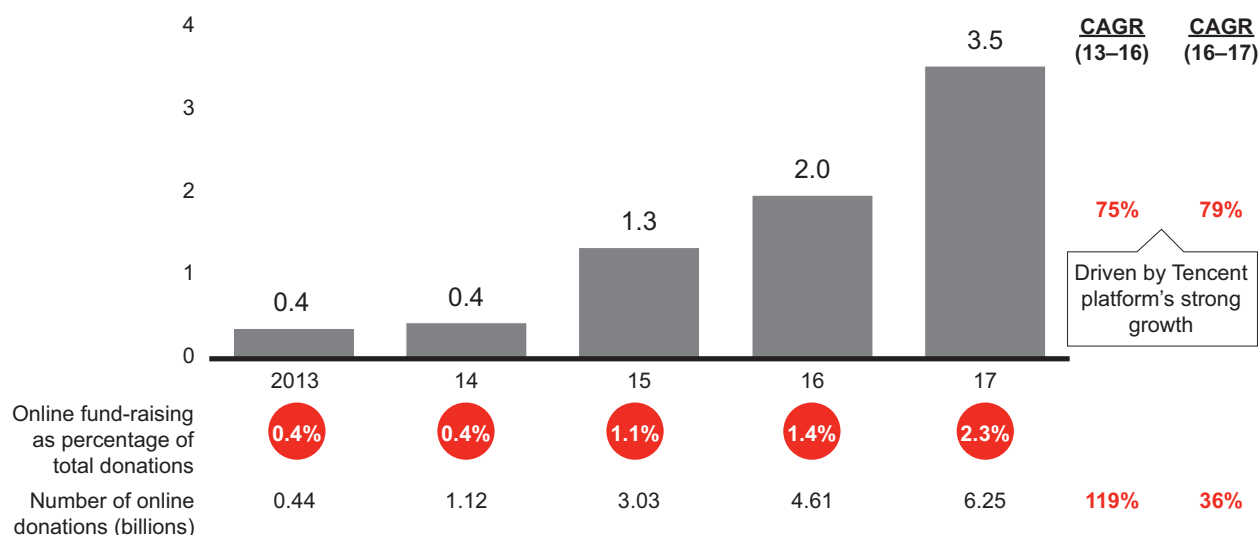


Note: Only 11 of the 13 online fund-raising platforms approved in 2016 are operating today, for a total of 20
Source: Bain analysis

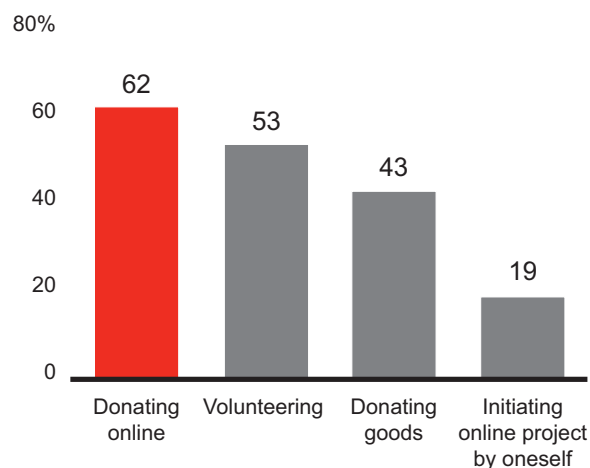
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Figure 12: Online fund-raising value and participation have soared over the past five years

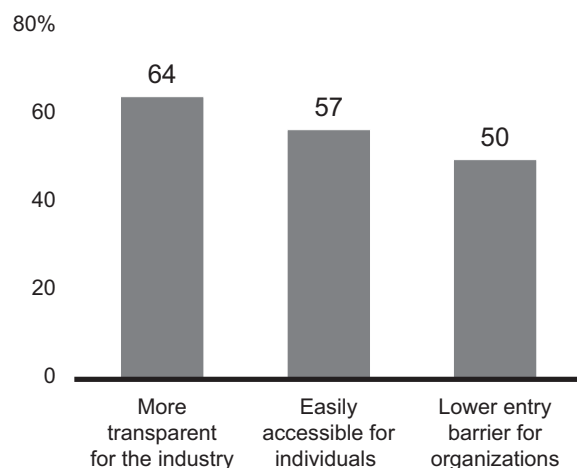
Online fundraising value (RMB billions)

**Figure 13:** Donating online is the preferred participation method, valued for its transparency and convenience*"What is your preferred way to participate in philanthropy?"*

