Impact of COVID-19 on Scottish Charities

Survey Findings

Survey fieldwork carried out between 5-15 May 2020
Results published: 5 June 2020
COVID-19 CHARITY SURVEY: CHARTS

FINDINGS

How charities are being affected?
How charities are being affected? (Summary)
How severely are charities affected? (Overall)
How severely are charities affected? (Very much or Severely)
How have charities responded?
How have charities responded? (Summary)
Impact on number of volunteers
Financial threat within the next 12 months
Impact on future position
Impact on future position (summary)
Sources of help & advice (1)
Sources of help & advice (2)
Funding support
Non-funding support
Funding support (summary)
Non-funding support (summary)
Support needed (open)

RESPONDENTS

Charity age
Income
Local authority area
Region
Main income sources
Main income sources (summary)
Scale
Paid staff
Volunteers engaged
Sector
Sector (summary)
Survey background
Q1a. In which of the following ways, if any, has your charity been affected by COVID-19 and the lockdown measures more generally? N 4827

- Planned work / events postponed or cancelled: 78%
- Lost income from fundraising: 51%
- Disruption of support or services to beneficiaries: 42%
- Lost income from trading and other sources (not fundraising): 42%
- All charity operations suspended: 39%
- Volunteers are unable to work: 37%
- Unable to hold an AGM: 36%
- Charity trustees struggling to meet or discuss matters: 36%
- Long-term risk to charity reserves: 34%
- Short-term risk (within next 6 months) to charity reserves: 30%
- Working at a reduced capacity: 30%
- Increased need for mental health and wellbeing support for staff: 18%
- Do not have the capacity to make use of the available volunteers: 13%
- Staffing issues: 13%
- Increased demand for services: 12%
- Unable to influence key decision makers: 7%
- Unable to access the right information and guidance for my charity: 2%
- In some other way (Please say what): 11%
- None of these: 2%
- Don't know: 0%
Q1a. In which of the following ways, if any, has your charity been affected by COVID-19 and the lockdown measures more generally?

<table>
<thead>
<tr>
<th>Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staffing and administration (NET)</td>
<td>96%</td>
</tr>
<tr>
<td>Impact on Services (NET)</td>
<td>92%</td>
</tr>
<tr>
<td>Impact on Finances (NET)</td>
<td>75%</td>
</tr>
</tbody>
</table>
HOW SEVERELY ARE CHARITIES AFFECTED? (OVERALL)

- Planned work / events postponed or cancelled
- Disruption of support or services to beneficiaries
- Lost income from fundraising
- All charity operations suspended
- Lost income from other sources
- Volunteers are unable to work
- Lost income from other sources
- Long-term risk to charity reserves
- Unable to hold an AGM
- Short-term risk (within next 6 months) to charity reserves
- Working at a reduced capacity
- Charity trustees struggling to meet or discuss matters
- Do not have the capacity to make use of the available…
- Increased need for mental health and wellbeing support…
- In some other way
- Staffing issues
- Increased demand for services
- Unable to influence key decision makers
- Unable to access the right information and guidance for…

Q1b. And, thinking about the following impacts of COVID-19 and the lockdown measures more generally, to what extent has each negatively affected your charity? N 4827

[Bar chart showing the extent of affectation]
### HOW SEVERELY ARE CHARITIES AFFECTED? (VERY MUCH OR SEVERELY)

