ASIA-PACIFIC NGO DIGITAL CAPABILITY REPORT 2023

Infoxchange

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ASIA-PACIFIC

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We're based on the lands of the Wurundjeri, Kaurna and Turrbal peoples, the traditional custodians of the land, waters and knowledge for this place where we gather to collaborate and strengthen communities.

In our work, we recognise the importance of Country – not just as a place, but how it also maintains community, family, kin, lore and language.

We pay our respects to Elders past and present. This always was, always will be aboriginal land.

We support the Uluru Statement from the Heart.

ABOUT THIS REPORT
The 2023 APAC NGO Digital Capability Report aims to recognise the unique digital strengths, challenges and opportunities present for NGOs, NPOs, charities and not-for-profits in the Asia-Pacific region.
It explores and summarises insights gathered from the region during the 2023 APAC Digital Capability Survey conducted by Infoxchange.
It also marks the first stage of the wider APAC NGO Digital Transformation Project, designed to elevate the digital skills and confidence of NGOs in the region.
Represented countries & territories:
» Australia
» India
» Indonesia
» Japan
» Malaysia
» New Zealand
» Philippines
» Singapore
» South Korea
» Taiwan
» Thailand
» Vietnam

WHO IS INFOXCHANGE?

Infoxchange is a leading not-for-profit social enterprise that has been delivering technology for social justice for over 30 years. We tackle the biggest social challenges through the smart and creative use of technology.

We work with community, government and corporate partners to solve issues around homelessness, family violence, mental health and disability, as well as supporting Indigenous communities, women, youth and families. Our products and services are used by over 35,000 government and community services. We provide the right tools to improve efficiency and deliver greater impact.

And through our work in digital inclusion and social innovation we use technology to empower people experiencing disadvantage, driving social inclusion and creating stronger communities. We believe no-one should be left behind in today's digital world.

We are Australia and New Zealand's leading not-for-profit dedicated to using technology to improve the lives of people experiencing disadvantage and the organisations that support them.

INFOXCHANGE MESSAGE

I am delighted to present the 2023 Asia-Pacific NGO Digital Capability Report.

This report explores the complex and diverse issues confronting organisations across the region, while showcasing their unwavering strength and perseverance during times of uncertainty. Community need is high, and it has never been more important for NGOs to build digital capability and resilience.

A key insight emerging from the report is the growing awareness of cyber security risks. One in six organisations surveyed experienced a cyber security incident in the last 12 months, and 21% of organisations currently provide cyber security training for their staff. This highlights the urgent need to prioritise cyber security practices and invest in the necessary training and infrastructure to protect sensitive data.

While 98% of organisations store emails in the cloud, only 54% store files in an NGO cloud platform, and a mere 27% report they have moved a significant portion of their IT to the cloud. There is a clear opportunity for organisations in the region to further embrace NGO cloud technology platforms and reap the benefits of increased efficiency, cost savings, and enhanced collaboration.

Organisations in the region are aware of the importance of raising digital capabilities for staff and volunteers, with 50% of respondents recognising this as a priority. A focus on upskilling and empowering the workforce will not only lead to more efficient operations, but enable organisations to better serve their communities and achieve their mission.

The insights from this report will guide the upcoming Digital Capability Training Program for organisations in the region. We intend, through that program, to support organisations to take steps in resolving some of the critical issues presented in these pages, and to continue building upon their strengths.

We are grateful to the nearly 1,600 organisations who took the time to share information about their digital capacity, challenges and opportunities. This initiative was made possible with support from Google.org. We also extend our thanks to our delivery partners TechSoup Asia, Kitabisa.com, Japan NPO Center and NPO IT Support Center. We appreciate their commitment to bringing this report and the APAC NGO Digital Transformation Project as a whole to life.

David Spriggs
CEO, Infoxchange

GOOGLE MESSAGE

We are pleased to support Infoxchange in developing this report, identifying the digital capability, challenges and priorities of NGOs across the region.

Google.org, Google's philanthropy, brings the best of Google to help solve some of humanity's biggest challenges combining funding, product donations and technical expertise to support underserved communities and provide opportunity for everyone. We engage nonprofits, social enterprises and civic entities who make a significant impact on the communities they serve, and whose work has the potential to produce scalable, meaningful change.

At Google.org, we believe the first steps to making a real difference are to ask a community what they need and to listen to the answers. This report represents those answers. It will serve as a guiding star for the broader digital transformation project, leveling up the skills and capability of NGOs in the region.

Infoxchange has a strong track record of working to build digital capability in the sector and we are proud to be supporting this initiative.

Annie Lewin
Head of Google.org APAC

EXECUTIVE SUMMARY

The 2023 Asia-Pacific NGO Digital Capability Report explores the digital landscape of NGOs, NPOs, charities, and not-for-profits (referred to collectively as "organisations") in the Asia-Pacific region. It identifies strengths, weaknesses, and areas of improvement, as well as key training and technology priorities.

The report is based on data collected from 1,589 organisations across Australia*, India, Indonesia, Japan, Malaysia, New Zealand*, Philippines, Singapore, South Korea, Taiwan, Thailand and Vietnam, providing a unique overview of the digital capabilities of organisations in the region. These organisations strive to create a civil society which is stronger, more inclusive, equitable and sustainable. Whether supporting people experiencing disadvantage, enabling sustainability initiatives or working to eliminate poverty, digital capability is critical for Remote working capabilities, efficient collaboration and improved service delivery, enhancing community impact.

There are many digital strengths across the region. On average, **50% of staff in organisations are confident using technology to perform their roles.** Australia (52%), India (47%), and Vietnam (46%) are leading in staff satisfaction with their digital environment. Where a technology plan is in place (45% of organisations), this correlates to a 26% rise in staff confidence and 24% rise in satisfaction with their digital environment.

However, cyber security is a pressing and growing concern, with **1 in 6 organisations experiencing a cyber security incident in the past year.** Only 21% of organisations provide cyber security training for staff, and just 41% have multi-factor authentication enabled on internet-facing systems storing sensitive data. Support for remote work is also limited, with 1 in 2 organisations not adequately meeting staff needs.

The technology priorities expressed by surveyed organisations highlight the importance of digital transformation and efficiency in communication. **A majority of 53% of organisations identified the need to improve their website,** while 50% recognised the value of enhancing the digital capabilities of their staff and volunteers. 49% of organisations consider making better use of social media and digital marketing as a key priority. **Exploring new technologies and innovations to help achieve their social mission is considered essential by 34% of organisations,** and 35% expressed the need to improve data protection and information security practices, demonstrating the growing awareness of cyber security risks.

Training priorities identified by surveyed organisations emphasise a need to adapt and enhance their digital capabilities. **A significant 38% of respondents see training to support migration to an NGO cloud collaboration environment as a priority** and 33% express the need for training to effectively support such an environment. Additionally, 30% of organisations prioritise learning how to use spreadsheets and forms for data capture and analysis, and 27% acknowledge the importance of personal computer, mobile phone, or tablet management and support.

Infoxchange and its delivery partners will conduct a digital capability training program for organisations in the Asia-Pacific region. The training will cover four key areas of digital capability that Asia-Pacific organisations have identified as priorities:

- NGO cloud collaboration environments, with a focus on selection, migration, and support.
- Data capture and analysis to enhance service delivery and understand impact.
- Digital marketing techniques and skills to effectively connect with audiences, attract funding, and drive support.
- Cyber security protections to ensure the safety of data and employees.

The APAC NGO Digital Capability Training Program will commence in the second half of 2023.

Some of our key findings include:

1 in 2 organisations are not adequately meeting remote working needs.

60% of organisations do not have a system that enables them to understand their impact.

Only **21%** of organisations provide cyber security training for staff and volunteers.

*Australia and New Zealand data was collected in late 2022. All other data was collected in early 2023.

PARTICIPANT SNAPSHOT

1589 organisations participated in the survey

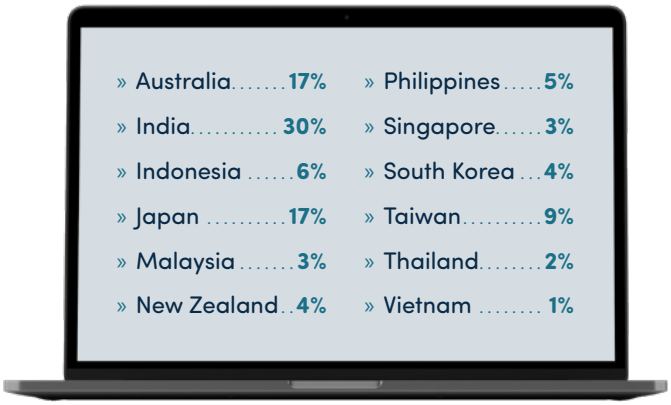
27% of respondents look after more than one service area

Organisation by primary service area

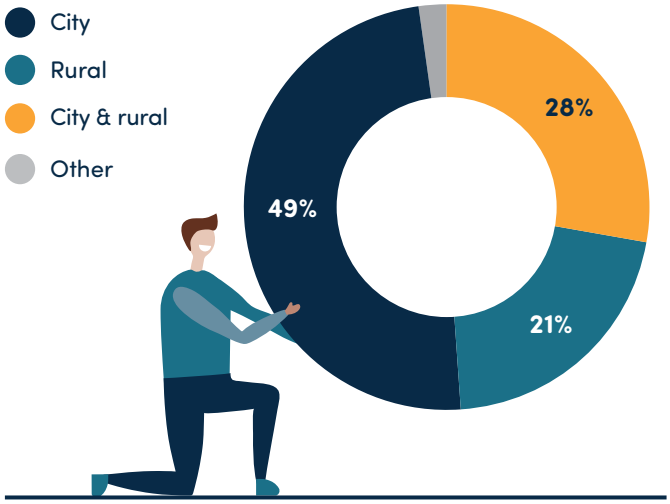
Employment, supplementary education & skills development	50%
Community development	38%
Medical, mental health and wellbeing	37%
Youth development	27%
Environment, conservation and animal welfare	20%
Family and domestic violence, counselling and/or financial services	19%
Services for people with a disability	19%
Food relief, housing and shelter services	18%
Human/civil rights, international aid, emergency and disaster relief	18%
Childcare services	15%
Philanthropy, fundraising and volunteering	15%
Social, sport and recreation	11%
Social and/or policy research	11%
Services for older people (aged care)	10%
Religion	10%
Creative/performing arts and media	8%
Legal services	6%
LGBTIQA+ support & education	5%
Other^	30%

Please note that this does not add up to 100% as many organisations provide services across more than one area.
*Full time equivalent
^Other services include: Womens and gender empowerment, water, sanitation & hygiene, tribal development, science, agriculture, HIV/AIDS prevention, historical societies.

Respondents by location



Locations where organisations deliver services



Organisation size

Very small (1-5 staff/volunteers*)	28%
Small (6-20 staff/volunteers*)	32%
Medium (21-150 staff/volunteers*)	30%
Large (151-500 staff/volunteers*)	7%
Very large (501+ staff/volunteers*)	2%

THE BIG PICTURE

In the Asia-Pacific region, hundreds of billions of dollars is invested in international aid and for NGOs to deliver services to people and regions in need.

Despite the critical role these organisations play, many struggle to effectively leverage digital technology and have little capacity to undertake digital transformation.

Many organisations lack the appropriate funding and resources to invest in the technology infrastructure required for digital transformation initiatives. Language and cultural diversity across the region also makes it more difficult to implement standardised solutions.

Despite these challenges, embracing digital technology can streamline the operations and impact of NGOs, creating efficiencies for staff and resources and opening up untapped potential.

Why Digital Transformation Is Critical

CLOUD COLLABORATION

As organisations expand their reach and collaborate with stakeholders across the globe, effective communication and project management tools have become critical. Online cloud collaboration platforms are both more important and accessible to NGOs than ever before.

Remote working arrangements are becoming more common, as organisations seek to attract and retain diverse talent while increasing operational efficiency. Well-implemented cloud collaboration platforms enable seamless communication and file-sharing among geographically separate team members, keeping everyone on the same page.

SYSTEMS AND DATA

The Asia-Pacific region continues to develop at a fast pace, and organisations must leverage data to maximise their impact. Through effective data collection and analysis, organisations can identify patterns and trends, enabling them to make informed decisions, optimise resource allocation, and better understand their communities' needs.

As the world becomes increasingly connected, competition for funding and support has grown. Donors, foundations, and governments are placing greater emphasis on transparency, accountability, and demonstrable impact. Data is an essential tool for organisations to evaluate their success and showcase tangible results to existing and prospective supporters.

DIGITAL MARKETING

The Asia-Pacific region has experienced a rapid surge in internet availability and smartphone adoption. Audiences of supporters, donors, and clients are available in ways they have never been before, presenting both a great opportunity and a great challenge.

Supporters have come to expect tailored and meaningful interactions with the organisations they support. Organisations must effectively meet and exceed these expectations, building engagement, trust and loyalty among their target audiences. Those that succeed in doing so create a powerful base from which to grow into the future. Those that fail risk stagnation.

CYBER SECURITY

Cyber security is vital to protect sensitive data, safeguard the privacy of clients, stakeholders, staff and beneficiaries, ensuring the organisation's reputation is maintained.

Organisations in the Asia-Pacific region must prioritise cyber security in their strategic planning. By investing in security protections, staff training, and regular security assessments, organisations can better protect themselves from outside cyber threats. A proactive approach to cyber security helps ensure long-term resilience and sustainability of digital transformation efforts.

While each country and territory has its unique challenges, the message from the entire region is clear. Organisations must get the most out of their digital infrastructure to remain adaptable, resilient, and able to address the needs of their communities.