Percentage of respondents, 2017

*"What is the biggest benefit of digital philanthropy?"*

Percentage of respondents, 2017

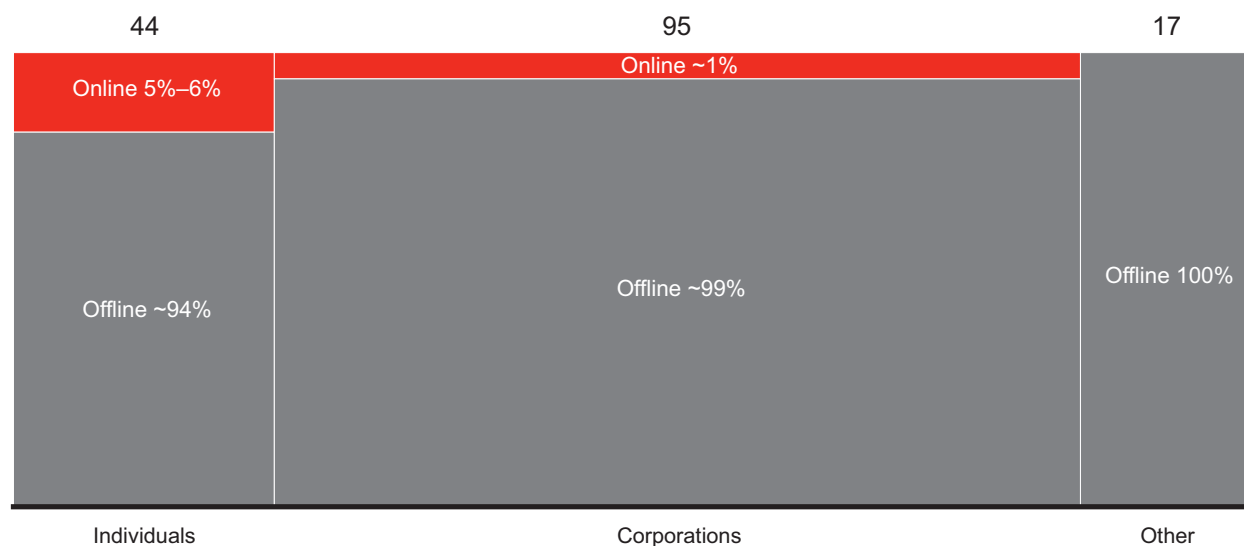


Note: Survey conducted on People Think Tank's WeChat accounts and website (n=11,484)
Sources: "The Public's View on Philanthropy in China," People Think Tank, 2017; Bain analysis

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Figure 14: Online fund-raising has plenty of room to grow across donor categories

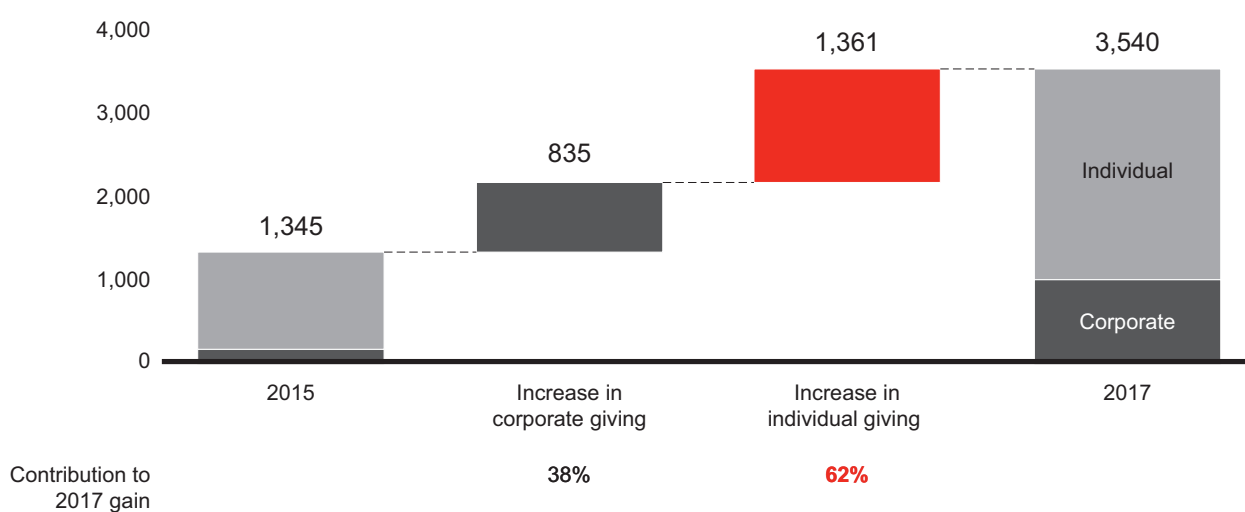
Donation value by channel and source, 2017 (RMB billions)

Total donation value=RMB 156B

Notes: Other includes government, foundations, social organizations, etc.; due to limited data availability, 2017 totals estimated using 2014–16 CAGRs for individuals, corporations and other; online corporate donations may be underestimated because Ant Financial does not disclose corporate donation data
 Sources: Annual Report on China's Philanthropy Development, 2017–18; *China Philanthropy Times*; China Global Philanthropy Institute; Shanghai United Foundation; Tencent and Qfund operational reports; expert interviews; Bain analysis

Figure 15: Digital has activated donations from individuals

Total online fund-raising and sources (RMB millions)

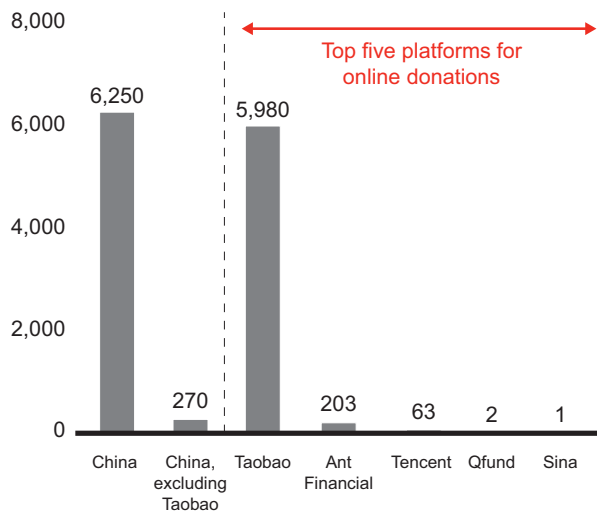


Notes: Corporate giving includes match donations for Tencent's 99 Charity Day and Tencent "steps walked" donations; online corporate donations for 2017 may be underestimated because Ant Financial does not disclose corporate donation data
 Sources: Annual Report on China's Philanthropy Development, 2017–18; Online Fundraising in China: A Research Report on Third-party Platforms, China Association of Fundraising Professionals, 2014–16; Tencent and Qfund operational reports; Shanghai United Foundation; *China Philanthropy Times*; China Global Philanthropy Institute; Bain analysis

