

Impact of COVID-19 on Scottish Charities

November Survey Findings



Survey fieldwork carried out between 3-15 November 2020
[Main findings published](#): Tuesday 15 December 2020

COVID-19 CHARITY SURVEY NOVEMBER 2020

INTRODUCTION

25,153

Charities on the Scottish Charity Register

The questionnaire was sent to each principal contact of a registered Scottish Charity (around 21,000 contacts) on 3 November 2020. Principal contacts for multiple charities were asked to respond on behalf of the charity they knew best.

Breaking Blue

Carried out the research on our behalf

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.

2,548

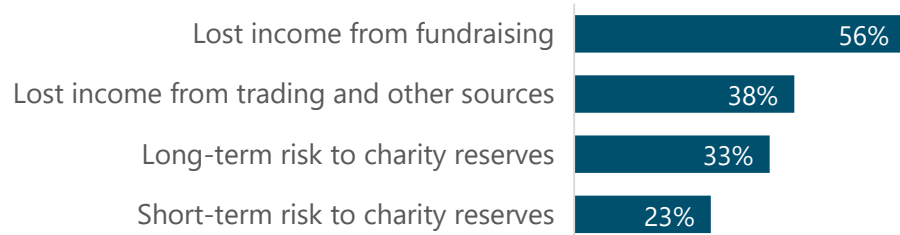
Valid responses

The survey was carried out between 3 and 15 November 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 a Scottish charity number was not entered the respondents were asked to complete some additional details.

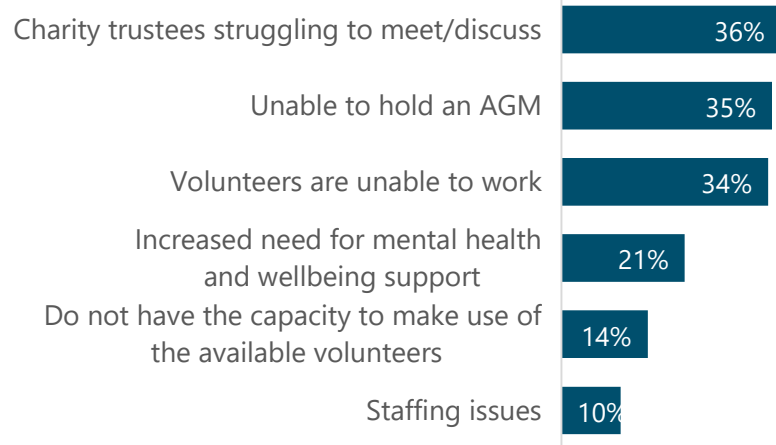


HOW ARE CHARITIES BEING AFFECTED?

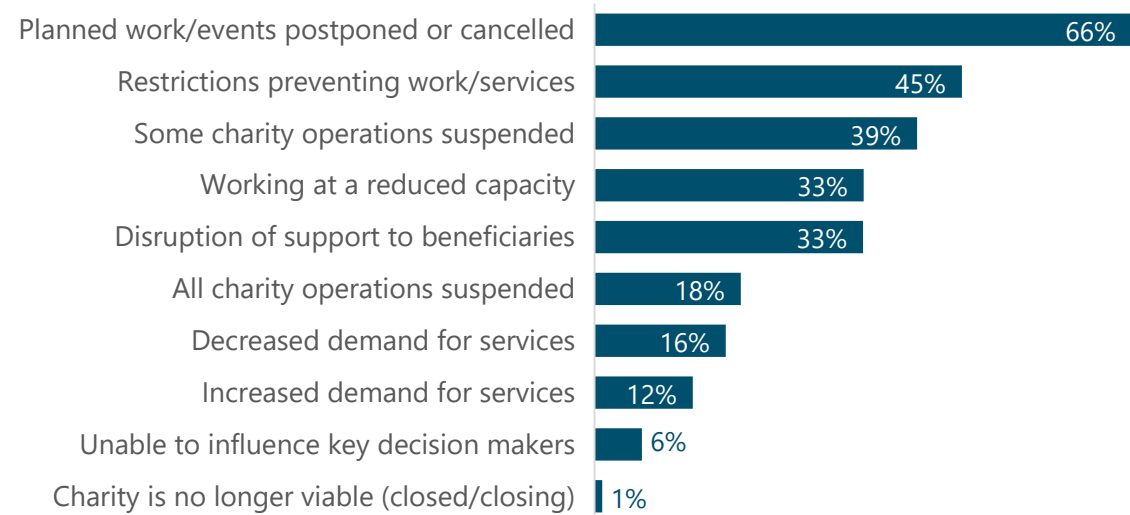
FINANCES



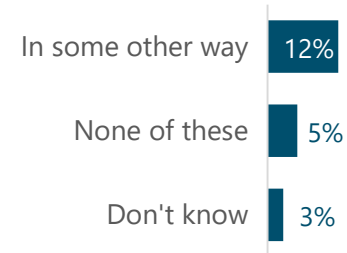
STAFF & GOVERNANCE



DELIVERY

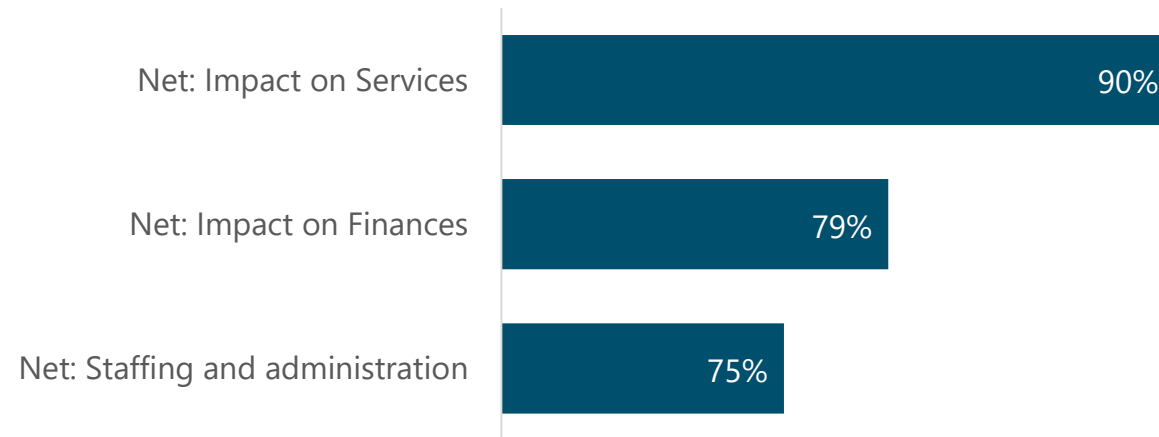


OTHER



Q1 In which of the following ways, if any, is your charity currently being affected by COVID-19 and the restrictions more generally? Please select as many as apply. N 2,548

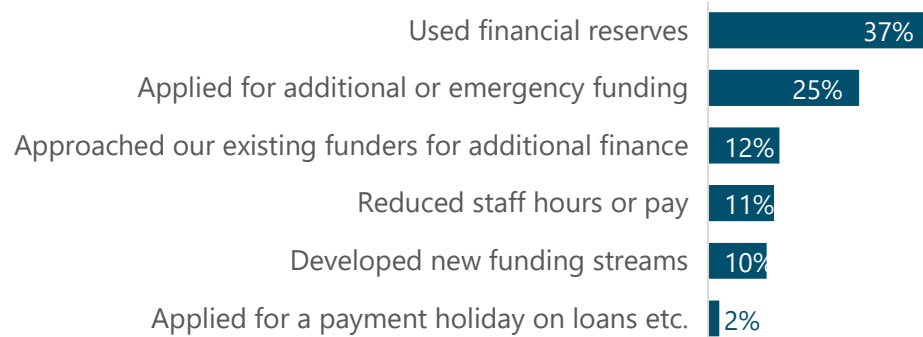
HOW ARE CHARITIES BEING AFFECTED? (SUMMARY)



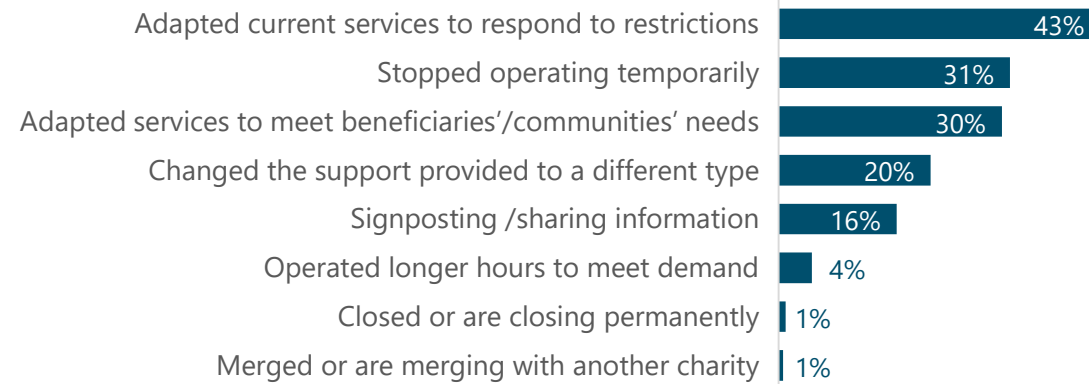
Q1 In which of the following ways, if any, is your charity currently being affected by COVID-19 and the restrictions more generally? Please select as many as apply. N 2,548. 'Net' results show the overall proportion of charities selecting one or more options when similar groups are combined.

HOW HAVE CHARITIES RESPONDED?

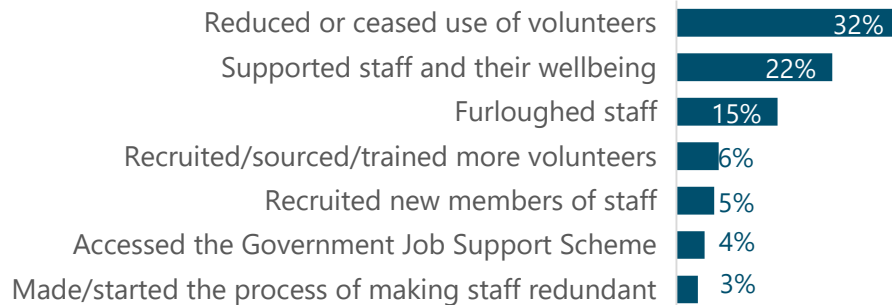
FINANCES



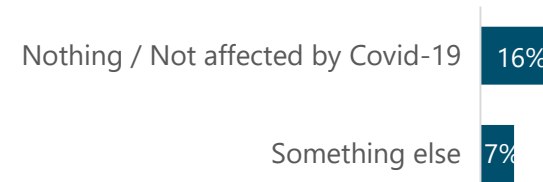
DELIVERY



STAFFING/ADMIN

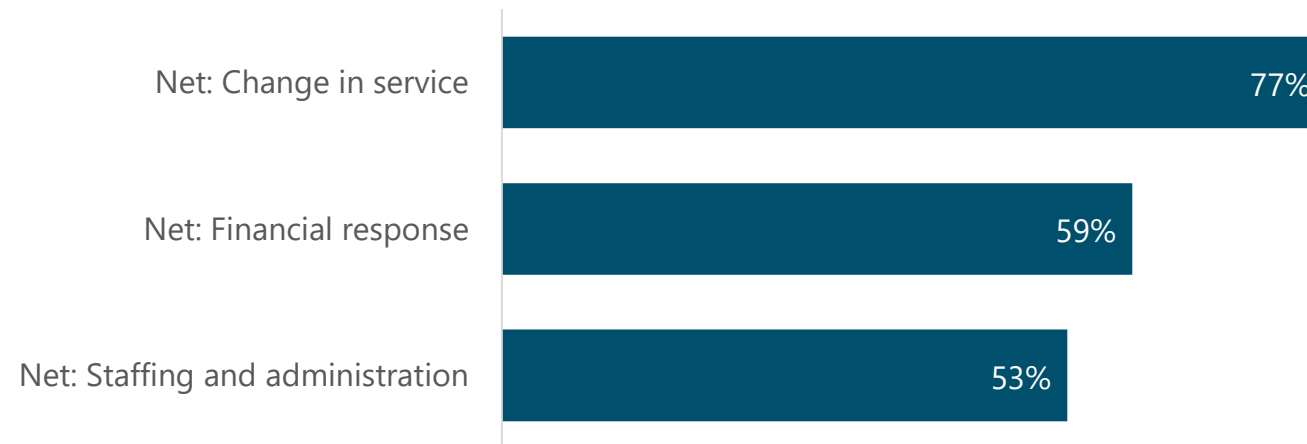


OTHER



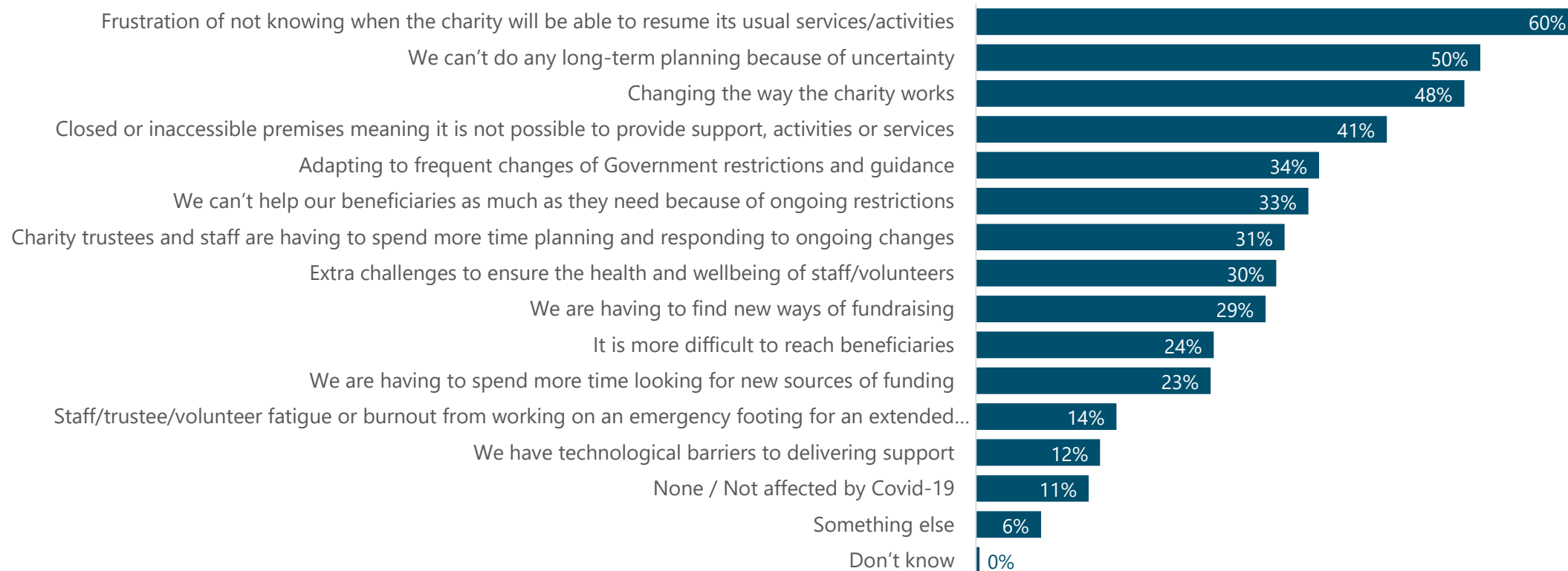
Q2a In the period from June 2020 to November 2020, in what ways, if any, has your charity responded to the challenges presented by COVID-19 and the restrictions? Please select as many as apply. N 2,548

