

Key Highlights

- **Malaysia:** The market is experiencing a slight drop in the ratio of cancellations to acquisitions. This is likely to be influenced by the temporary stop of outbound calls due to the Movement Control Order. Outbound calls have now recommenced for the market and we shall update further on any impact to cancellations in our next bulletin.
- **Thailand:** The announcement of lockdowns in specific provinces by the Government has led to a natural reduction of movement in the country. This has made it very difficult for face-to-face acquisition to continue particularly for sites located in the heart of Bangkok. The ratio of cancellations to acquisitions is 13 points up from the previous month, indicating that the market is seeing a spike of donors cancelling despite recruitment being low. We will update regularly on cancellation rates in Thailand, during the weeks to come.
- **Philippines:** With the longest (and arguably the strictest) lockdown in place, the market has seen cancellations drop proportionate to the drop in acquisitions.
- **Korea:** Normally an acquisition powerhouse, the market's acquisitions were greatly impacted by the removal of face-to-face activities, which began on the 21st of February. Very low acquisition numbers and a wave of cancellations from previous weeks with higher acquisition volumes has caused the ration of cancellations to acquisition spike massively. We will monitor this and provide a further update in the next bulletin.

935,957

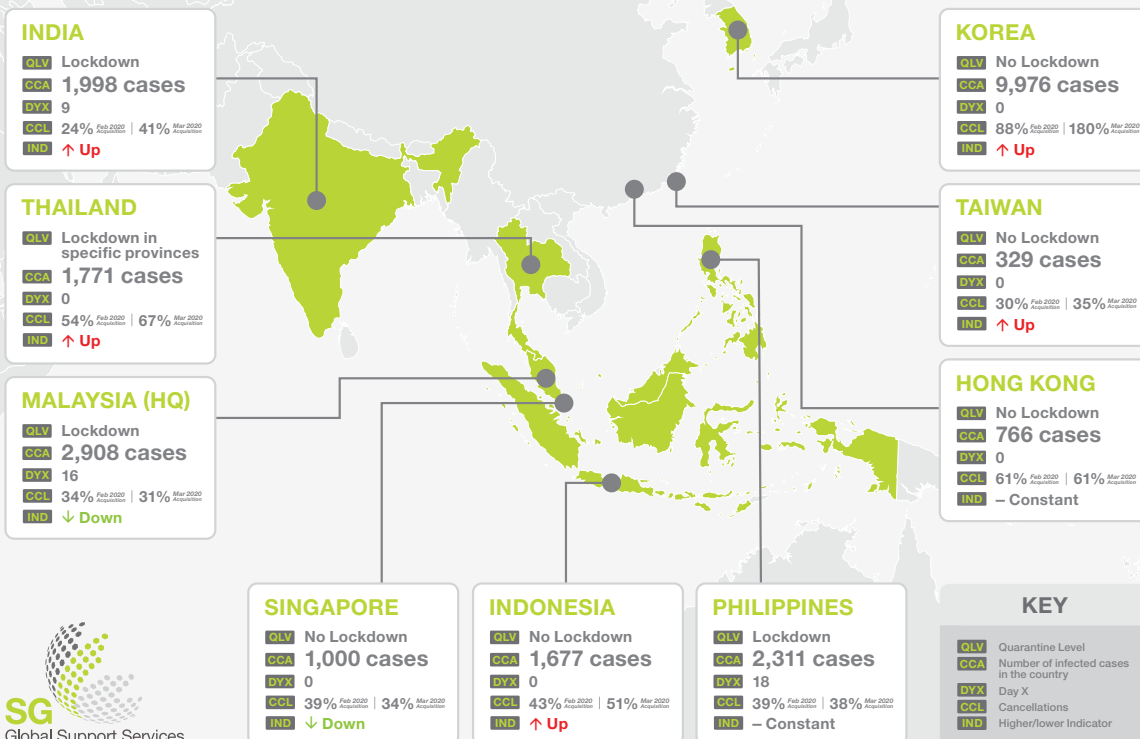
COVID-19 Cases Worldwide

As of 2nd April, <https://www.worldometers.info/coronavirus/>

Overall Cancellations versus Acquisition of the same month

51% (Mar 2020) ↑
45% (Feb 2020)

Country Level Updates:



Conclusion

As the COVID-19 lockdown begins to take effect in many regions, the strain on fundraising has been very apparent, with much smaller daily acquisition numbers reported as compared to the daily average numbers in early Q1 2020. SG expects to see a proportionate drop in cancellation volumes but we will also analyse whether the current economic uncertainty across markets, triggers a new benchmark in regular give cancellations in any of our countries. This will be a key measure for this bulletin moving forward.

SG also expect a renewed focus on digital and telemarketing channels as a means of attracting regular give donors, whilst face to face channels remain affected by #socialdistancing guidelines.

Recommendations

- 1.** Focus on new acquisitions for calls via your existing supporter base and reactivations. Your best donor is one that has previously given to you before. If calls are made to existing donors, it is important to note that these are potential windows of opportunity for cancellation. Therefore, a balance must be struck and some traditional points of contact should be reviewed or temporarily stopped, based on donor feedback.
- 2.** Set up a strong telemarketing strategy and look into effective digital sign up tools.
- 3.** Ensure the messaging in your telemarketing scripts and email communications to donors regarding COVID-19 are urgent, straight forward and succinct. Donors are currently receiving more emails than ever, it's important to make your messaging impactful and make sure it does not get lost in over-messaging.
- 4.** Support your face to face sales channel, it's in everyone's interest to protect our main source of donor recruitment!

