

Introduction

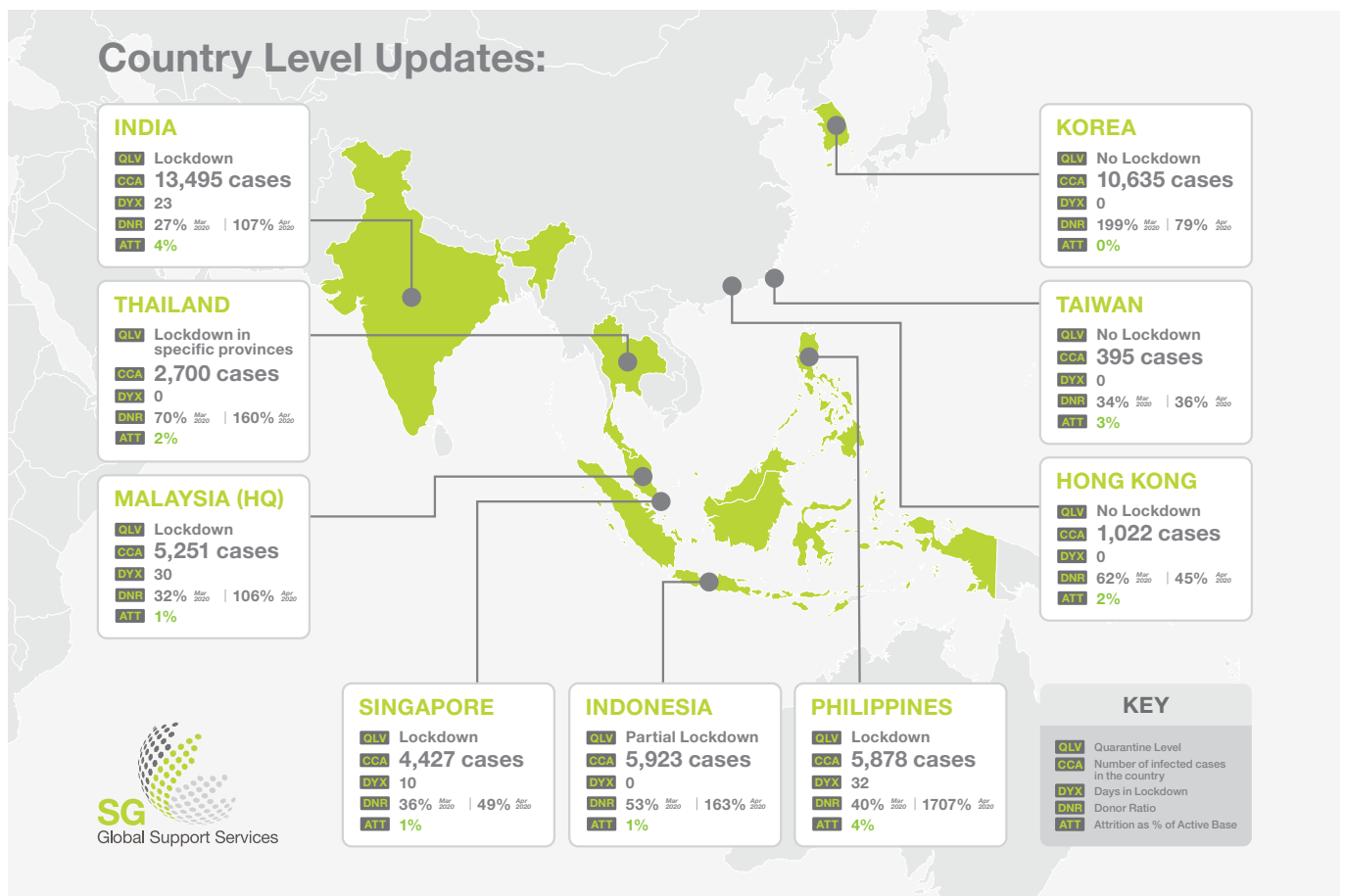
As the world continues to grapple with the challenges brought about by COVID-19, this special weekly bulletin will track the impact of the pandemic on the non-profit fundraising industry, across the region. Over time, this bulletin will use a number of measures to quantify the impacts, however as a starting point we will be using "Donor Ratio". Donor ratio is a performance indicator which looks at Cancellations as a proportion of Acquisitions for the month. This will be a constant metric that we will be using to measure the COVID-19 impact.