HOW HAVE CHARITIES RESPONDED? (SUMMARY)



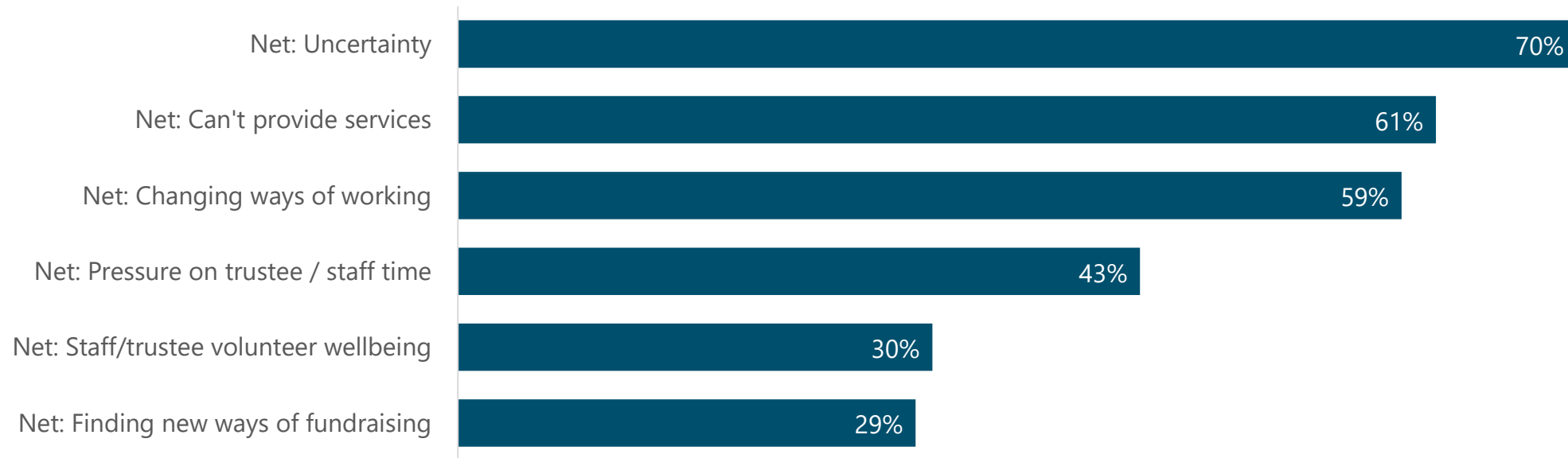
Q2a. In what ways, if any, has your charity responded to the challenges presented by COVID-19 and the restrictions. Please select as many as apply. N 2,548. 'Net' results show the overall proportion of charities selecting one or more options when similar groups are combined.

OPERATIONAL CHALLENGES



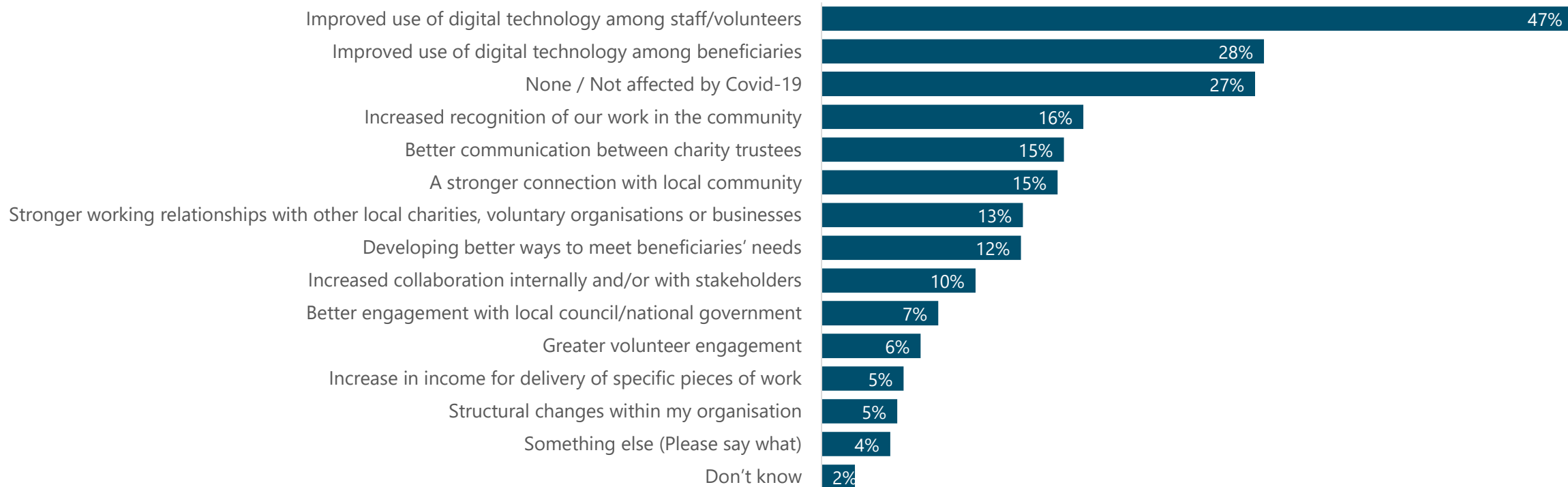
Q2b Considering any operational challenges that may affect your charity's ability to achieve its purpose...
 Which of the following operational challenges, if any, is your charity is facing because of COVID-19 and the restrictions?
 Please select as many as apply. N 2,548

OPERATIONAL CHALLENGES (SUMMARY)



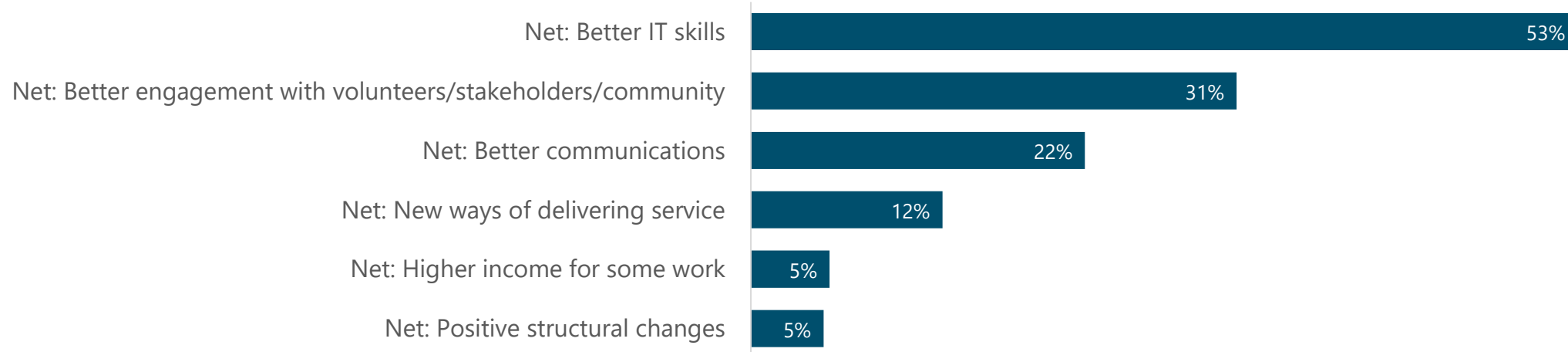
Q2b Considering any operational challenges that may affect your charity's ability to achieve its purpose...
Which of the following operational challenges, if any, is your charity is facing because of COVID-19 and the restrictions?
Please select as many as apply. N 2,548. 'Net' results show the overall proportion of charities selecting one or more options
when similar groups are combined.

POSITIVE CHANGES



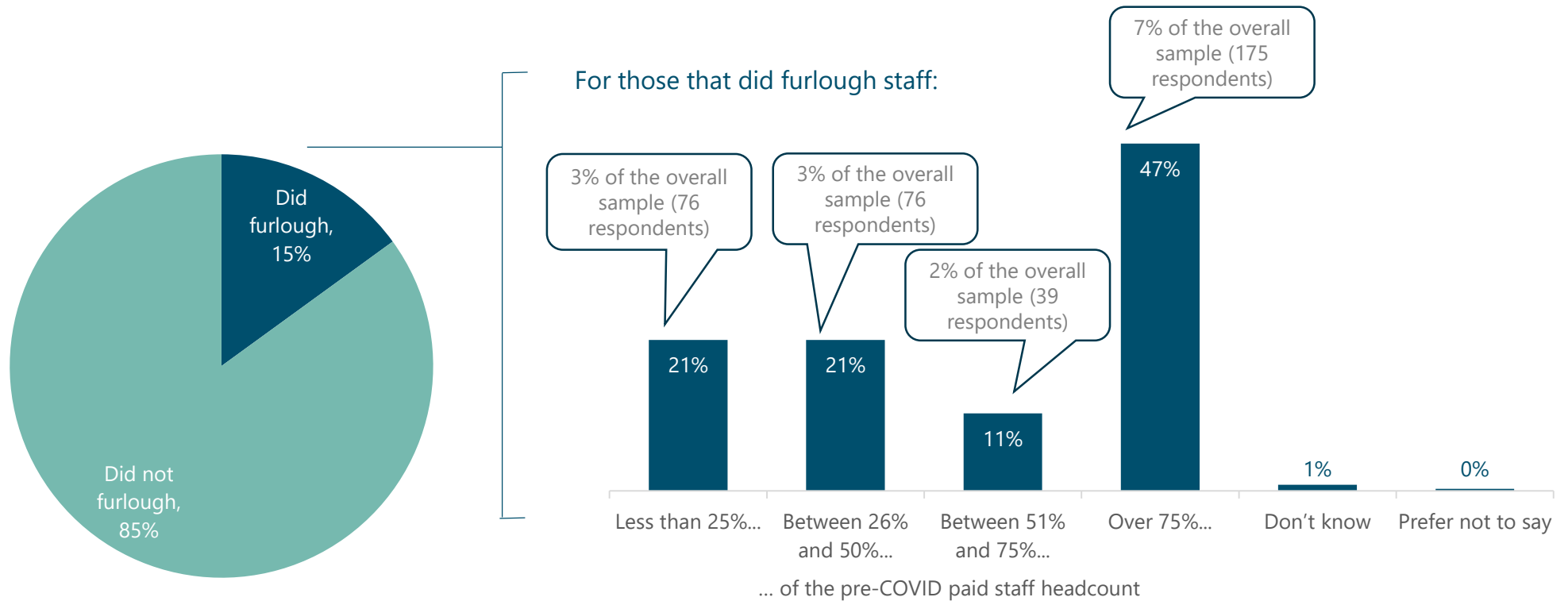
Q2d In which of the following ways, if any, has your charity benefitted from positive changes you have made since the start of the pandemic? N 2,548

POSITIVE CHANGES (SUMMARY)



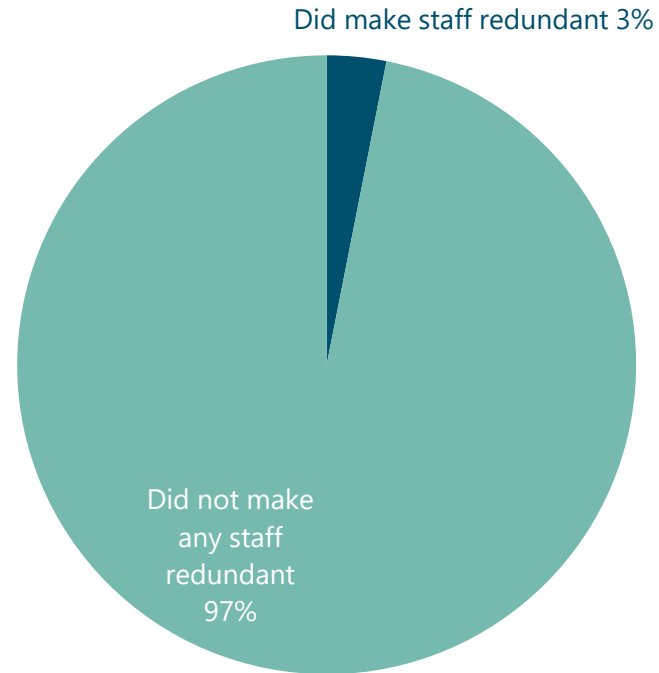
Q2d In which of the following ways, if any, has your charity benefitted from positive changes you have made since the start of the pandemic? N 2,548. 'Net' results show the overall proportion of charities selecting one or more options when similar groups are combined.

FURLOUGH



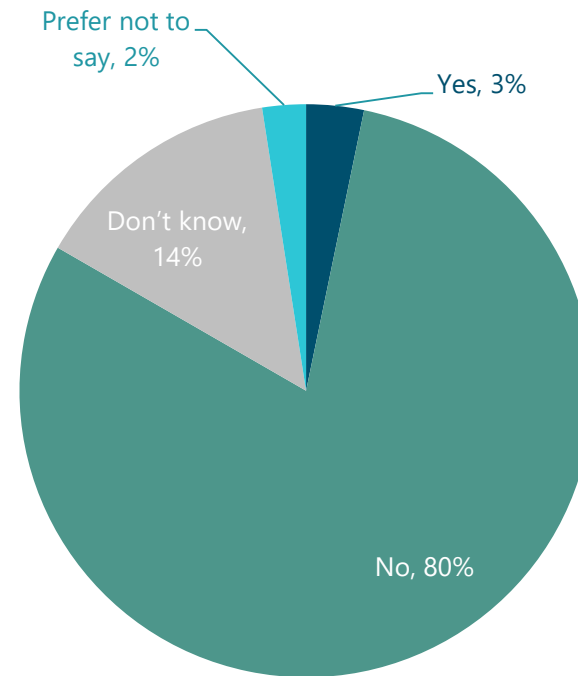
Q2e Thinking about the Government furlough scheme that ran from March to 31 October 2020.
 What proportion of the staff at your charity experienced furloughing at some point during this time? Did furlough staff N 370. Did not furlough staff N 2,178

