EXECUTIVE SUMMARY

—

ICT NONPROFIT ORGANIZATIONS SURVEY

2022

Executive Summary
ICT Nonprofit Organizations 2022

In its fourth edition, the ICT Nonprofit Organizations 2022 survey was carried out between February and July 2022, in a context marked by the effects of the COVID-19 pandemic and the resumption of face-to-face activities. The survey results allow us to identify the changes related to information and communication technologies (ICT) access, use, and appropriation in Brazilian nonprofit organizations influenced by the context of the pandemic, as well as the challenges to access and use that still persist. The data also reflects the effects of ICT use on the operations of these organizations and the relationship between them and their target audiences, other organizations, key actors, and society in general.

PROFILE OF ORGANIZATIONS

Indicators related to the organizations' administrative capacities show that in 2022 there was an increase in the proportion of organizations with specific areas or departments. An example is that 80% of organizations had administrative areas or departments, and 68% had finance or accounting areas or departments. The organizations that presented the highest proportions of all the areas investigated were those with 10 or more paid workers and those that operated in the area of education and research. Organizations also hired third-party services, most notably those related to finance or accounting (68%) and information technology or informatics services (31%). In addition, organizations in the sector presented a high number of volunteers: 86% had at least one volunteer and more than half had at least ten volunteers (58%).

> THERE WERE ADVANCES RELATED TO INFRASTRUCTURE, BUT THERE ARE STILL CHALLENGES TO MORE MEANINGFUL CONNECTIVITY

Regarding financial capacities, most organizations relied on voluntary donations by individuals (63%), a proportion that increased by 12 percentage points compared to the 2016 edition. In the case of organizations that received donations from individuals, half received donations occasionally, 46% monthly, and only 2% biannually. The proportion of organizations that relied on monthly or annual fees paid by members was also significant (47%). There was an increase in the proportion of organizations that received funding from churches and religious organizations, as well as other nonprofit organizations. As for government funding, there was a decrease in the proportion found in 2022 when compared to the 2016 edition.

ICT INFRASTRUCTURE

The results of the ICT Nonprofit Organizations 2022 survey point out that there were advances related to infrastructure, but there are still challenges to more meaningful connectivity. The data shows a predominance of mobile phone use, which imposes barriers to the diversification of the activities carried out. Furthermore, there were higher proportions of the use of desktop computers in organizations with 10 or more paid workers and in those that operated in the area of education and research (Chart 1). In addition, among those that used devices, most were personal and not owned by the organizations, which was more common among smaller organizations and those that worked in development and defense of rights, and housing and the environment.

Regarding the Internet use, an increase was observed since the 2016 edition, although it

was more present in organizations with 10 or more paid workers and among those in the area of education and research (Chart 2). Along with the growth in Internet use, there was also expansion in the use of fiber-optic connections. The survey also shows that most organizations used Wi-Fi, but only 38% made it available to the public. With the greater presence of fiber-optic connections in nonprofit organizations, the speed of reported connections was also higher. An example is that connections with speeds over 30 up to 100 Mbps were used by about half of the organizations.

> ONLINE PRESENCE VIA WEBSITES REMAINED STABLE, WHILE PRESENCE ON ONLINE PLATFORMS AND SOCIAL NETWORKS INCREASED

ICT USE

The 2022 edition of the survey shows that the online activities carried out at higher proportions were still those related to communication, such as sending e-mails or using instant messaging, and searching for information. Significant growth between 2016 and 2022 was observed in the use of instant messaging and telephone via the Internet and VoIP calls or videoconferences via Internet. Regarding fundraising via the Internet, 22% of organizations received donations through the Internet in 2022, a level that increased substantially compared to the 2016 edition.

Regarding online fundraising channels, there was an increase between 2016 and 2022 in all investigated channels (social networks or platforms where organizations are present, organization websites, and crowdfunding campaigns or websites). However, digital channels were used at low proportions.