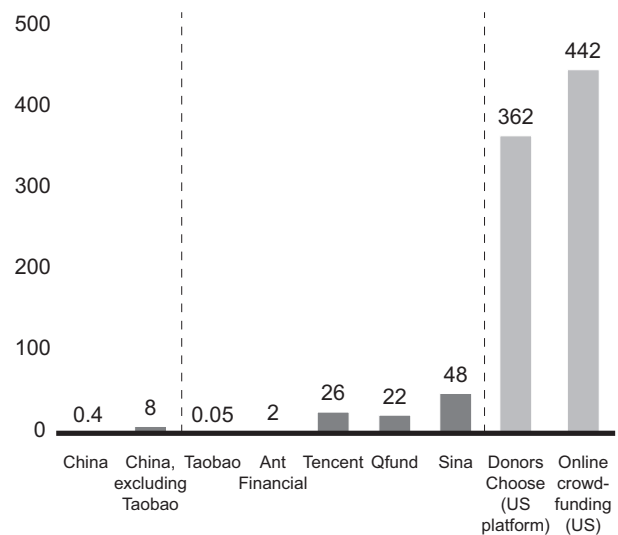
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Figure 16: Small average donation amount indicates huge potential for online fund-raising among individuals

Number of online donations, 2017 (millions)



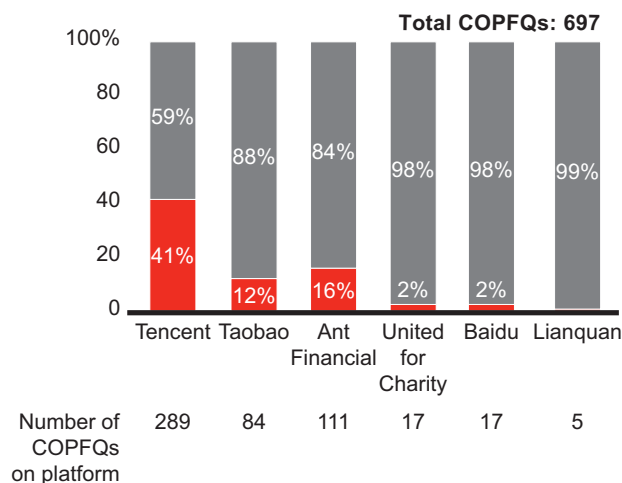
Average donation amount, 2017 (RMB)



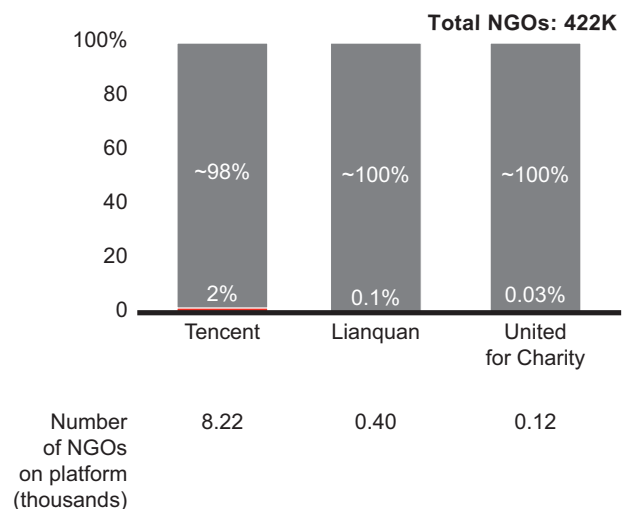
Notes: DonorsChoose selects and runs education fund-raising campaigns online; average donation amount for DonorsChoose reflects first-time donors only
Sources: Annual Report on China's Philanthropy Development, 2018; *China Philanthropy Times*; NonprofitSource.com; DonorsChoose.org; Bain analysis

Figure 17: NGOs and charities with public fund-raising qualifications have a limited presence on online platforms

COPFQ penetration on online platforms, 2017



NGO penetration on online platforms, 2017



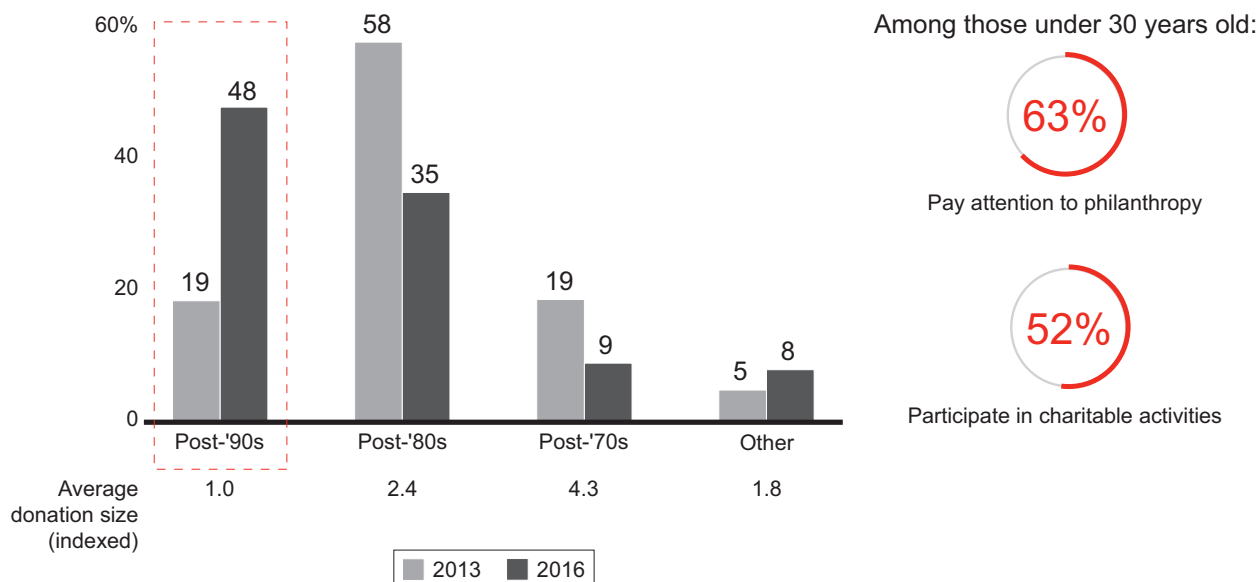
Legend: ■ Already launched ■ Not launched