REDUNDANCIES MADE



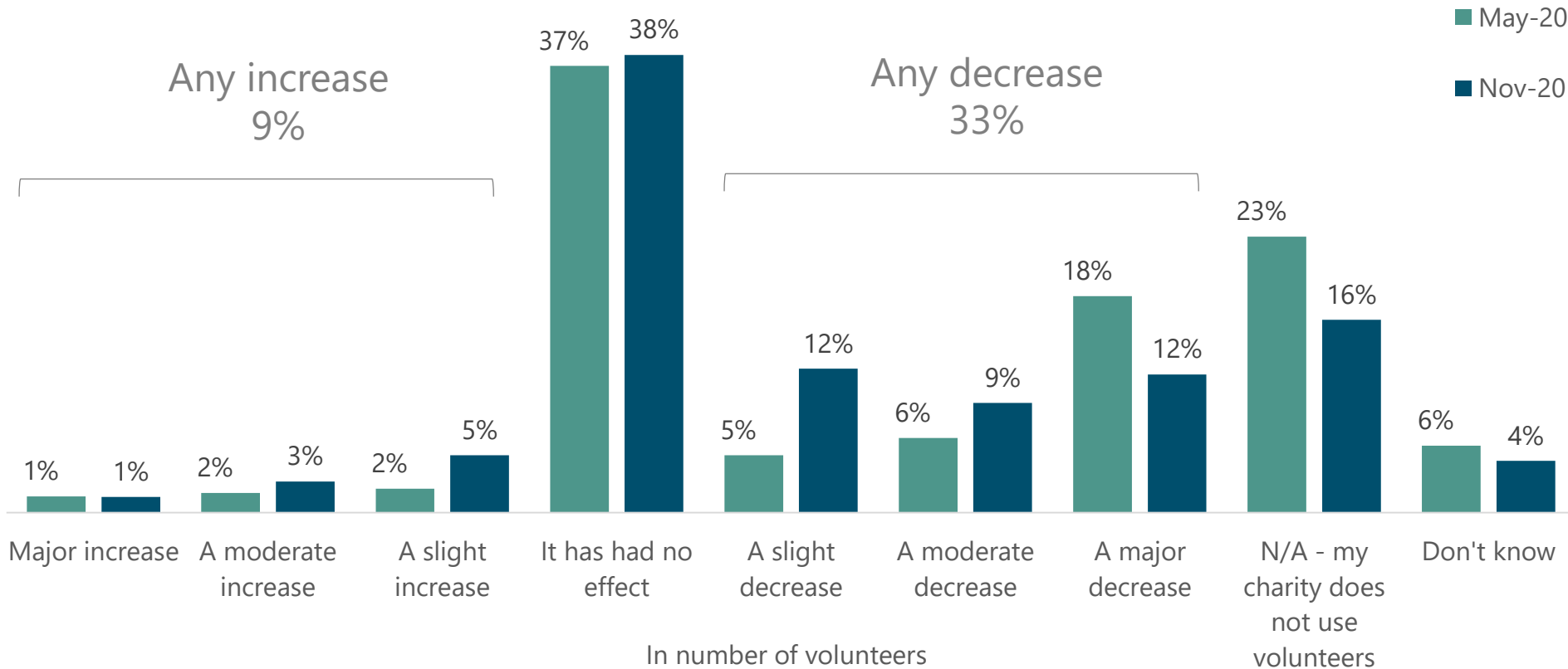
Q2f Thinking about the period from June to November 2020, what proportion of the staff at your charity have been made redundant due to COVID-19 and the restrictions either directly or indirectly? Did make staff redundant N 79. Did not make staff redundant N 2,469

REDUNDANCIES PLANNED IN THE NEXT 12 MONTHS



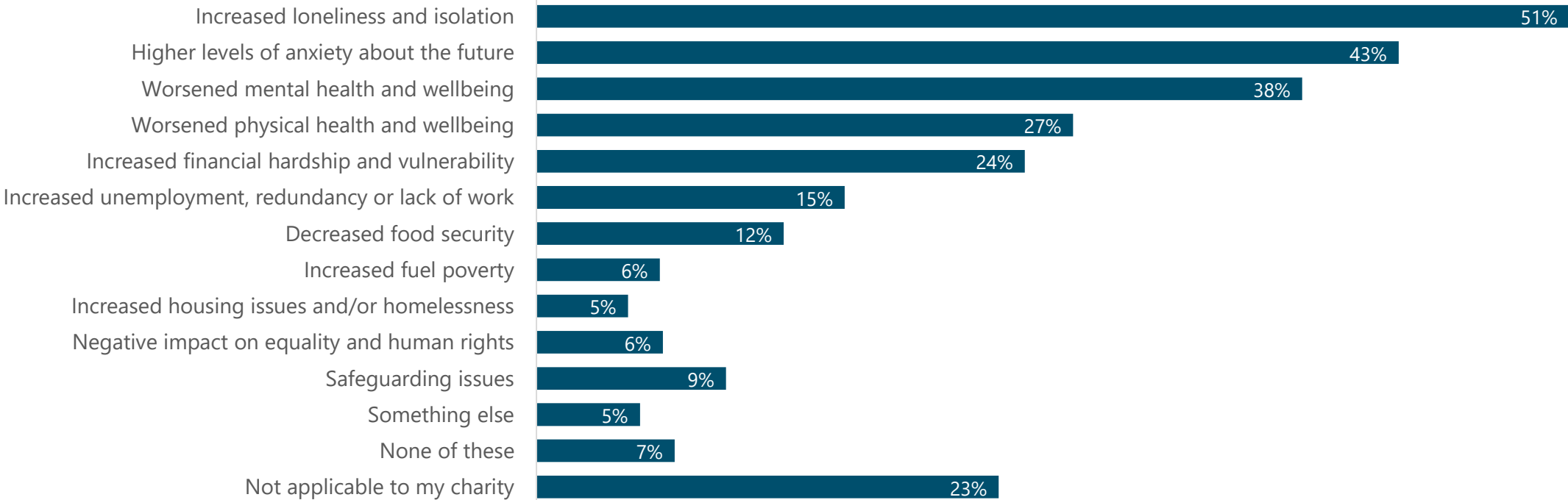
Q2g: In the next 12 months, do you expect any of your charity's current staff to be made redundant due to COVID-19 and the restrictions either directly or indirectly? N 2,524.

IMPACT ON NUMBER OF VOLUNTEERS



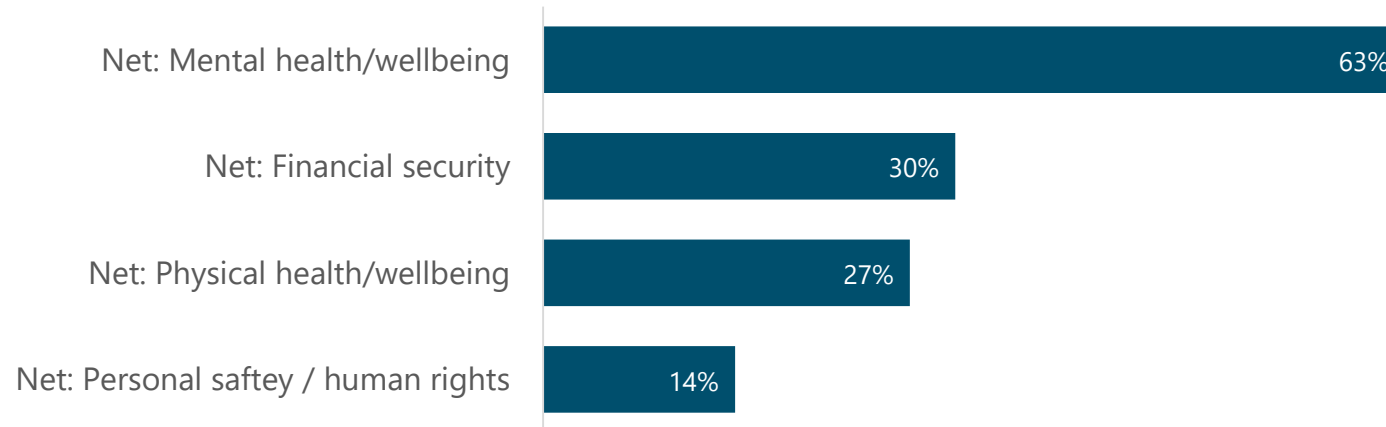
Q3: What has been the impact of COVID-19 on the number of volunteers you engage? May N 4,827. November N 2,548.

IMPACT ON BENEFICIARIES



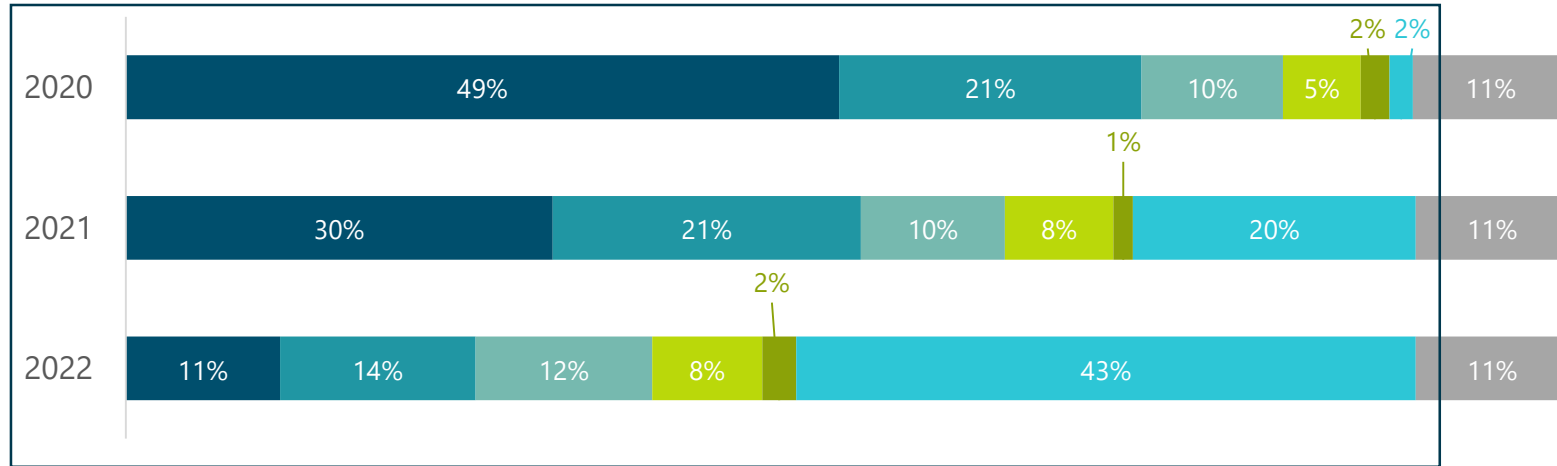
Q4 For this next question, please think about the impact of COVID-19 and the current restrictions upon your charity’s own service users or other beneficiaries. In which of the following ways, if any, have you seen COVID-19 and the current restrictions negatively impact on your charity’s beneficiaries or service users? Please select as many as apply N 2,548. Charities selecting not applicable may feel this type of question is not suited to the charity’s beneficiaries e.g. the charity’s main purpose may be to manage a facility or service;.

IMPACT ON BENEFICIARIES (SUMMARY)

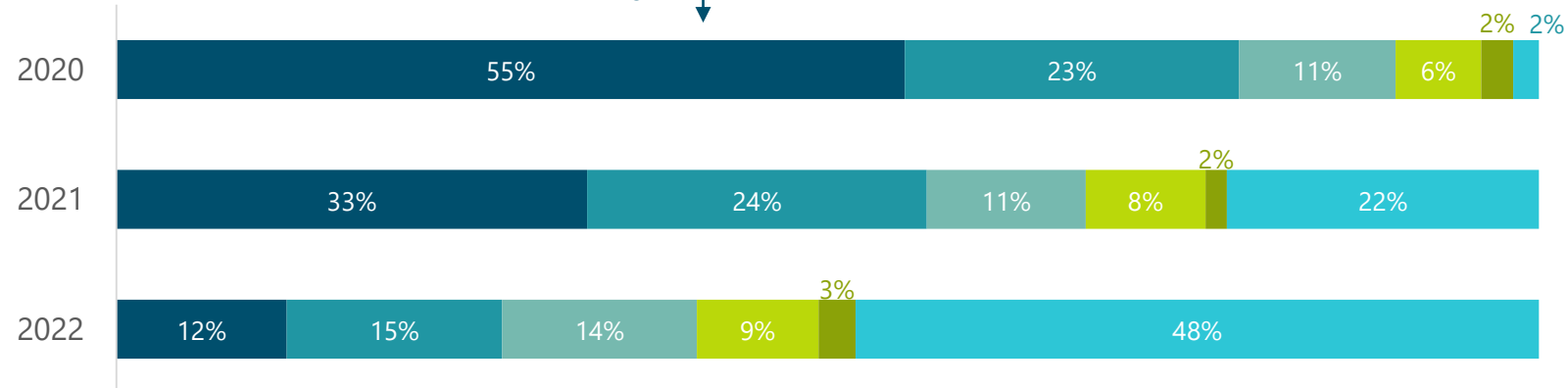


Q4 For this next question, please think about the impact of COVID-19 and the current restrictions upon your charity's own service users or other beneficiaries. In which of the following ways, if any, have you seen COVID-19 and the current restrictions negatively impact on your charity's beneficiaries or service users? Please select as many as apply N 2,548. 'Net' results show the overall proportion of charities selecting one or more options when similar groups are combined.

IMPACT ON: DONATIONS & FUNDRAISING (89% raise funds this way)



Excluding charities that don't raise funds in this way

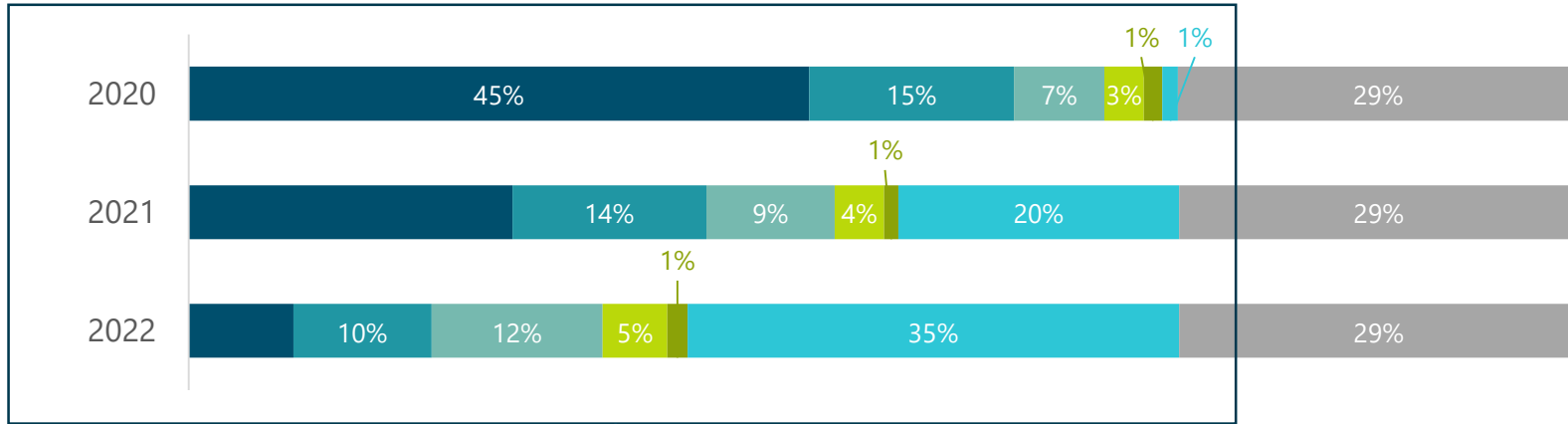


- Led to a significant decrease
- Led to a slight decrease
- No difference
- Led to a slight increase
- Led to a significant increase
- Don't know / we can't forecast that far ahead
- N/A – we don't raise funds in this way

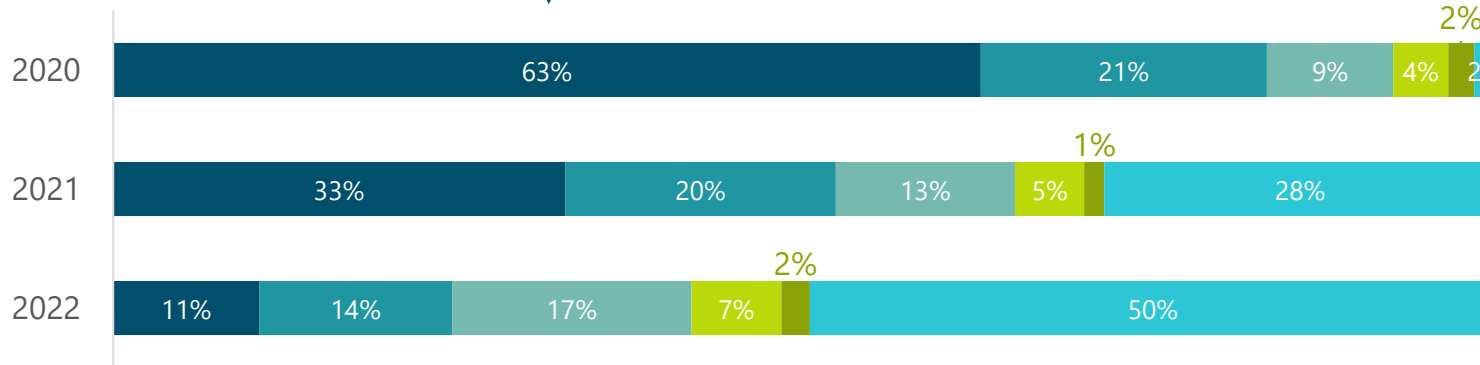
Q5a: What impact do you think COVID-19 and the restrictions have had on the income your charity raised in 2020, in terms of...Donations and fundraising. N 2,548. Q5b: And thinking forward to 2021, what impact do you think COVID-19 will have on the income you expect your charity to raise, in terms of... Donations and fundraising. N 2,524. Q5c: Thinking forward to 2022, what impact do you think COVID-19 will have on the revenue you expect your charity to raise, in terms of... Donations and fundraising. N 2,524.