	Challenged	Leading	Why
CLOUD COLLABORATION PCs, network, telephony, servers, email, file sharing and collaboration platforms such as Microsoft 365 and Google Workspace	Individual devices sharing files and information via email attachments	Staff can work and access information from anywhere, enabled by cloud-collaboration platforms	Staff can collaborate from anywhere, creating a resilient, mobile organisation
SYSTEMS AND DATA Client/case management, CRM, membership, finance, HR and related systems to deliver services and understand activities, outputs and outcomes	Paper based systems, or individual spreadsheets tracking everything for delivery and reporting	Integrated, accessible solutions enable efficient processes and rapid responses to any issues that arise	Painless reporting, efficient processes and client outcomes tracked
DIGITAL MARKETING Website, email marketing, social media, events management systems, and fundraising processes and systems	No social media presence, and a basic, static website	An engaged audience across multiple digital channels, connecting with your organisation and services	Attract new funds, supporters, volunteers, staff, and clients
CYBER SECURITY Information security, threat protection processes, systems and governance	"I hope it doesn't happen to us."	Our staff, systems, and processes keep information safe and secure	Organisation, client, and staff information kept safe, and reputation protected

DIGITAL LANDSCAPE ACROSS THE REGION

Asia-Pacific region snapshot

File sharing & collaboration platform	Google Workspace	Primary solution to store stakeholder data	Documents & spreadsheets (e.g. Google Docs/Sheets, Microsoft Word/Excel)
Average IT spend %OpEx	3.4%	Overall technology environment	Functional

Australia

- Microsoft 365
- An information/ database system
- 4.8%
- Functional

India

- Email
- Documents & spreadsheets
- 3.3%
- Functional

Indonesia

- Google Workspace
- Documents & spreadsheets
- 4.3%
- Functional

Japan

- Google Workspace
- Documents & spreadsheets
- 3.4%
- Basic

Malaysia

Google Workspace

Documents & spreadsheets

3.5%

Functional

New Zealand

Microsoft 365 / Google Workspace*

An information/ database system

3.2%

Functional

Philippines

Google Workspace

Documents & spreadsheets

2.9%

Basic

Singapore

Google Workspace

An information/ database system

3.6%

Functional

South Korea

Google Workspace

Documents & spreadsheets

1.7%

Basic

Taiwan

Google Workspace

Documents & spreadsheets

2.5%

Basic

Thailand

Google Workspace

Documents & spreadsheets

3.1%

Basic / Challenged*

Vietnam

Google Workspace

Documents & spreadsheets

3.9%

Challenged

*Even split

WHAT TECHNOLOGY ARE NGOS USING?

Current file storage and collaboration solution

On average, 55% of organisations use an NGO cloud collaboration platform (e.g., Google Workspace, Microsoft 365). The remaining 45% of organisations' file management solutions varies across the region.

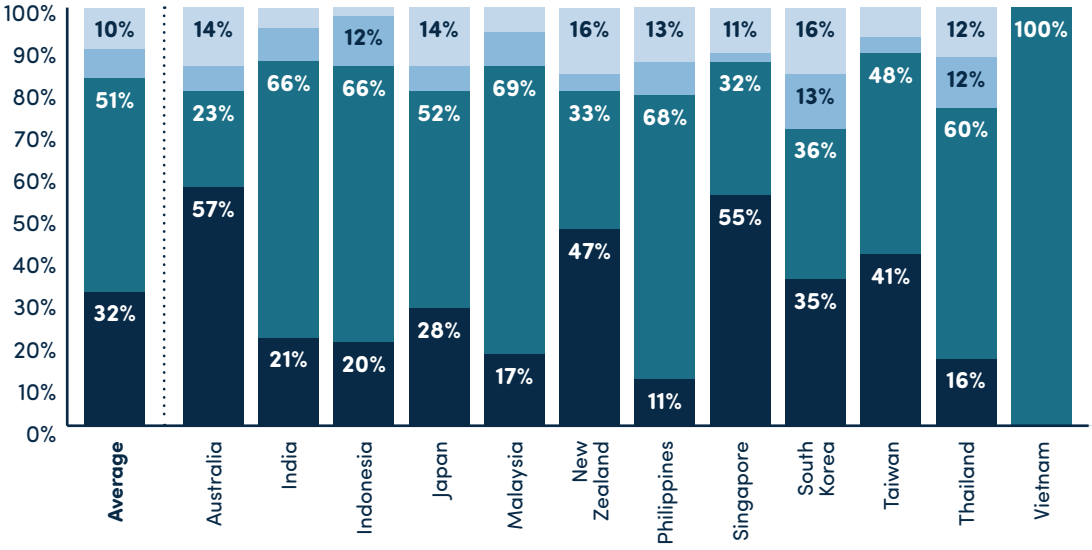
Google Workspace is the most commonly used solution across the region, with exception to Australia and New Zealand, where Microsoft 365 is favoured

Country / Territory	Google Workspace	Microsoft 365	Personal Google Drive	Email	Dropbox	Server- based file sharing	Other
Average	**36%**	**19%**	**10%**	**16%**	**4%**	**8%**	**6%**
Australia	20%	**48%**	0%	0%	5%	15%	12%
India	29%	8%	11%	**47%**	1%	2%	3%
Indonesia	**42%**	5%	28%	20%	2%	2%	0%
Japan	**25%**	21%	7%	12%	12%	15%	8%
Malaysia	**62%**	0%	16%	16%	3%	0%	3%
New Zealand	29%	**32%**	0%	0%	6%	17%	16%
Philippines	**45%**	11%	13%	24%	3%	1%	3%
Singapore	**42%**	22%	11%	9%	4%	9%	2%
South Korea	**27%**	16%	7%	16%	4%	13%	16%
Taiwan	**32%**	16%	13%	16%	3%	16%	4%
Thailand	**44%**	8%	12%	20%	4%	4%	8%
Vietnam	38%	**46%**	0%	15%	0%	0%	0%

Primary systems used to capture stakeholder data

In Australia, Singapore and New Zealand, the majority of organisations use a system to manage their stakeholders rather document/spreadsheet based solutions. This may be associated with cost to implement and manage a system, and the availability of localised solutions to support service delivery needs.

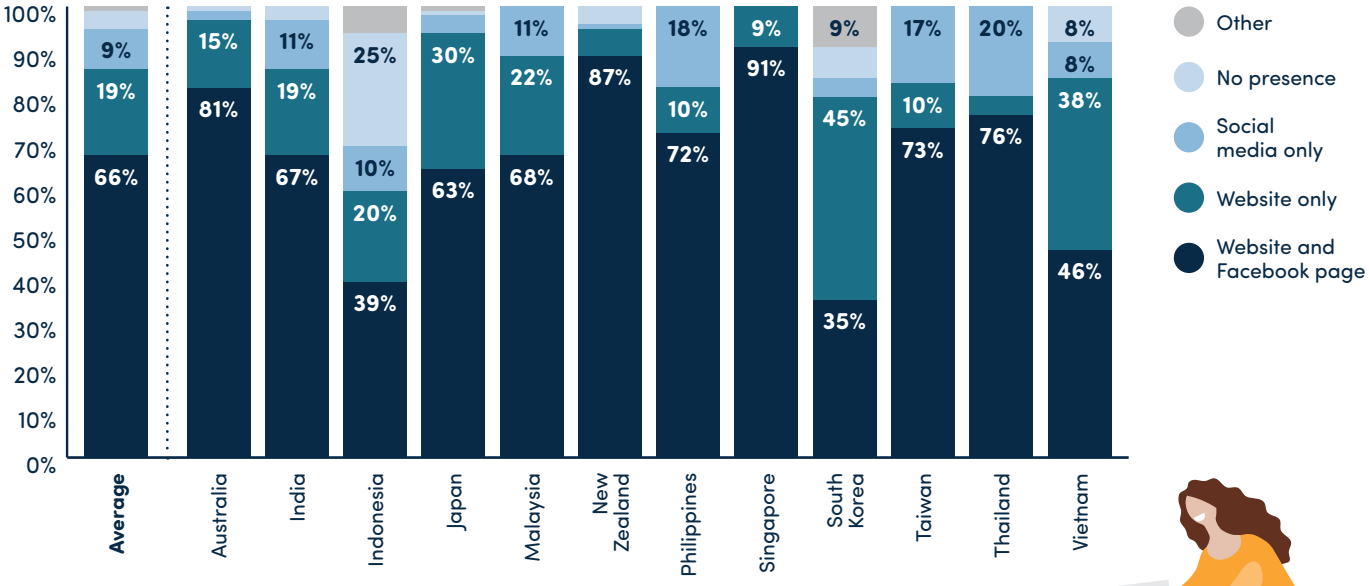
In other locations, organisations primarily use online documents and spreadsheets to store and manage client, member, volunteer and stakeholder information. This can make it more difficult for staff to directly enter quality data, and for structured analysis and reports to be produced.



Only **40%** of organisations agree that their system enables them to understand their impact and outcomes

- Other
- Paper documents
- Online documents and spreadsheets
- An information system

Online presence across the region

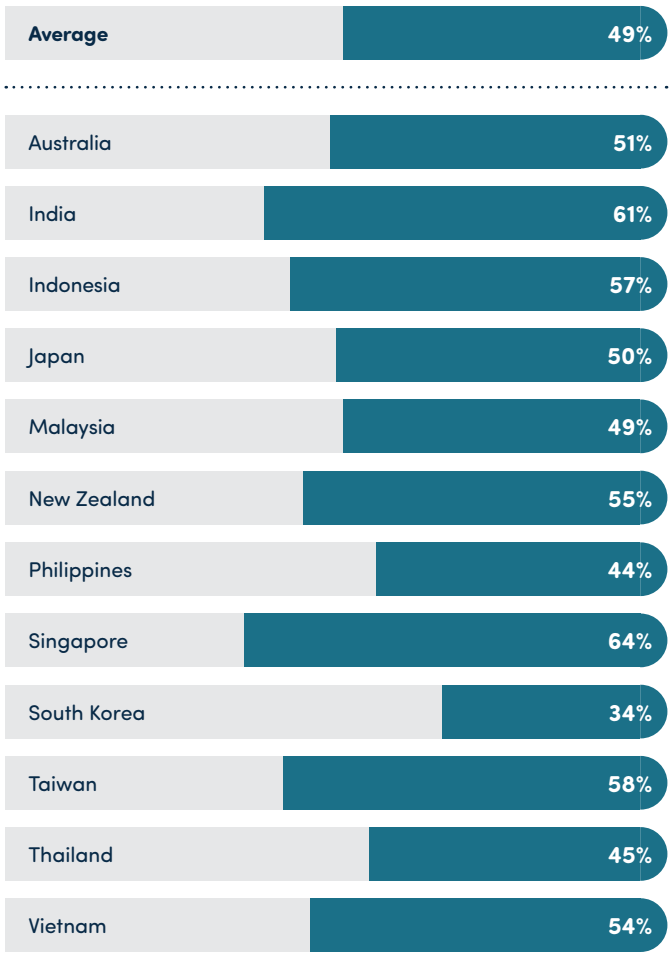


51%

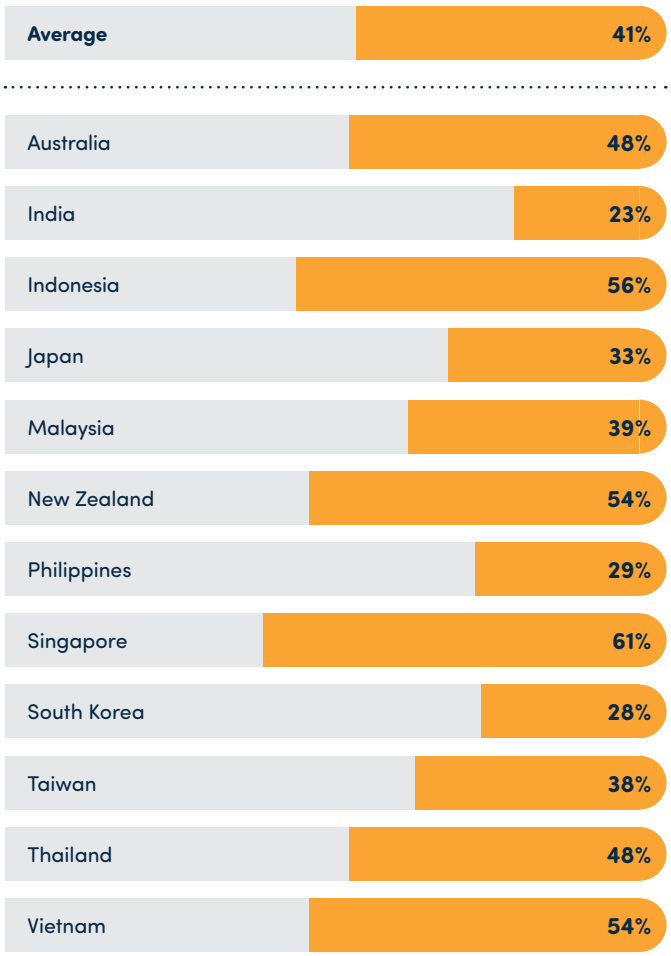
of organisations across the NGO sector utilise social media as their primary marketing tactic

To protect NGOs from cyber attacks, mitigation activities can protect staff and volunteers from being exposed

Have data backups for all important systems



Have multi-factor authentication enabled*



*% of organisations that have Multi-factor authentication enabled for internet-facing systems with sensitive data

STRENGTHS ACROSS THE REGION

It's encouraging to note that, on average, 50% of staff across the region are confident or better in using their NGO's technology to perform their roles.

The highest levels of staff satisfaction are found in Australia (52%), India (47%), and Vietnam (46%). Interestingly, staff satisfaction is closely linked to the organisation's technology environment, with over 60% of organisations expressing satisfaction when their technology environment is functional or leading.

Additionally, 45% of NGOs on average have or partially have a technology plan in place. The presence of a technology plan correlates with a 26% increase in confidence and a 24% rise in satisfaction.

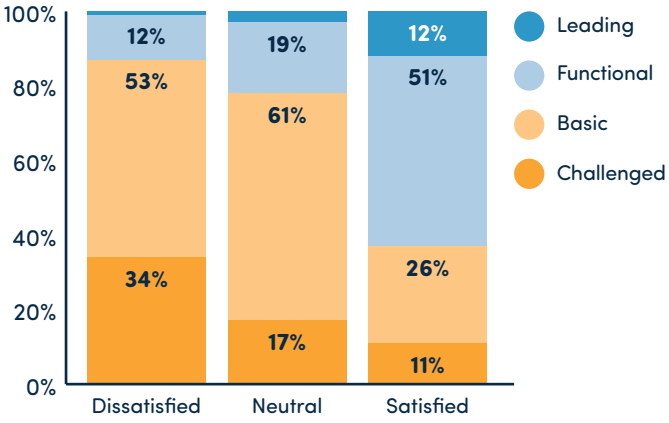
84%

of staff are satisfied with their technology when there is a technology plan in place

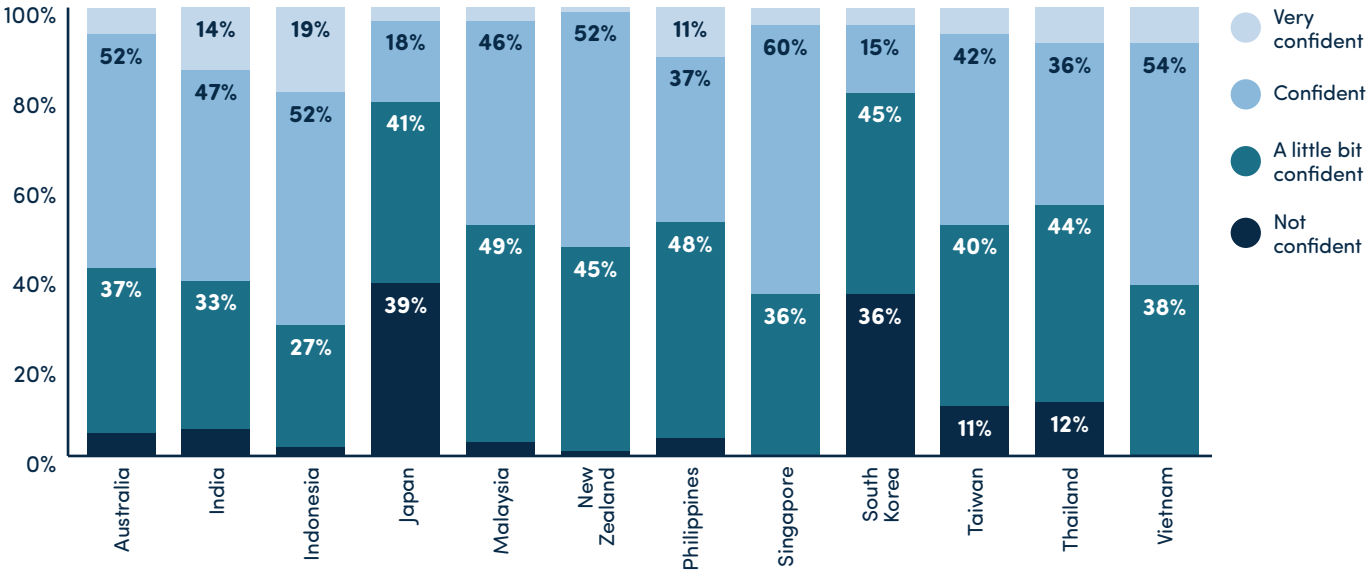
63% of staff are confident or better when their technology environment is functional or leading

When staff are confident, **1 in 2** are willing to introduce new or emerging technologies into their organisation

Staff satisfaction is relative to the success of the technology environment



Confidence of staff to use technology to perform their roles



CHALLENGES FACING THE REGION

Cyber security remains a significant challenge for NGOs across the region.