Notes: COPFQs refers to charitable organizations with public fund-raising qualifications; NGOs refers to social service organizations (previously known as private nonenterprise units); some individuals/organizations that are not registered as NGOs or foundations can still initiate projects
Sources: Annual Report on China's Philanthropy Development, 2018; Tencent, Taobao, Ant Financial, United for Charity, Baidu and Lianquan operational reports; Xinhuanet; Bain analysis

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Figure 18: China's younger generation shows a strong interest in philanthropy

Percentage of online donors by generation

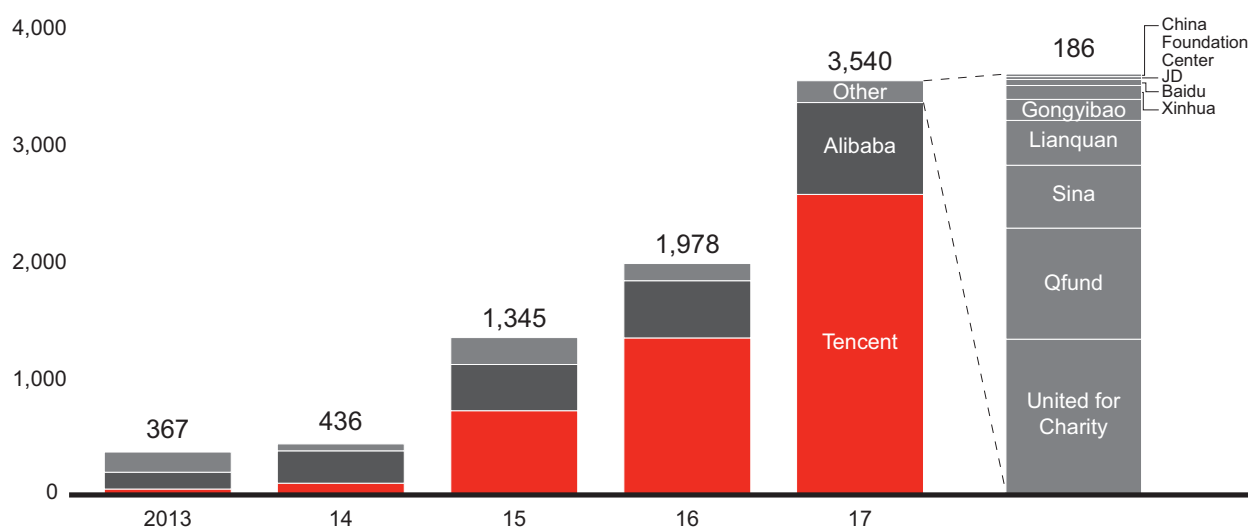


Note: Donation size indexed to the post-'90s period

Sources: 2017 Youth Attitudes Toward Philanthropy Report, Ifeng; China Online Donation Report, 2013; Ant Financial; Bain analysis

Figure 19: Tencent and Alibaba currently dominate among online fund-raising platforms

Online donation value by platform (RMB millions)



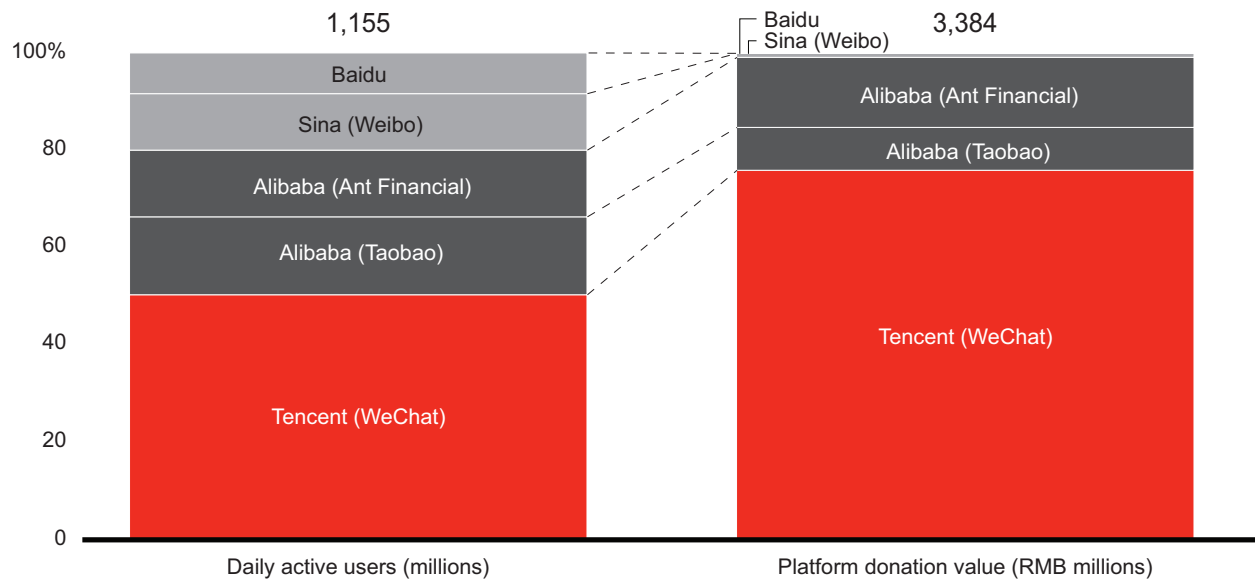
Notes: 2014–16 totals sourced from Online Fundraising in China: A Research Report on Third-party Platforms; 2017 total is the sum of each platform's data; Alibaba data includes both Ant Financial and Taobao; Alibaba's data may be underestimated because Ant Financial does not disclose "steps walked" donations; Tencent data includes individual donations, "steps walked" donations and corporate match donations on 99 Charity Day; in 2013, Other includes Sina only, due to limited data availability