The results of the survey show that among organizations that had Internet access, 68% had carried out some e-government activity in the 12 months prior to the survey. As occurs with other indicators, the proportions were higher among those with 10 or more paid workers and those operating in education and research. The most performed activities include those that involve searching for information and transactions. There was an increase in some of these activities, especially paying taxes and fees online.

Regarding the type of software, adoption was highest to carry out activities related to finance and accounting and storage of digital archives. The use of customer relationship management (CRM) software was low, as only 12% reported having used it in the 12 months before the survey. When it comes to paying for cloud services, only 21% of organizations paid for file storage or database in the cloud, 19% for e-mail in the cloud, 11% for office software in the cloud, and 11% for processing capacity in the cloud.

INTERNET PRESENCE

The online presence of nonprofit organizations was still restricted, especially with regard to websites, both their own and third-party ones. Online presence via websites remained stable, while presence on online social platforms and networks increased, being Facebook the most commonly used. Larger organizations had a greater presence via websites and social networks than smaller ones (Chart 3). The indicators related to the activities carried out by organizations on social networks show that they were similar to the resources available on their websites, and the most frequent were those related to the dissemination of information and activities (Chart 4).

SURVEY METHODOLOGY AND ACCESS TO DATA

The ICT Nonprofit Organizations survey aims to map out the infrastructure, use, and appropriation of ICT in Brazilian nonprofit organizations. In 2022, 1,529 managers of nonprofit organizations were interviewed,

CHART 1
ORGANIZATIONS BY DEVICES (2022)
Total number of organizations (%)

Legend: ■ No paid workers   ■ 1 to 9 paid workers   ■ 10 or more paid workers

Device	No paid workers	1 to 9 paid workers	10 or more paid workers
Mobile phones	84	91	93
Portable computers	70	75	83
Desktop computers	58	74	93
Tablets	21	22	33
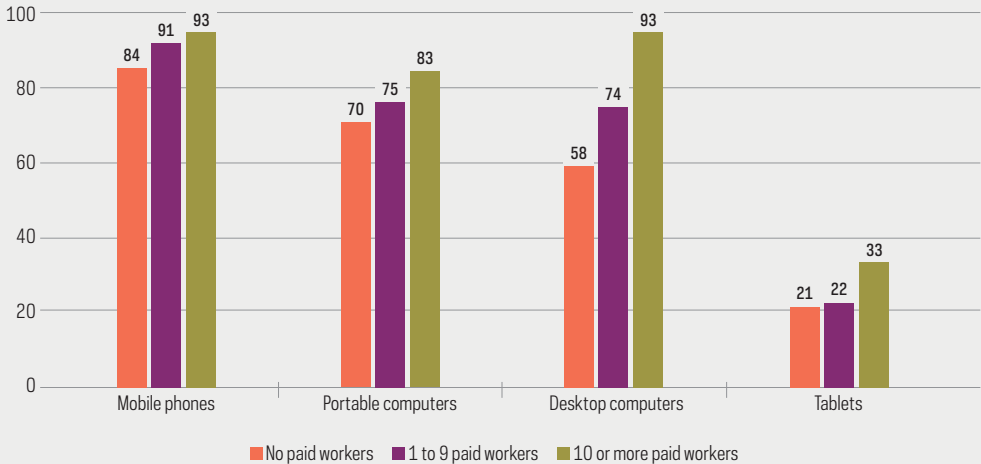
CHART 2
ORGANIZATIONS BY INTERNET USE (2022)
Total number of organizations (%)