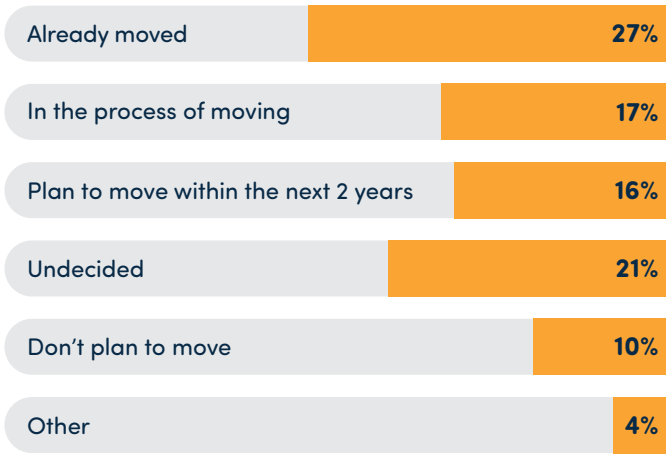
This is especially the case in Indonesia, where 1 in 3 have experienced a cyber security incident in the last 12 months. Similarly, 1 in 4 in Taiwan. 46% of the Taiwanese NGO's top training priority for 2023 is cyber security training to protect their clients and staff.

Whilst 98% of organisations store emails in the cloud, only 54% store files in an NGO cloud platform and only 27% report they have moved a significant proportion of IT to the cloud. 21% of organisations have not decided if they will move to the cloud, with **the top reason for not moving being the lack of skills or knowledge**.

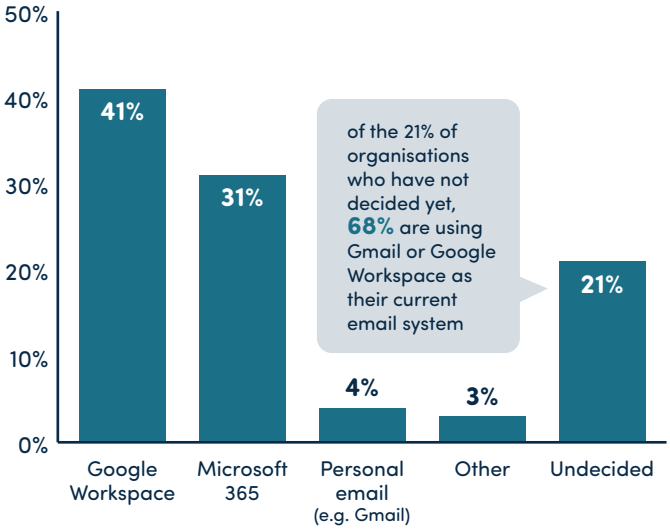
Vietnam is leading the way, with 85% of organisations storing files in a NGO cloud platform. However, things are different in South Korea, with 53% using emails or server solutions to work with files. Additionally, only 2% of South Korean NPOs have moved a significant proportion of IT to the cloud. This differs from New Zealand where 60% of organisations have moved.

When asked which cloud collaboration platform organisations would like to use, **Google Workspace was the preferred solution (41%), with Microsoft 365 as a close runner up (31%).** Of the 21% of organisations that are undecided, over two thirds are using Google Workspace or personal Gmail accounts.

NGO plans to use cloud collaboration services



Preferred NGO cloud collaboration platforms



AUSTRALIA

On average, Australian NGOs allocate 4.8% of their annual operating expenditure towards IT, surpassing the regional average of 3.4%. This higher investment enables Australian NGOs to make significant progress in their digital transformation journey.

Australian organisations may be investing these extra funds in their cyber security mitigation activities. Notably, 48% of Australian NGOs have MFA enabled on internet-facing systems, compared to the regional average of 41%. However, there is still room for improvement, as only 27% of organisations currently provide cyber security training for their staff.

Key statistics

48%
Of organisations have Multi-Factor Authentication enabled

97%
Of organisations have at least a website to market their services

4.8%
Average IT spend relative to Operational Expenditure (OpEx)

51%
Of organisations have data backups for all important systems

77%
Of organisations use a crowdfunding or e-commerce facility on their website

52%
Of staff are satisfied or better with their IT

#1
Microsoft 365 is the most popular staff email service

43%
Of organisations have a documented plan to improve cyber security protections

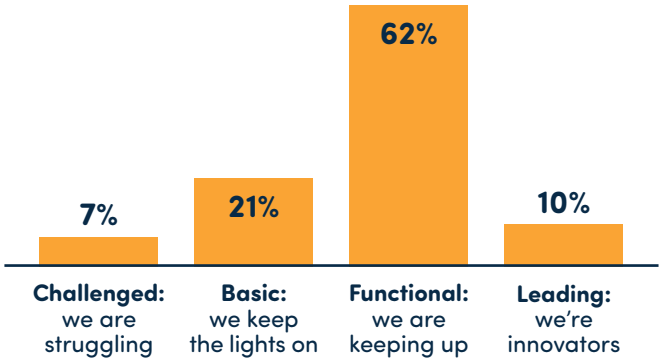
Top technology priorities

01	Improve website
02	Make better use of social media or digital marketing
03	Improve the digital capabilities of staff and volunteers

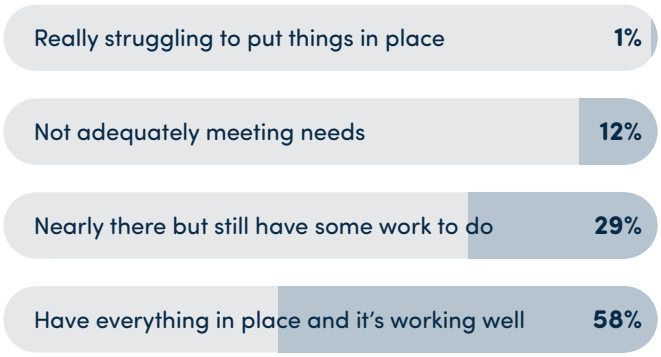
Top priorities to improve digital resilience

01	Building staff members' digital skills
02	Setting up better team collaboration tools
03	Setting up better video conferencing tools

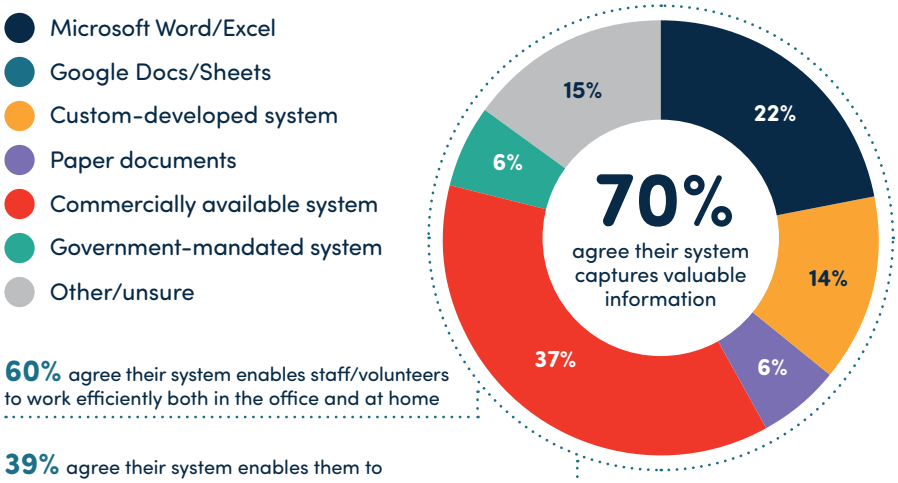
Overall technology environment



Remote working capabilities



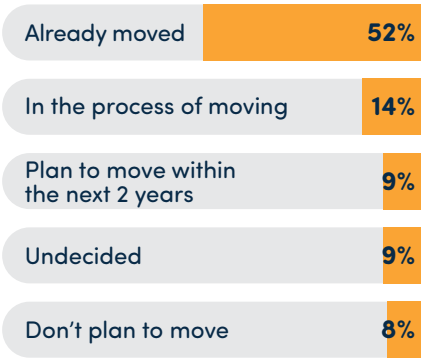
Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders



60% agree their system enables staff/volunteers to work efficiently both in the office and at home

39% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud

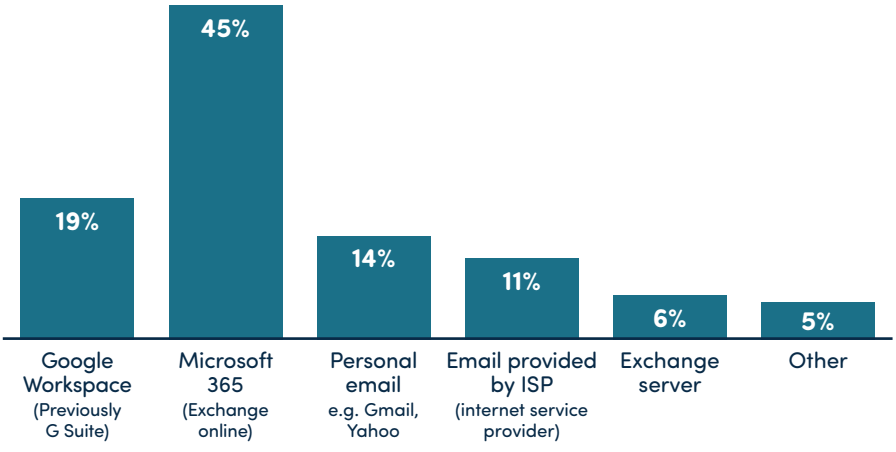


Key reasons for not moving:

- Not a priority
- Lack of skills/knowledge
- Data security, sovereignty, or data privacy concerns

Digital marketing tools

Current email service



New or emerging technologies being used to help achieve the NGO's social mission

17% Mobile Apps

6% Artificial intelligence (AI)/machine learning

8% Crowdsourcing/ crowdfunding platforms

INDIA

50% of the surveyed Indian organisations have 20 or fewer staff members, and an encouraging 61% of staff in Indian NGOs express confidence or higher in their current technology usage, surpassing the regional average of 50%.

However, there is still progress to be made in enhancing the use of technology for Indian NGOs. Two-thirds of these organisations are not effectively utilising collaboration platforms, such as Google Workspace and Microsoft 365. This likely contributes to 45% of organisations planning or currently undergoing a transition to cloud-based solutions.

Key statistics

43%
Of organisations have Multi-Factor Authentication enabled

86%
Of organisations have at least a website to market their services

3.3%
Average IT spend relative to Operational Expenditure (OpEx)

60%
Of organisations have data backups for all important systems

#1
WhatsApp is the most popular staff communication channel

47%
Of staff are satisfied or better with their IT

23%
Of organisations provide staff with cyber security training

69%
Of organisations are confident they do not use pirated software

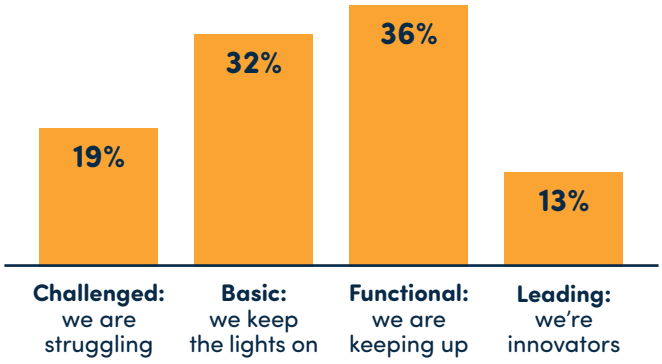
Top technology priorities

01	Improve the digital capabilities of staff and volunteers
02	Improve website
03	Make better use of social media or digital marketing

Top training priorities

01	Migrating to a nonprofit cloud collaboration environment
02	Using spreadsheets and forms for data capture & analysis
03	Personal computer, mobile phone or tablet management & support

Overall technology environment

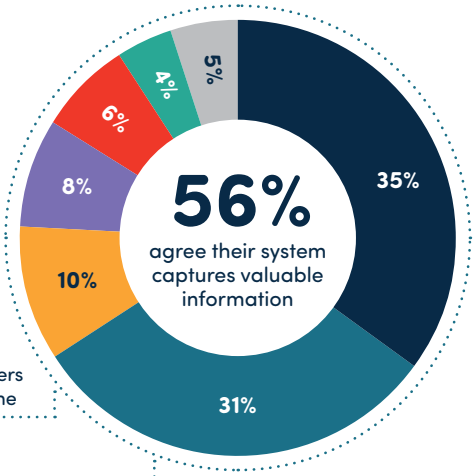


Remote working capabilities

Really struggling to put things in place	16%
Not adequately meeting needs	36%
Nearly there but still have some work to do	24%
Have everything in place and it's working well	24%

Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



57% agree their system enables staff/volunteers to work efficiently both in the office and at home

48% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud

Already moved	16%
In the process of moving	17%
Plan to move within the next 2 years	27%
Undecided	25%
Don't plan to move	12%

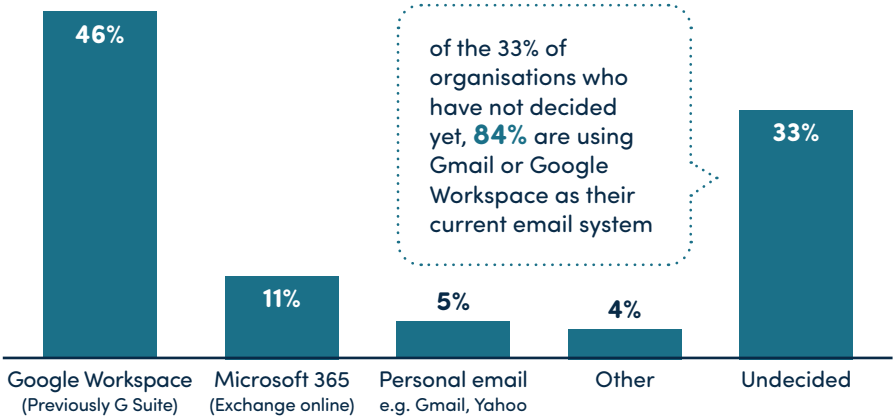
Key reasons for not moving:

- Lack of skills/knowledge
- Not a priority
- Migration cost

Digital marketing tools

Social media marketing	62%
Graphic design apps e.g. Canva, Adobe Creative Suite	38%
Email marketing	38%
Website analytics e.g. Google Analytics	22%
Video storytelling platforms e.g. YouTube Nonprofit Program	19%
Don't know	15%
Bulk SMS	13%
Search engine marketing (SEM) e.g. Google Ads	13%
Video animation software	12%
Other	8%

Preferred collaboration platform



of the 33% of organisations who have not decided yet, **84%** are using Gmail or Google Workspace as their current email system

Internet speed and reliability

57% agree that Internet at home is fast and reliable

75% agree that Internet at the office is fast and reliable

46% agree that Internet in the field is fast and reliable

INDONESIA

In Indonesia, NGOs achieve greater value from their information systems than most with 66% of organisations agreeing that their systems enable staff to work remotely, exceeding the regional average of 54%. Furthermore, over half of them agree that their systems facilitate understanding of impact and outcomes.