IMPACT ON: TRADING INCOME

(71% raise funds this way)



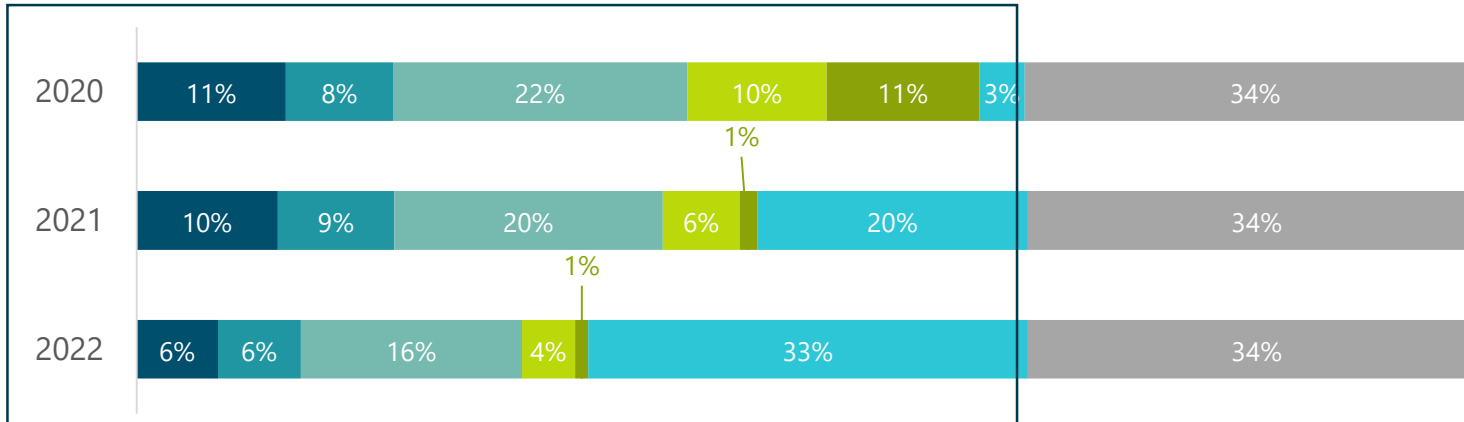
Excluding charities that don't raise funds in this way



- Led to a significant decrease
- Led to a slight decrease
- No difference
- Led to a slight increase
- Led to a significant increase
- Don't know / we can't forecast that far ahead
- N/A – we don't raise funds in this way

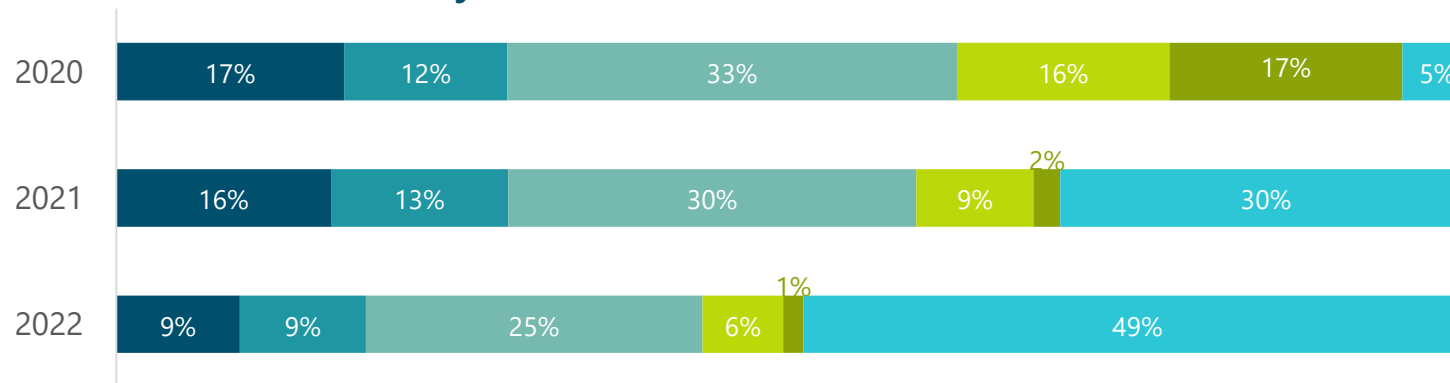
Q5a: What impact do you think COVID-19 and the restrictions have had on the income your charity raised in 2020, in terms of... Trading income. N 2,548. Q5b: And thinking forward to 2021, what impact do you think COVID-19 will have on the income you expect your charity to raise, in terms of...Trading income. N 2,524. Q5c: Thinking forward to 2022, what impact do you think COVID-19 will have on the revenue you expect your charity to raise, in terms of...Trading income. N 2,524.

IMPACT ON: GRANTS AND GOVERNMENT FUNDING (66% raise funds this way)



- Led to a significant decrease
- Led to a slight decrease
- No difference
- Led to a slight increase
- Led to a significant increase
- Don't know / we can't forecast that far ahead
- N/A – we don't raise funds in this way

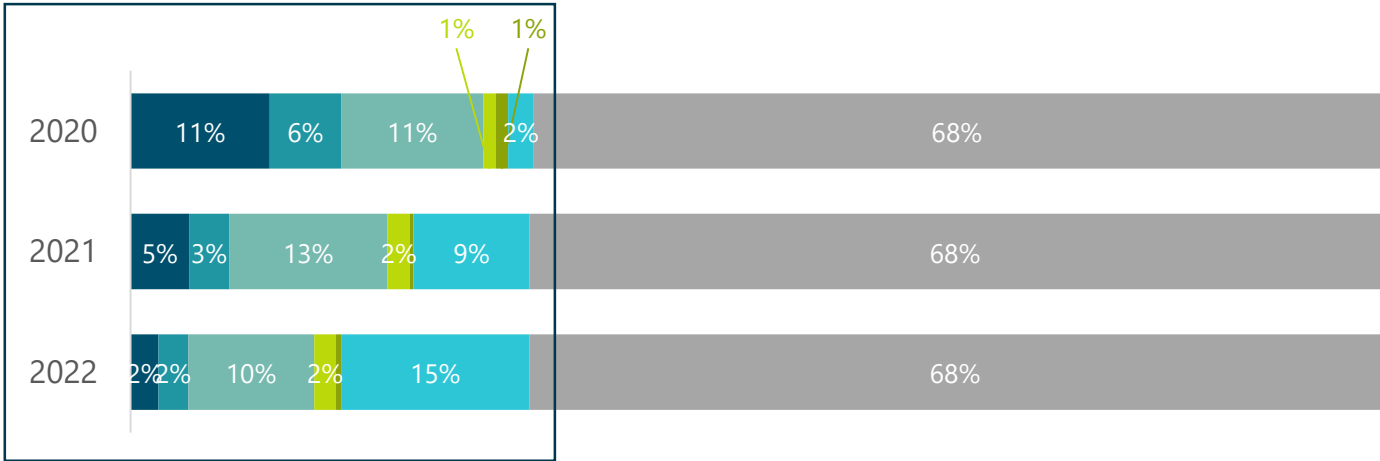
Excluding charities that don't raise funds in this way



Q5a: What impact do you think COVID-19 and the restrictions have had on the income your charity raised in 2020, in terms of...Grants and Government funding. N 2,548. Q5b: And thinking forward to 2021, what impact do you think COVID-19 will have on the income you expect your charity to raise, in terms of... Grants and Government funding. N 2,524. Q5c: Thinking forward to 2022, what impact do you think COVID-19 will have on the revenue you expect your charity to raise, in terms of... Grants and Government funding. N 2,524.

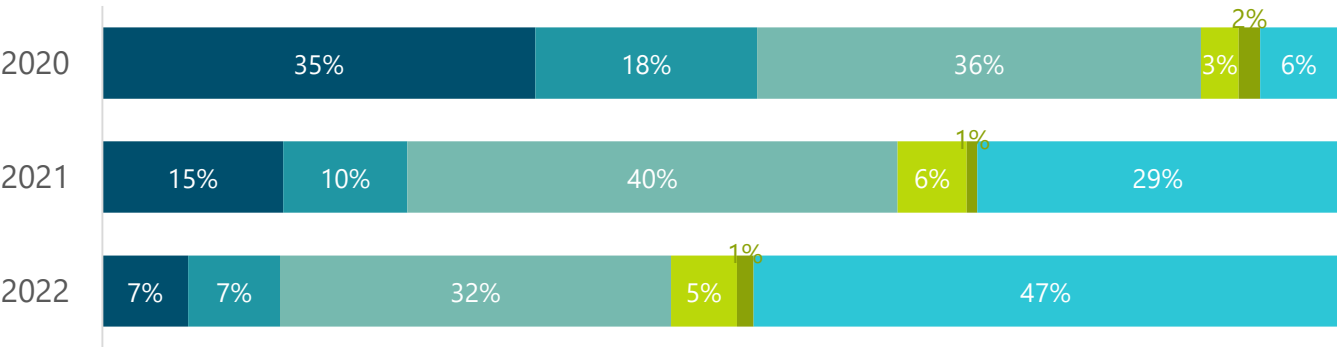
IMPACT ON: CONTRACTS

(32% raise funds this way)



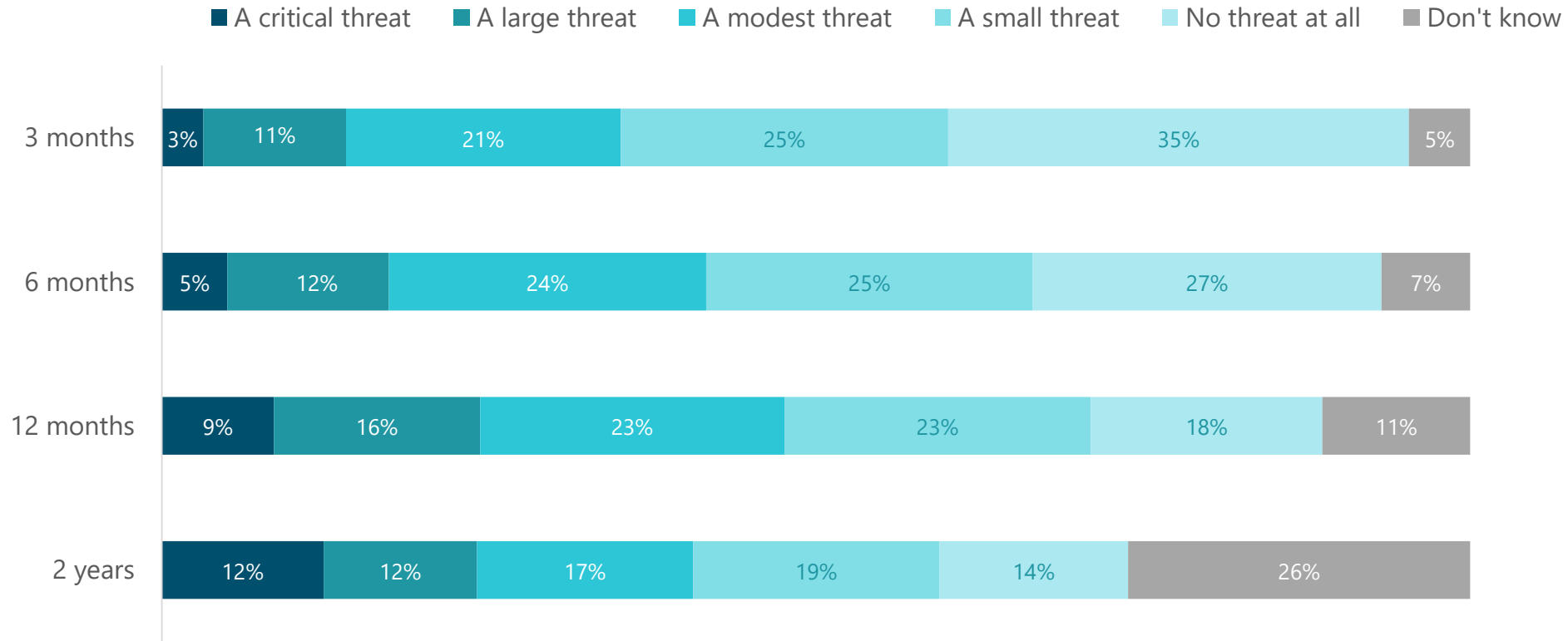
- Led to a significant decrease
- Led to a slight decrease
- No difference
- Led to a slight increase
- Led to a significant increase
- Don't know / we can't forecast that far ahead
- N/A – we don't raise funds in this way