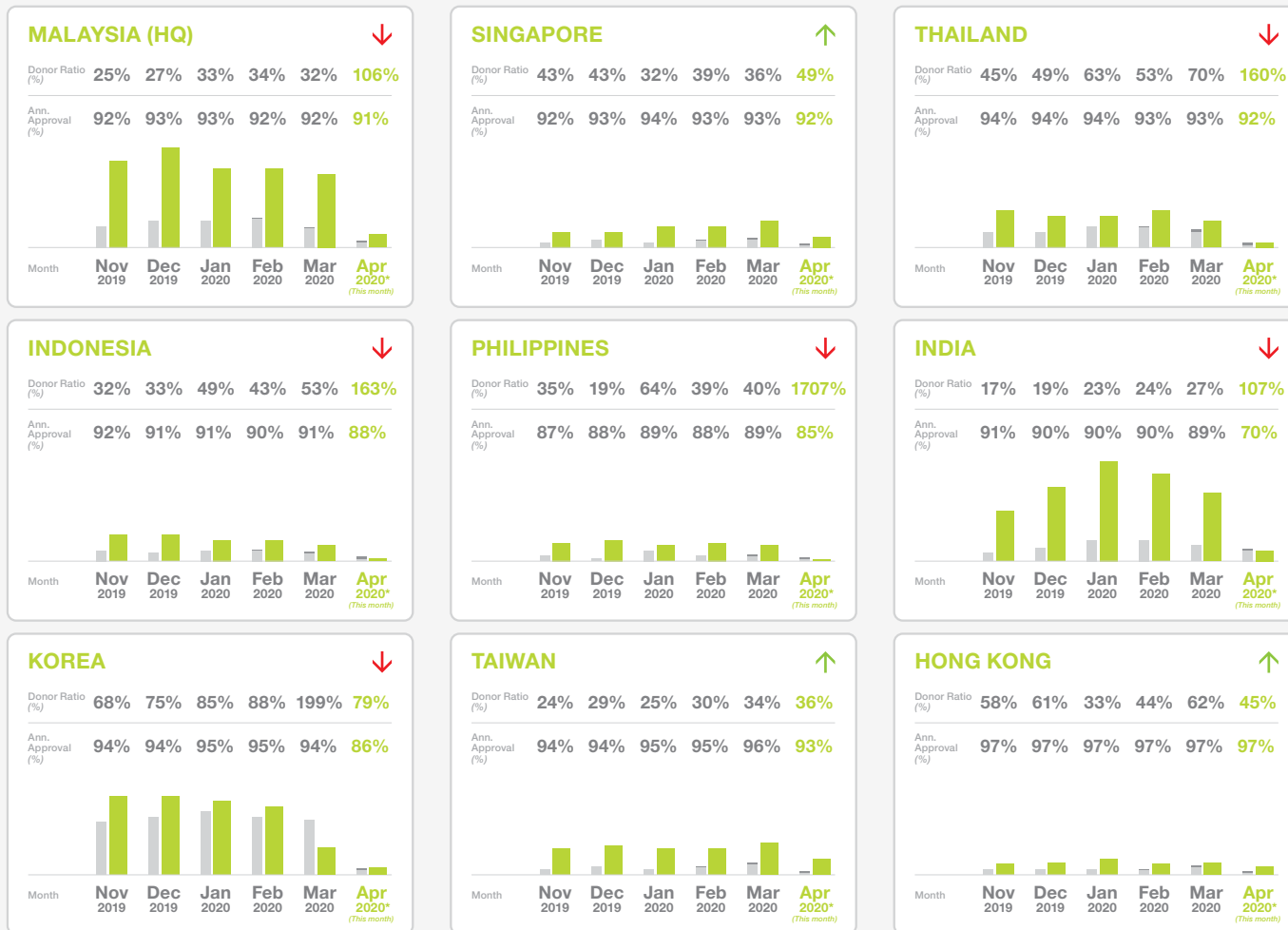
Key Highlights

- **Thailand:** As face-to-face acquisitions ceased at the end of March, the Donor Ratio in April will look much higher as a consequence. The current cancellation trajectory in April is not indicating an increase from previous months. However, more donors are notably citing COVID-19 as the reason for cancelling their donations.
- **India:** As India moves into resubmissions of Regular Give Donors for April, the limitations on the wider banking infrastructure become apparent with a drop in anniversary approval rates. We see cancellations having a current projected increase of 3% as compared to March 2020.
- **Philippines:** The Philippines Donor Ratio has continued to rise as new acquisitions have remained minimal, whilst we see cancellations have currently increased beyond normal trajectory.
- **Taiwan:** Donor Ratio is expected to maintain at a steady level, as we move towards closing the month since all acquisition channels are active.
- **Hong Kong:** High acquisitions are seen in the first two weeks of April (whilst cancellations remain constant) which has contributed to a lower Donor Ratio.

2,192,597
 COVID-19 Cases Worldwide
As of 17th April, <https://www.worldometers.info/coronavirus/>

Overall Cancellations to Acquisitions (Donor Ratio)
101% (Apr 2020)
53% (Mar 2020)





* April figures are as of 16th April and are preliminary. These figures will be adjusted week on week, as we close out the month.

KEY	Donor Ratio (%)	Ratio of Cancellations to Acquisitions	Ann. Approval (%)	Approval for Anniversary	Donor Base Growth (+ve / -ve / flat)	Cancellations minus COVID-19 Cancellation Code	Cancellations under COVID-19 Cancellation Code	Approved Acquisitions (Regular give)
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Conclusion

This week the impact of COVID-19 on Regular Give donor bases across the region begin to show stresses, as markets move into a negative growth. Generally, markets that are not in lockdown (where face-to-face acquisitions continue), are experiencing a steady growth of new donors. Singapore is currently still in growth as the impact of COVID-19 on Regular Give Fundraising has not yet shown its full impact. Across all markets, non-profits have started diversifying acquisition channels, which will cushion the impact of ceasing face-to-face acquisitions.

<p>Markets in Decline</p> <ul style="list-style-type: none"> - Malaysia - Thailand - India - Philippines - Korea - Indonesia 	<p>Markets in Growth</p> <ul style="list-style-type: none"> - Hong Kong - Taiwan - Singapore
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Recommendations

1. Start having **conversations** around re-strategizing 2020 acquisition targets. Since its unlikely another acquisition channel will bring in the same volume as face-to-face, where can we cushion the impact of new revenue?
2. **Redirect** the spend on acquisitions and consider **providing** something back to your donors in challenging times like these. It's important to care about their mental health and well-being. You could strategize this by segmenting your donor base and provide personalised check-ins to your most loyal donors via calls, personalised emails, or social media reach outs and mentions.
3. Non-profits are understated frontliners in this pandemic, when looking at new avenues of acquisition non-profits should **support** each other to maximize efficiencies and reduce cost. Consider **collaborations** to support flows of new donor sign-ups.

If you have any questions or would like further information, please drop us an email at consulting@sgsupport.com or reach out to your country representative.