Google Workspace is the preferred file collaboration environment among Indonesian NGOs, with 42% utilising this platform to support their services. However, it is noteworthy that 28% of organisations still rely on personal Google Drives, a figure that is considerably higher than the regional average of 9%.

Key statistics

#1
WhatsApp is the most popular staff communication channel

59%
Of organisations have at least a website to market their services

4.3%
Average IT spend relative to Operational Expenditure (OpEx)

57%
Of organisations have data backups for all important systems

27%
Of organisations use a crowdfunding or e-commerce facility on their website

38%
Of staff are satisfied or better with their IT

35%
Of organisations provide staff with cyber security training

57%
Of organisations are confident they do not use pirated software

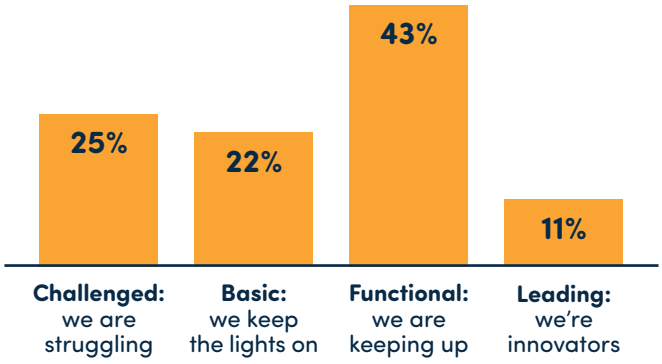
Top technology priorities

01	Make better use of social media or digital marketing
02	Improve the digital capabilities of staff and volunteers
03	Improve website

Top training priorities

01	Migrating to a nonprofit cloud collaboration environment
02	Using spreadsheets and forms for data capture & analysis
03	Supporting a nonprofit cloud collaboration environment

Overall technology environment

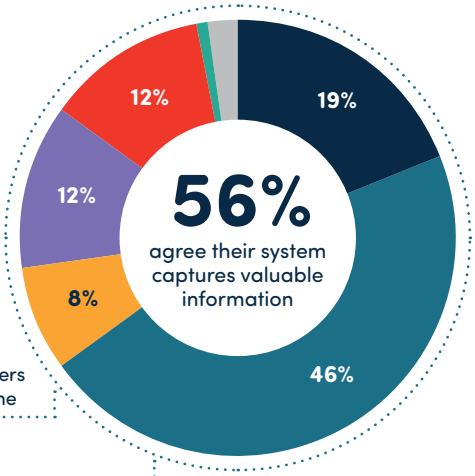


Remote working capabilities

Really struggling to put things in place	18%
Not adequately meeting needs	40%
Nearly there but still have some work to do	26%
Have everything in place and it's working well	16%

Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



65% agree their system enables staff/volunteers to work efficiently both in the office and at home

55% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud

Already moved	22%
In the process of moving	20%
Plan to move within the next 2 years	31%
Undecided	20%
Don't plan to move	3%

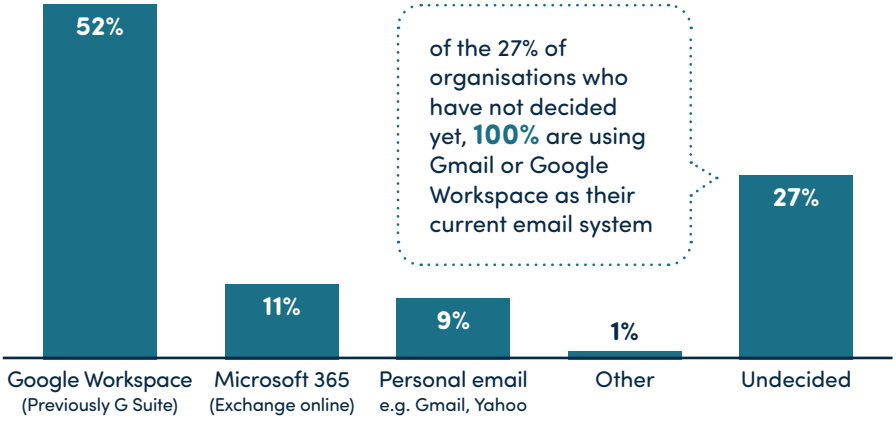
Key reasons for not moving:

- Not a priority
- Data security, sovereignty, or data privacy concerns
- Lack of skills/knowledge

Digital marketing tools

Social media marketing	76%
Graphic design apps e.g. Canva, Adobe Creative Suite	55%
Video storytelling platforms e.g. YouTube Nonprofit Program	36%
Website analytics e.g. Google Analytics	26%
Email marketing	23%
Video animation software	22%
Search engine marketing (SEM) e.g. Google Ads	17%
Other	14%
Don't know	6%
Bulk SMS	5%

Preferred collaboration platform



Internet speed and reliability

40% agree that Internet at home is fast and reliable

54% agree that Internet at the office is fast and reliable

11% agree that Internet in the field is fast and reliable

JAPAN

In Japan, over half of the responding organisations operate with 5 or less staff or volunteers. This differs from the regional average of 5-20 staff members or volunteers. Additionally, only 18% of organisation staff feel confident using digital technology in their roles.

82% of organisations in Japan utilise at least a website to communicate their services, and 62% of these organisations also employ social media. Contrary to the regional trend, where social media is the most popular marketing tactic, 39% of Japanese organisations identified website analytics as their primary marketing tool. Moreover, 42% list improving the organisation's website as their top technology priority, aligning with the top priority of the region.

Key statistics

32%
Of organisations have Multi-Factor Authentication enabled

93%
Of organisations have at least a website to market their services

3.4%
Average IT spend relative to Operational Expenditure (OpEx)

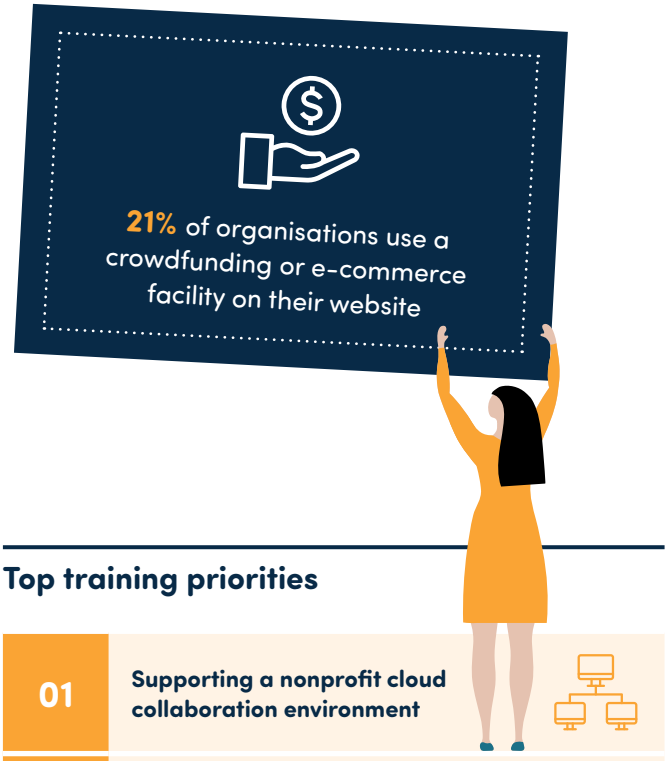
49%
Of organisations have data backups for all important systems

#1
SMS/Text message is the most popular staff communication channel

18%
Of staff are satisfied or better with their IT

12%
Of organisations provide staff with cyber security training

92%
Of organisations are confident they do not use pirated software



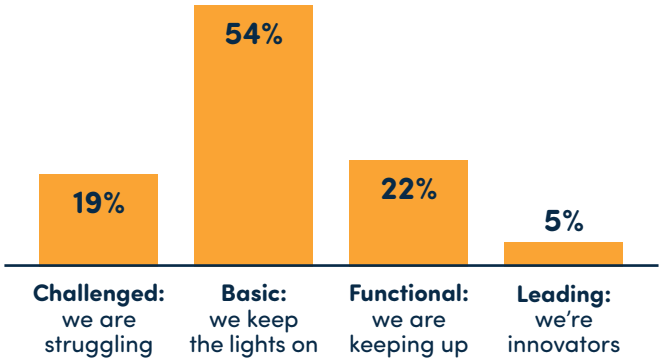
Top technology priorities

01	Improve website
02	Improve the digital capabilities of staff and volunteers
03	Make better use of social media or digital marketing

Top training priorities

01	Supporting a nonprofit cloud collaboration environment
02	Migrating to a nonprofit cloud collaboration environment
03	Personal computer, mobile phone or tablet management & support

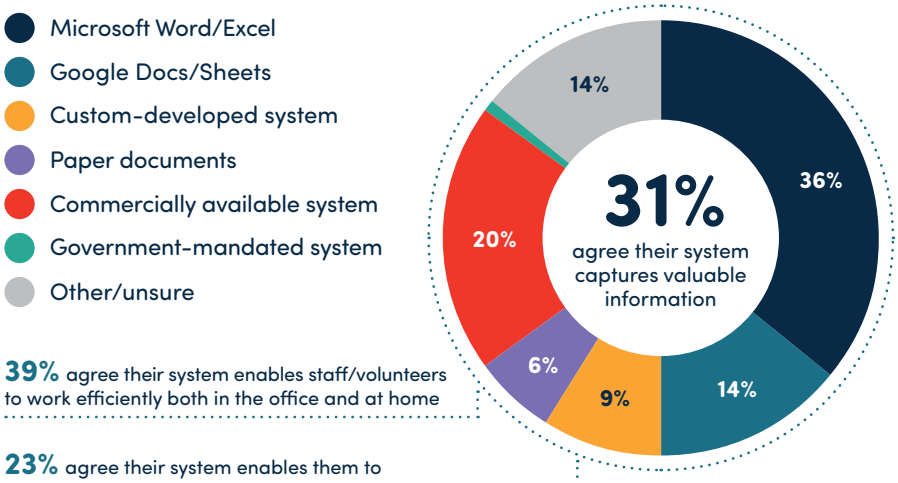
Overall technology environment



Remote working capabilities

Really struggling to put things in place	21%
Not adequately meeting needs	21%
Nearly there but still have some work to do	38%
Have everything in place and it's working well	20%

Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders



39% agree their system enables staff/volunteers to work efficiently both in the office and at home

23% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud

Already moved	25%
In the process of moving	20%
Plan to move within the next 2 years	19%
Undecided	24%
Don't plan to move	9%

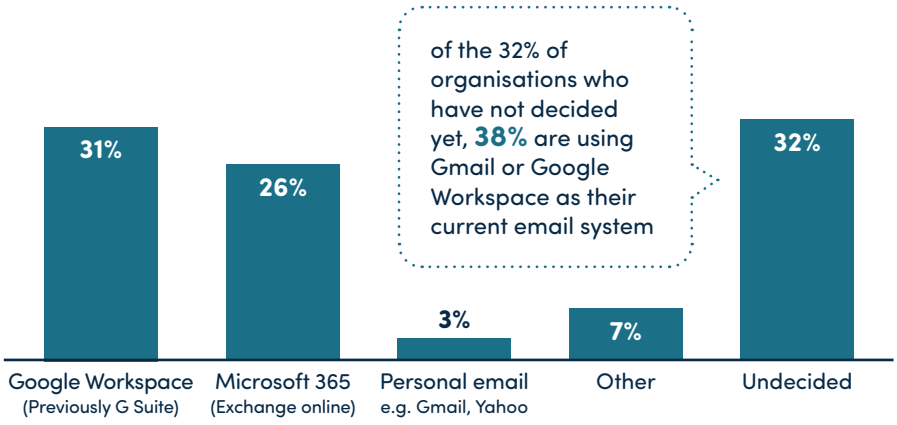
Key reasons for not moving:

- Data security, sovereignty, or data privacy concerns
- Lack of skills/knowledge
- Not a priority

Digital marketing tools

Website analytics e.g. Google Analytics	39%
Don't know	34%
Graphic design apps e.g. Canva, Adobe Creative Suite	31%
Social media marketing	24%
Email marketing	22%
Video storytelling platforms e.g. YouTube Nonprofit Program	15%
Search engine marketing (SEM) e.g. Google Ads	13%
Other	9%
Video animation software	3%
Bulk SMS	1%

Preferred collaboration platform



Internet speed and reliability

56% agree that Internet at home is fast and reliable

69% agree that Internet at the office is fast and reliable

31% agree that Internet in the field is fast and reliable

MALAYSIA

In Malaysia, Google Workspace is the preferred collaboration platform among NGOs, with 70% favouring it and 62% currently using it.