<table>
<thead>
<tr>
<th>Impact</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned work / events postponed or cancelled</td>
<td>64%</td>
</tr>
<tr>
<td>Disruption of support or services to beneficiaries</td>
<td>35%</td>
</tr>
<tr>
<td>Lost income from fundraising</td>
<td>34%</td>
</tr>
<tr>
<td>All charity operations suspended</td>
<td>34%</td>
</tr>
<tr>
<td>Lost income from other sources</td>
<td>30%</td>
</tr>
<tr>
<td>Volunteers are unable to work</td>
<td>28%</td>
</tr>
<tr>
<td>Long-term risk to charity reserves</td>
<td>23%</td>
</tr>
<tr>
<td>Unable to hold an AGM</td>
<td>22%</td>
</tr>
<tr>
<td>Short-term risk (within next 6 months) to charity reserves</td>
<td>21%</td>
</tr>
<tr>
<td>Working at a reduced capacity</td>
<td>19%</td>
</tr>
<tr>
<td>Charity trustees struggling to meet or discuss matters</td>
<td>19%</td>
</tr>
<tr>
<td>Do not have the capacity to make use of the available volunteers</td>
<td>10%</td>
</tr>
<tr>
<td>Increased need for mental health and wellbeing support for staff,...</td>
<td>9%</td>
</tr>
<tr>
<td>In some other way</td>
<td>8%</td>
</tr>
<tr>
<td>Staffing issues</td>
<td>7%</td>
</tr>
<tr>
<td>Increased demand for services</td>
<td>6%</td>
</tr>
<tr>
<td>Unable to influence key decision makers</td>
<td>4%</td>
</tr>
<tr>
<td>Unable to access the right information and guidance for my charity</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q1b. And, thinking about the following impacts of COVID-19 and the lockdown measures more generally, to what extent has each negatively affected your charity? Very much or severely (NET) N 4827
HOW HAVE CHARITIES RESPONDED?

Q2. In what ways, if any, has your charity responded to COVID-19 and the lockdown measures?  N 4716
Q2. In what ways, if any, has your charity responded to COVID-19 and the lockdown measures? N 4716
### IMPACT ON NUMBER OF VOLUNTEERS

<table>
<thead>
<tr>
<th>Impact Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major increase in volunteers</td>
<td>1%</td>
</tr>
<tr>
<td>A moderate increase in the number of volunteers</td>
<td>2%</td>
</tr>
<tr>
<td>A slight increase in the number of volunteers</td>
<td>2%</td>
</tr>
<tr>
<td>It has had no effect on the number of volunteers</td>
<td>37%</td>
</tr>
<tr>
<td>A slight decrease in the number of volunteers</td>
<td>5%</td>
</tr>
<tr>
<td>A moderate decrease in the number of volunteers</td>
<td>6%</td>
</tr>
<tr>
<td>A major decrease in the number of volunteers</td>
<td>18%</td>
</tr>
<tr>
<td>Not applicable, my charity does not use volunteers</td>
<td>23%</td>
</tr>
<tr>
<td>Don't know</td>
<td>6%</td>
</tr>
</tbody>
</table>

Q3: What has been the impact of COVID-19 on the number of volunteers you engage? N 4827
Q4: How would you rate the threat that COVID-19 and the lockdown measures more generally pose to your charity’s financial viability in the next 3 months, 6 months, 12 months. Financial threat within the next 12 months. N 4827
Q5 And, thinking about your charity’s ability to do its work, which of the following best represents the position you feel your charity will be in in the next... 3 months, 6 months, 9 months. N 4827
IMPACT ON FUTURE POSITION (SUMMARY)

Unable to operate at some point in the next 12 months, 20%

Able to operate throughout the next 12 months, 80%

Q5 And, thinking about your charity’s ability to do its work, which of the following best represents the position you feel your charity will be in in the next... 3 months, 6 months, 9 months. All those unable to operate at some point in the next 12 months. N 4827
## SOURCES OF HELP & ADVICE (1)

<table>
<thead>
<tr>
<th>Source</th>
<th>Used</th>
<th>Seen but not used</th>
<th>Neither seen nor used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scottish Government Coronavirus in Scotland information</td>
<td>45%</td>
<td>37%</td>
<td>17%</td>
</tr>
<tr>
<td>Information on social media about COVID-19 (LinkedIn, Twitter, Facebook)</td>
<td>31%</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>OSCR's COVID-19 update and guidance for charities</td>
<td>25%</td>
<td>55%</td>
<td>19%</td>
</tr>
<tr>
<td>SCVO Coronavirus Third Sector Information Hub</td>
<td>19%</td>
<td>32%</td>
<td>49%</td>
</tr>
<tr>
<td>Guidance from the Health and Social Care Alliance Scotland</td>
<td>9%</td>
<td>21%</td>
<td>70%</td>
</tr>
<tr>
<td>ACOSVO's Stay Connected, CEO Check-ins and thematic zoom groups</td>
<td>7%</td>
<td>15%</td>
<td>77%</td>
</tr>
<tr>
<td>Volunteer Scotland Volunteering and Coronavirus (COVID-19) support</td>
<td>6%</td>
<td>28%</td>
<td>66%</td>
</tr>
<tr>
<td>Information from Scotland’s International Development Alliance</td>
<td>8%</td>
<td>91%</td>
<td></td>
</tr>
</tbody>
</table>

