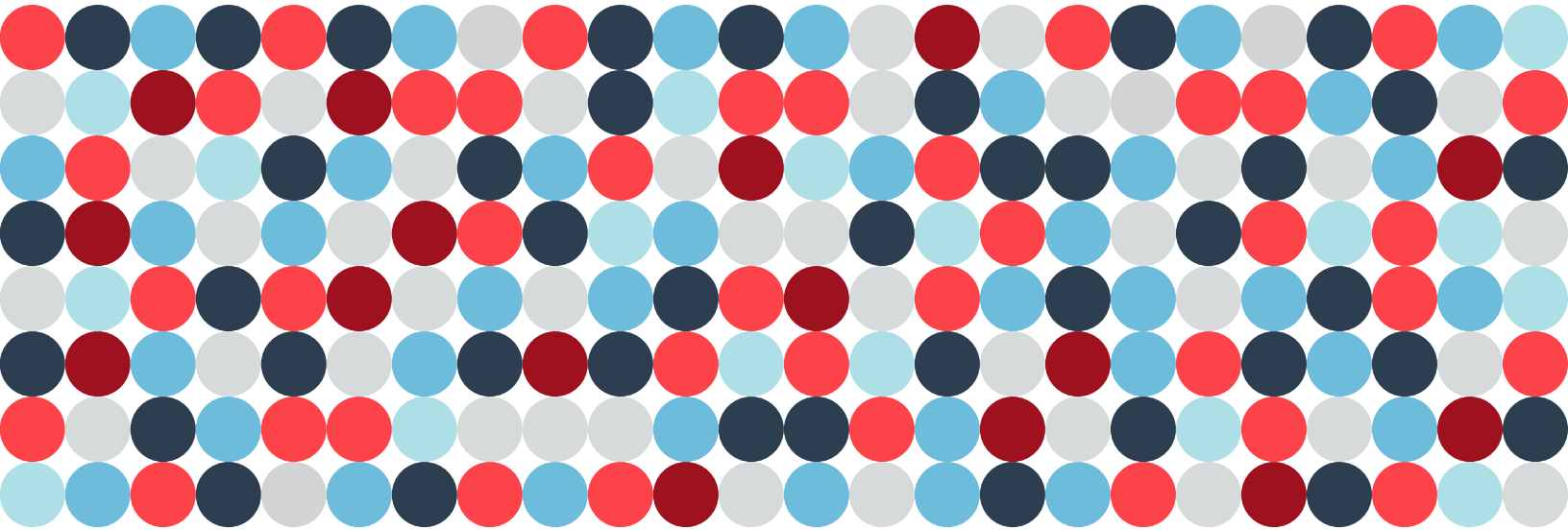


# IMPACT REPORT

## COVID-19:

### How the Coronavirus Pandemic is Impacting Direct Mail Fundraising

Transactions through April 26, 2020



## MERKLE RMG'S

# COVID-19 IMPACT REPORT

**WE HAD SOME WINS THIS WEEK.** Now don't throw a party just yet. But, I think a quick happy dance is acceptable. The Merkle Response Management Group's (Merkle RMG) team continues to work through the challenges cast our way as a result of the Coronavirus pandemic. Our operations and technology teams are continually adapting and looking for ways to improve processes to accommodate our "new normal."

This is the seventh installment of Merkle RMG's **Impact Report**. This updated report includes transactions from the first week of February through the fourth week of April. Our report shares transactional data reflecting the mail processed at our facility during the stated reporting period. This report is updated every Monday evening and posted on our website ([www.merkleresponse.com/covid-19reports](http://www.merkleresponse.com/covid-19reports)). It shares the transactional data from the week prior.

## REPORT METHODOLOGY

- The organizations included in this report are a subset of Merkle RMG's total business.
  - These organizations are those who were fully onboarded by January 1, 2019, and remain a client as of February 2, 2020.
  - The report includes 135 nonprofit organizations.
  - Political organizations, like party committees, campaigns, and PACs, are not included in this report.
- The industry sectors reported follow those traditionally used in Target Analytics' *donorCentrics® Index of Direct Marketing Fundraising Report*.
  - The sectors included are:
    - Animal Welfare (8 organizations)
    - Arts & Culture (24 organizations)
    - Environmental (11 organizations)
    - Health (25 organizations)
    - Human Services (16 organizations)
    - International Relief (15 organizations)
    - Societal Benefit (36 organizations)
- The 2020 weekly volumes may be impacted by processing delays caused by the Coronavirus pandemic that cannot be quantified.
- This report shares the transactions processed by Merkle RMG and does not account for changes to business rules, mail dates, mail volumes, or fundraising strategies.
- The trends reported are directional and not intended to serve as a sole source of information. Any opinions shared are solely our own and not the views of the organizations included in this report.

# THE NONPROFIT INDUSTRY

**SMALL WINS TO KEEP US MOTIVATED.** Every sector had strong week-over-week improvements in donation mail volume and revenue. Except for the Environmental sector, each sector made up ground in donation volume and revenue for this reporting period compared to last year. The **Arts & Culture, Human Services, International Relief,** and **Societal Benefit** sectors experienced incredible year-over-year growth in the fourth week of April. Some of these increases may be due to catching up from the power outage earlier this month and staffing levels.

**-13.3%**  
VOLUME OF  
DONATIONS

YEAR-OVER-YEAR CHANGE

- Over the last twelve weeks, donation mail volume decreased by -13.3% compared to the same period in 2019. This past week, the fourth week of April, donation mail volume increased year-over-year by 13.7%. And from the third to the fourth week of April, donation volume jumped 29.1%.

**9.8%**  
AMOUNT OF TOTAL  
DONATIONS

YEAR-OVER-YEAR CHANGE

- Donation revenue over this reporting period was 9.8% higher this year than it was for the same period last year. This was primarily due to the higher average gift as volume remained lower than last year. In the fourth week of April, donation revenue soared 54.7% higher than the same week in 2019—much of this was driven by the increase in the **Human Services** sector.

**26.6%**  
AVERAGE GIFT

YEAR-OVER-YEAR CHANGE

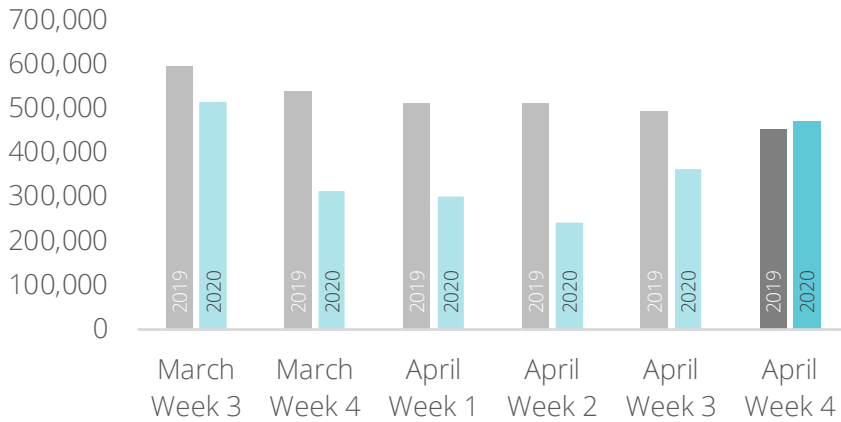
- The 26.6% higher average gift for this reporting period helped mitigate the negative impact of the lower donation volume on revenue. Last week, the average gift was 54.7% higher compared to the fourth week of April in 2019. From the third to the fourth week of April this year, the average gift increased by 60.9%, which was primarily due to an increase in the **International Relief** sector.

# NONPROFIT INDUSTRY

## WEEKLY YEAR-OVER-YEAR COMPARISON

### TOTAL MAIL PIECES | Year-Over-Year Comparison

Comparing the number of mail pieces processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-17.0%**

APRIL WEEK 4: **4.2%**

The increase in donation mail volume drove the increase in total mail volume; non-donation mail volume was down -33.8% this week compared to the same week in 2019.

### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **30.0%**

This increase in total mail volume was due to the combination of increases in donation and non-donation mail. Non-donation mail volume increased by 36.7% week-over-week.

### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-13.3%**

In last week's report, donation mail volume for the period was down -15.5%.

APRIL WEEK 4: **13.7%**

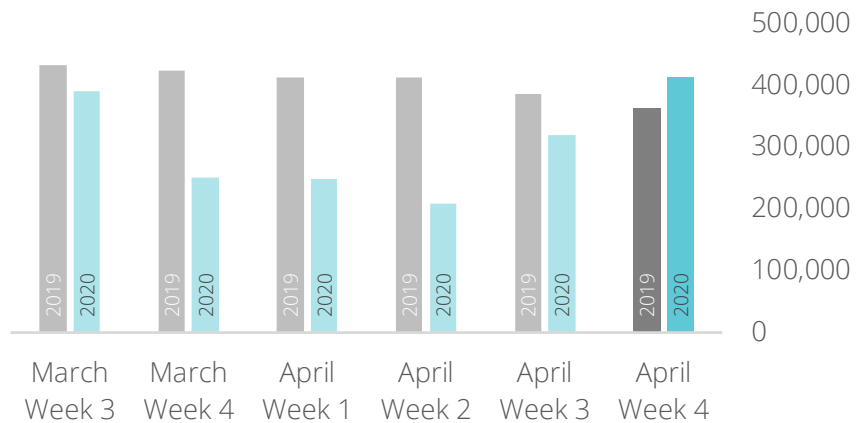
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **29.1%**

Another strong week-over-week gain, from the second to the third week of April donation mail volume increased by 53.1%. For the month, this year is -24.3% behind compared to the volume at this point in April 2019.

### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **9.8%**

The increase in donation mail volume and the 26.6% increase in the average gift both drove this year-over-year increase.

APRIL WEEK 4: **54.7%**

Both donation mail volume and the average gift were the reasons for this year's donation revenue increase in the fourth week of April.

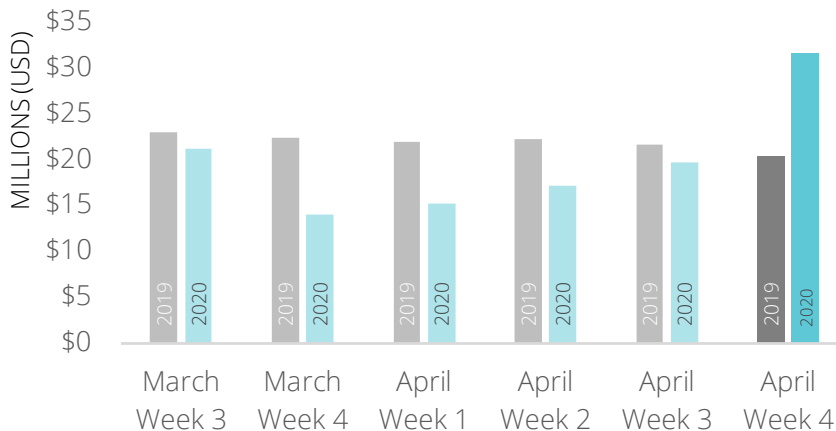
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **60.9%**

Again, the week-over-week increase was caused by increases in the donation mail volume and a 24.7% increase in the average gift. To date, April was only -2.8% less than the donations processed at this time in the month last year.

### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

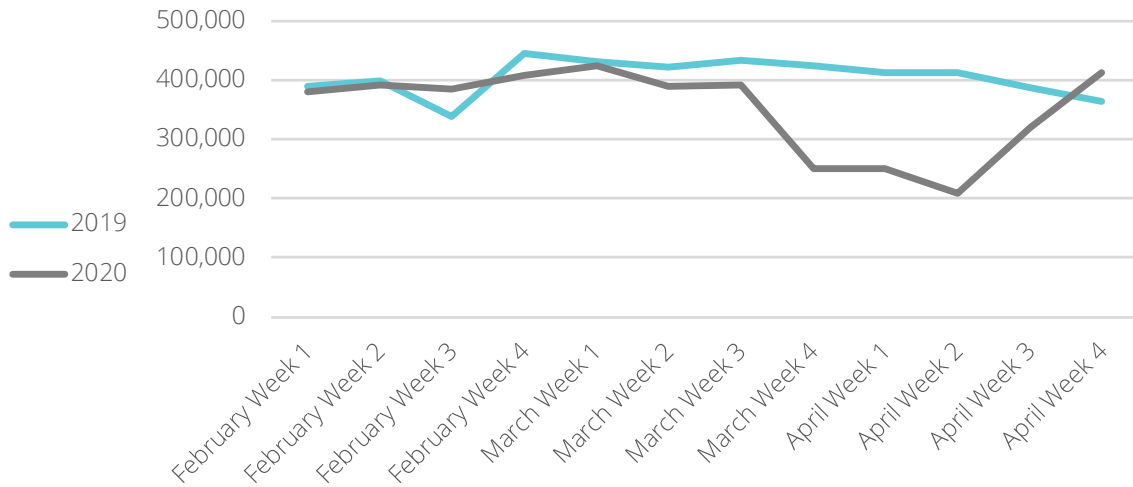


# NONPROFIT INDUSTRY

## WEEKLY YEAR-OVER-YEAR COMPARISON

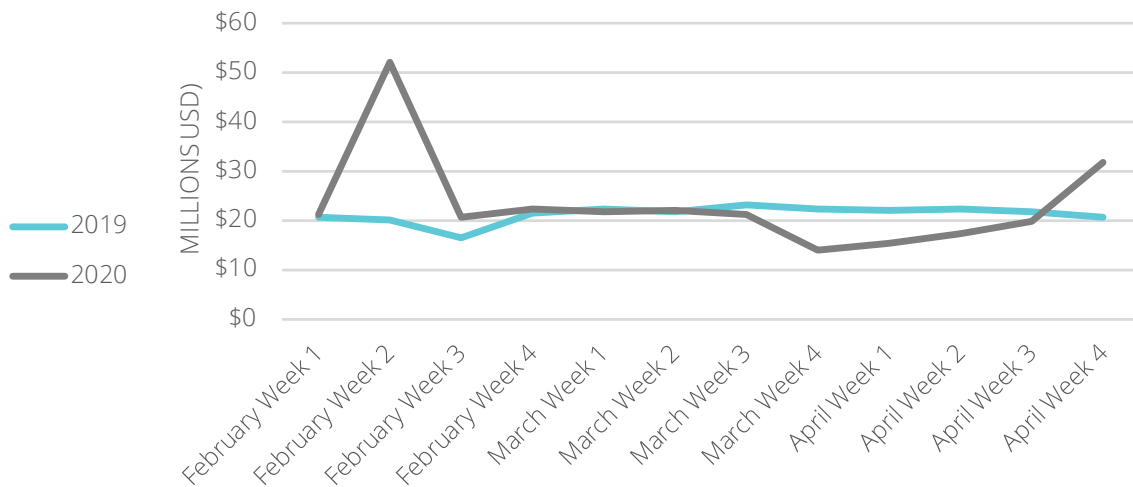
### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

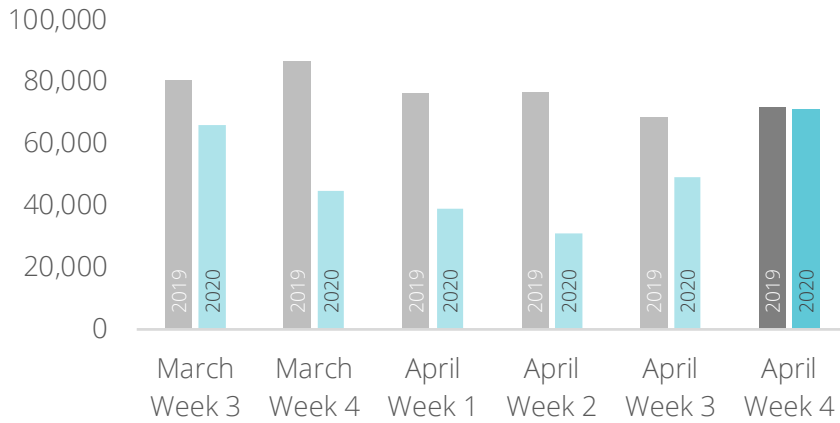


# ANIMAL WELFARE

## WEEKLY YEAR-OVER-YEAR COMPARISON

### TOTAL MAIL PIECES | Year-Over-Year Comparison

Comparing the number of mail pieces processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-20.4%**

*This variance improved from last week's report, where total mail volume through the third week of April was -22.0% compared to the reporting period in 2019.*

APRIL WEEK 4: **-0.7%**

*The slight decrease in total mail volume compared to this week in 2019 was due to a -28.7% decrease in non-donation mail volume.*

### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **44.6%**

*Total mail volume increased from the third to the fourth week of April due to increases in both donation and non-donation mail volumes.*

### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-20.3%**

*Last week this was reported as a year-over-year decrease of -22.4% in donation mail volume.*

APRIL WEEK 4: **4.9%**

*This past week came back from a -20.2% year-over-year decline in the third week of April.*

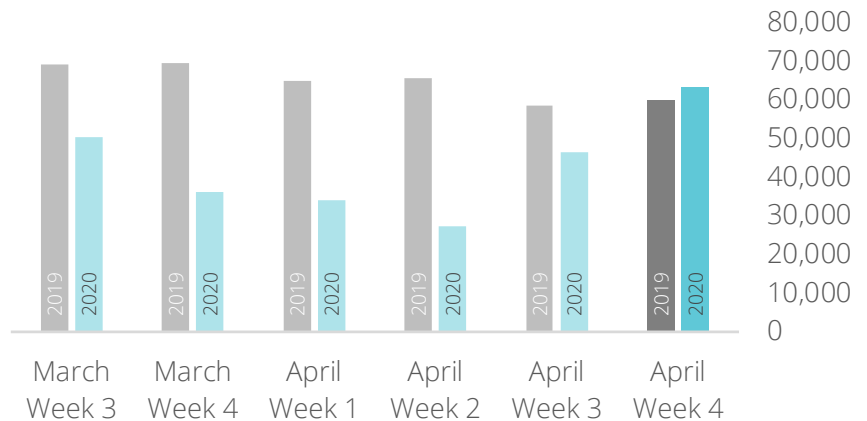
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **35.2%**

*Despite this week-over-week gain, April's donation mail volume was -31.1% behind where it was at this point in the month last year.*

### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-14.3%**

*The drop in donation mail volume was the driver for the decline in donation revenue. The average gift was 7.6% higher this year compared to last.*

APRIL WEEK 4: **15.0%**

*Compared to this week in 2019, donation revenue increased primarily due to a 9.7% increase in the average gift.*