Excluding charities that don't raise funds in this way



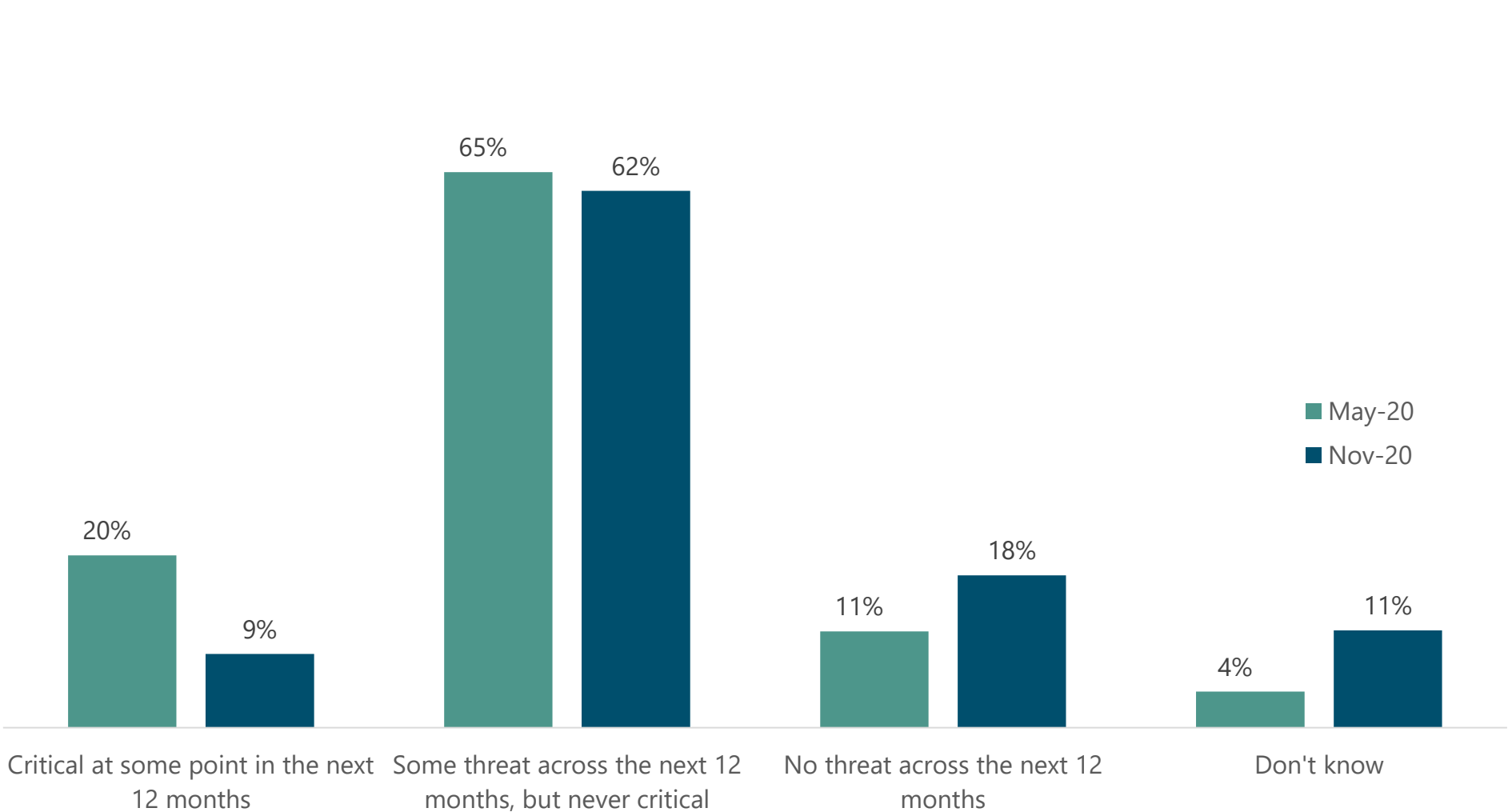
Q5a: What impact do you think COVID-19 and the restrictions have had on the income your charity raised in 2020, in terms of... Contracts. N 2,548. Q5b: And thinking forward to 2021, what impact do you think COVID-19 will have on the income you expect your charity to raise, in terms of... Contracts. N 2,524. Q5c: Thinking forward to 2022, what impact do you think COVID-19 will have on the revenue you expect your charity to raise, in terms of... Contracts. N 2,524.

THREAT TO FINANCIAL VIABILITY



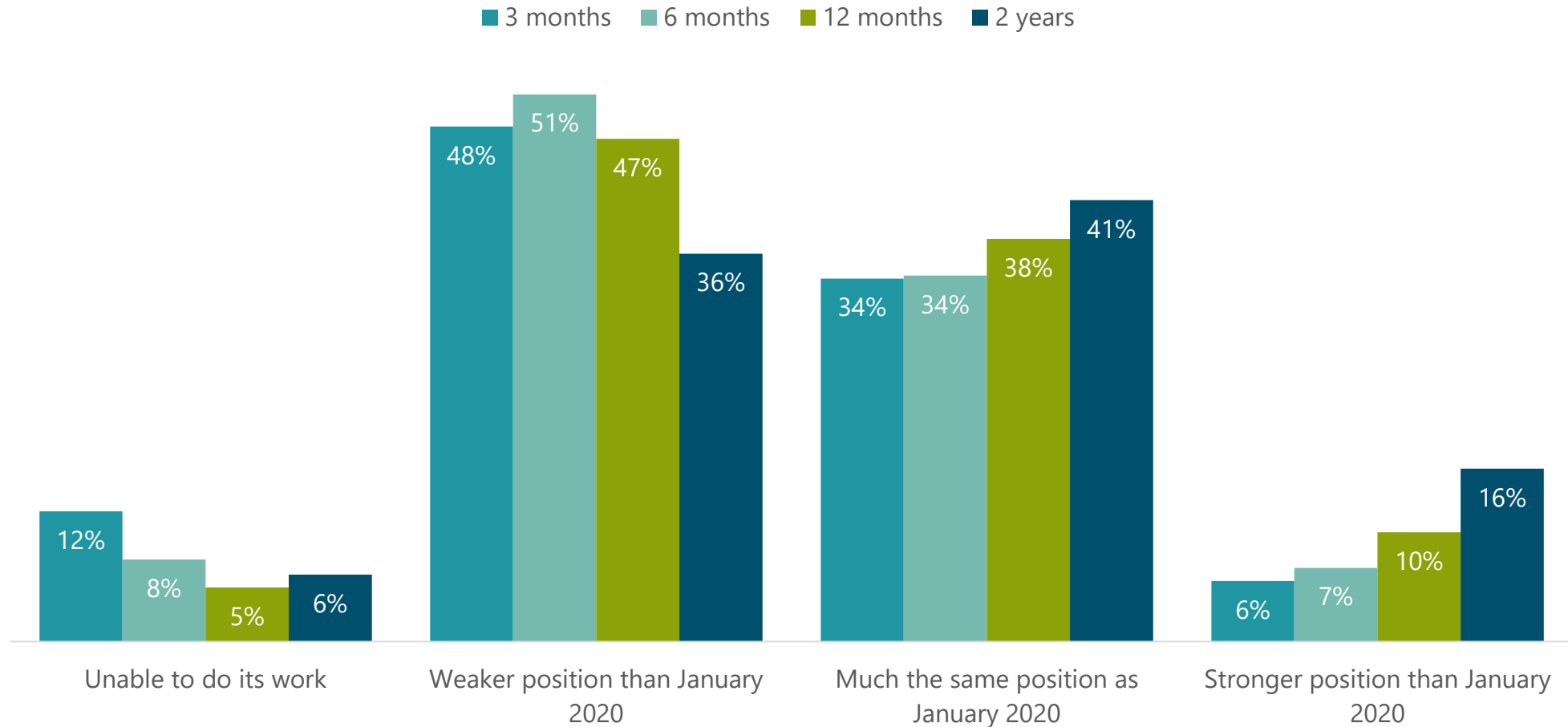
Q6a. How would you rate the threat that COVID-19 and the restrictions more generally pose to your charity's financial viability in the next... Scottish Charity Regulator
3 months, 6 months, 12 months and 2 years. N 2,524.

FINANCIAL THREAT WITHIN THE NEXT 12 MONTHS



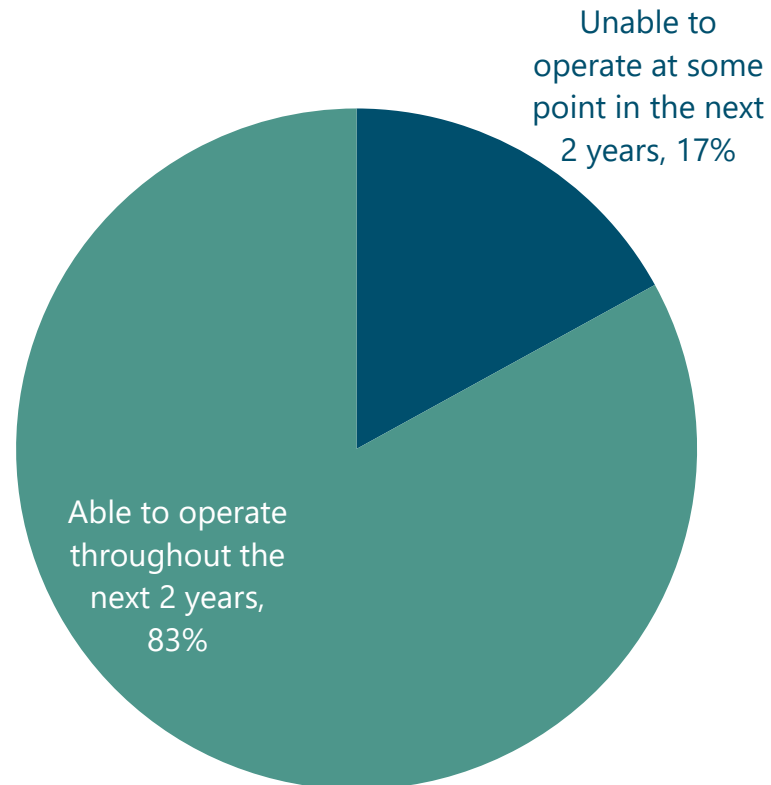
Q6. How would you rate the threat that COVID-19 and the restrictions more generally pose to your charity's financial viability in the next... 3 months, 6 months, 12 months and 2 years. Financial threat within the next 12 months. May N 4,827. November N 2,524.

IMPACT ON FUTURE POSITION



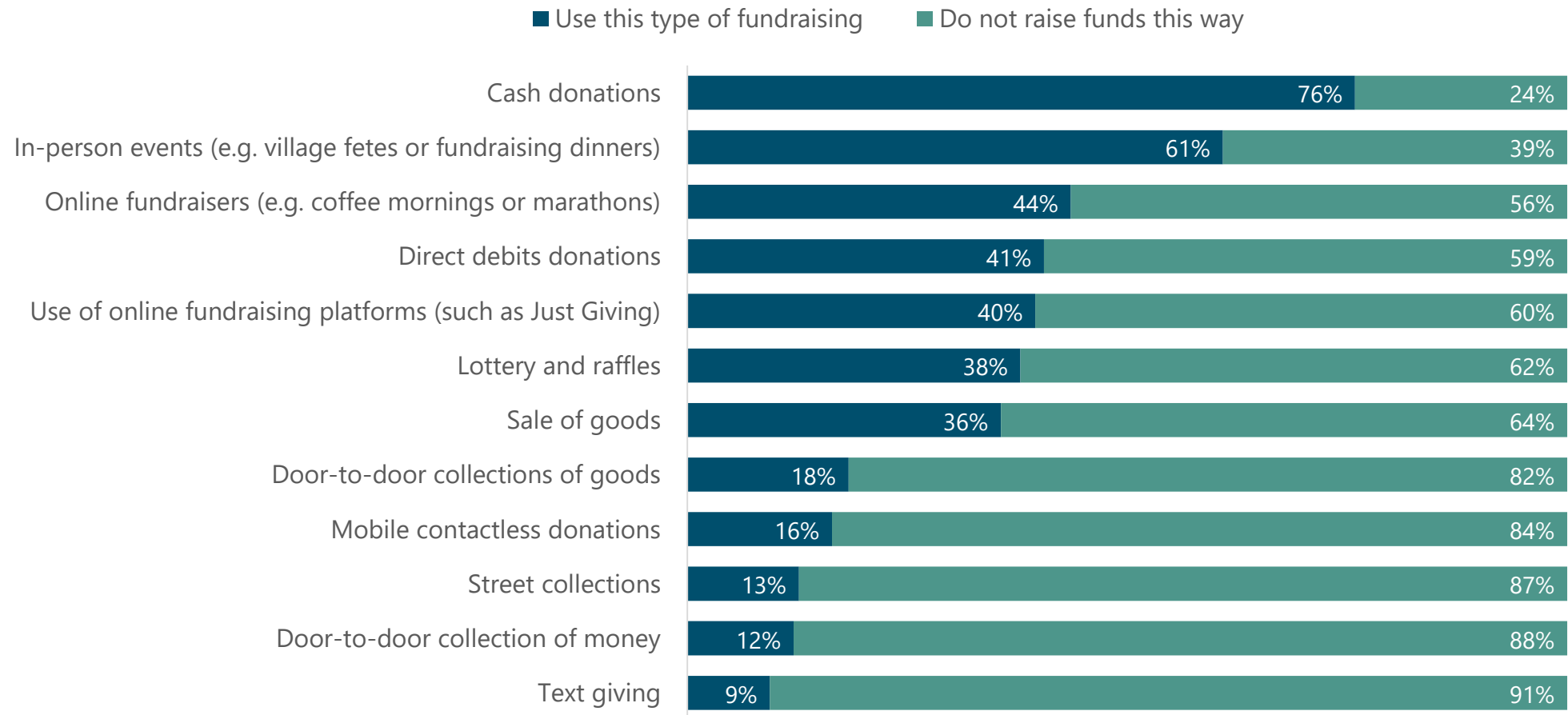
Q6b And, thinking about your charity's ability to do its work, which of the following best represents the position you feel your charity will be in, in the next... 3 months, 6 months, 12 months, 2 years. N 2,524.

IMPACT ON FUTURE POSITION (SUMMARY)



Q6b 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, 12 months, 2 years. Unable to operate at some point in the next 2 years. N 2,524.

