

# Country Highlights

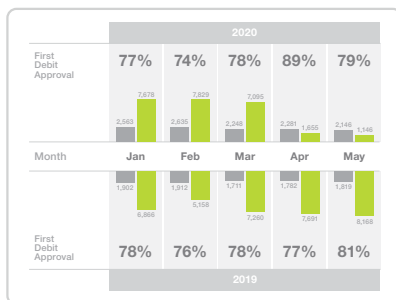
This issue marks SG Support's 10th edition of the Weekly COVID-19 Bulletin.

With growing data week-on-week, we take a greater look into the numbers, comparing 2020 (including pre-COVID-19 performance) against the same position in 2019 to support a fuller view of the impact COVID-19 has had on your donor bases. Across the markets, we have seen communities band together to support non-profits in carrying out essential support and services, in a way that we have never seen before. However, how has this translated against the bigger backdrop of the COVID-19 crisis in terms of new donors and cancellations?



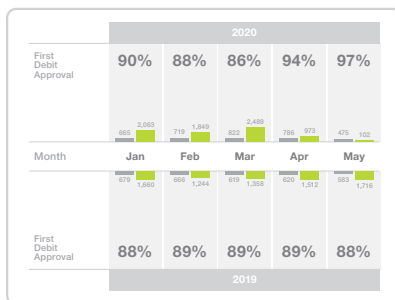
## Malaysia

Malaysia's first debit approval rates hit their highest in April 2020 (a quarantine month) - indicating quality measures in place for alternative fundraising methods. As Malaysia moves towards restarting their economy post-quarantine, First Debit Rate Approvals, Piece Rates and Average Gifts will be the key performance indicators of the market post-COVID-19.



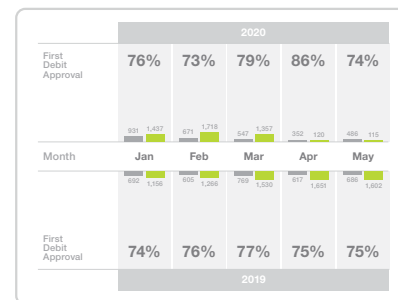
## Singapore

In 2019, Singapore underwent a restart of their Regular Giving program - with a strict 30% cap by the regulators as a portion of acquisition spend to donation value. Singapore looks to change acquisition plans that meet this regulation. Current alternative acquisition channels (namely telemarketing) have brought in quality donors (where a 'yes' translates to a successful debit as measured by a first debit approval rate) and non-profits in Singapore should look into greater telemarketing efforts to keep the momentum of their Regular Giving program.



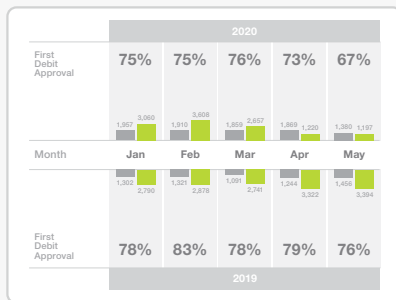
## Philippines

With the strictest quarantine in place, acquisitions in the Philippines has dropped the most during COVID-19, with majority of the acquisitions coming via digital campaigns. This could be better supported by a cohesive digital to telemarketing strategy to cushion the loss of Face-to-Face activities. However, non-profits should keep in mind that acquisitions via telemarketing with an annual churn rate (attrition) of 40% of smartphone and data card users swapping network operators, lead lists will need to be constantly updated.



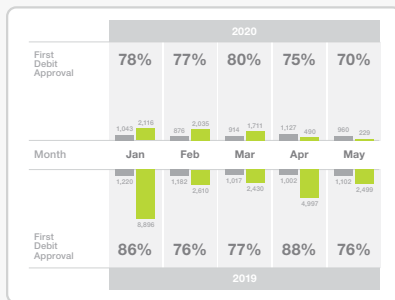
## Thailand

Although Thailand never underwent a full quarantine, and their overall COVID-19 numbers have been low, the drop in acquisition numbers are attributed to the limitation of Face-to-Face fundraisers in the field and the decision to halt fundraising activities during this period. In May, Thailand began full Face-to-Face activities again. The low first debit approval rate could be indicative of what we may see when other countries begin to restart their Face-to-Face programs.