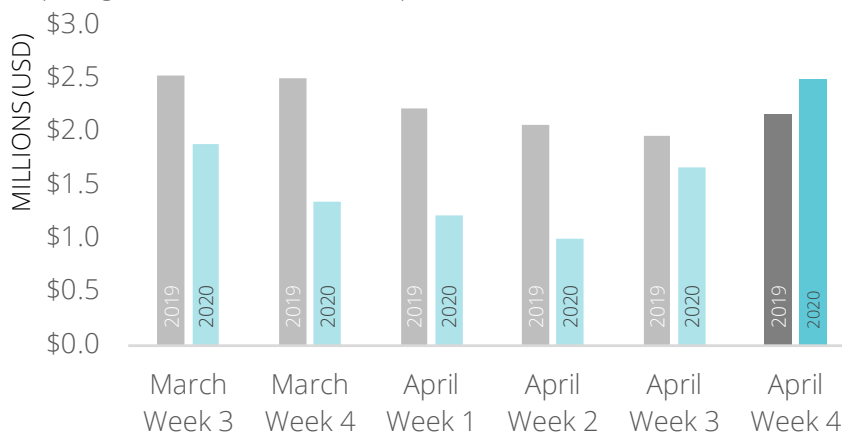
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **46.9%**

*The combination of volume and the average gift contributed to the week-over-week gain. Still, through this point in the month, this year is behind 2019 by -24.3%.*

### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

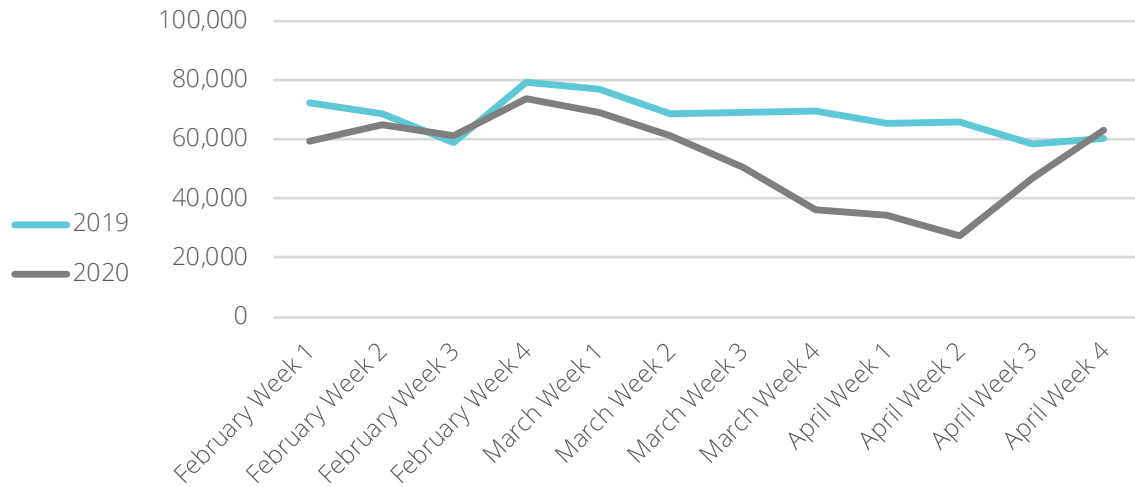


# ANIMAL WELFARE

## WEEKLY YEAR-OVER-YEAR COMPARISON

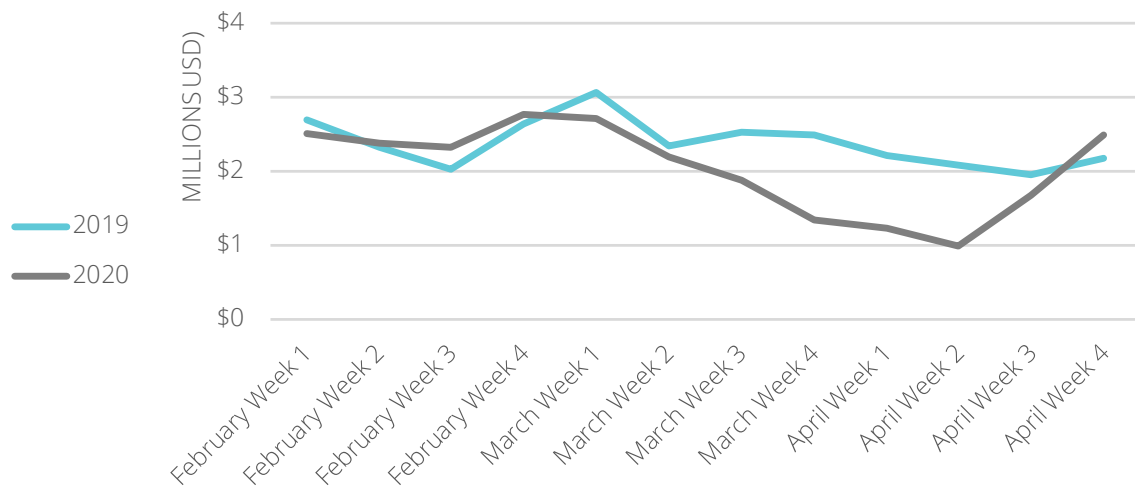
### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

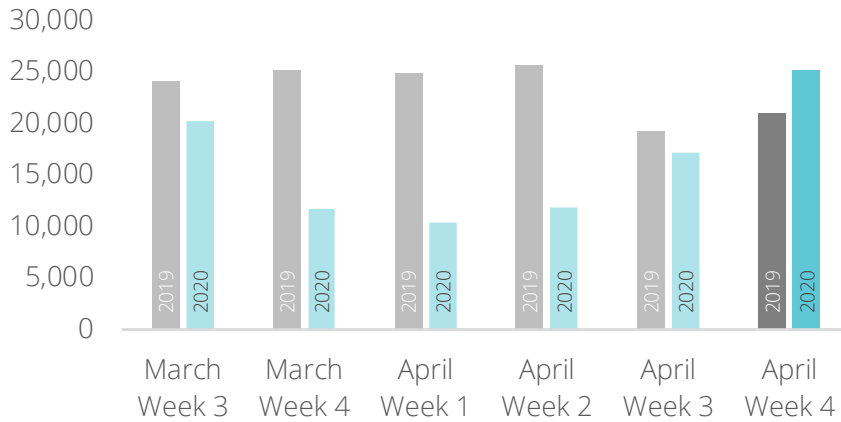


# ARTS & CULTURE

## WEEKLY YEAR-OVER-YEAR COMPARISON

### TOTAL MAIL PIECES | Year-Over-Year Comparison

Comparing the number of mail pieces processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-22.4%**

Last week this variance was reported as a decrease of -25.5% in donation mail volume.

APRIL WEEK 4: **19.4%**

The week prior, total mail volume was down -11.2% compared to that week in 2019. The resurgence this week was due to increases in the donation and non-donation mail volumes.

### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **46.7%**

The week-over-week increase was due to donation mail volume.

### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-21.6%**

This past week, the sector gained some ground, as last week the year-over-year variance for this period -24.4%.

APRIL WEEK 4: **17.5%**

This past week bounced from a -11.9% year-over-year decline in the third week of April.

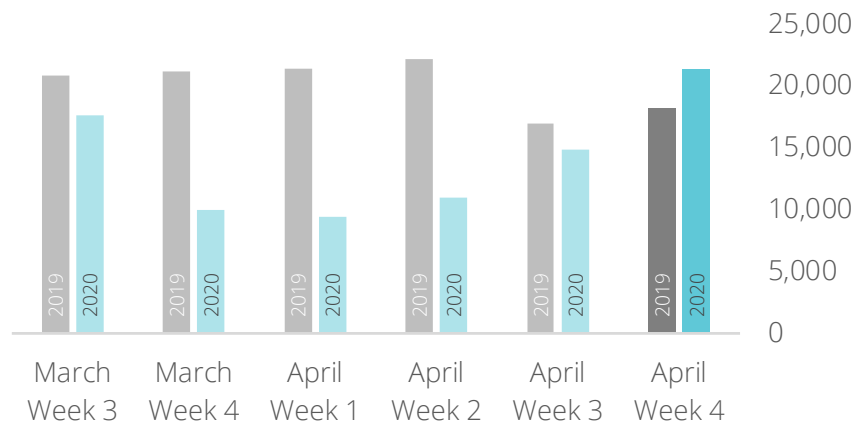
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **43.3%**

Compared to this point in the month last April, the donation mail volume was behind by -27.8%.

### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-10.8%**

There was a 13.7% year-over-year increase in the average gift, which helped soften the impact of the lower volume on donation revenue.

APRIL WEEK 4: **20.8%**

The average gift for this week was 2.8% higher than this week last year for this week. The increase in donation revenue was due to an increase in volume.

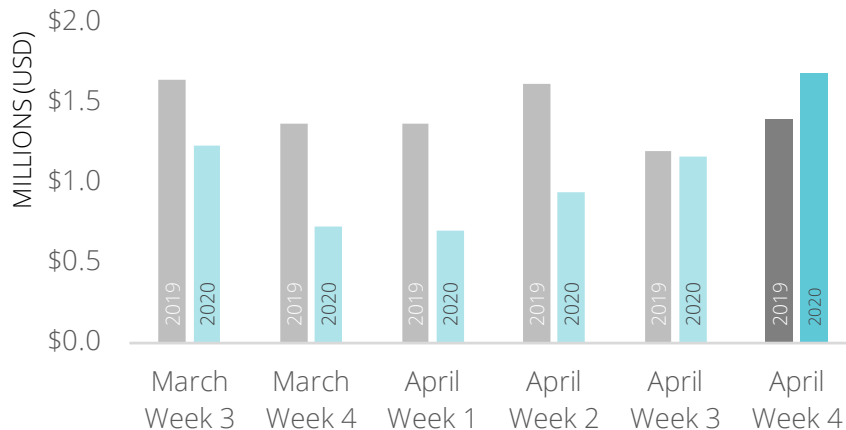
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **44.8%**

Again, the week-over-week increase in donation revenue was driven by volume as the average gift increased by only 1.1%. Unfortunately, to-date, April was -19.5% behind compared to this point in April 2019.

### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week





# ARTS & CULTURE

## REPORT PERIOD YEAR-OVER-YEAR COMPARISON

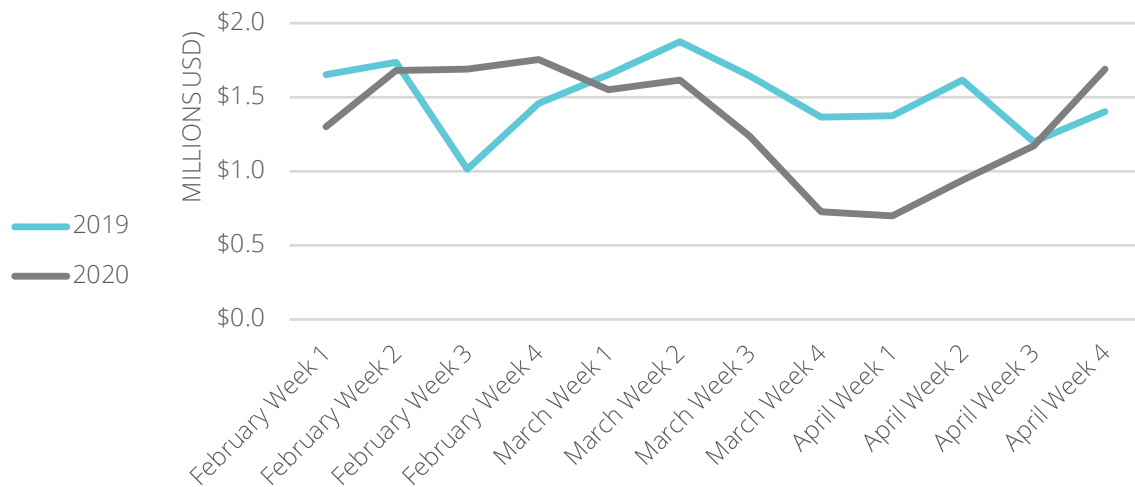
### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

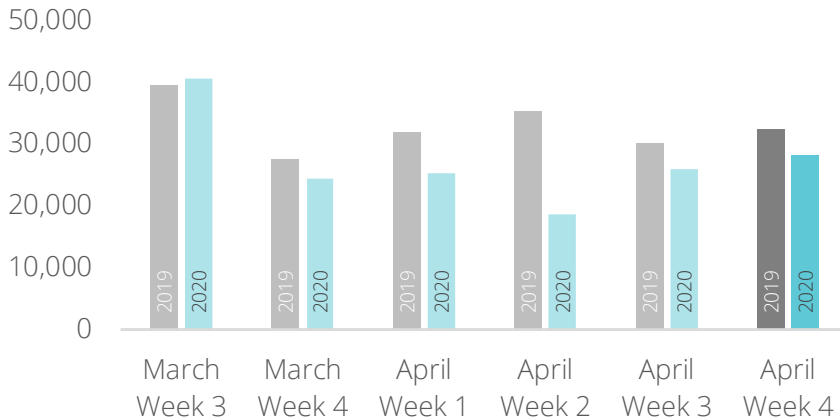


# ENVIRONMENTAL

## WEEKLY YEAR-OVER-YEAR COMPARISON

### TOTAL MAIL PIECES | Year-Over-Year Comparison

Comparing the number of mail pieces processed each week



### YEAR-OVER-YEAR VARIANCES

**REPORTING PERIOD: -6.2%**

*This sector remained fairly stable compared to last week's report, which was -5.7%. The slight decrease can be attributed to lower non-donation mail volume.*

**APRIL WEEK 4: -13.2%**

*Total mail volume in the fourth week of April was down primarily due to a -30.1% decline in non-donation volume.*

### WEEK-OVER-WEEK VARIANCE

**APRIL WEEK 3 TO WEEK 4: 8.6%**

### YEAR-OVER-YEAR VARIANCES

**REPORTING PERIOD: -6.0%**

*Donation mail volume remained -6.0% lower than this period last year. That was the same variance reported last week.*

**APRIL WEEK 4: -5.9%**

*Compared to this week last year, donation volume declined. But it was a lesser variance compared to the -20.3% year-over-year decline in the third week of April.*

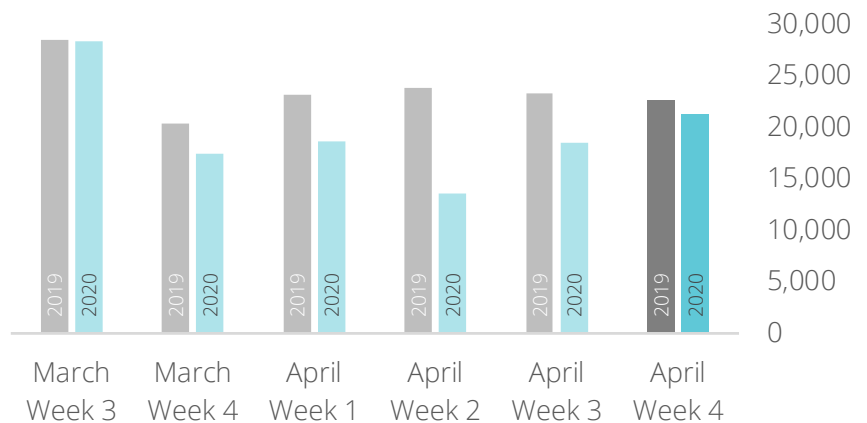
### WEEK-OVER-WEEK VARIANCE

**APRIL WEEK 3 TO WEEK 4: 14.7%**

*To date, the month of April was -22.3% behind in donation mail volume compared to this same time last April.*

### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### YEAR-OVER-YEAR VARIANCES

**REPORTING PERIOD: -5.5%**

*The decline in donation revenue for this period in 2020 compared to 2019 was primarily due to the drop in volume—the average gift was virtually flat.*

**APRIL WEEK 4: -4.5%**

*Again, lower donation mail volume was the driver for the year-over-year drop in donation revenue in the fourth week of April. The average gift had a modest increase of 1.4%.*

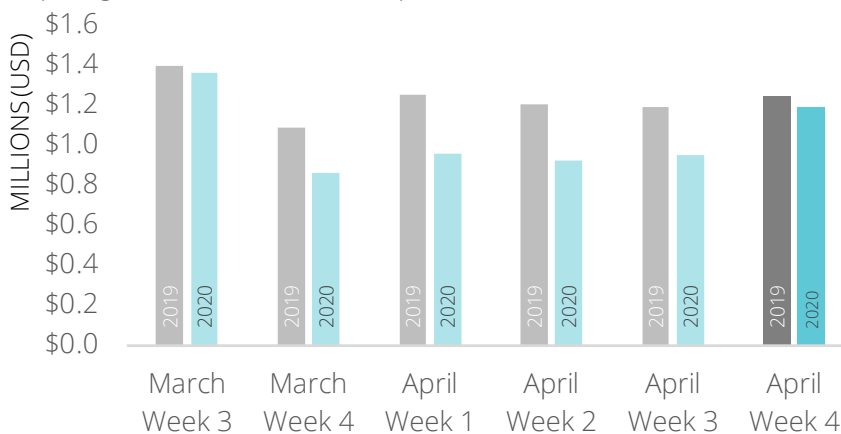
### WEEK-OVER-WEEK VARIANCE

**APRIL WEEK 3 TO WEEK 4: 25.0%**

*Donation revenue in April was -17.9% behind the donation revenue reported through this time in April 2019.*

### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

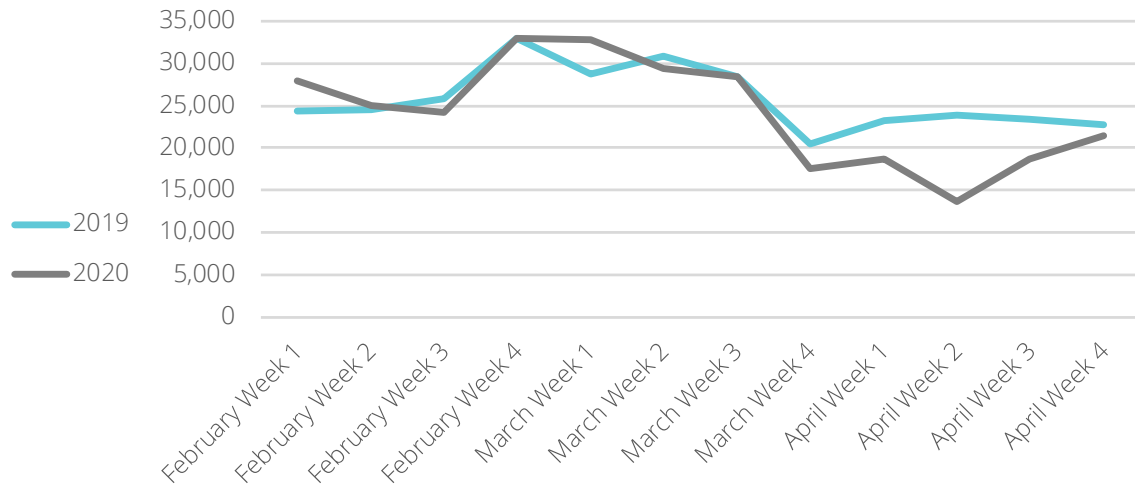


# ENVIRONMENTAL

## REPORT PERIOD YEAR-OVER-YEAR COMPARISON

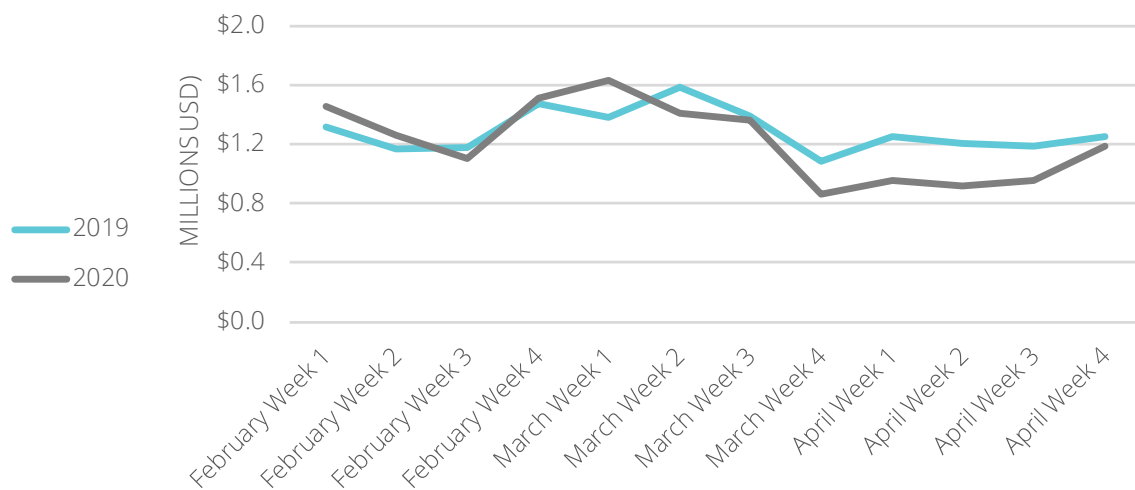
### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

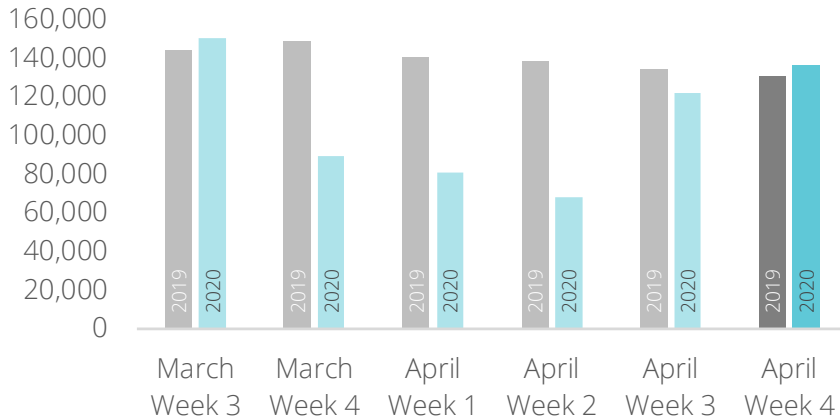


# HEALTH

## WEEKLY YEAR-OVER-YEAR COMPARISON

### TOTAL MAIL PIECES | Year-Over-Year Comparison

Comparing the number of mail pieces processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-8.2%**

Total mail volume increased since last week's report, where this year-over-year variance was -9.4%.

APRIL WEEK 4: **4.7%**

The increase in total mail volume was driven by donation mail volume. Non-donation mail volume was down -16.8% compared to this week last year.

### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **11.7%**

This week-over-week increase was also driven by donation mail volume. Despite a 20.9% increase, non-donation mail volume accounted for only 7.8% of the total mail volume.

### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-9.1%**

APRIL WEEK 4: **7.1%**

This was a solid increase considering the third week of April had a decrease of -6.4% this year versus last.

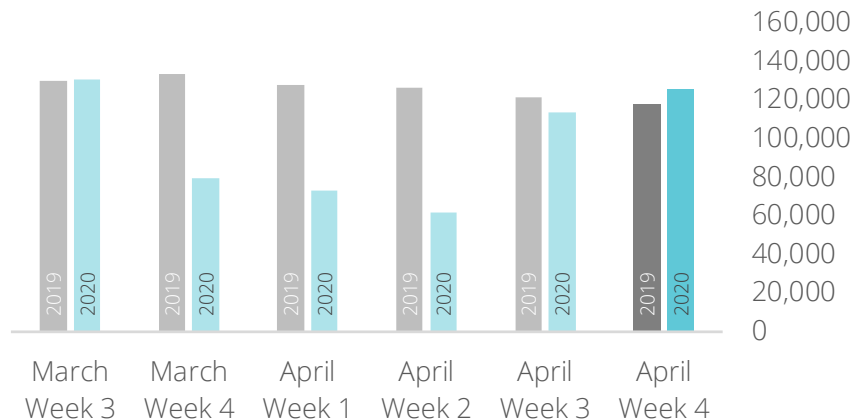
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **11.0%**

The donation mail volume was -24.0% lower at the end of the fourth week of April compared to same point for this month in 2019.

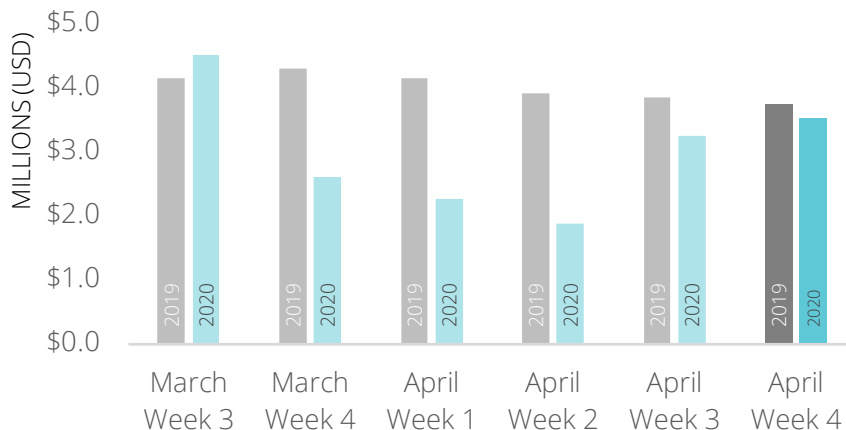
### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-7.1%**

The year-over-year drop in donation revenue was due to the decline in donation mail volume for the reporting period this year, as the average gift was 2.2% higher this year than last.

APRIL WEEK 4: **-5.8%**

In the fourth week of April, the average gift was -12.0% less compared to this week in 2019, which was the reason for the lower donation revenue.

### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **9.0%**

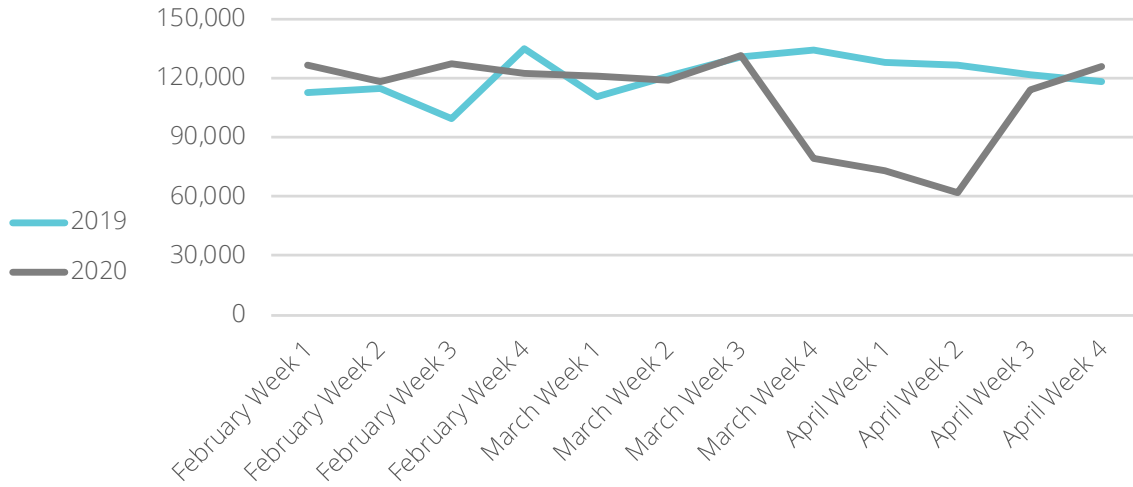
Through this point in the month, April was behind -30.4% compared to this time last April.