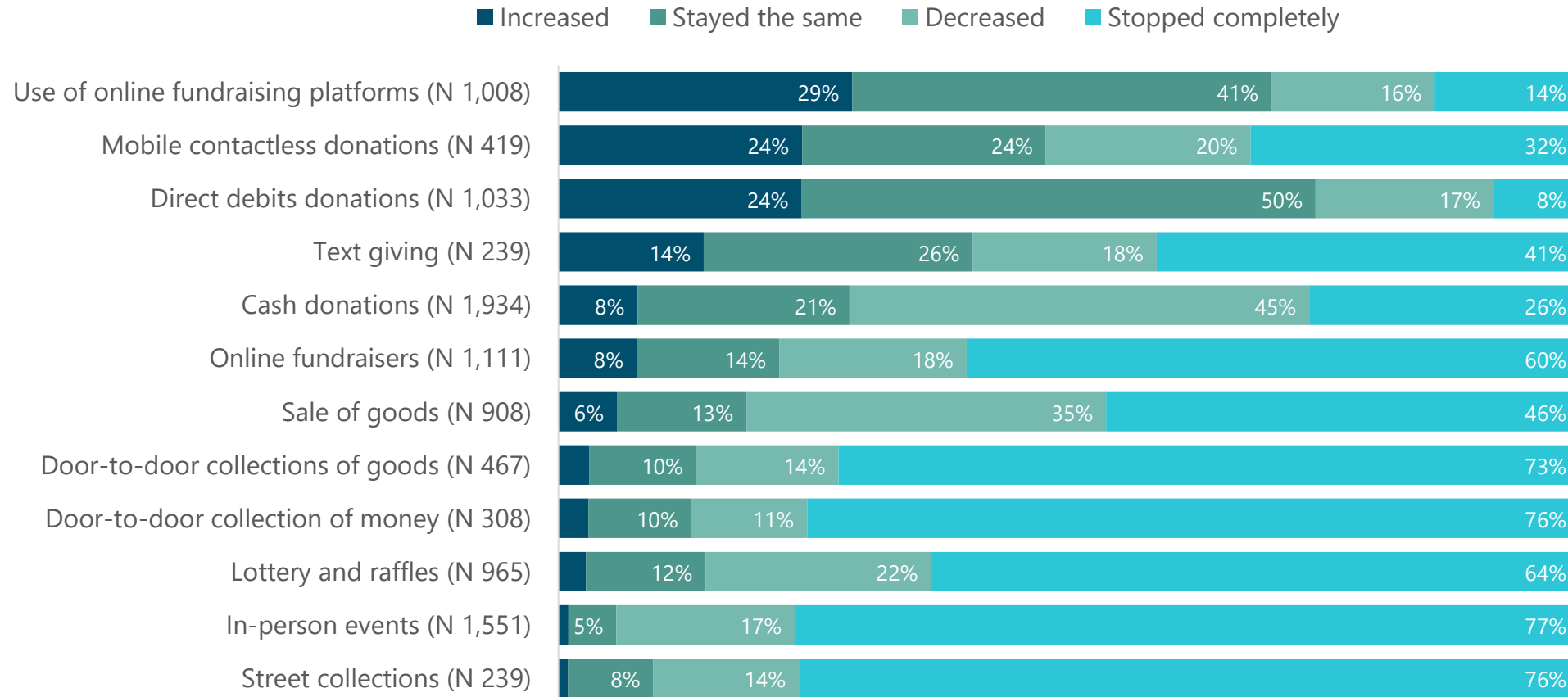
FUNDRAISING METHODS USED



Q6c Thinking about the following methods of fundraising, has your charity increased or decreased its efforts to generate income in this way, since June 2020? N 2,548.

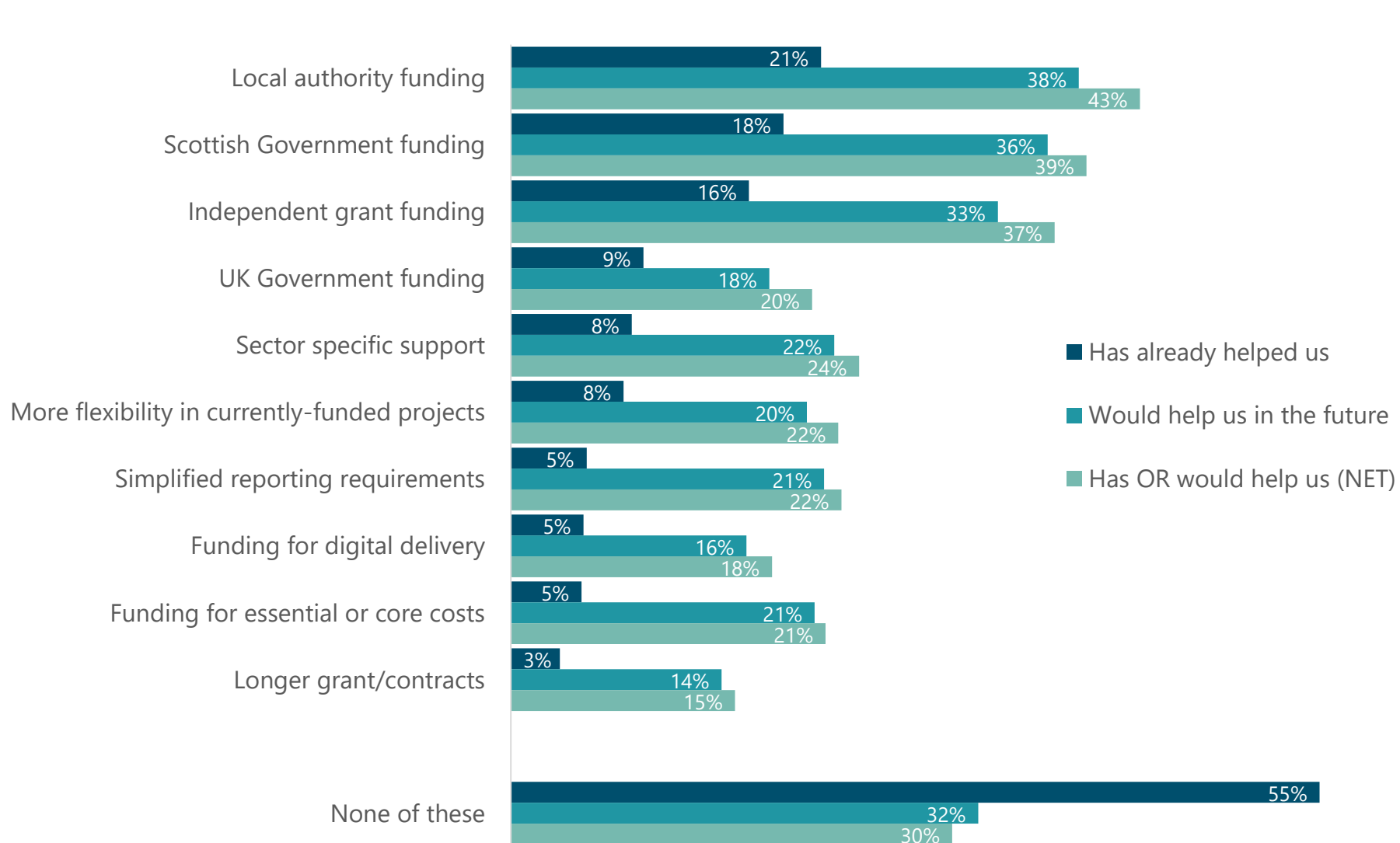
FUNDRAISING METHODS USED

(EXCLUDING THOSE NOT USING THAT METHOD TO RAISE FUNDS)



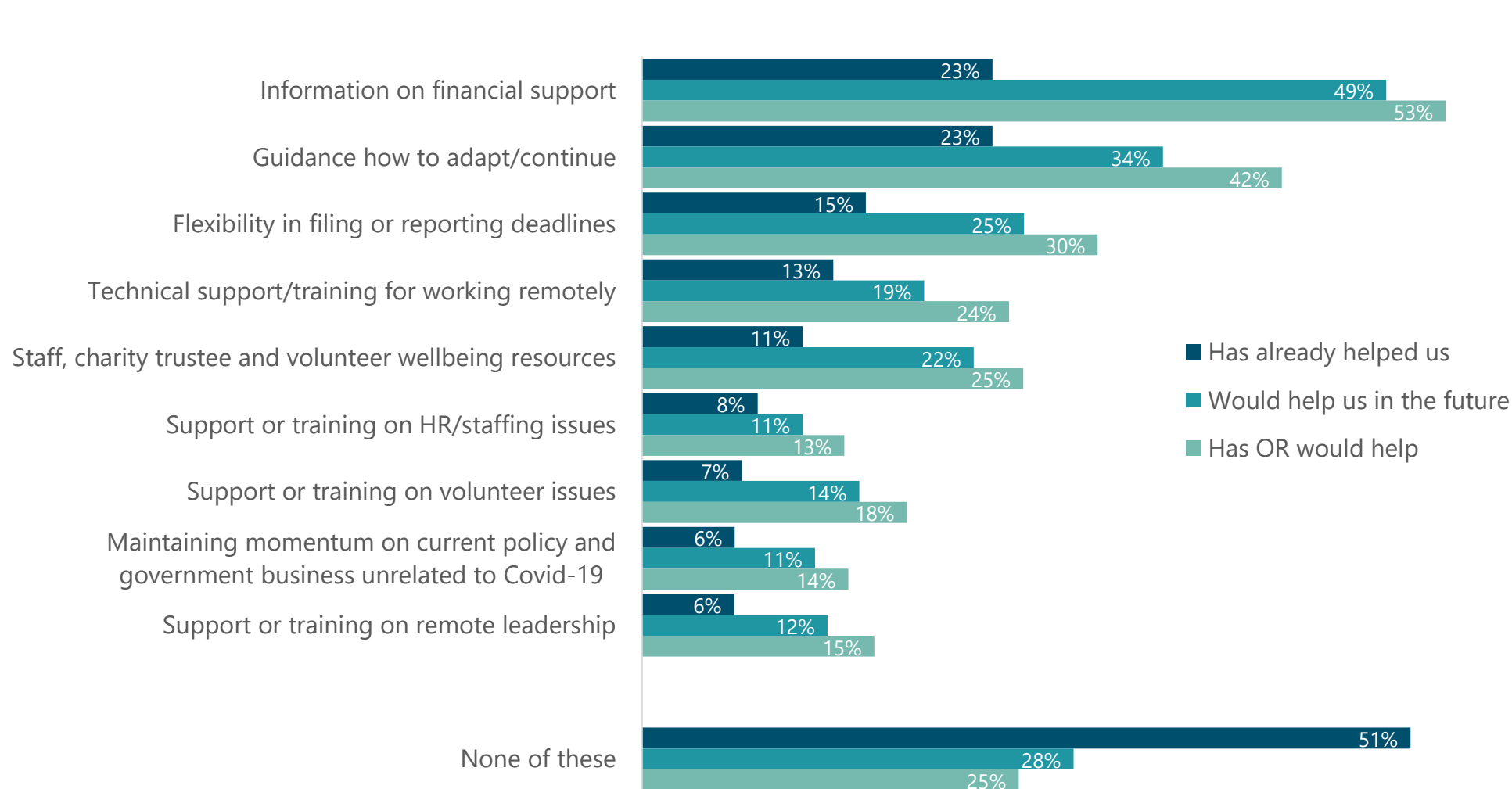
Q6c Thinking about the following methods of fundraising, has your charity increased or decreased its efforts to generate income in this way, since June 2020? N 2,548.

ADDITIONAL FUNDING SUPPORT



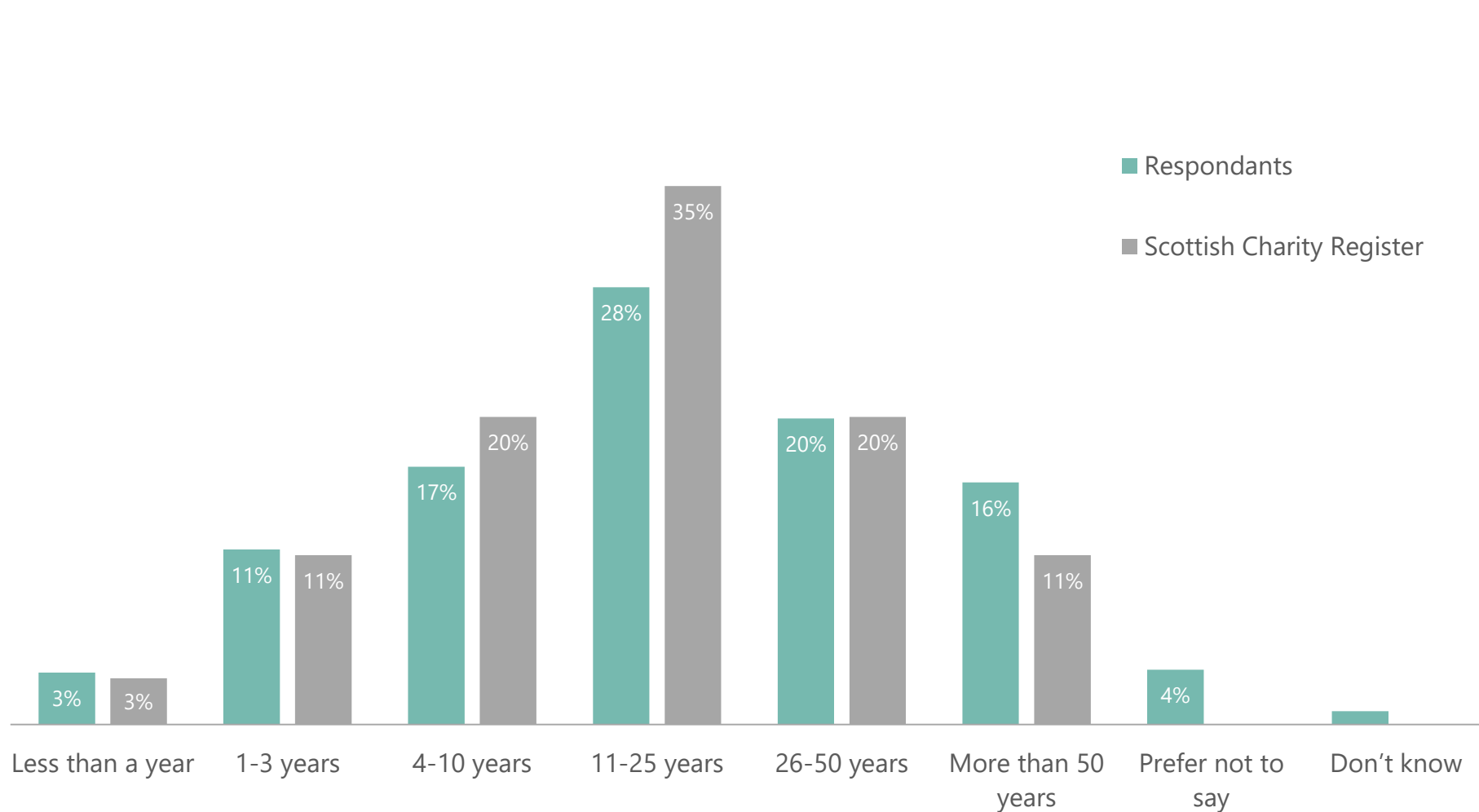
Q7a For each of the following types of additional funding support, which if any, have you already used since the start of the pandemic and which do you think would be useful to you in future? If you have already used a type of funding and feel that it would be useful again in future, please select both options. N 2,320.