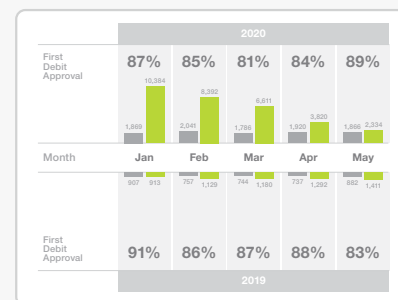
## Indonesia

Indonesia has been one of the hardest-hit countries by COVID-19 in South East Asia. In May, Indonesia experienced its lowest first debit approval rates, indicating that alternative fundraising channels will need to put quality check measures in place to support a greater ROI on acquisition spend.



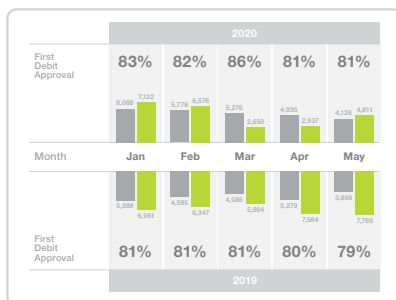
## India

At the end of 2019, India underwent a massive break in the Face-to-Face acquisition volumes (akin to January 2020 figure) - the quarantine has halted this new growth trajectory, but India's acquisitions and first debit approvals are still outperforming itself even with COVID-19 in place. Cancellations have been steady throughout this period, despite the backdrop of reports of high unemployment figures due to COVID-19 (27 million in April).



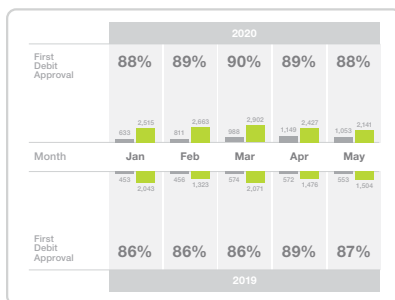
## Korea

Korea has seen fluctuations in their acquisition numbers, which has followed the greater COVID-19 situation. In March and April, Face-to-Face fundraising was limited as new clusters were being discovered and isolated. Isolating these cases have cushioned the impact of a full quarantine, as limited acquisition practices could still take place. Currently, there seems to be limited cancellations due to COVID-19 (1% of total May 2020 cancellations).



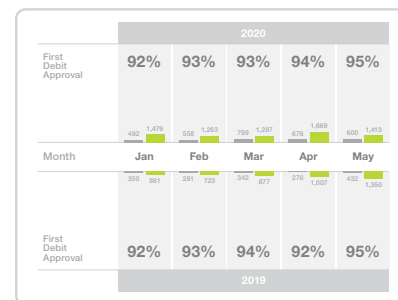
## Taiwan

With controlled COVID-19 case numbers, Face-to-Face acquisition for Taiwan has seen little impact during this period. Non-profits in Taiwan should consider a greater diversification of existing acquisition channels as part of its fundraising matrix as the long-term economic impacts of COVID-19 on Taiwan come to light. The stop of world trade routes and tourism have left a mark on Taiwan's economy and has impacted fundraising in the form of cancellations - as evidenced by the relatively high cancellations citing COVID-19 as the reason for stopping their gift (12% of cancellations in May 2020).



## Hong Kong

Hong Kong has been the marvel of COVID-19. With strong safety measures in place from the SARS epidemic, we see a limited impact to its acquisition numbers. As COVID-19 started to peak in towards the start of February 2020; existing Face-to-Face fundraising strategies have not had to drastically change the way in which they operate.



KEY  
Acquisitions  
Cancellations