# HEALTH

## REPORT PERIOD YEAR-OVER-YEAR COMPARISON

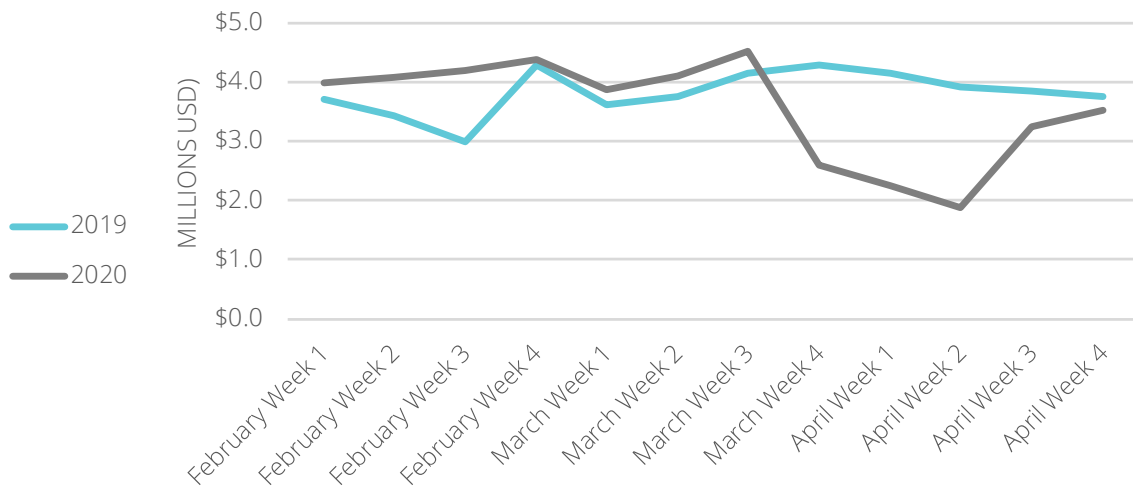
### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

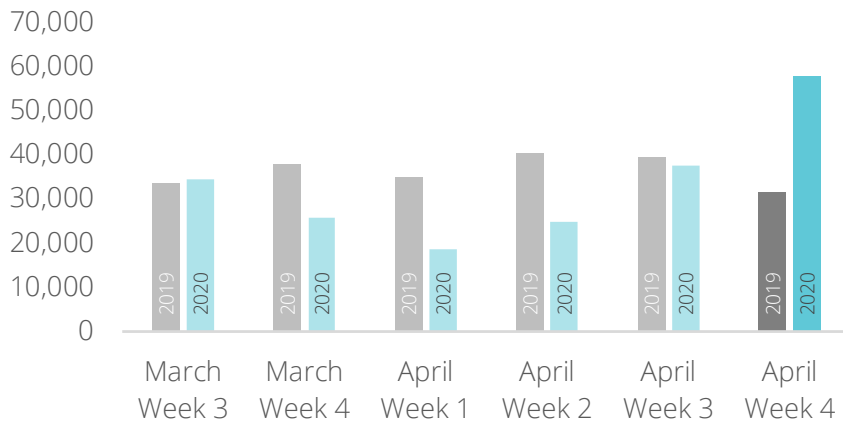


# HUMAN SERVICES

## WEEKLY YEAR-OVER-YEAR COMPARISON

### TOTAL MAIL PIECES | Year-Over-Year Comparison

Comparing the number of mail pieces processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **5.8%**

Last week for this sector, the year-over-year variance was -0.8%.

APRIL WEEK 4: **81.3%**

Donation mail volume was the reason for this substantial increase—non-donation mail volume was -13.8% less compared to this week in 2019.

### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **53.2%**

Again, this jump was due to donation mail volume.

### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **17.4%**

APRIL WEEK 4: **107.5%**

Catch up from the power outage and staffing may have played a part in this substantial year-over-year increase for this week.

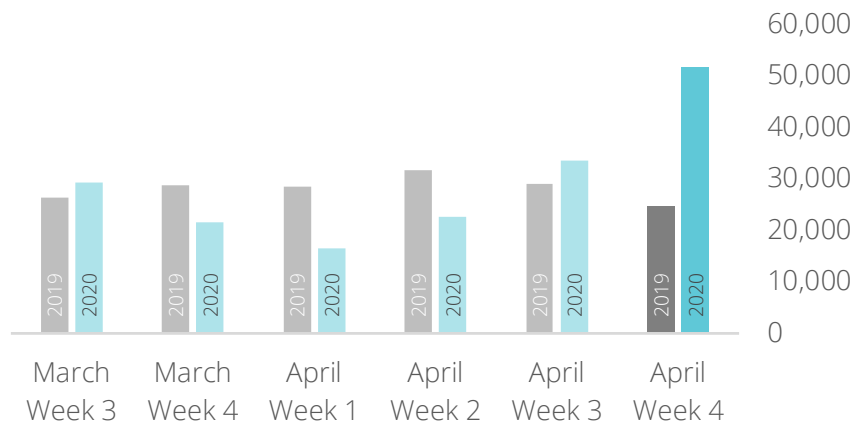
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **128.3%**

Compared to this time last April, this year April was 9.2% ahead in donation mail volume.

### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **67.4%**

The combination of increased volume and the 42.6% higher average gift were the drivers for the year-over-year donation revenue increase for this time frame.

APRIL WEEK 4: **378.5%**

There was a 130.5% increase in the average gift this week compared to this week in 2019. The check average gift increased by 131.3% and the credit card average gift increased by 66.1%.

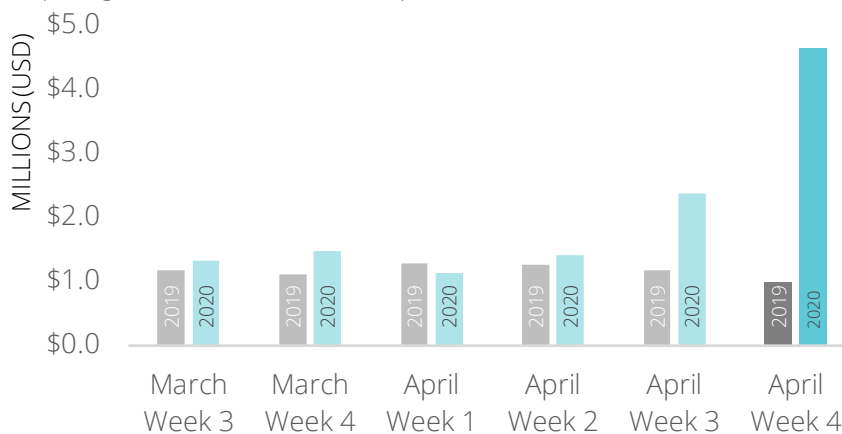
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **96.1%**

April 2020 was 103.3% ahead in donation revenue compared to where it was at this time in April last year.

### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

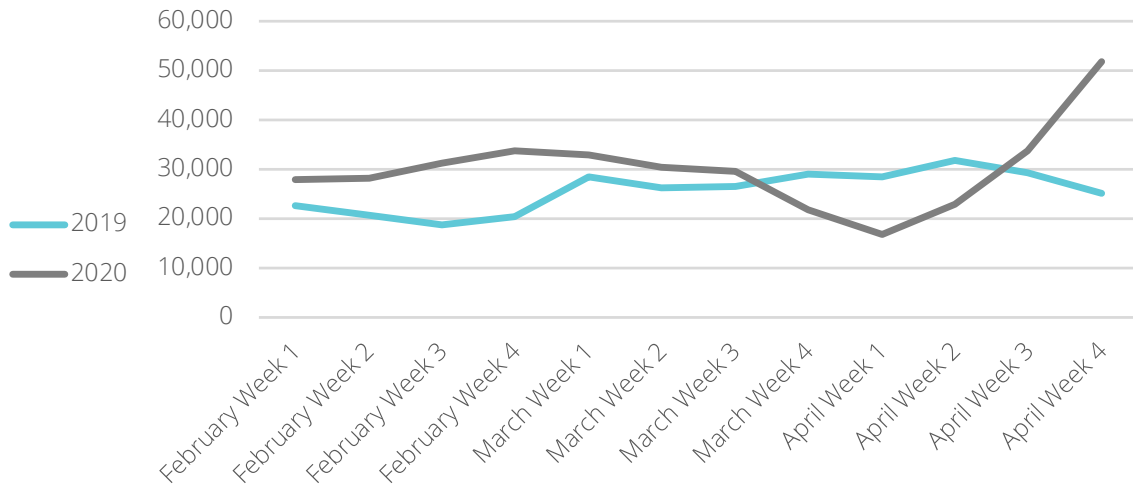


# HUMAN SERVICES

## REPORT PERIOD YEAR-OVER-YEAR COMPARISON

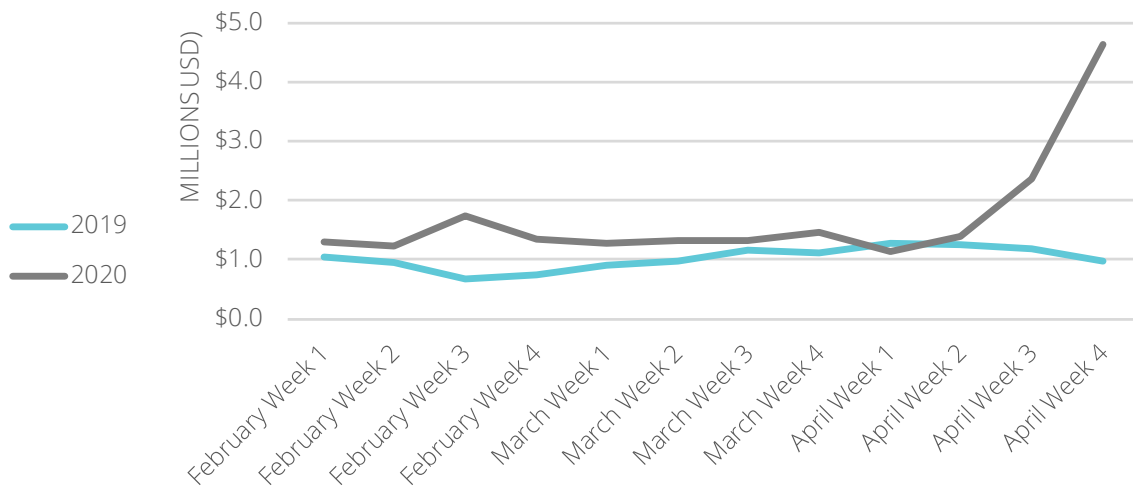
### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

