

Introduction

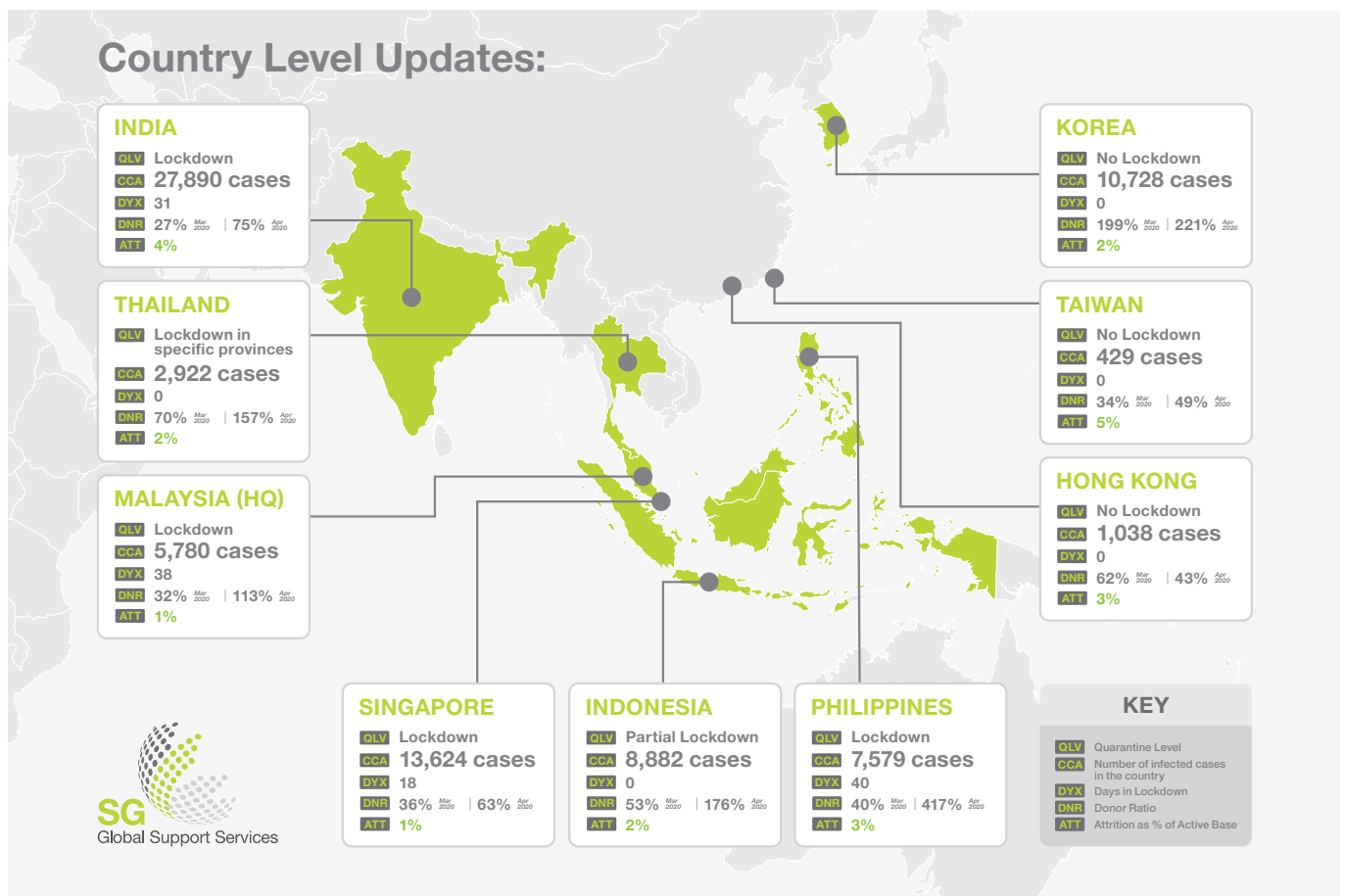
As the world continues to grapple with the challenges brought about by COVID-19, this special weekly bulletin will track the impact of the pandemic on the non-profit fundraising industry, across the region. Over time, this bulletin will use a number of measures to quantify the impacts, however as a starting 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.