For those not yet effectively leveraging cloud technology, 59% plan to migrate or are in the process of doing so. Among these respondents, 67% intend to adopt Google Workspace, while 14% plan to move to Microsoft 365.

Malaysian NGOs lag behind their regional counterparts in terms of cyber security mitigation activities. Only 25% of them are confident that security updates and patches are applied on all devices, compared to the regional average of 50%. Furthermore, just 9% provide cyber training.

Key statistics

36%
Of organisations have Multi-Factor Authentication enabled

89%
Of organisations have at least a website to market their services

3.4%
Average IT spend relative to Operational Expenditure (OpEx)

#1
WhatsApp is the most popular staff communication channel

28%
Of organisations use a crowdfunding or e-commerce facility on their website

73%
Of staff are satisfied or better with their IT

9%
Of organisations provide staff with cyber security training

68%
Of organisations are confident they do not use pirated software

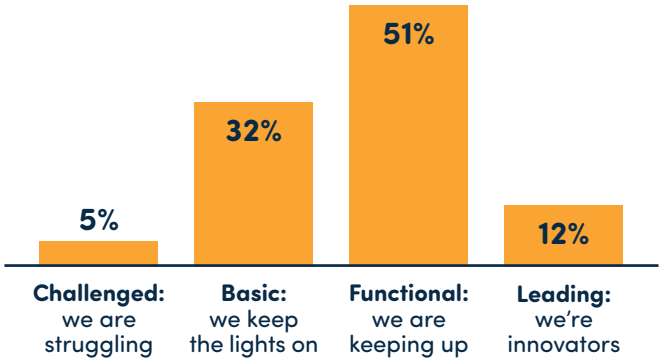
Top technology priorities

01	Improve website
02	Improve the digital capabilities of staff and volunteers
03	Make better use of social media or digital marketing

Top training priorities

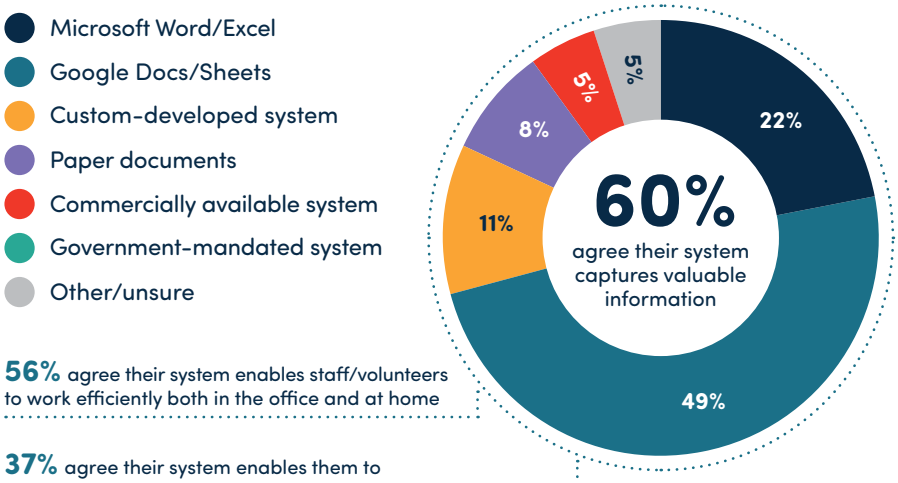
01	Data analysis, dashboards and business intelligence
02	Using spreadsheets and forms for data capture & analysis
03	Creating an impactful website

Overall technology environment



Remote working capabilities

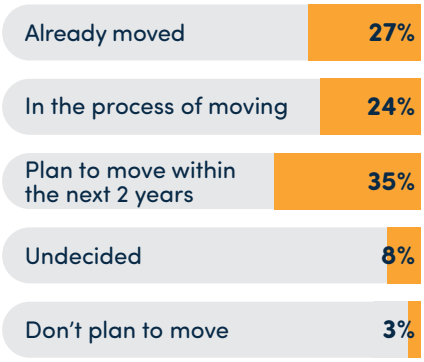
Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders



56% agree their system enables staff/volunteers to work efficiently both in the office and at home

37% agree their system enables them to understand the impact of services and outcomes

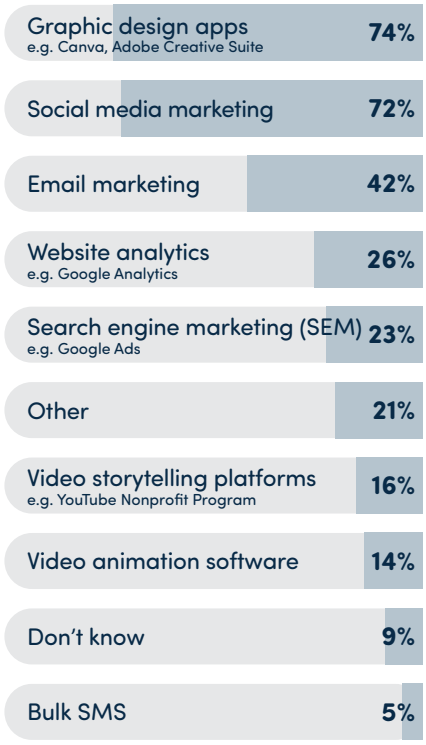
Plans to move to the cloud



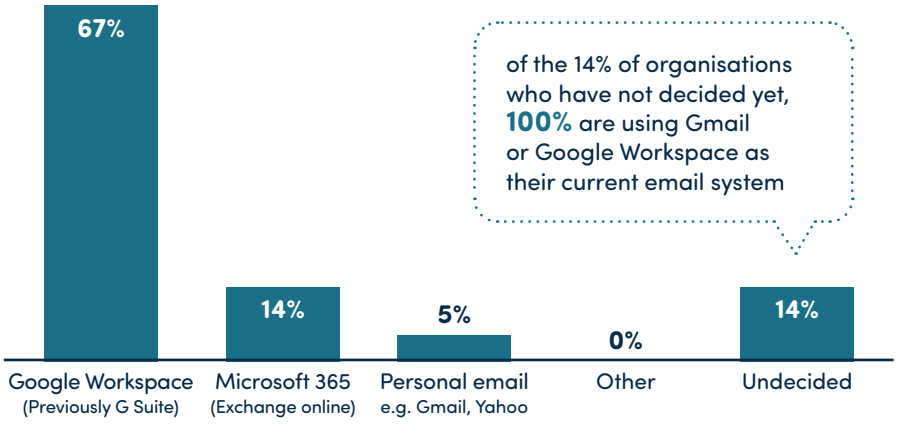
Key reasons for not moving:

- Lack of skills/knowledge
- Data security, sovereignty, or data privacy concerns
- Internet connectivity is too expensive or insufficient quality

Digital marketing tools



Preferred collaboration platform



of the 14% of organisations who have not decided yet, **100%** are using Gmail or Google Workspace as their current email system

Internet speed and reliability

49% agree that Internet at home is fast and reliable

63% agree that Internet at the office is fast and reliable

49% agree that Internet in the field is fast and reliable

NEW ZEALAND

New Zealand are leading the way, with 1 in 2 organisations providing staff with the required systems, software and infrastructure to support mobile working.

This is supported by 60% of organisations who have already moved to the cloud. With a close split in use between Google Workspace (33%) and Microsoft 365 (29%) as the preferred collaboration and email platforms.

However, 1 in 3 organisations use spreadsheets and word documents to manage their stakeholder information. For these organisations, only 22% have a system that enables them to understand impact and outcomes. When compared to organisations that do have a system, 48% have a system that enables them to understand impact and outcomes.

Key statistics

54%
Of organisations have Multi-Factor Authentication enabled

93%
Of organisations have at least a website to market their services

3.2%
Average IT spend relative to Operational Expenditure (OpEx)

55%
Of organisations have data backups for all important systems

70%
Of organisations use a crowdfunding or e-commerce facility on their website

78%
Of staff are satisfied or better with their IT

#1
Google Workspace is the most popular staff email service

45%
Of organisations have a documented plan to improve cyber security protections

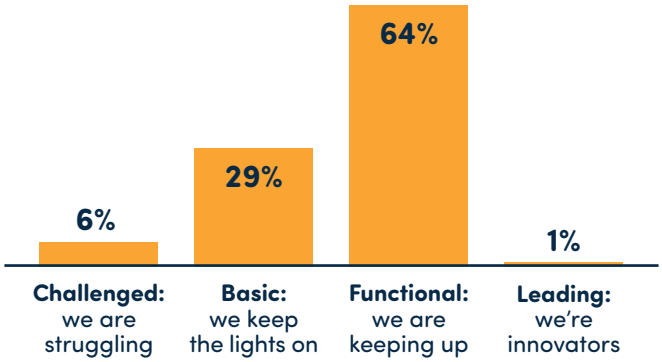
Top technology priorities

01	Improve website
02	Improve the digital capabilities of staff and volunteers
03	Make better use of social media or digital marketing

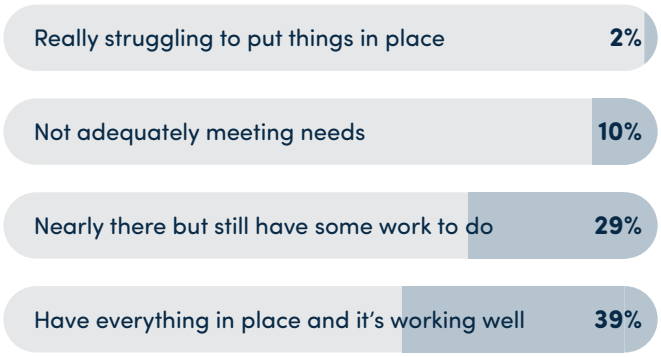
Top priorities to improve digital resilience

01	Building staff members' digital skills
02	Setting up better team collaboration tools
03	Managing our information security and data privacy better

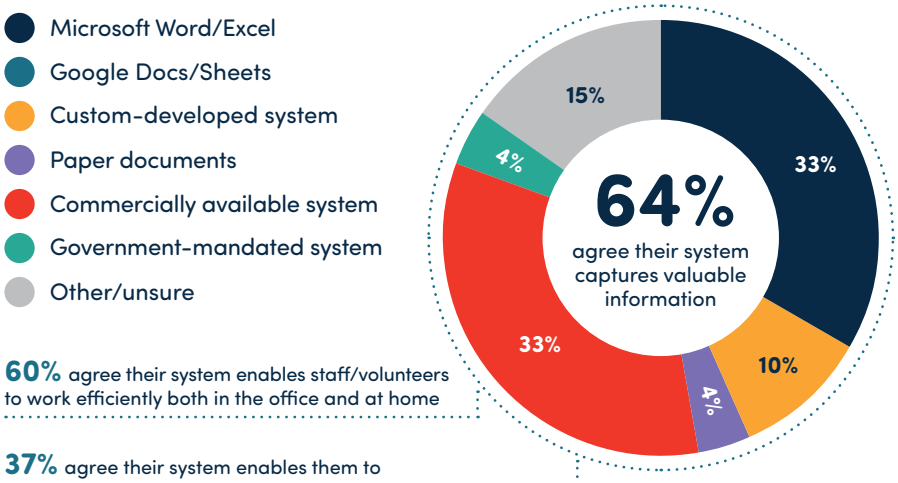
Overall technology environment



Remote working capabilities



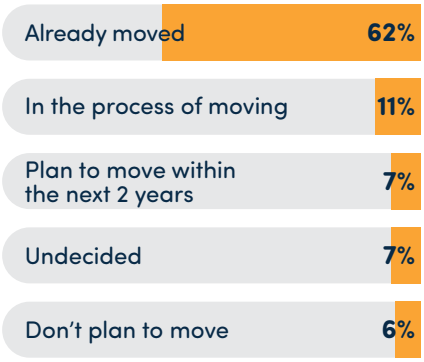
Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders



60% agree their system enables staff/volunteers to work efficiently both in the office and at home

37% agree their system enables them to understand the impact of services and outcomes

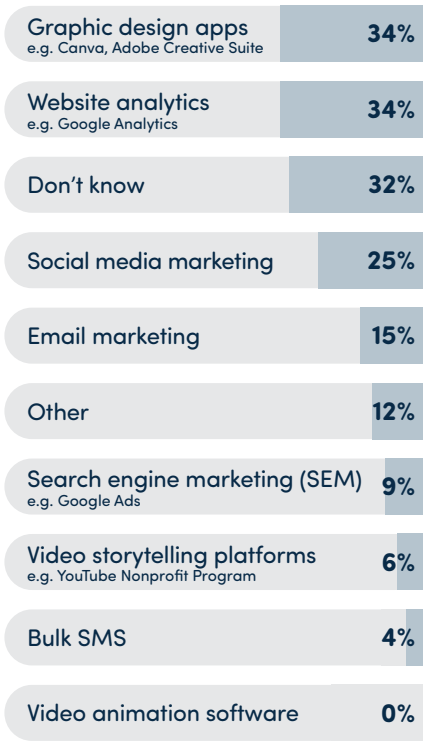
Plans to move to the cloud



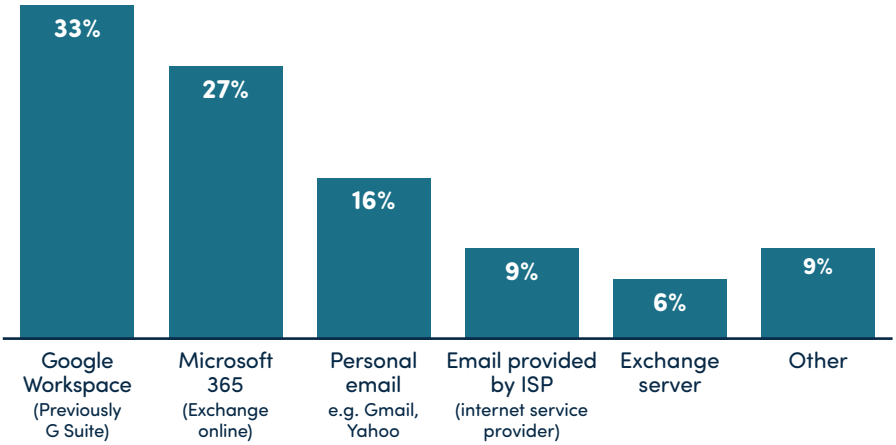
Key reasons for not moving:

- Not a priority
- Lack of skills/knowledge
- Data security, sovereignty, or data privacy concerns

Digital marketing tools



Current email service



New or emerging technologies being used to help achieve the NGO's social mission

14% Mobile Apps

6% Assistive technology e.g. for people with disabilities or the elderly

4% Artificial intelligence (AI)/machine learning

PHILIPPINES

In the Philippines, internet connectivity is among the weakest in the region, with only 37% of respondents agreeing that their office internet is fast and reliable, and a mere 6% stating the same for their internet in the field.