Sources: Annual Report on China's Philanthropy Development, 2017–18; Online Fundraising in China: A Research Report on Third-party Platforms, China Association of Fundraising Professionals, 2014–16; Tencent and Qfund operational reports; *China Philanthropy Times*; China Global Philanthropy Institute; Bain analysis

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Figure 20: Tencent and Alibaba outperform other platforms by better leveraging their business traffic

Online platform performance, 2017

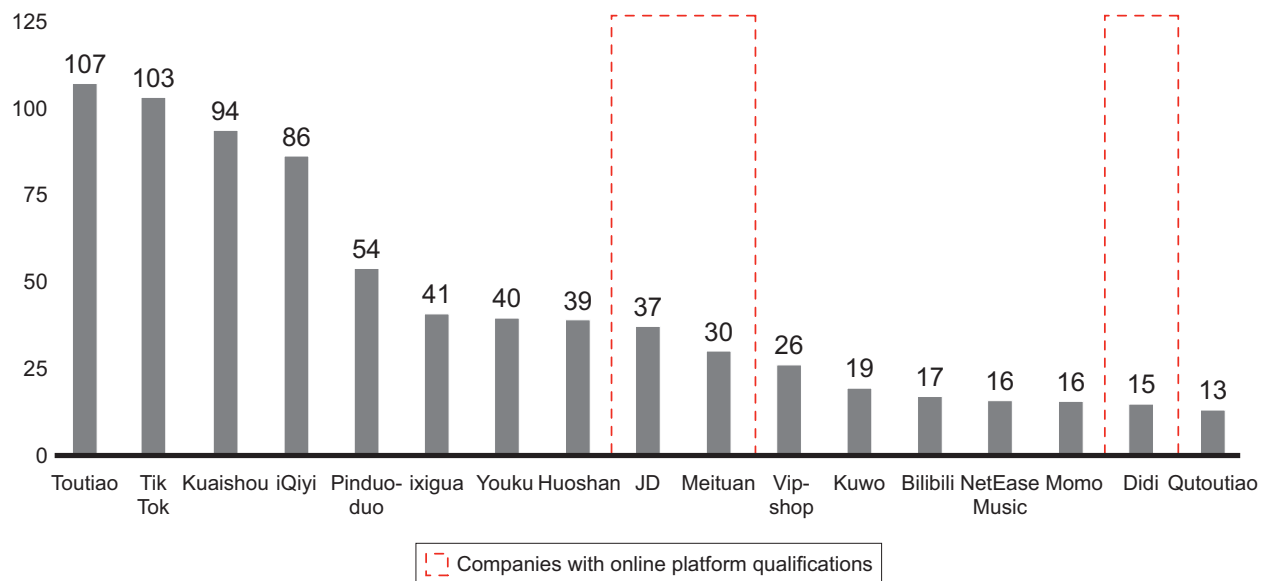


Note: Daily active users refers to users of mobile apps

Sources: Jiguang; Tencent, Taobao, Ant Financial, Baidu and Sina operational reports; *China Philanthropy Times*; Bain analysis

Figure 21: Other Internet players can harness their traffic to create innovative philanthropic models

Daily active users, Q2 2018 (millions)

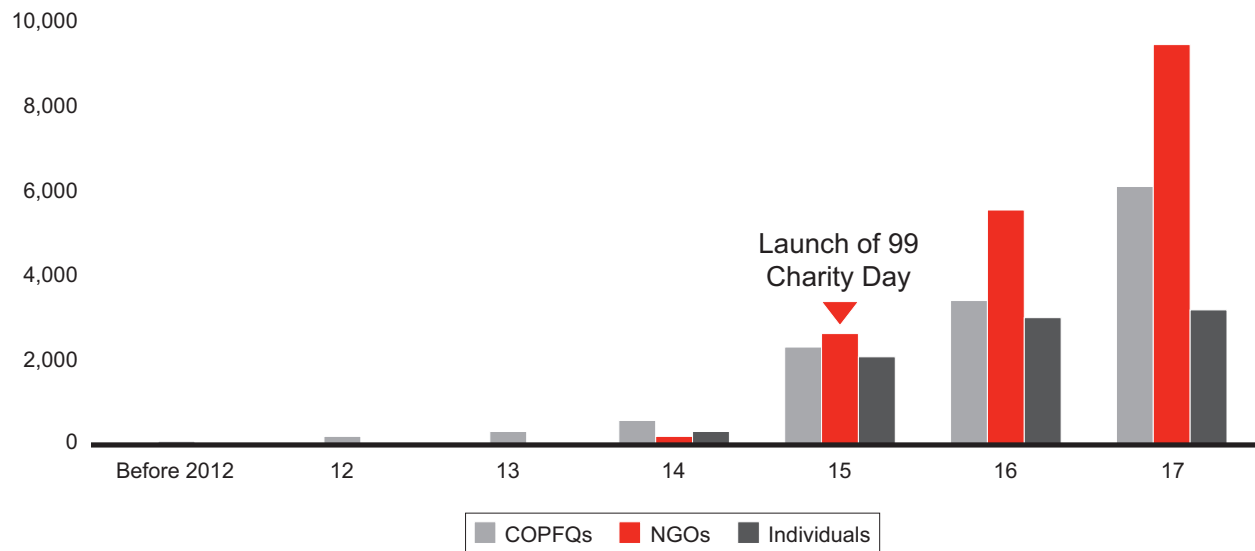


Sources: Jiguang; Bain analysis

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Figure 22: As online platforms empower NGOs and individuals, public foundations are no longer the sole major player