Q6 Since the start of the COVID-19 pandemic, which, if any, of the following sources of help and advice for charities have you seen, considered or used? N 4827


Q6 Since the start of the COVID-19 pandemic, which, if any, of the following sources of help and advice for charities have you seen, considered or used? N 4827

<table>
<thead>
<tr>
<th>Source of Help &amp; Advice</th>
<th>Used</th>
<th>Considered but not used</th>
<th>Not considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your funders</td>
<td>34%</td>
<td>19%</td>
<td>48%</td>
</tr>
<tr>
<td>Your local authority</td>
<td>29%</td>
<td>23%</td>
<td>48%</td>
</tr>
<tr>
<td>Your accountant</td>
<td>28%</td>
<td>14%</td>
<td>58%</td>
</tr>
<tr>
<td>Your local Third Sector Interface</td>
<td>19%</td>
<td>22%</td>
<td>58%</td>
</tr>
<tr>
<td>A lawyer</td>
<td>7%</td>
<td>7%</td>
<td>86%</td>
</tr>
<tr>
<td>A consultant</td>
<td>4%</td>
<td>90%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Q7 Which, if any, of the following would help, or are already helping, your charity respond to the challenges presented by COVID-19 and the lockdown measures more generally? N 4827

- None of these: 35%
- British Business Bank business interruption loans: 0%
- Scottish Government Food Fund: 1%
- Scottish Government Business Grant Support Schemes: 3%
- National Emergencies Trust funding through Foundation Scotland: 2%
- Job Retention Scheme (furloughing): 7%
- Scottish Government Supporting Communities Fund: 5%
- Funding for essential or core costs, such as staffing: 7%
- Scottish Government Third Sector Resilience Fund: 8%
- Simplified requirements for reporting on grants or outcomes: 8%
- Scottish Government Wellbeing Fund: 9%
- Local authority funding: 9%
- Other independent grant funding: 8%
- More flexibility in currently-funded projects, such as removing: 7%
- Scottish Government Third Sector Resilience Fund: 23%
- Scottish Government Supporting Communities Fund: 22%
- Funding for essential or core costs, such as staffing: 21%
- Scottish Government Wellbeing Fund: 18%
- Job Retention Scheme (furloughing): 16%
- National Emergencies Trust funding through Foundation Scotland: 11%
- Scottish Government Business Grant Support Schemes: 9%
- Scottish Government Food Fund: 5%
- British Business Bank business interruption loans: 3%
Q7 Which, if any, of the following would help, or are already helping, your charity respond to the challenges presented by COVID-19 and the lockdown measures more generally? N 4827
FUNDING SUPPORT
(HAS OR WOULD HELP - SUMMARY)

- Local authority funding: 33%
- Other independent grant funding: 33%
- Simplified requirements for reporting on grants or outcomes: 32%
- Scottish Government Third Sector Resilience Fund: 29%
- More flexibility in currently-funded projects, such as removing restrictions...: 25%
- Scottish Government Supporting Communities Fund: 24%
- Funding for essential or core costs, such as staffing: 23%
- Scottish Government Wellbeing Fund: 21%
- Job Retention Scheme (furloughing): 21%
- National Emergencies Trust funding through Foundation Scotland: 13%
- Scottish Government Business Grant Support Schemes: 12%
- Scottish Government Food Fund: 6%
- British Business Bank business interruption loans: 4%
- None of these: 35%

Q7 Which, if any, of the following would help, or are already helping, your charity respond to the challenges presented by COVID-19 and the lockdown measures more generally? Funding support that has OR would help us (NET). N 4827
Q7 Which, if any, of the following would help, or are already helping, your charity respond to the challenges presented by COVID-19 and the lockdown measures more generally? Non-funding support that has OR would help (NET). N 4827
**WHAT SUPPORT IS NEEDED?**