Despite these challenges, Filipino NGOs are striving to utilise technology within their organisations, with 44% working towards incorporating emerging technologies into their operations.

As for file management systems, 45% of organisations in the Philippines use Google Workspace. However, 28% have not yet decided if they will move a significant portion of their IT to the cloud. Among those undecided, 25% do not view it as a priority, and 22% believe the migration would be too costly.

Key statistics

29%
Of organisations have Multi-Factor Authentication enabled

#1
Facebook messenger is the most popular staff communication channel

2.9%
Average IT spend relative to Operational Expenditure (OpEx)

44%
Of organisations have data backups for all important systems

29%
Of organisations use a crowdfunding or e-commerce facility on their website

77%
Of staff are satisfied or better with their IT

20%
Of organisations provide staff with cyber security training

72%
Of organisations are confident they do not use pirated software

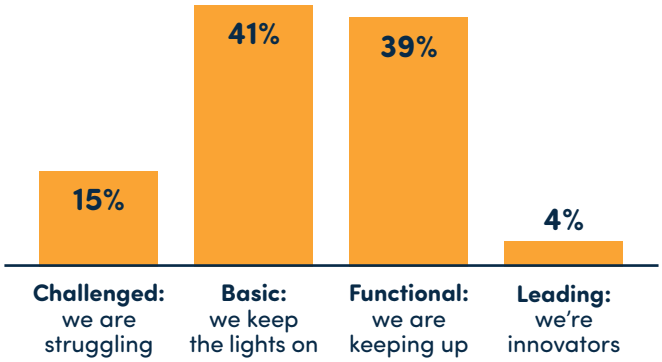
Top technology priorities

01	Improve website
02	Improve the digital capabilities of staff and volunteers
03	Make better use of social media or digital marketing

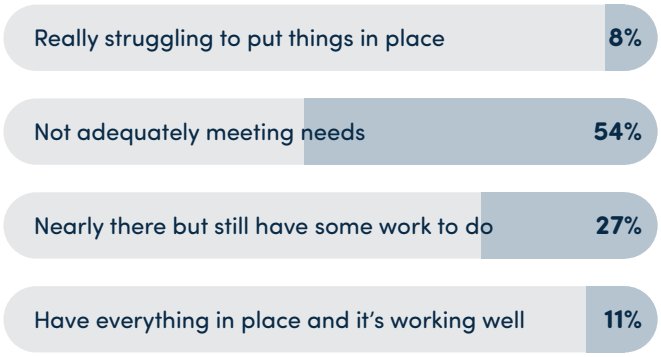
Top training priorities

01	Migrating to a nonprofit cloud collaboration environment
02	Using spreadsheets and forms for data capture & analysis
03	Personal computer, mobile phone or tablet management & support

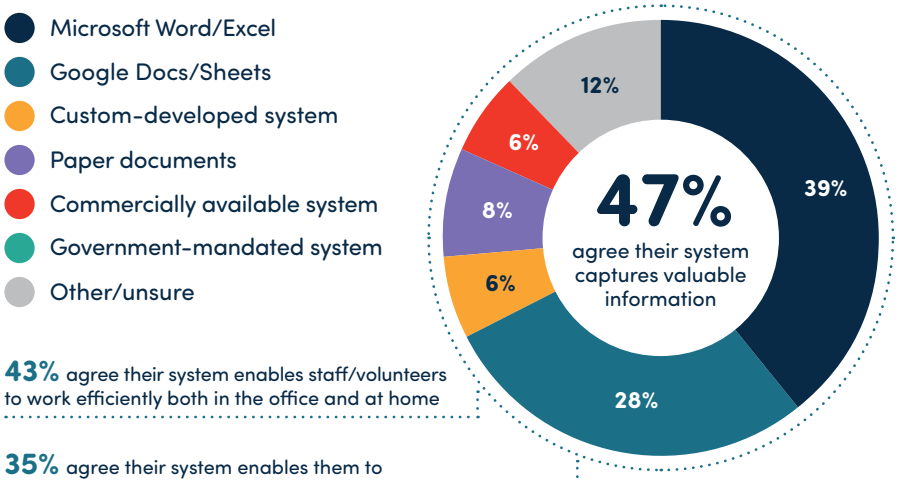
Overall technology environment



Remote working capabilities



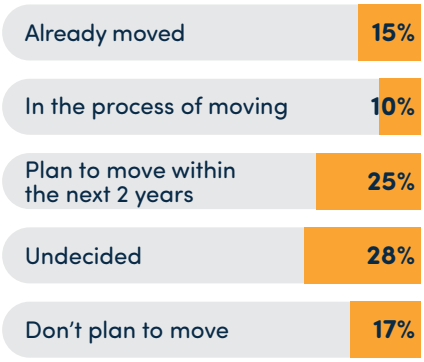
Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders



43% agree their system enables staff/volunteers to work efficiently both in the office and at home

35% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud

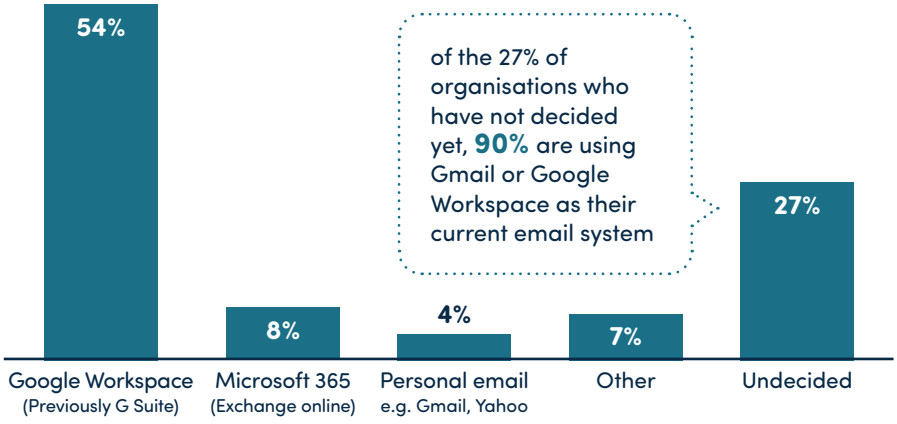


Key reasons for not moving:

- Not a priority
- Migration cost
- Data security, sovereignty, or data privacy concerns

Digital marketing tools

Preferred collaboration platform



Internet speed and reliability

30% agree that Internet at home is fast and reliable

37% agree that Internet at the office is fast and reliable

6% agree that Internet in the field is fast and reliable

SINGAPORE

In Singapore, 66% of NGOs agree that their overall technology environment is functional or better, enabling staff and volunteers to effectively perform their jobs.

Additionally, 80% of organisations are either almost there or currently providing all the necessary systems, software, and infrastructure for staff to work remotely. This is supported by the fact that four out of five organisations in Singapore utilise a NGO file collaboration platform.

Distinct from the region, over half of Singaporean NGOs employ a system (e.g., commercially available CRM, government-mandated system, custom-developed system) to store stakeholder information. When such a system is in place, 64% of organisations agree it captures valuable information.

Key statistics

62%
Of organisations have Multi-Factor Authentication enabled

100%
Of organisations have at least a website to market their services

#1
WhatsApp is the most popular staff communication channel

64%
Of organisations have data backups for all important systems

28%
Of organisations use a crowdfunding or e-commerce facility on their website

38%
Of staff are satisfied or better with their IT

30%
Of organisations provide staff with cyber security training

85%
Of organisations are confident they do not use pirated software

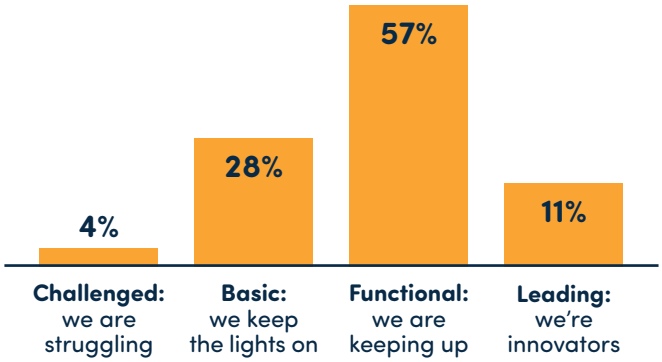
Top technology priorities

01	Make better use of social media or digital marketing
02	Improve website
03	Improve the digital capabilities of staff and volunteers

Top training priorities

01	Cyber security protections for your information systems
02	Migrating to a nonprofit cloud collaboration environment
03	Personal computer, mobile phone or tablet management & support

Overall technology environment

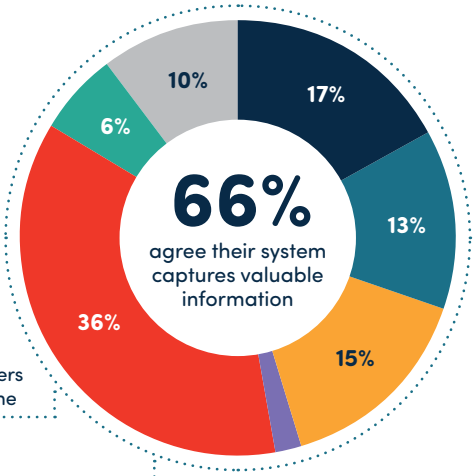


Remote working capabilities

Really struggling to put things in place	0%
Not adequately meeting needs	20%
Nearly there but still have some work to do	38%
Have everything in place and it's working well	42%

Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



57% agree their system enables staff/volunteers to work efficiently both in the office and at home

45% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud

Already moved	33%
In the process of moving	18%
Plan to move within the next 2 years	27%
Undecided	9%
Don't plan to move	11%

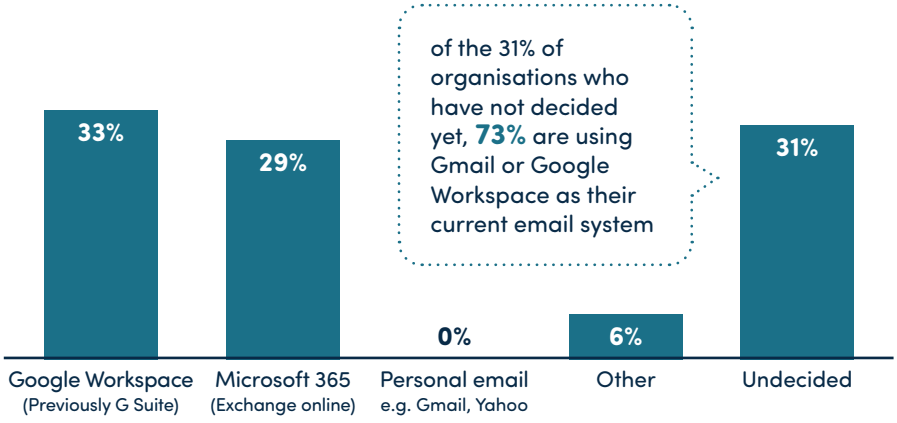
Key reasons for not moving:

- Data security, sovereignty, or data privacy concerns
- Migration cost
- Not a priority

Digital marketing tools

Social media marketing	70%
Email marketing	55%
Graphic design apps e.g. Canva, Adobe Creative Suite	53%
Website analytics e.g. Google Analytics	34%
Search engine marketing (SEM) e.g. Google Ads	17%
Video storytelling platforms e.g. YouTube Nonprofit Program	15%
Don't know	15%
Video animation software	13%
Bulk SMS	11%
Other	11%

Preferred collaboration platform



Internet speed and reliability

83% agree that Internet at home is fast and reliable

81% agree that Internet at the office is fast and reliable

49% agree that Internet in the field is fast and reliable

SOUTH KOREA

In South Korea, organisations allocate 1.7% of their operational expenditure to IT, which is the lowest in the region compared to the average of 3.4%.

Despite this, 30% of organisations are either planning or in the process of moving to the cloud, with migration to a non-profit cloud collaboration environment being their top training priority. Interestingly, 41% of organisations remain undecided about migrating, with lack of skills and knowledge being the primary reason for their hesitation.

One in three organisations in South Korea utilises spreadsheets and documents to track stakeholder information (e.g., stakeholders, clients, donors, members, etc.). Among these organisations using these documents, 45% agree that they capture valuable information, and 40% believe that it helps them understand impact and outcomes.

Key statistics

28%
Of organisations have Multi-Factor Authentication enabled

80%
Of organisations have at least a website to market their services

1.7%
Average IT spend relative to Operational Expenditure (OpEx)

34%
Of organisations have data backups for all important systems

23%
Of organisations use a crowdfunding or e-commerce facility on their website

24%
Of staff are satisfied or better with their IT

23%
Of organisations provide staff with cyber security training

34%
Of organisations are confident they do not use pirated software

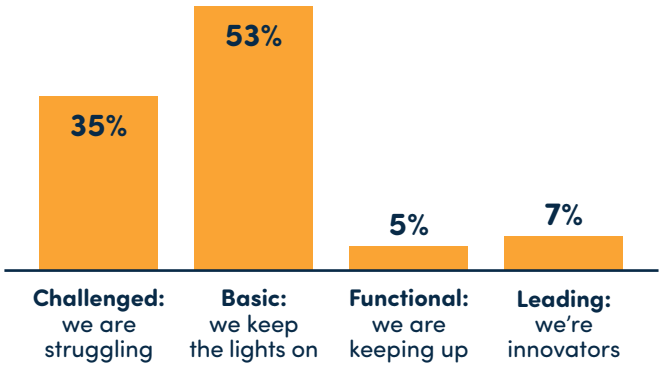
Top technology priorities

01	Improve the digital capabilities of staff and volunteers
02	Make better use of social media or digital marketing
03	Improve our website

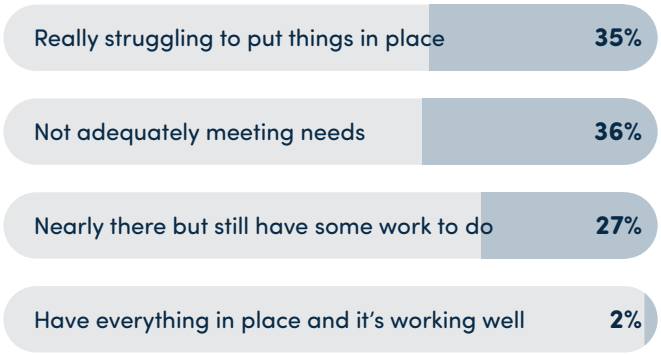
Top training priorities

01	Migrating to a nonprofit cloud collaboration environment
02	Process and data automation
03	Assessing your technology environment and identifying your strengths and weaknesses