NON-FUNDING SUPPORT



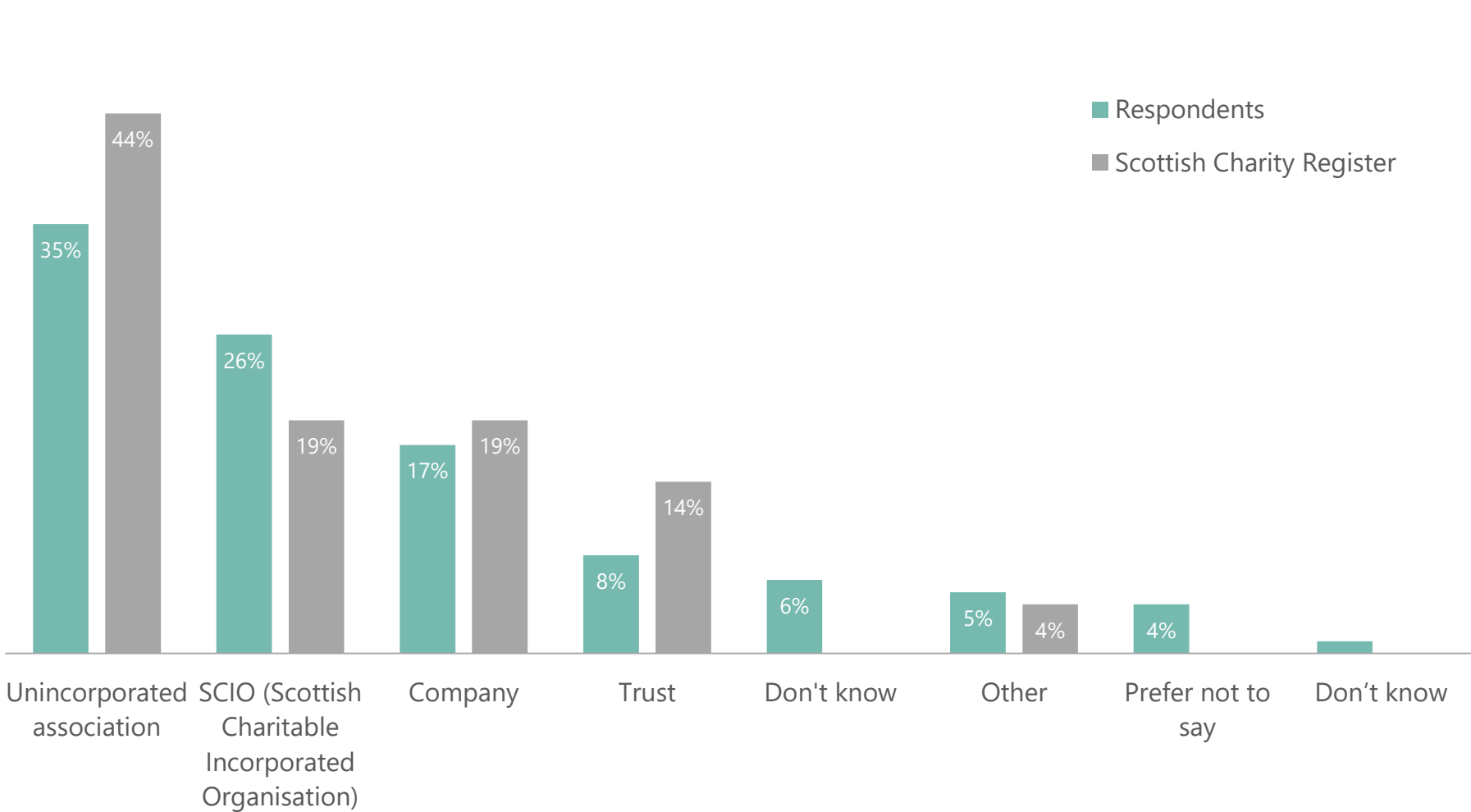
Q7b For each of the following types of support, which if any, have you already used since the start of the pandemic and which do you think would be useful to you in future? If you have already used a type of support and feel that it would be useful again in future, please select both options. N 2,320.

RESPONDENTS: CHARITY AGE



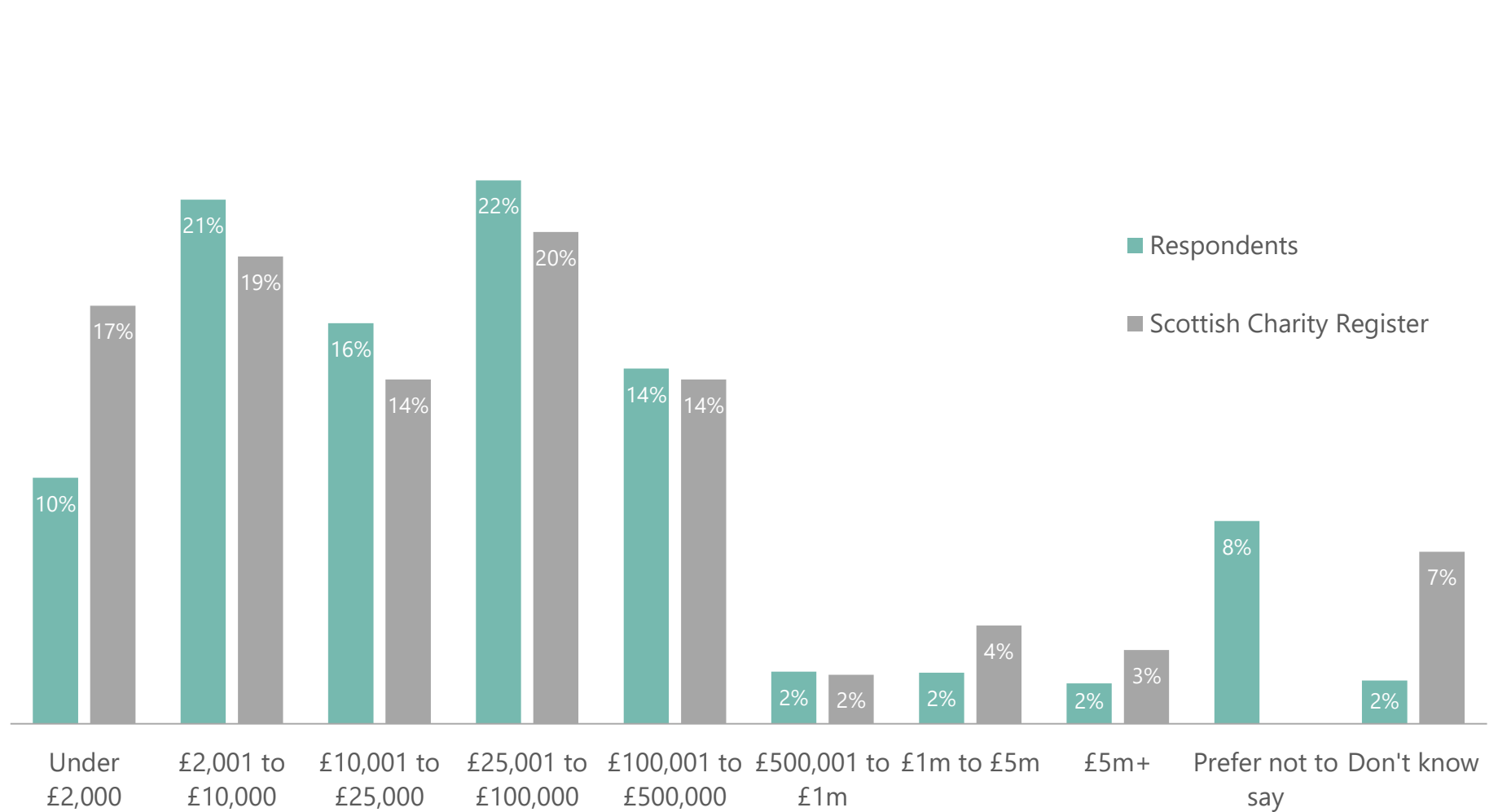
Q10 How long has your charity been established? Respondents N 2,548. Scottish Charity Register 25,153

RESPONDENTS: LEGAL FORM



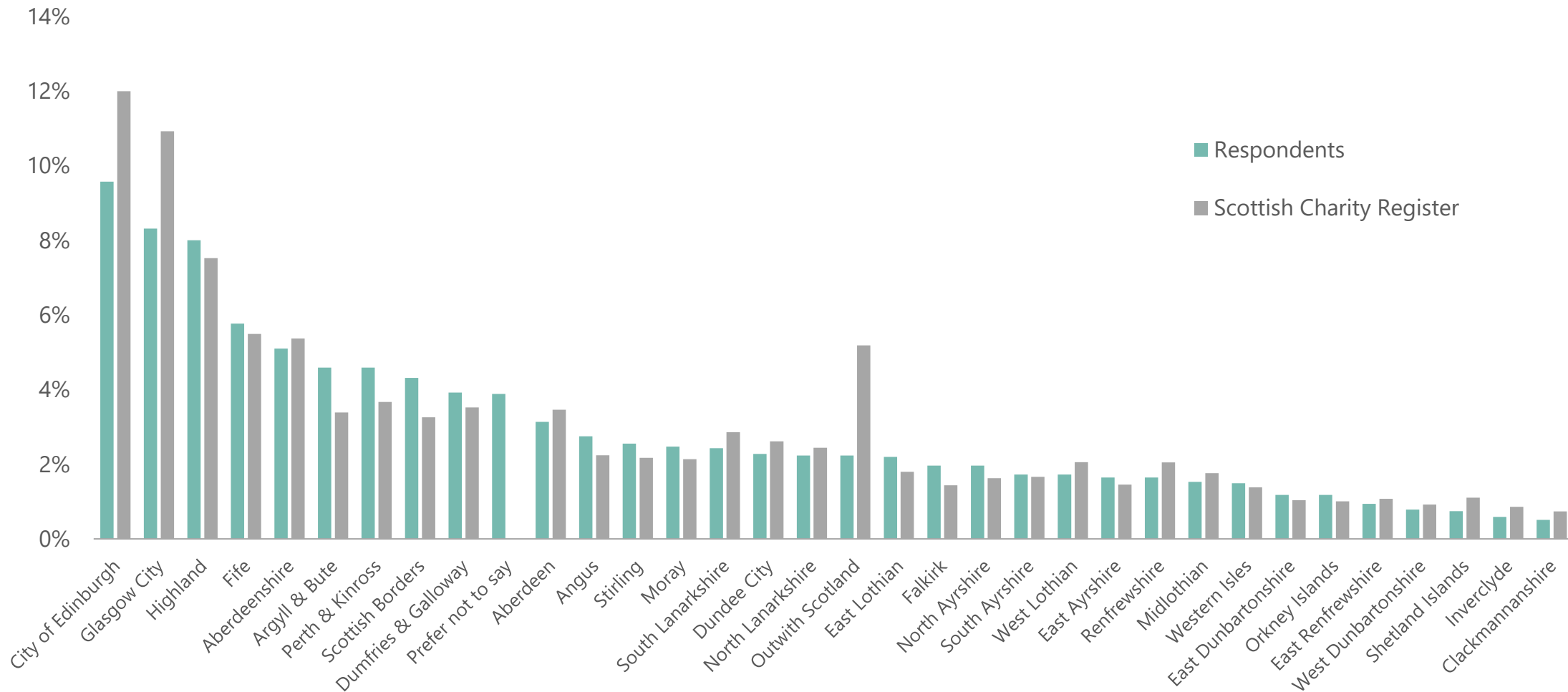
Q10b What is your charity's legal form? Respondents N 2,548. Scottish Charity Register 25,153

RESPONDENTS: CHARITY INCOME



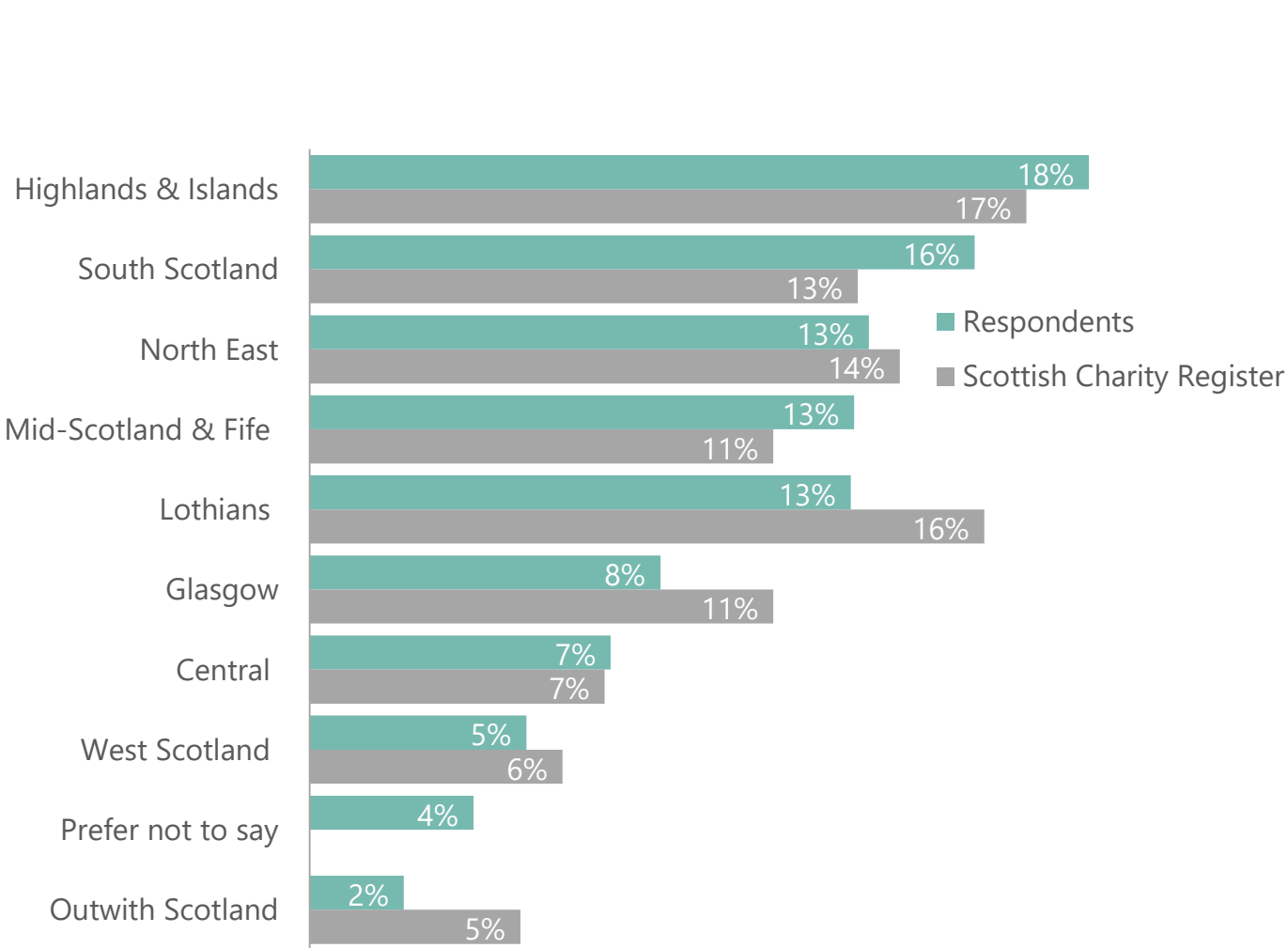
Q11 What was your charity's income in its most recent set of annual accounts? Respondents N 2,548. Scottish Charity Register 25,153