<table>
<thead>
<tr>
<th>Support</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue with support/ happy with support</td>
<td>17%</td>
</tr>
<tr>
<td>Nothing</td>
<td>17%</td>
</tr>
<tr>
<td>Other</td>
<td>15%</td>
</tr>
<tr>
<td>General funding support</td>
<td>14%</td>
</tr>
<tr>
<td>More flexible with deadlines/ payments from regulatory body</td>
<td>10%</td>
</tr>
<tr>
<td>Unsure/ don’t know</td>
<td>10%</td>
</tr>
<tr>
<td>Inform on government guidelines</td>
<td>10%</td>
</tr>
<tr>
<td>Generally keep in touch/ general advice/ support</td>
<td>9%</td>
</tr>
<tr>
<td>Guidance on where to find support</td>
<td>4%</td>
</tr>
<tr>
<td>Collate information/ provide more information</td>
<td>4%</td>
</tr>
<tr>
<td>More advice/ support on technology and how to stay connected</td>
<td>4%</td>
</tr>
<tr>
<td>Provide specific advice to help with specific needs of charities</td>
<td>4%</td>
</tr>
<tr>
<td>Health and safety guidance</td>
<td>4%</td>
</tr>
<tr>
<td>Lobby government/ help with government</td>
<td>3%</td>
</tr>
<tr>
<td>Specific guidance on AGMs</td>
<td>2%</td>
</tr>
<tr>
<td>Advice for hard copy accounts</td>
<td>1%</td>
</tr>
<tr>
<td>Grant funding</td>
<td>1%</td>
</tr>
<tr>
<td>Help for the future, to get going again</td>
<td>0%</td>
</tr>
</tbody>
</table>

Q8 Earlier you told us about how COVID-19 and the lockdown measures were affecting your charity. In your view, what should OSCR and charity sector support organisations be doing to help your charity overcome these challenges? Please give as much detail as you can. Coded open responses. N 400
Q10 How long has your charity been established? Respondents N 4827. Scottish Charity Register 24921
Q11 What was your charity's income in its most recent set of annual accounts? Respondents N 4827.
Scottish Charity Register N 24921
Q12 In which local authority area is your charity based? If your charity is based in more than one local authority, please choose the location of its main office. N 4827. Scottish Charity Register N 24921
Q12 In which local authority area is your charity based? If your charity is based in more than one local authority, please choose the location of its main office. Summarised by regions. N 4827. Scottish Charity Register N 24921
RESPONDENTS: MAIN INCOME SOURCES

- Fundraising events: 52%
- Public donations and legacies: 48%
- Trading: 19%
- Non-government grant funding: 18%
- Rental income: 16%
- Local government grants: 15%
- Private sector funding: 13%
- Other public sector grants: 10%
- Lottery funding: 10%
- Investments and interest: 10%
- Scottish Government grants: 7%
- Local government contracts: 5%
- Other public sector contracts: 2%
- Scottish Government contracts: 1%
- Don't know: 3%

Q13 Usually, what are your charity’s main sources of income? N 4827
Q13 Usually, what are your charity's main sources of income? N 4827

RESPONDENTS: MAIN INCOME SOURCES (SUMMARY)

- Contracts (NET): 16%
- Grants (NET): 34%
- Others (NET): 91%
- Don't know: 3%
Q14 Which of the following best describes where your charity provides its service(s)? N 4827
Q15a How many paid staff members (including both full and part time paid staff) are normally employed at your charity? N 4827. Scottish Charity Register N 24921
Q15b How many volunteers are normally engaged by your charity (not including charity trustees)? N 1275

- None: 23%
- 1-10: 42%
- 11-50: 26%
- 51-250: 5%
- 251-500: 1%
- 500+: 1%
- Don’t know: 2%
Q16 In which sector or sectors does your charity mainly operate? N 4827
Q16 In which sector or sectors does your charity mainly operate? (Summary). N 4827
The questionnaire was sent to each principal contact of a registered Scottish Charity (around 21,000 contacts) on 5 May 2020. Principal contacts for multiple charities were asked to respond on behalf of the charity they knew best.

The survey was carried out between 5 and 15 May 2020. Charities were asked to enter their Scottish charity number if they knew it to allow us to link the survey responses to data on the Scottish charity Register. If no Scottish charity number was entered the respondents were asked to complete some additional details.

The survey was carried out on our behalf by Breaking Blue an independent market research agency and member of the Market Research Society. All responses were treated in confidence and in accordance with the Market Research Society’s Code of Conduct.

We would like to thank all charities who took the time to share their views, and everyone who provided feedback on the survey questions before it was issued.