	Value
Total	82
SIZE	
No paid workers	69
1 to 9 paid workers	88
10 or more paid workers	97
REGION	
North	83
Northeast	86
Southeast	81
South	79
Center-West	87
ACTIVITY	
Employer and professional associations	77
Culture and recreation	80
Education and research	97
Development and defense of rights	66
Religion	84
Health and social assistance	88
Housing and the environment	70
Others	92
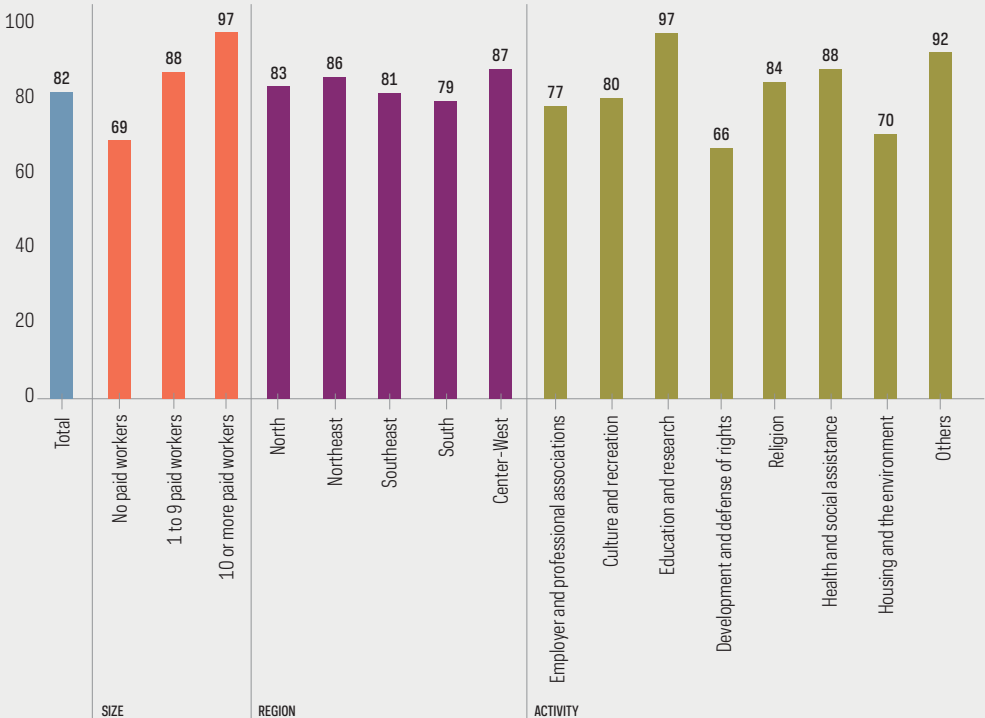
randomly selected based on the 2020 Central Register of Enterprises (Cempre) of the Brazilian Institute of Geography and Statistics (IBGE). Data collection was carried out between February and July 2022 through computer-assisted telephone interviews (CATI). The results of the ICT Nonprofit Organizations 2022 survey, including the tables of proportions, total values, and margins of error, are available on the Cetic.br|NIC.br website (https://cetic.br). The methodological and data collection reports can be consulted in both the printed publication of the survey and on the website.

22% of organizations received donations via the Internet	**11%** of organizations received donations through platforms or social networks	**6%** through the organization websites	**4%** through crowdfunding campaigns or websites
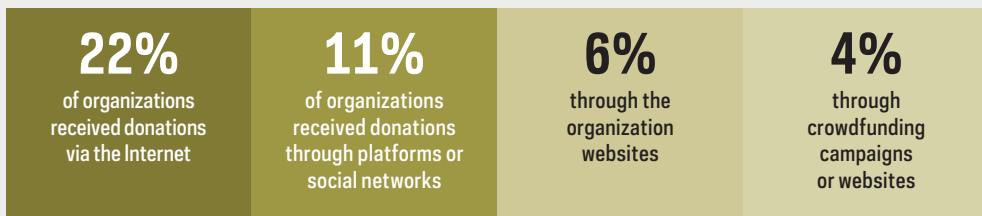
Barriers to ICT use

The results show that there are challenges related to ICT infrastructure and information technology (IT) capacity among Brazilian nonprofit organization. Among the difficulties in computer use, most reported having limited financial resources to invest in technology. Other difficulties included lack of adequate devices to access the Internet and lack of digital skills of team members.