Number of fund-raising projects by initiator type, Tencent platform



Note: COPFQs refers to charitable organizations with public fund-raising qualifications
Sources: Tencent reports; Bain analysis

Figure 23: Relatively few strong projects claim an outside share of online donations

Distribution of funding across One Foundation projects on the Tencent platform, July 2018 (RMB millions)



Sources: China Development Brief; Tencent operational reports; expert interviews; Bain analysis

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Figure 24: Four categories of online fund-raising projects have emerged

	“The Long Tail”	“The Survivor”	“The Star”	“The Influencer”
Performance and key characteristics	● No clear differentiating points	● Initiated/strongly promoted by foundations	● One of the most successful projects on online platforms; strong reputation and media exposure	● Highly empathy-provoking topic; wide public awareness thanks to strong platform promotion
Historical track record	● Relatively new	● Good track record offline	● Award-winning or widely reported	● Award-winning or widely reported
Branding and marketing capabilities	● Limited	● Dedicated team	● Dedicated team and PR professionals	● Strong IT and online support from platforms
Resources (online/offline)	● Very limited	● Strong source of funds	● Strong source of funds; wide collaboration with media and online players	● Strong source of funds; deep collaboration with media and online players
Platform engagement/support	● Regular support	● Regular support	● Positioned at key traffic point for online campaign	● Full ownership; co-branding campaign

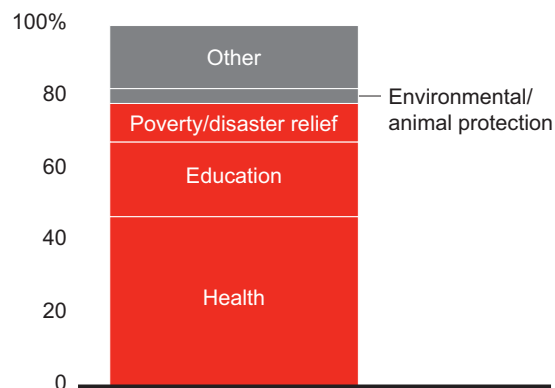
Level of capability Low ● → High ●

Source: Bain & Company

Figure 25: Health, poverty alleviation and education are the most popular themes of online projects

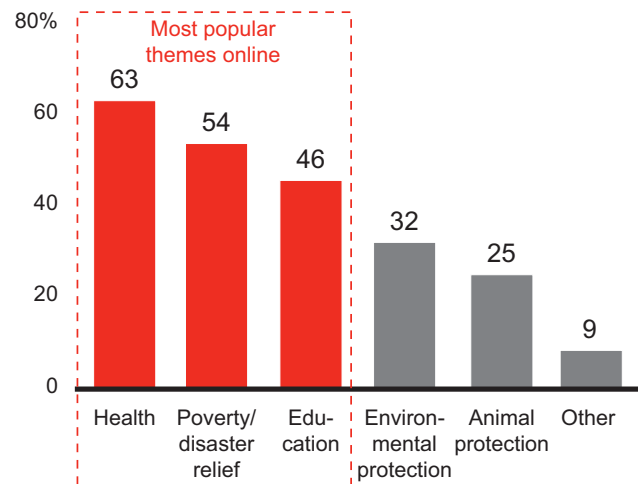
Online platforms focus on projects that inspire public empathy or support government initiatives

Topics on Tencent platform, 2017



Donors are most interested in health, poverty/disaster relief and education

Percentage of donors by topic, 2017



Note: Health category does not include fund-raising requests initiated by friends and relatives

Sources: “The Public’s View on Philanthropy in China”, People Think Tank, 2017; Tencent reports; expert interviews; Bain analysis



3.

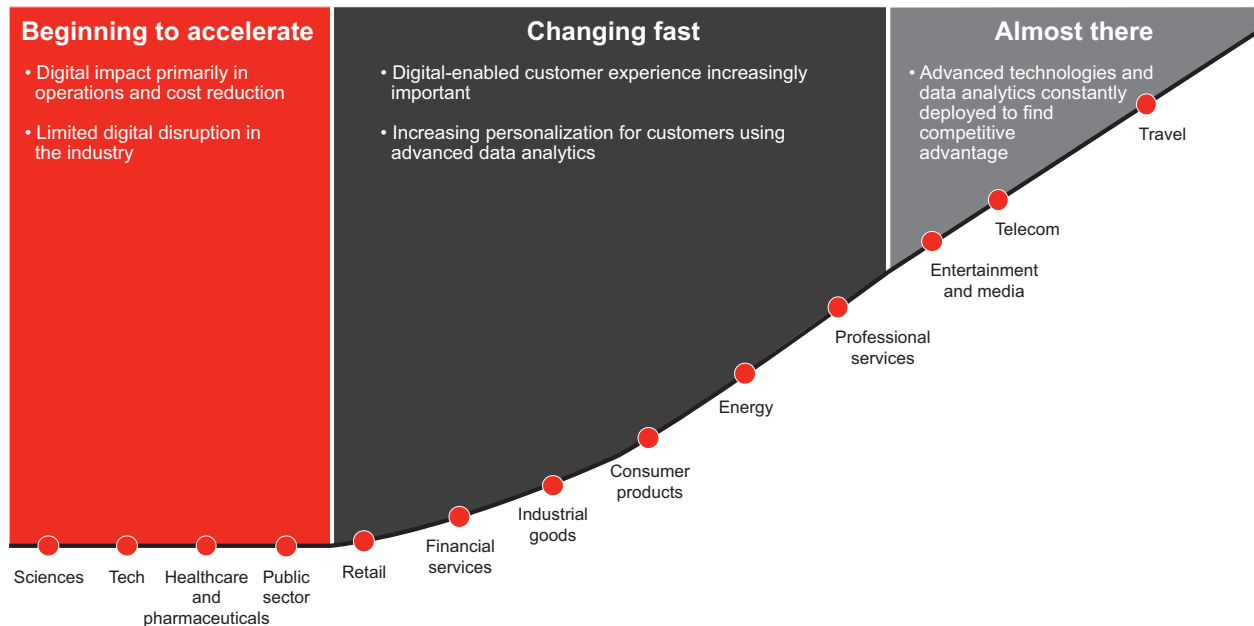
Digital fund-raising:

Vision and implications

- As digital reshapes a wide range of industries, China's philanthropy sector is positioned to lead the world in innovation given its unique combination of digitally savvy users and large ecosystem players.
- China's philanthropy sector can harness digital to accelerate the development of its overall culture. To do so, stakeholders will need to clearly define their objectives and develop corresponding strategies.
- Digital philanthropy in China is still in its infancy, and there will be no single path to success in the market. As stakeholders assess the opportunity, it is important for them to ask several key questions, with a focus on how they will engage customers, manage operations, leverage data and analytics, and grow their internal talent pool.
- Even for the most mature organizations, these are not easy tasks, and they can be even more challenging for nonprofits. Finding partners to supplement capability gaps will be an important part of any winning strategy.

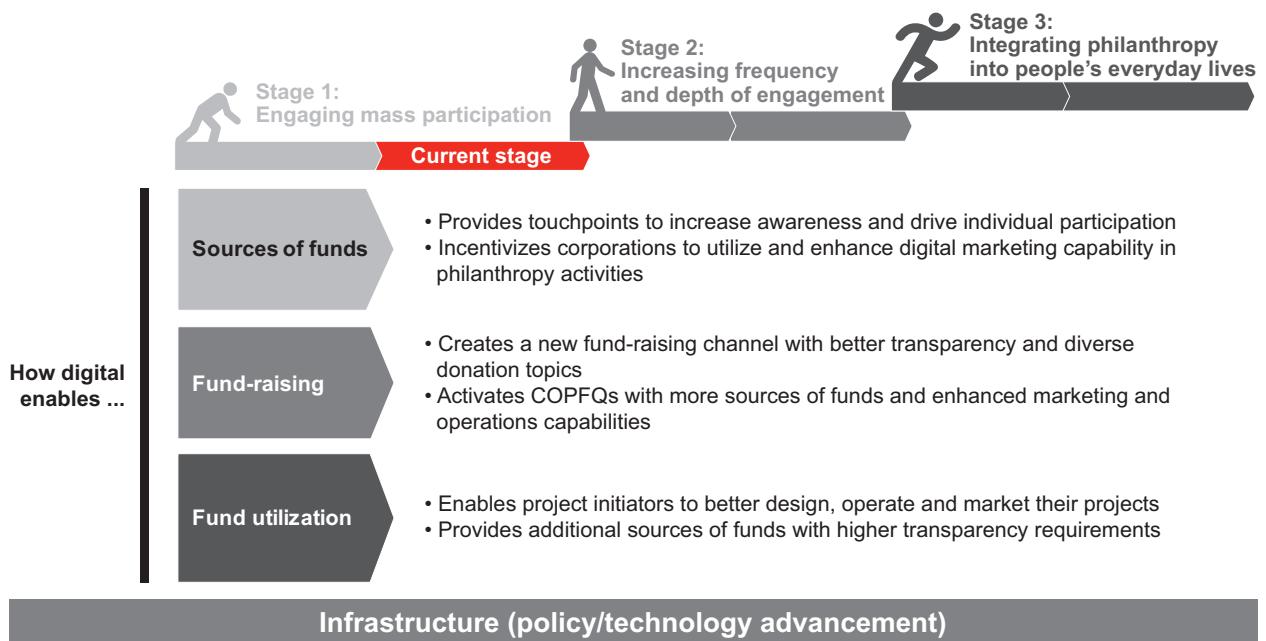
Digital Philanthropy in China: Activating the Individual Donor Base

Figure 26: Industries further along the digitalization curve can shed light on China's digital philanthropy journey



Note: Industry placement based on prevalence of data management platforms, use of predictive modeling, and adoption of multivariate and A/B testing in marketing campaigns
Source: Bain Worldwide Marketing Leaders and Laggards Survey (n=487)