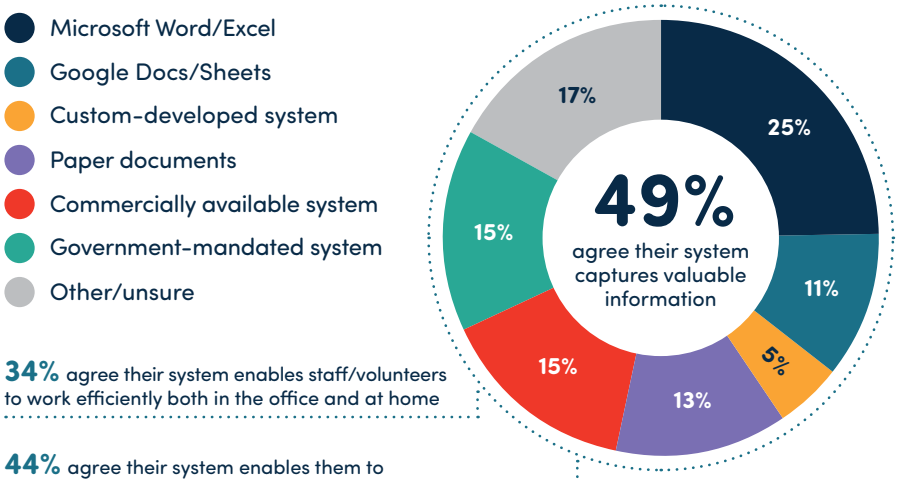
Overall technology environment



Remote working capabilities



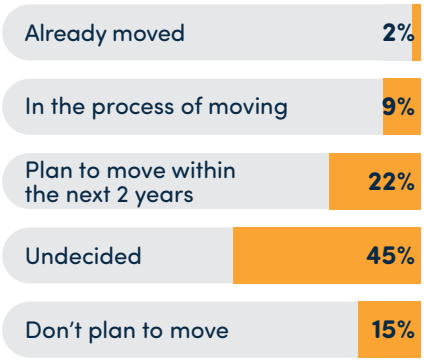
Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders



34% agree their system enables staff/volunteers to work efficiently both in the office and at home

44% agree their system enables them to understand the impact of services and outcomes

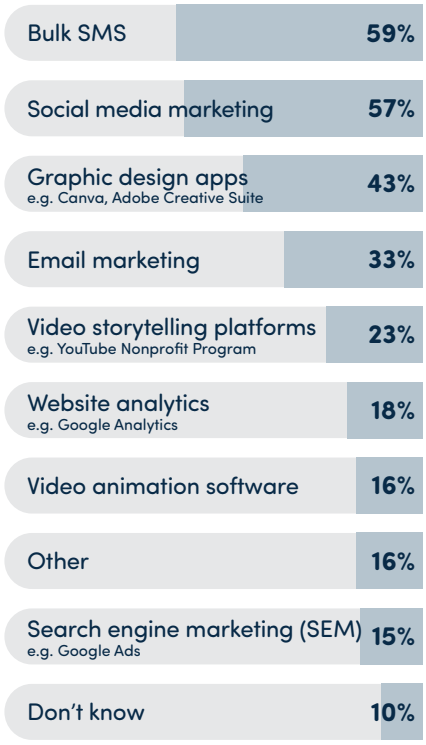
Plans to move to the cloud



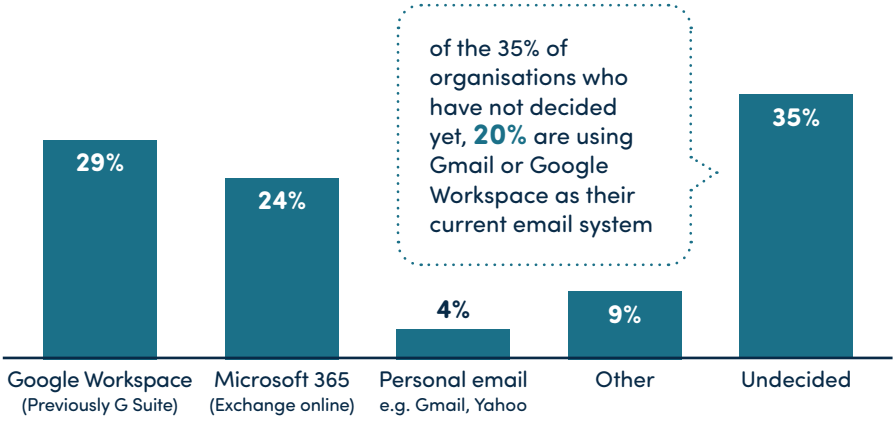
Key reasons for not moving:

- Lack of skills/knowledge
- Not a priority
- Migration cost

Digital marketing tools



Preferred collaboration platform



Internet speed and reliability

71% agree that Internet at home is fast and reliable

74% agree that Internet at the office is fast and reliable

43% agree that Internet in the field is fast and reliable

TAIWAN

In Taiwan, one in four responding organisations have experienced a cyber security incident in the past 12 months.

Considering that statistic, it's encouraging to see 61% have antivirus software installed on all devices, and 46% of organisations consider cyber security as their top technology priority for 2023. There is still more work to do though, as only 9% of organisations have a documented plan to enhance cyber security protections.

On another note, half of the organisations are not yet effectively using file collaboration platforms such as Microsoft 365 or Google Workspace. However, 21% of organisations have already moved a significant portion of their IT to the cloud, and 31% are either planning or in the process of doing so.

Key statistics

39%
Of organisations have Multi-Factor Authentication enabled

83%
Of organisations have at least a website to market their services

2.4%
Average IT spend relative to Operational Expenditure (OpEx)

58%
Of organisations have data backups for all important systems

27%
Of organisations use a crowdfunding or e-commerce facility on their website

35%
Of staff are satisfied or better with their IT

#1
LINE is the most popular staff communication channel

16%
Of organisations are confident they do not use pirated software

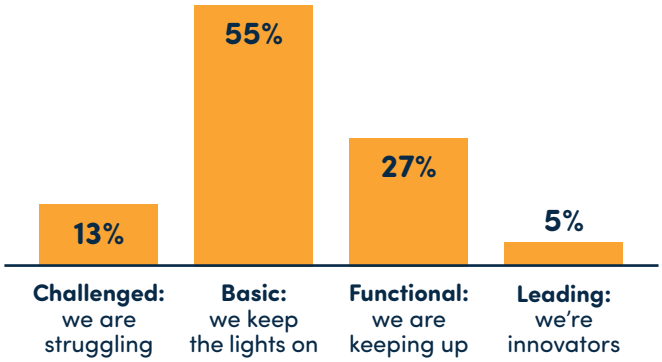
Top technology priorities

01	Make better use of social media or digital marketing
02	Improve the digital capabilities of staff and volunteers
03	Improve website

Top training priorities

01	Supporting a nonprofit cloud collaboration environment
02	Migrating to a nonprofit cloud collaboration environment
03	Process and data automation

Overall technology environment

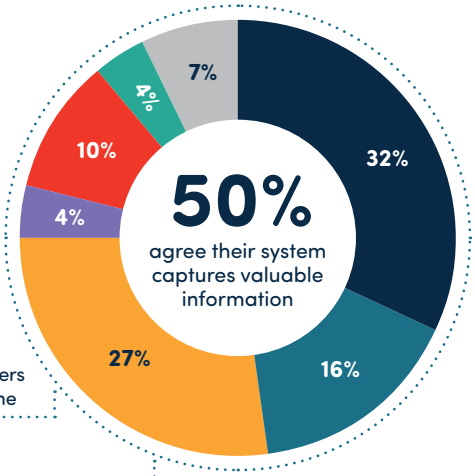


Remote working capabilities

Really struggling to put things in place	32%
Not adequately meeting needs	22%
Nearly there but still have some work to do	28%
Have everything in place and it's working well	18%

Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



54% agree their system enables staff/volunteers to work efficiently both in the office and at home

42% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud

Already moved	21%
In the process of moving	8%
Plan to move within the next 2 years	24%
Undecided	30%
Don't plan to move	13%

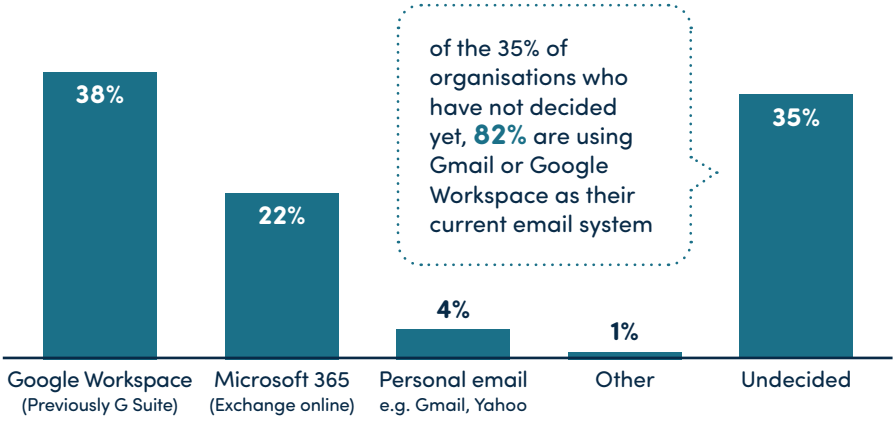
Key reasons for not moving:

- Data security, sovereignty, or data privacy concerns
- Lack of skills/knowledge
- Migration cost

Digital marketing tools

Social media marketing	76%
Email marketing	35%
Website analytics e.g. Google Analytics	30%
Graphic design apps e.g. Canva, Adobe Creative Suite	28%
Search engine marketing (SEM) e.g. Google Ads	22%
Video storytelling platforms e.g. YouTube Nonprofit Program	22%
Bulk SMS	15%
Don't know	13%
Video animation software	9%
Other	4%

Preferred collaboration platform



Internet speed and reliability

49% agree that Internet at home is fast and reliable

66% agree that Internet at the office is fast and reliable

34% agree that Internet in the field is fast and reliable

THAILAND

In Thailand, Google Workspace is the preferred NGO file collaboration environment. 28% of organisations have already moved a significant port of their IT to the cloud and 52% plan or are in the process of moving to the cloud. Of the 52%, 46% plan to move to Microsoft 365, and 38% plan to move to Google Workspace.

6 in 10 organisations use online documents and spreadsheets (e.g. Google Docs/Sheets, Microsoft Word/Excel) to collect stakeholder information. With 1 in 10 still using paper documents. This likely explains why only 20% of organisations systems' in Thailand enable them to understand impact and outcomes. This is significantly below the average of 40% across the region.

Key statistics

48%
Of organisations have Multi-Factor Authentication enabled

80%
Of organisations have at least a website to market their services

3.1%
Average IT spend relative to Operational Expenditure (OpEx)

45%
Of organisations have data backups for all important systems

45%
Of organisations use a crowdfunding or e-commerce facility on their website

36%
Of staff are satisfied or better with their IT

32%
Of organisations provide staff with cyber security training

68%
Of organisations are confident they do not use pirated software

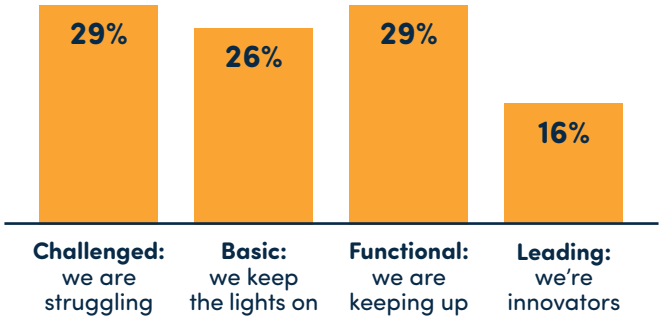
Top technology priorities

01	Improve website
02	Make better use of social media or digital marketing
03	Improve the digital capabilities of staff and volunteers

Top training priorities

01	Supporting a nonprofit cloud collaboration environment
02	Data analysis, dashboards and business intelligence
03	Migrating to a nonprofit cloud collaboration environment

Overall technology environment

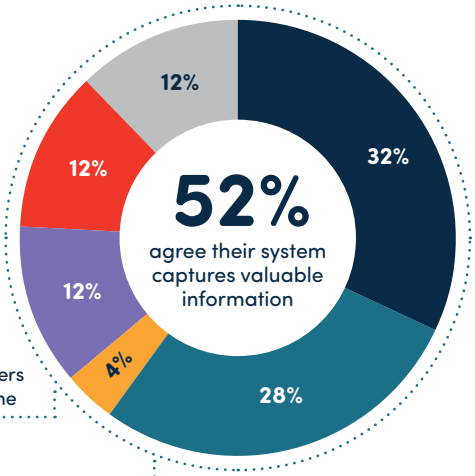


Remote working capabilities

Really struggling to put things in place	19%
Not adequately meeting needs	19%
Nearly there but still have some work to do	29%
Have everything in place and it's working well	32%

Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
- Commercially available system
- Government-mandated system
- Other/unsure



52% agree their system enables staff/volunteers to work efficiently both in the office and at home

32% agree their system enables them to understand the impact of services and outcomes

Plans to move to the cloud

Already moved	28%
In the process of moving	20%
Plan to move within the next 2 years	32%
Undecided	12%
Don't plan to move	4%

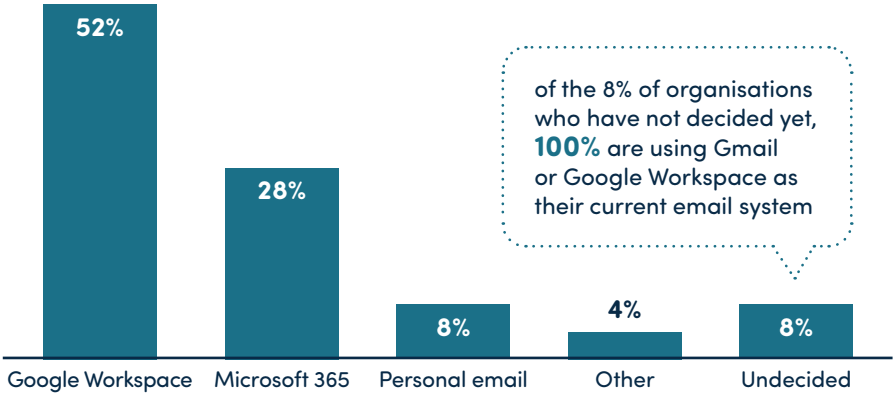
Key reasons for not moving:

- Not a priority
- Internet connectivity is too expensive or insufficient quality
- Lack of skills/knowledge

Digital marketing tools

Social media marketing	65%
Graphic design apps e.g. Canva, Adobe Creative Suite	61%
Website analytics e.g. Google Analytics	45%
Email marketing	42%
Search engine marketing (SEM) e.g. Google Ads	26%
Other	23%
Video animation software	19%
Video storytelling platforms e.g. YouTube Nonprofit Program	19%
Bulk SMS	3%
Don't know	3%

Preferred collaboration platform



of the 8% of organisations who have not decided yet, **100%** are using Gmail or Google Workspace as their current email system

Internet speed and reliability

48% agree that Internet at home is fast and reliable

61% agree that Internet at the office is fast and reliable

45% agree that Internet in the field is fast and reliable

VIETNAM

Vietnam is leading the way for effective NGO collaboration platform usage, with 85% of organisations employing a tool like Google Workspace and Microsoft 365.