The ICT Nonprofit Organizations 2022 survey addressed issues related to compliance with the Brazilian General Data Protection Law (LGPD) in these organizations. However, the results point out that this process is still a challenge for organizations. An example is that only 27% of organizations had offered internal training on privacy and data protection to paid workers and/or volunteers in the last 12 months. This practice was more common among organizations with 10 or more paid workers and those in the areas of education and research, and religion. Only 10% reported that they paid for external courses on the topic for their staff.

76% of organizations used personal mobile phones	**60%** of organizations used desktop computers owned by the organizations	**51%** of organizations used laptops owned by the organizations

CHART 3

ORGANIZATIONS BY WEBSITES AND/OR SOCIAL NETWORKS, BY SIZE AND ACTIVITY (2022)

Total number of organizations (%)

	Websites	Social networks
Total	36	71
No paid workers	22	53
1 to 9 paid workers	40	81
10 or more paid workers	62	89
Employer and professional associations	36	63
Culture and recreation	52	76
Education and research	64	88
Development and defense of rights	16	48
Religion	29	72
Health and social assistance	38	81
Housing and the environment	34	64
Others	61	83

SIZE   ACTIVITY

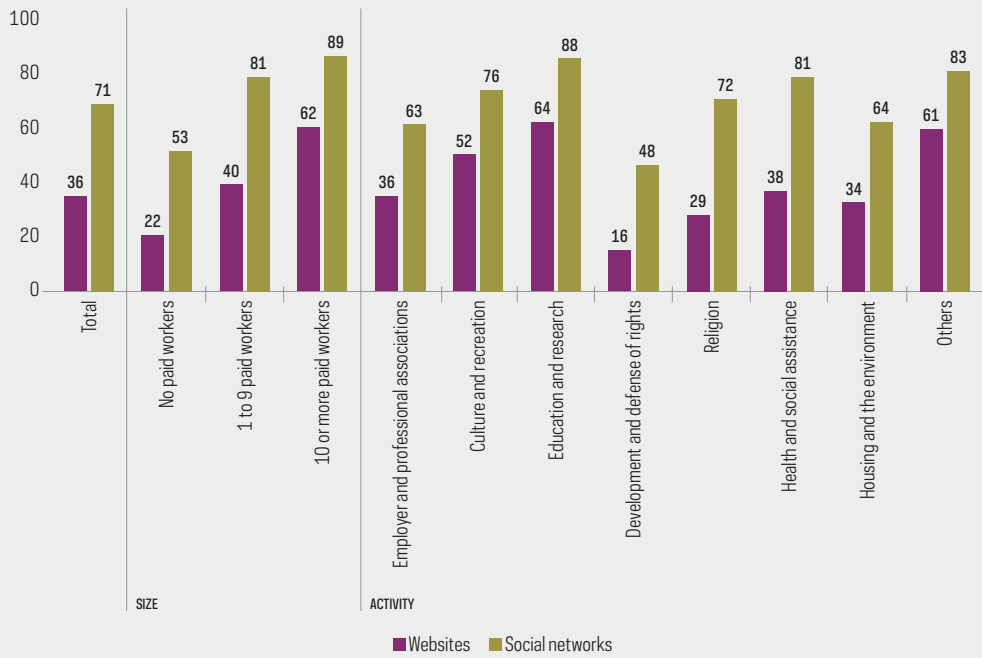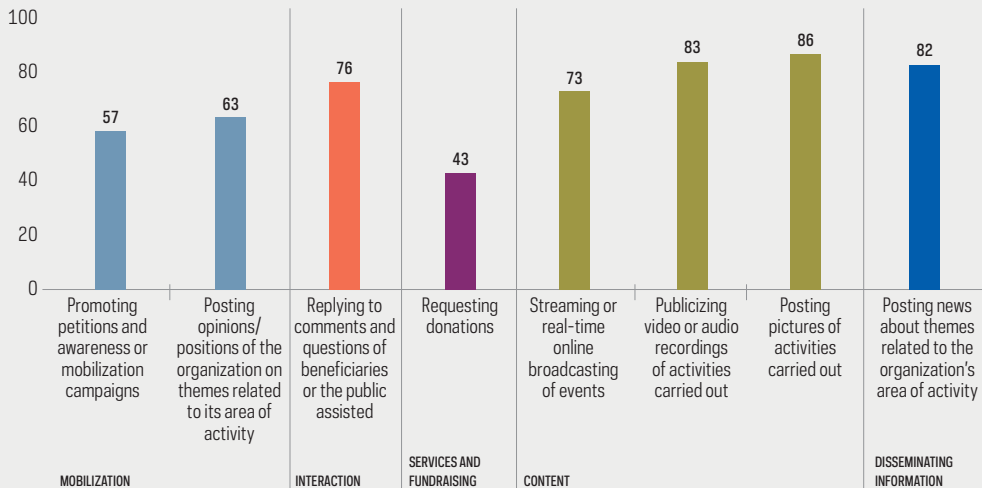■ Websites   ■ Social networks