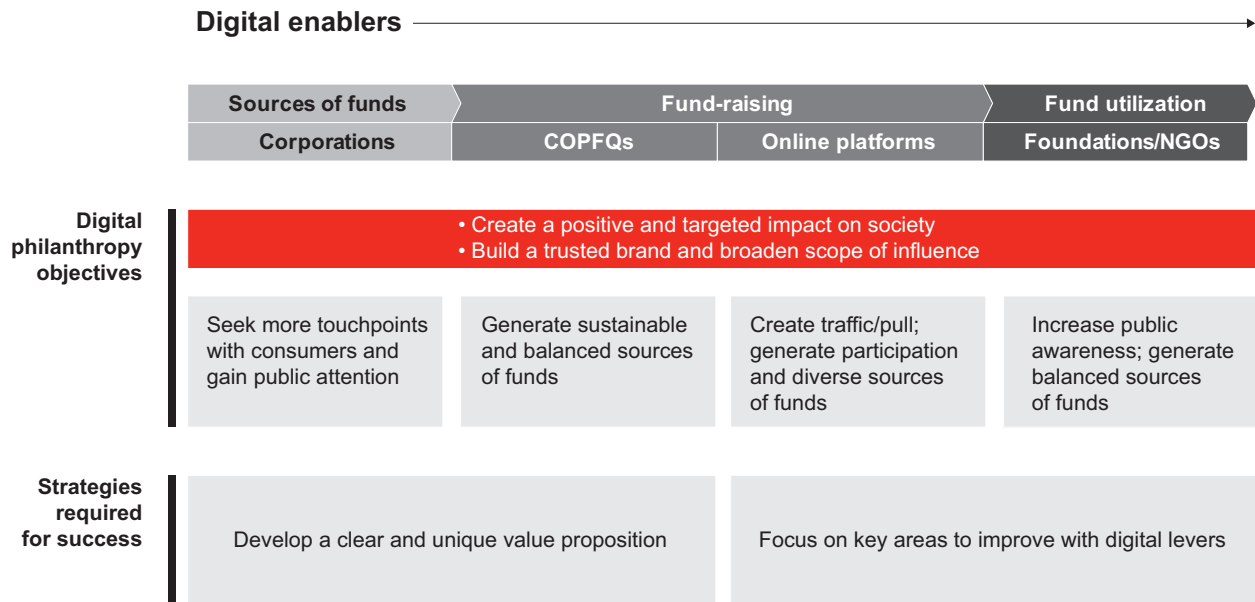
Figure 27: China's philanthropy sector can leverage digital to increase its impact and cultivate a donation culture



Note: COPFQs refers to charitable organizations with public fund-raising qualifications
Source: Bain & Company

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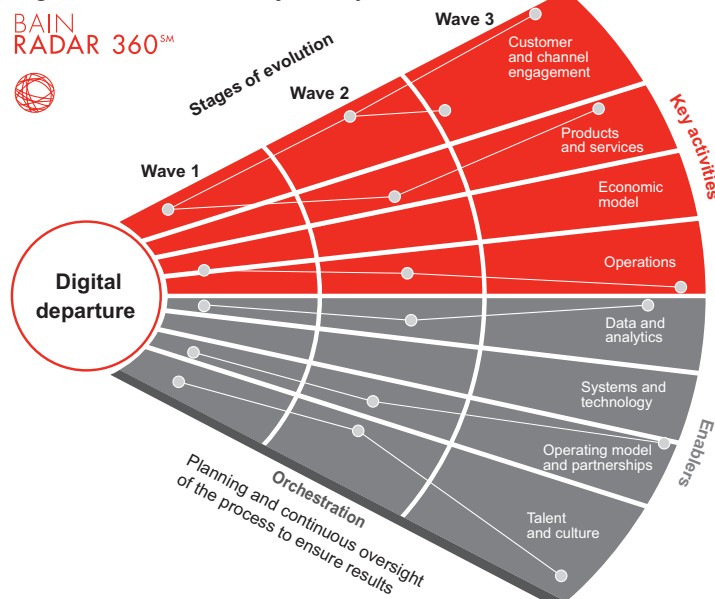
Figure 28: Philanthropy stakeholders need to define clear digital objectives and develop corresponding strategies



Note: COPFQs refers to charitable organizations with public fund-raising qualifications
Source: Bain & Company

Figure 29: Asking a set of key questions can help stakeholders focus their efforts and develop digital strategies

Bain Radar 360 helps an organization define its digital transformation journey



Source: Bain & Company

Philanthropy stakeholders can focus on relevant elements to guide their efforts

Customer and channel engagement

How do we leverage digital infrastructure to maximize donor engagement?

Products and services

What donation options and donor services can we develop for digital platforms?

Operations

How do we improve our internal operations by leveraging new digital tools and capabilities?

Data and analytics

What analytics can help us measure and track key activities, and how can we apply digital tools to manage them?

Operating model and partnerships

How do we tailor our operating model to cater to digital needs? Do we need ecosystem partners?

Talent and culture

Do we have the right talent/culture to make our digital plan work? If not, how can we practically close the gaps?

Digital Philanthropy in China: Activating the Individual Donor Base

Figure 30: To pursue their digital philanthropy objectives, stakeholders should identify critical areas for development

Objectives	Key questions	Capabilities to develop
Customer and channel engagement	How do we leverage digital infrastructure to maximize donor engagement?	Invest in a trusted brand with strong traffic base Create engaging digital marketing/storytelling campaigns Embed best-in-class customer relationship management processes
Products and services	What donation options and donor services can we develop for digital platforms?	Integrate philanthropy with core business strategies Source and manage high-quality projects within focus area Develop innovative models (e.g., gamification) and sustainable project design
Operations	How do we improve our internal operations by leveraging new digital tools and capabilities?	Embed operational efficiency best practices, enabled by digital Standardize reporting and increase information disclosure
Data and analytics	What analytics can help us measure and track key activities, and how can we apply digital tools to manage them?	Leverage digital tools to conduct data analysis
Operating model and partnerships	How do we tailor our operating model to cater to digital needs? Do we need ecosystem partners?	Establish a digital-ready operating model Develop ability to partner with the right ecosystem stakeholders
Talent and culture	Do we have the right talent and culture to make our digital plan work? If not, how can we close the gaps?	Acquire and cultivate digital talent with a clear career story

Source: Bain & Company

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