Additionally, 62% of Vietnamese NGOs are planning or currently undergoing a transition to cloud-based solutions, a figure higher than the average of 38%. 23% of organisations have already moved a significant portion of their IT infrastructure to the cloud.

A noteworthy 54% of staff in Vietnam feel confident using the existing technology to perform their roles. However, there are areas that require attention, particularly in terms of cyber security. While 54% of organisations have Multi-Factor Authentication (MFA) enabled on internet-facing systems, only 31% possess a documented plan to improve cyber security protections.

Key statistics

#1

Google Chat is the most popular staff communication channel

85%

Of organisations have at least a website to market their services

3.3%

Average IT spend relative to Operational Expenditure (OpEx)

54%

Of organisations have data backups for all important systems

32%

Of organisations use a crowdfunding or e-commerce facility on their website

46%

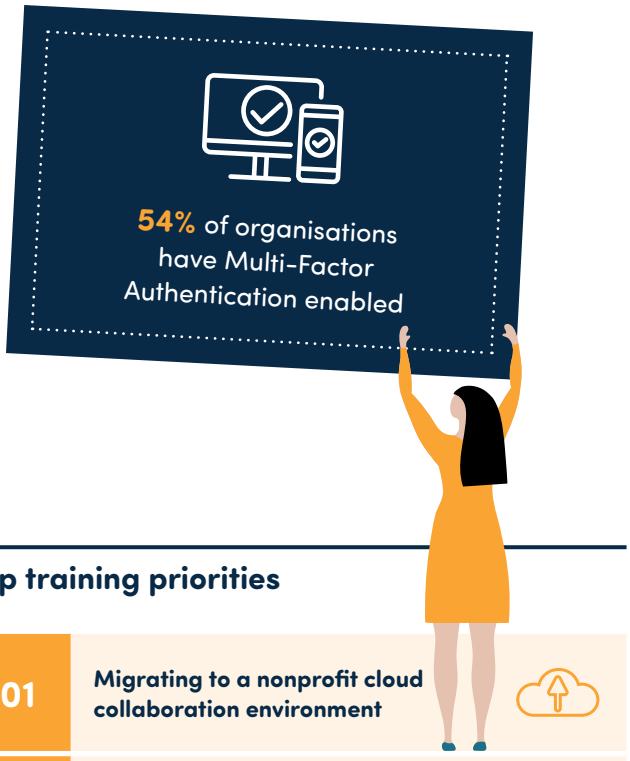
Of staff are satisfied or better with their IT

31%

Of organisations provide staff with cyber security training

53%

Of organisations are confident they do not use pirated software



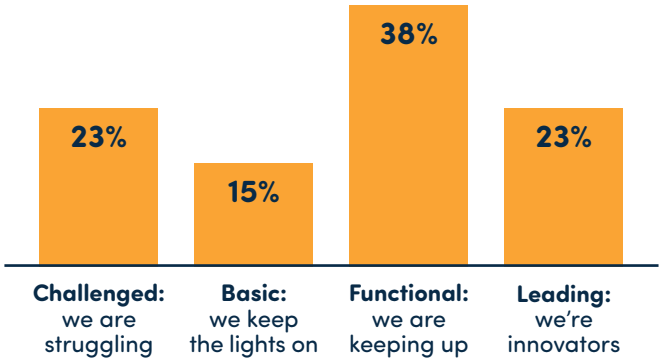
Top technology priorities

01	Explore new technology/ innovations
02	Upgrade our IT infrastructure
03	Improve website

Top training priorities

01	Migrating to a nonprofit cloud collaboration environment
02	Developing an IT plan and operating budget
03	Creating an impactful website

Overall technology environment



Remote working capabilities

Primary systems used to capture information about your clients, members, volunteers, and/or stakeholders

- Microsoft Word/Excel
- Google Docs/Sheets
- Custom-developed system
- Paper documents
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- Government-mandated system
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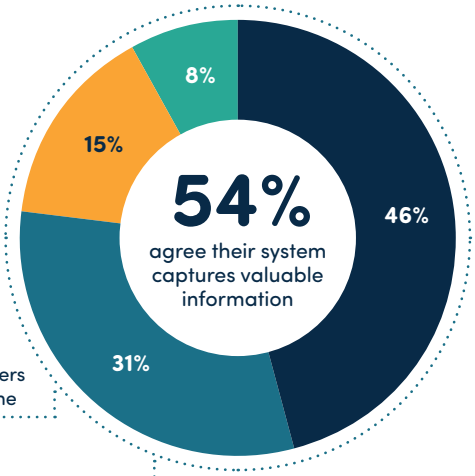
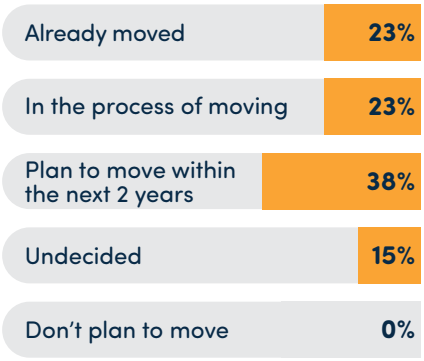


46% agree their system enables staff/volunteers to work efficiently both in the office and at home

54% agree their system enables them to understand the impact of services and outcomes

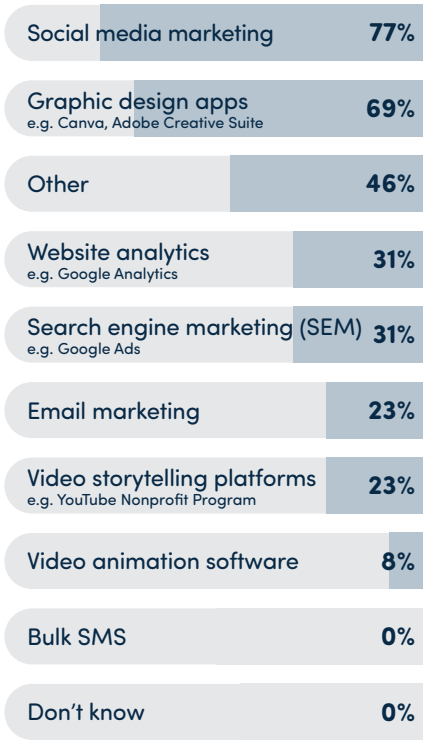
Plans to move to the cloud



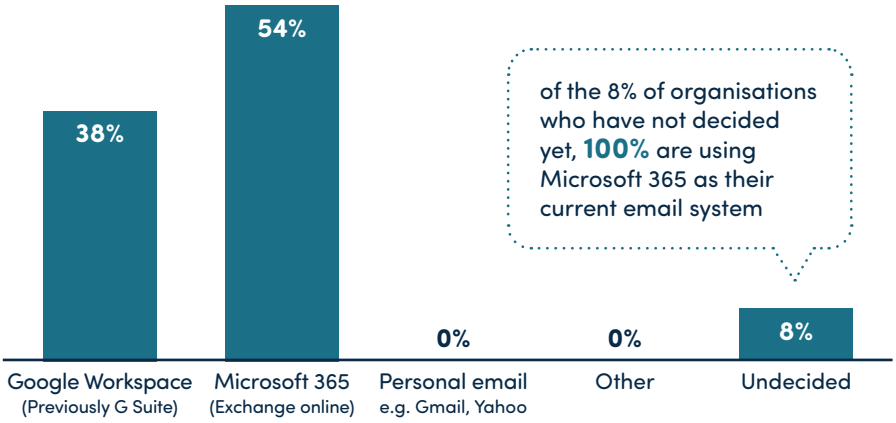
Key reasons for not moving:

- Lack of skills/knowledge
- Internet connectivity is too expensive or insufficient quality

Digital marketing tools



Preferred collaboration platform



of the 8% of organisations who have not decided yet, **100%** are using Microsoft 365 as their current email system

Internet speed and reliability

23% agree that Internet at home is fast and reliable

23% agree that Internet at the office is fast and reliable

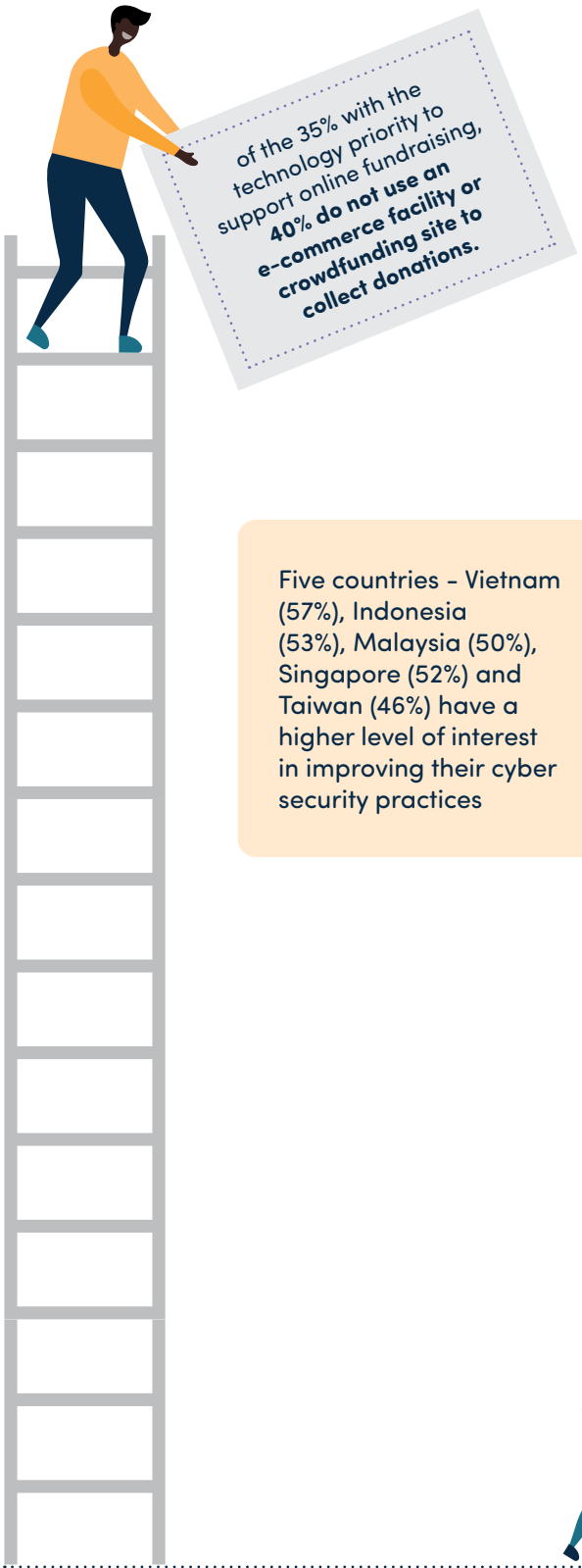
8% agree that Internet in the field is fast and reliable

TECHNOLOGY PRIORITIES

Improving NGOs' website, improving the digital capabilities of staff and volunteers and boosting social media marketing are consistent top priorities for all countries and territories across the region.

Contrasting the averages, Indonesia (62%), Malaysia (56%), and India (51%) and Singapore (48%) prioritised exploring new technologies and innovations to help achieve their social mission.

Of the NGOs where their priority is to improve the digital capabilities of staff and volunteers, 53% of staff are not confident or a little bit confident.



Five countries - Vietnam (57%), Indonesia (53%), Malaysia (50%), Singapore (52%) and Taiwan (46%) have a higher level of interest in improving their cyber security practices

Improve website	**53%**
Improve the digital capabilities of staff	**50%**
Make better use of social media &/or digital marketing	**49%**
Explore new technologies/ innovations to help achieve social mission	**34%**
Improve our data protection and information security practices	**35%**
Supporting online fundraising	**35%**
Upgrade IT infrastructure	**32%**
Enable staff and volunteers to work effectively out of the office	**28%**
Move to the cloud	**27%**
Implement a new client, stakeholder or member information management system	**26%**
Develop an IT/Digital transformation plan	**22%**
Supporting delivery of our services online	**20%**

Please note that this does not add up to 100% as many organisations requested training in more than one area.

TRAINING PRIORITIES

When organisations were asked what digital technology training they would like to see available in the next 12 months, migrating and supporting a nonprofit cloud collaboration platform (Microsoft 365, Google Workspace etc.) and optimising data capture and analysis to support service delivery and understand impact are the top areas of interest.

Of the 38% that requested training in migrating to a nonprofit cloud collaboration platform, 39% of organisations would prefer to use Google Workspace and 43% would prefer to use Microsoft 365.

Migrating to a nonprofit cloud collaboration environment (Microsoft 365, Google Workspace etc)	**38%**
Supporting a nonprofit cloud collaboration environment (Microsoft 365, Google Workspace etc)	**33%**
Using spreadsheets and forms for data capture and analysis	**30%**
Personal computer, mobile phone or tablet management & support	**27%**
Data analysis, dashboards and business intelligence	**23%**
Process and data automation	**20%**
Creating an impactful website	**20%**
Assessing your technology environment and identifying your strengths and weaknesses	**16%**
Cloud server management and support	**16%**
Leveraging social media	**14%**
Developing, implementing and monitoring your fundraising campaign	**13%**
Developing an IT plan and operating budget	**13%**
Cyber security protections for your information systems	**12%**
Assessing your digital marketing strengths and opportunities	**12%**
Best practice technology management and governance practices	**11%**
Developing high impact marketing content	**10%**

Four key training themes NGOs are seeking

27-38%
NFP cloud collaboration migration/support as well as user device support

20-30%
Data capture and analysis to support service delivery and understand impact

10-20%
Digital marketing techniques and skills to connect with your audience, attract funding, and drive support

8-12%
Cyber security protections to keep your data and employees safe

WHAT'S NEXT?

For NGOs, NPOs, charities, and nonprofits in the Asia-Pacific region, embracing digital transformation is a necessity.

It's time to take the next step and equip your organisation with the digital capability it needs to thrive.

For more information, and to sign up for the APAC Digital Capability Training Program which will commence in the second half of 2023, visit **www.digitaltransformation.ngo**

The training will cover four key areas of digital capability that Asia-Pacific organisations have identified as priorities:

#1 NFP cloud collaboration environments, with a focus on selection, migration, and support.

#2 Data capture and analysis to enhance service delivery and understand impact.

#3 Digital marketing techniques and skills to effectively connect with audiences, attract funding, and drive support.

#4 Cyber security protections to ensure the safety of data and employees.

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