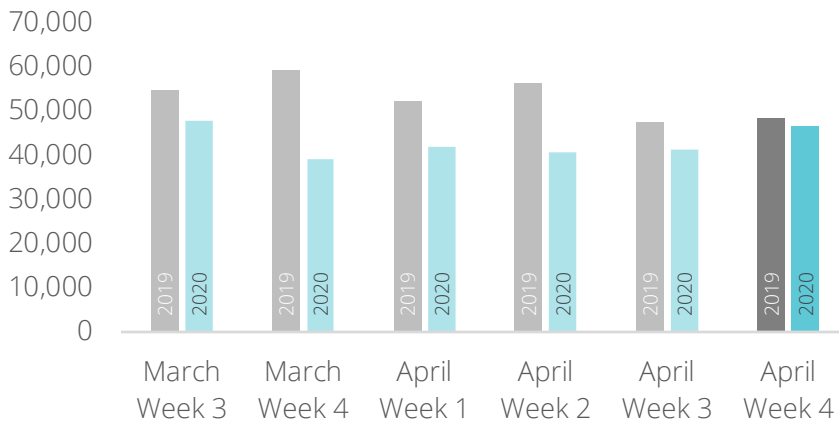


# INTERNATIONAL RELIEF

## WEEKLY YEAR-OVER-YEAR COMPARISON

### TOTAL MAIL PIECES | Year-Over-Year Comparison

Comparing the number of mail pieces processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-11.5%**

There was a small improvement compared to last week's report, where this year-over-year variance in the total mail volume was -12.2%.

APRIL WEEK 4: **-4.0%**

Non-donation mail decreased by -54.3% this week compared to the fourth week of April last year, which is the reason for the year-over-year decline.

### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **12.9%**

### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-12.4%**

In last week's report, the donation mail volume for the reporting was -14.2% lower this year compared to last.

APRIL WEEK 4: **9.9%**

This year-over-year increase was a strong turnaround from the third week of April, where donation mail volume was down -6.0% that week.

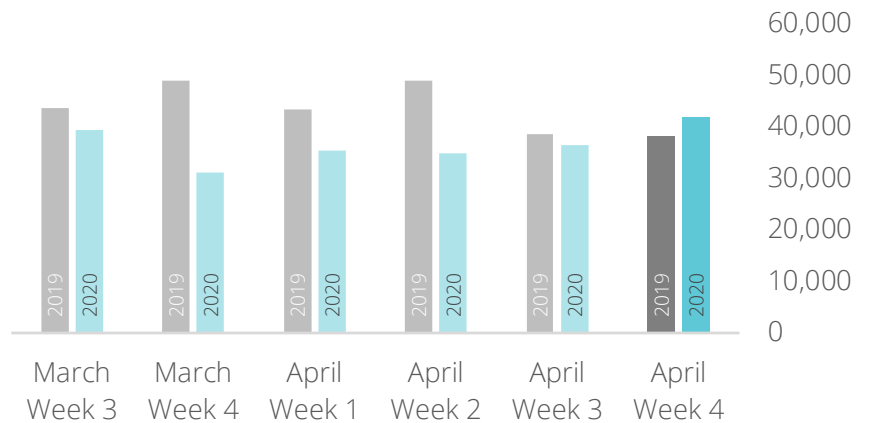
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **14.7%**

Despite the week-over-week increase, for the month donation volume lags -12.1% behind the volume through this point of the month last year.

### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **69.6%**

This year-over-year increase was due to the average gift increasing by 93.5% for the reporting period.

APRIL WEEK 4: **104.8%**

The variance this week compared to this week last year was primarily due to an 86.4% increase in the average gift. The increase in volume contributed, too. Check revenue increased 111.8% this week—both volume and the average gift were factors.

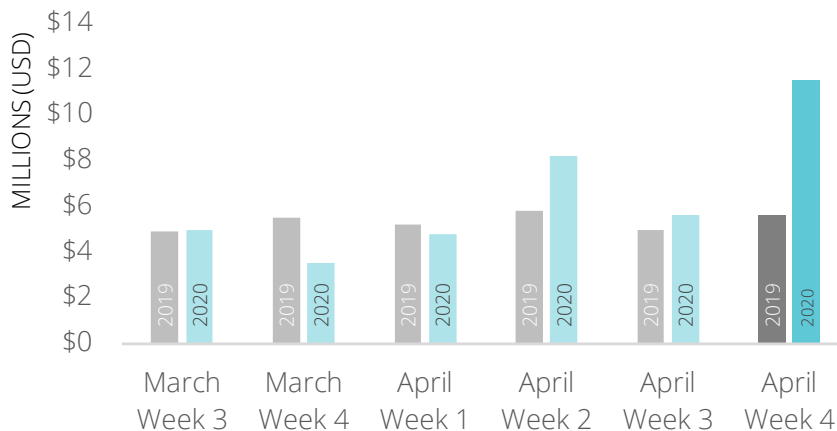
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **104.1%**

Through this point in the month, April 2020 was 40.0% ahead of where April was at this point last year.

### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week



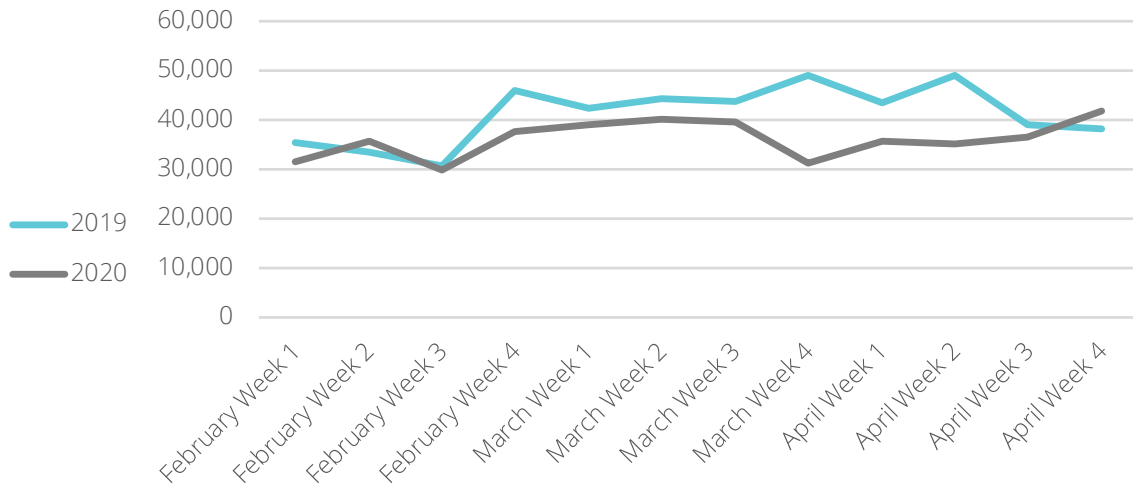


# INTERNATIONAL RELIEF

## REPORT PERIOD YEAR-OVER-YEAR COMPARISON

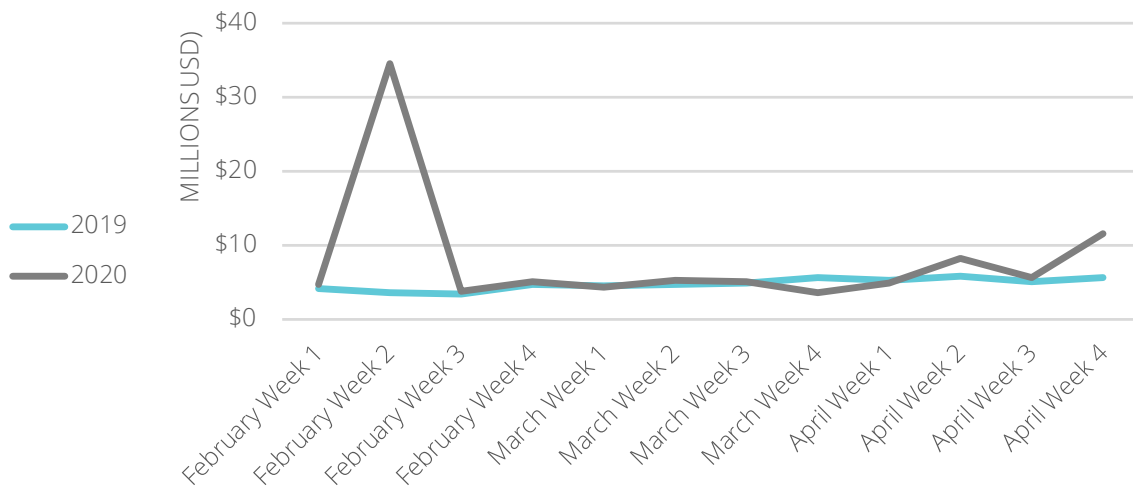
### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

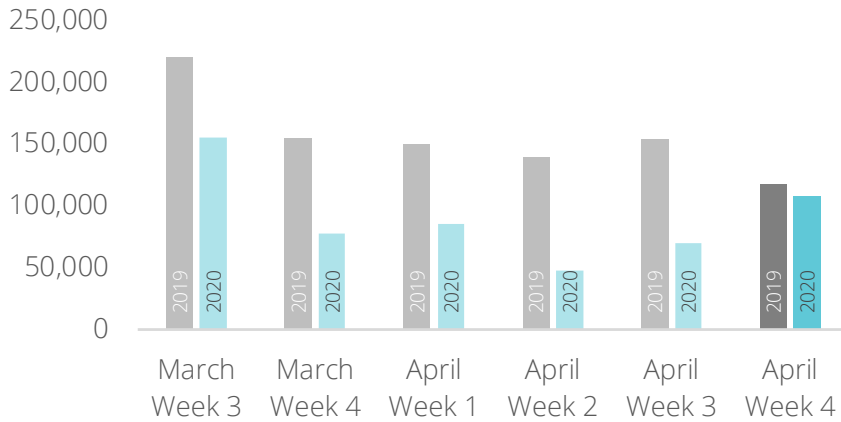


# SOCIETAL BENEFIT

## WEEKLY YEAR-OVER-YEAR COMPARISON

### TOTAL MAIL PIECES | Year-Over-Year Comparison

Comparing the number of mail pieces processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-30.4%**

APRIL WEEK 4: **-8.8%**

The decrease in non-donation mail volume was the reason for the year-over-year drop in total mail volume for the fourth week of April.

### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **52.8%**

Donation mail volume was the driver for this sizable week-over-week increase. Non-donation mail volume increased 40.1% but accounted for less than 20.0% of the total mail volume.

### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-21.7%**

There was a slight year-over-year improvement in donation mail volume for this period. In last week's report, the year-over-year variance for the reporting period was -23.8%.

APRIL WEEK 4: **7.6%**

In the third week of April, donation mail volume was -42.8% down compared to that week last year. This week's increase was a strong turnaround.

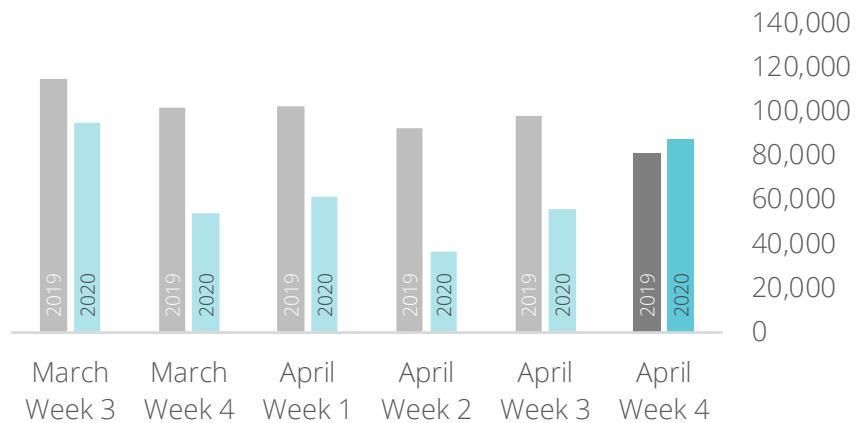
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **56.0%**

For the month, donation mail volume was -35.4% behind compared to the volume at this time in April last year.

### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### YEAR-OVER-YEAR VARIANCES

REPORTING PERIOD: **-16.4%**

Donation revenue made a comeback this week. Last week, the year-over-year variance for the reporting period was a decrease of -19.5%. The decline was primarily volume-driven, as the average gift was 6.8% higher than last year.

APRIL WEEK 4: **25.1%**

In the third week of April, the year-over-year variance was -35.4%. The increase last week can be attributed to the 16.3% higher average gift compared to that week in 2019.

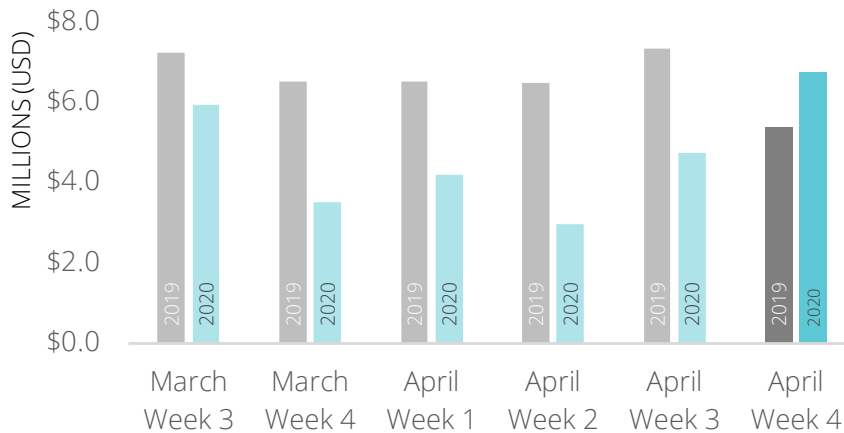
### WEEK-OVER-WEEK VARIANCE

APRIL WEEK 3 TO WEEK 4: **42.5%**

To date, donation revenue in April was -27.6% behind compared to the revenue processed through this point in the month last year.

### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week

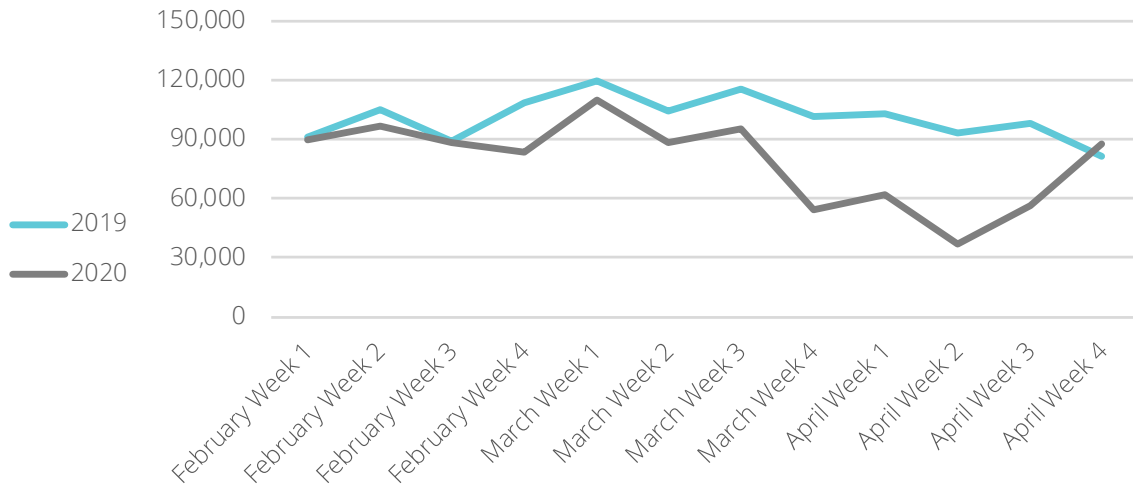


# SOCIETAL BENEFIT

## REPORT PERIOD YEAR-OVER-YEAR COMPARISON

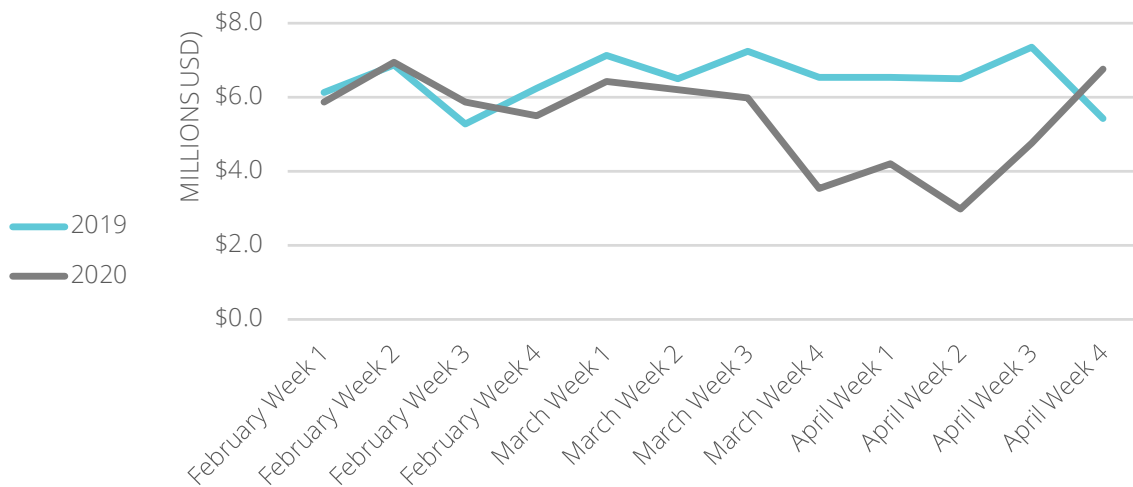
### # OF DONATIONS | Year-Over-Year Comparison

Comparing the number of donations processed each week



### TOTAL REVENUE | Year-Over-Year Comparison

Comparing the amount of donations processed each week



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TAKE EACH WIN,  
NO MATTER HOW SMALL.

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## **ABOUT MERKLE RMG**

[www.merkleresponse.com](http://www.merkleresponse.com)

Merkle Response Management Group (RMG) is a processing, data, and technology-driven company. By combining best-in-class direct response processing, customer care, and fulfillment solutions with actionable data insights, Merkle RMG drives one-to-one relationships for an improved donor and customer experience that increases retention and revenue.

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