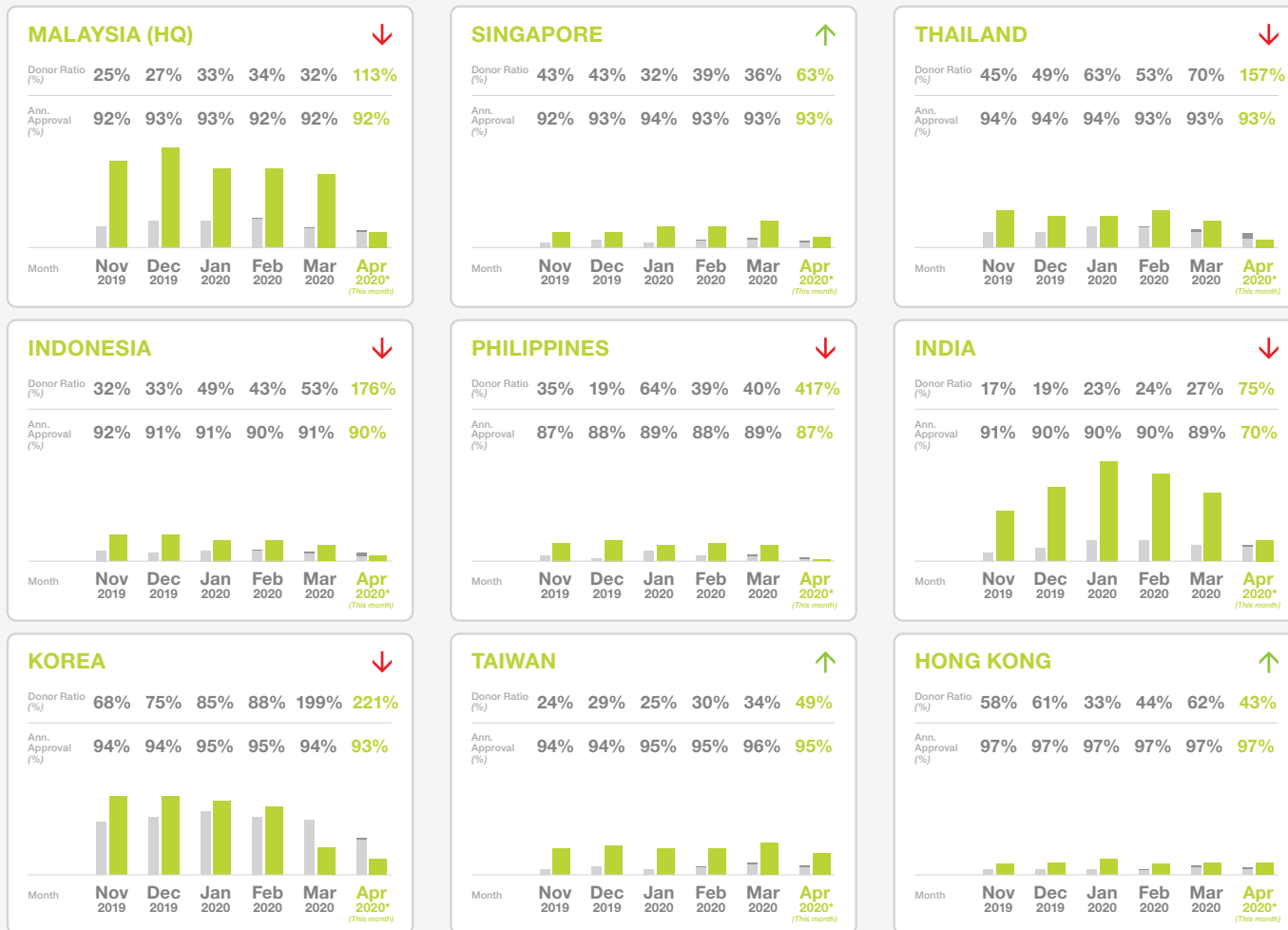
Key Highlights

- **Malaysia:** With lockdown (locally known as Movement Control Order) officially extended until 12th May and the start of Ramadan, non-profits will need to consider maximizing their alternative acquisition channels during this festive season.
- **Indonesia:** With the start of Ramadan and upcoming Eid celebrations, much like in Malaysia, non-profits will need to consider innovative alternative acquisition channels to maximize new sign-ups during this time.
- **Philippines:** Being the longest market in lockdown (locally known as the Enhanced Community Quarantine) with an extension until 15th May, the Philippines has shown that the overall cancellation rate has not increased in correlation to the amount of days spent in quarantine. This dispels initial fears that a lockdown will correlate with high cancellation volumes.
- **Taiwan:** Donor Ratio has maintained at a steady level moving towards the end of April, as all acquisition channels are active. Cancellation volumes remain constant.
- **Hong Kong:** High acquisitions in the first two weeks of April whilst cancellations remain constant, has contributed to the lower Donor Ratio as compared to March 2020.

2,995,043
COVID-19 Cases Worldwide
 As of 26th April, <https://www.worldometers.info/coronavirus/>

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





* April figures are as of 24th April and are preliminary. These figures will be adjusted week on week, as we close out the month. Correction to the data published in the COVID-19 Fundraising Bulletin Edition 3 – the donor ratio for Philippines was 403% instead of 1707%.

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, Singapore saw a dramatic increase in COVID-19 positive cases, as they hit the peak of their 2nd wave. Fundraising performance in Singapore is being monitored closely through this period, and there has not been a correlating spike in cancellations. As we reach the end of April, Donor Ratio has begun to stabilize and a full month's picture of the numbers start to become apparent.

Historically, the fasting month and upcoming Eid celebrations in Malaysia and Indonesia brings forth high acquisition volumes. However, this year, it will likely be very different as quarantines are extended and celebration of festivities take on a new form. E.g. Messaging of digital ads will need to consider targeting around the message of staying safe during this festive period as opposed to being together with family.

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

- Don't reinvent** the wheel in coming up with new campaigns and platforms, but rather make use of what is readily available. For example, Instagram has just launched its #MonthofGood initiative to inspire people to come together. Riding the hype on such platforms should be considered.
- Consider **cross-country collaborations** with organization partners to support acquisition goals, which will then support the maximizing of resources and support cost cutting measures. E.g. Digital ads can be positioned to support acquisition in both Malaysia and Indonesia where the festive sentiment and local languages are similar.
- General messaging** to your donors in this time should look into checking in to the "Me" of the donor, whilst urging them to act for the "We" of the community. Communication to your donors with messages such as "How are you staying safe during this period? Support those that are unable to #stayhome" should be considered.

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.