CHART 4

ORGANIZATIONS WITH SOCIAL NETWORK PROFILE OR ACCOUNTS BY ACTIVITIES CARRIED OUT (2022)

Total number of organizations with Internet access and social network profiles or accounts (%)

Activity	%
Promoting petitions and awareness or mobilization campaigns	57
Posting opinions/positions of the organization on themes related to its area of activity	63
Replying to comments and questions of beneficiaries or the public assisted	76
Requesting donations	43
Streaming or real-time online broadcasting of events	73
Publicizing video or audio recordings of activities carried out	83
Posting pictures of activities carried out	86
Posting news about themes related to the organization's area of activity	82

MOBILIZATION

INTERACTION

SERVICES AND FUNDRAISING

CONTENT

DISSEMINATING INFORMATION

ABOUT CETIC.br

cetic.br

The Regional Center for Studies on the Development of the Information Society, a department of NIC.br, is responsible for producing indicators and statistics on the access and use of the Internet in Brazil, disseminating analyzes and periodic information on the Internet development in the country. Cetic.br is a Regional Study Center, under the auspices of UNESCO. More information at http://www.cetic.br/.

ABOUT NIC.br

nic.br

The Brazilian Network Information Center – NIC.br (http://www.nic.br/) is a non-profit civil entity, which in addition to implementing the decisions and projects of the Brazilian Internet Steering Committee, has among its attributions: coordinate the registration of domain names – Registro.br (http://www.registro.br/), study, address and handle security incidents in Brazil – CERT.br (http://www.cert.br/), study and research network technologies and operations – CEPTRO.br (http://www.ceptro.br/), produce indicators on information and communication technologies – Cetic.br (http://www.cetic.br/), implement and operate Internet Exchange Points – IX.br (http://ix.br/), enable the participation of the Brazilian community in the global development of the Web and support the formulation of public policies – Ceweb.br (http://www.ceweb.br), and host the Brazilian W3C office (http://www.w3c.br/).

ABOUT CGI.br

cgi.br

The Brazilian Internet Steering Committee, responsible for establishing strategic guidelines related to the use and development of the Internet in Brazil, coordinates and integrates all Internet service initiatives in the country, promoting technical quality, innovation and dissemination of the services offered. Based on the principles of multistakeholderism and transparency, CGI.br represents a democratic Internet governance model, internationally praised, in which all sectors of society participate equitable in the decision-making. One of its formulations is the 10 Principles for the Governance and Use of the Internet in Brazil (http://www.cgi.br/principios). More information at http://www.cgi.br/.

Access complete data from the survey

The full publication and survey results are available on the **Cetic.br** website, including the tables of proportions, totals and margins of error.

ACCESS
WWW.CETIC.BR