RESPONDENTS: LOCAL AUTHORITY



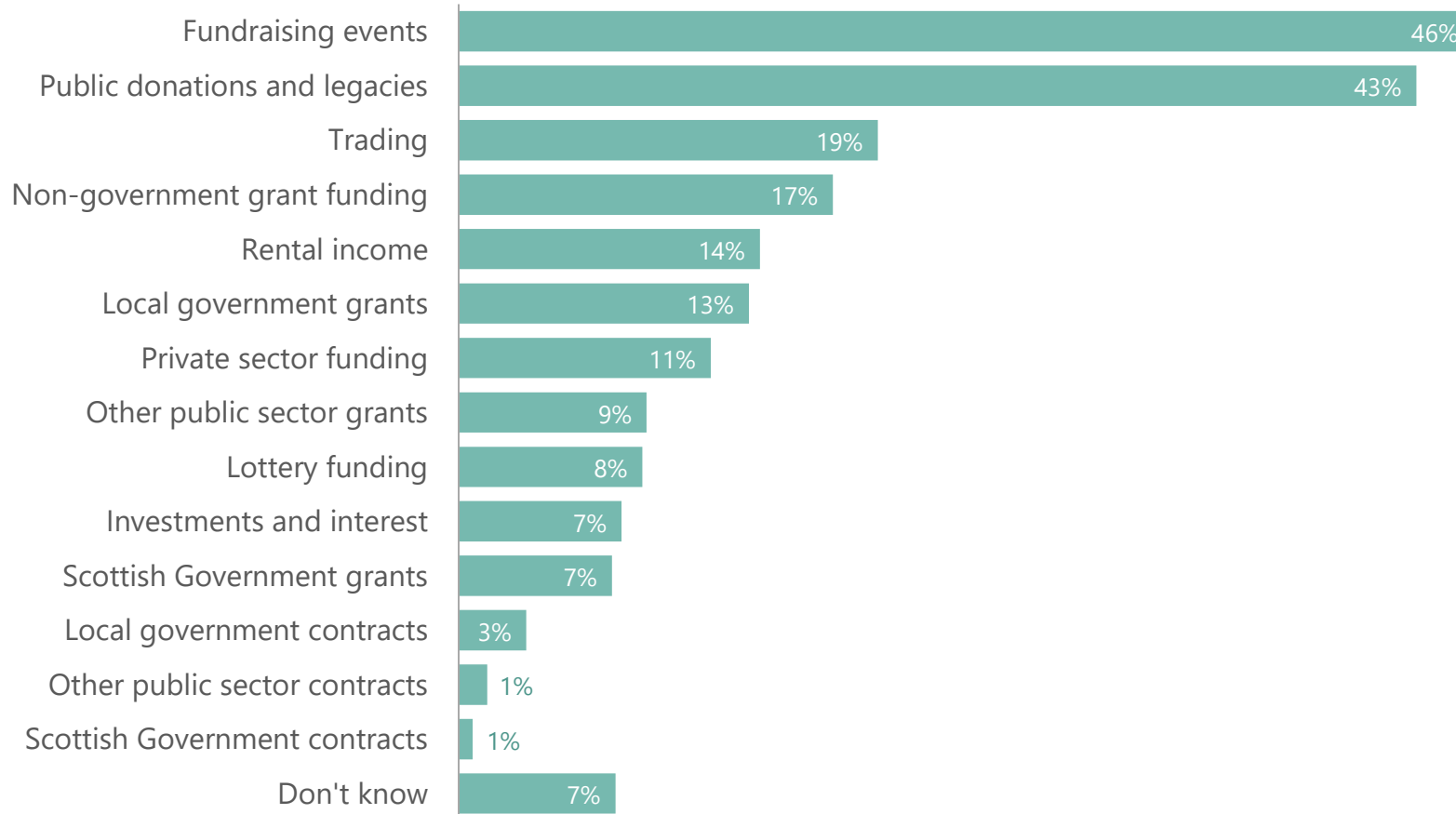
Q12 In which local authority area is your charity based? Respondents N 2,548. Scottish Charity Register 25,153

RESPONDENTS: REGION



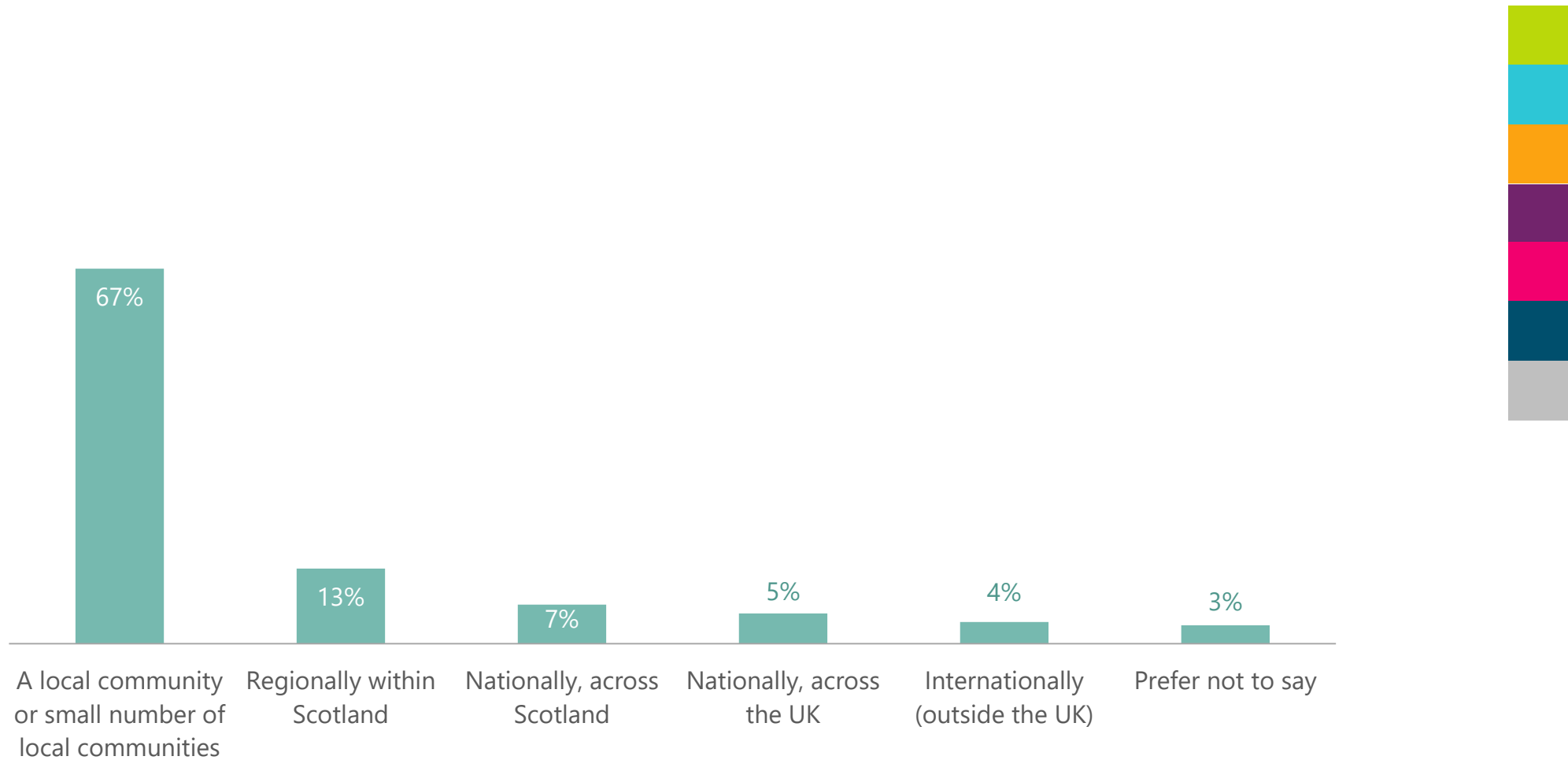
Q12 In which local authority area is your charity based? Respondents N 2,548. Scottish Charity Register 25,153

RESPONDENTS: MAIN INCOME SOURCES



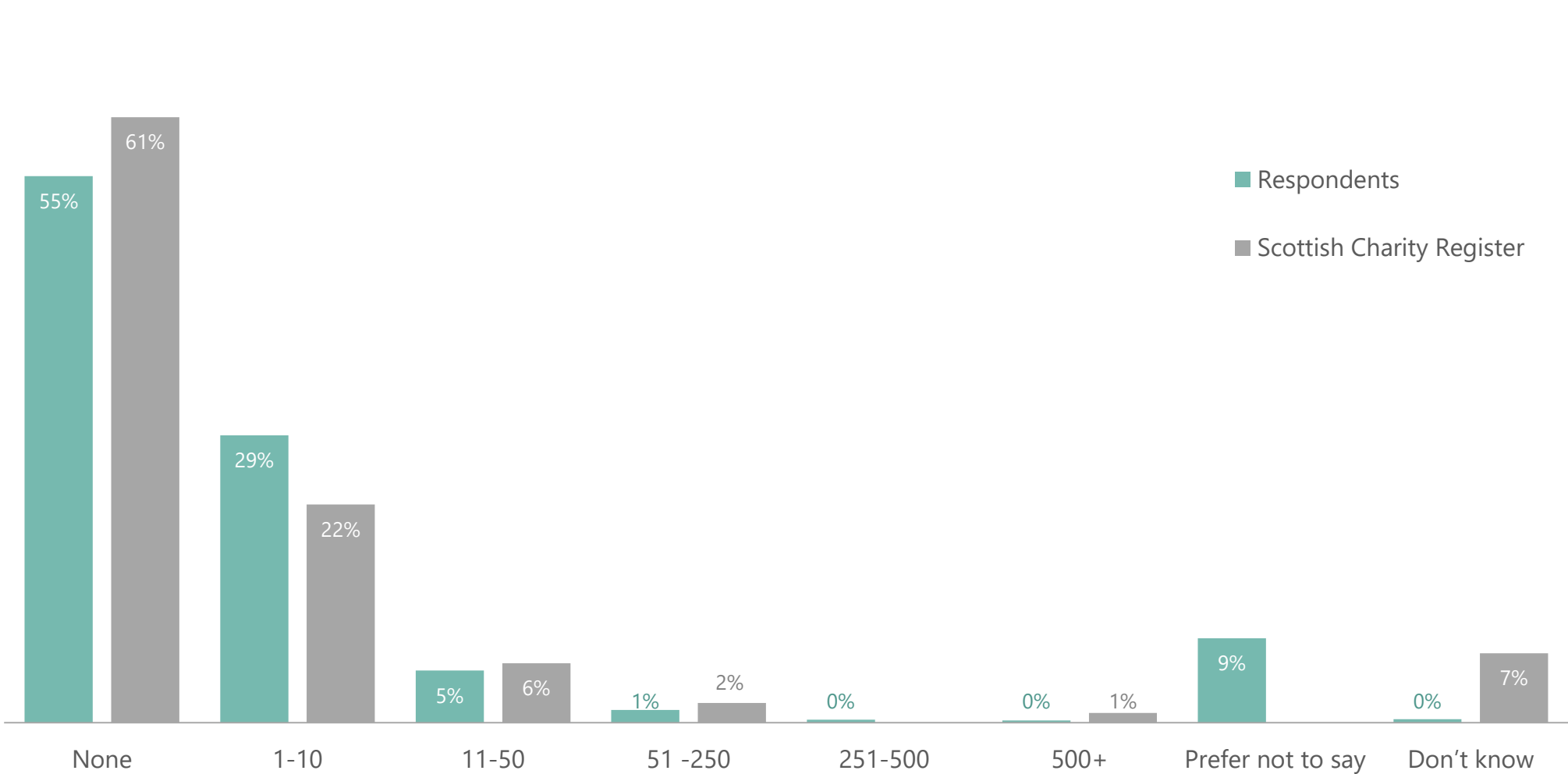
Q13 Usually, what are your charity's main sources of income? Respondents N 2,548. Scottish Charity Register 25,153

RESPONDENTS: SCALE



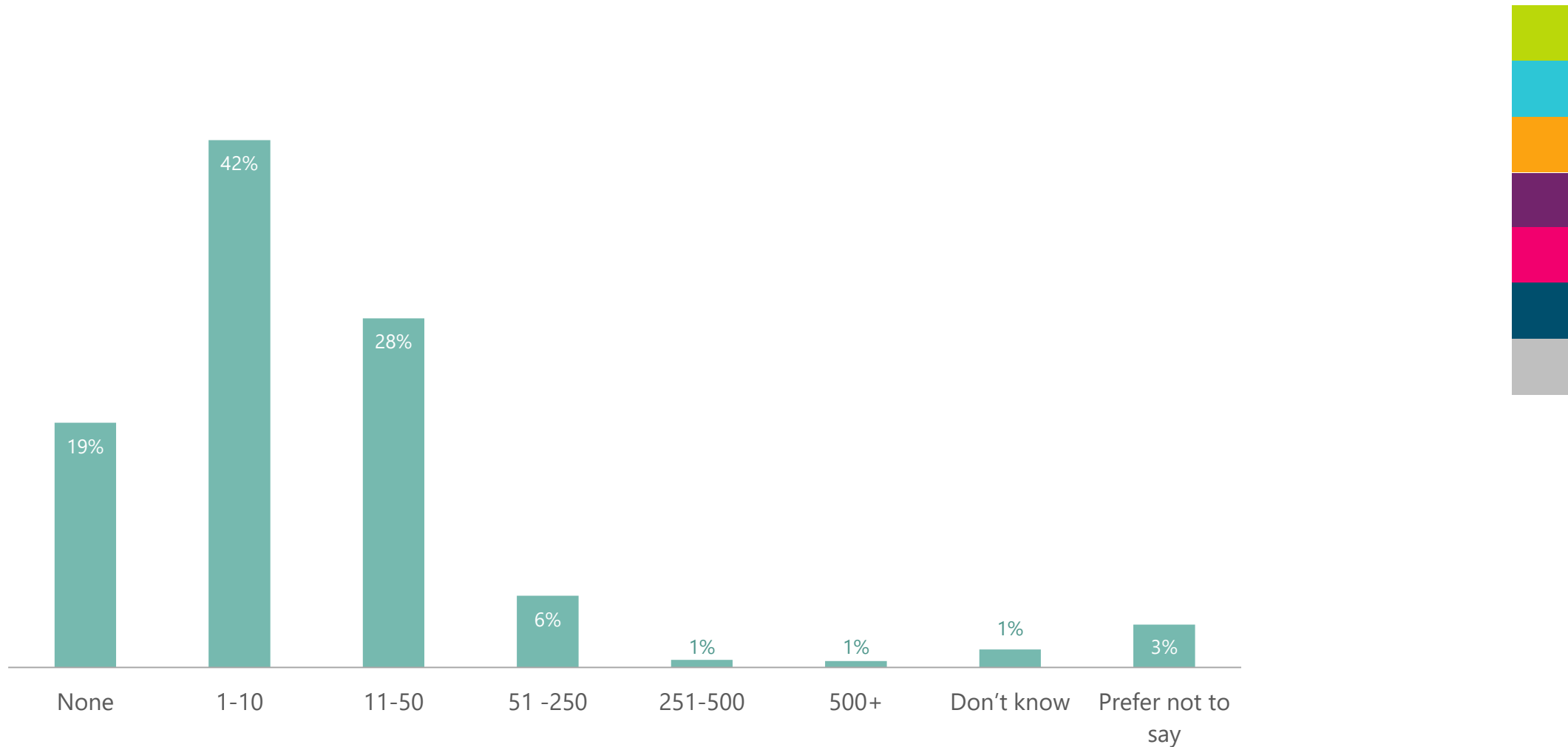
Q14 Which of the following best describes where your charity provides its service(s)? Respondents N 2,548.

RESPONDENTS: PAID STAFF



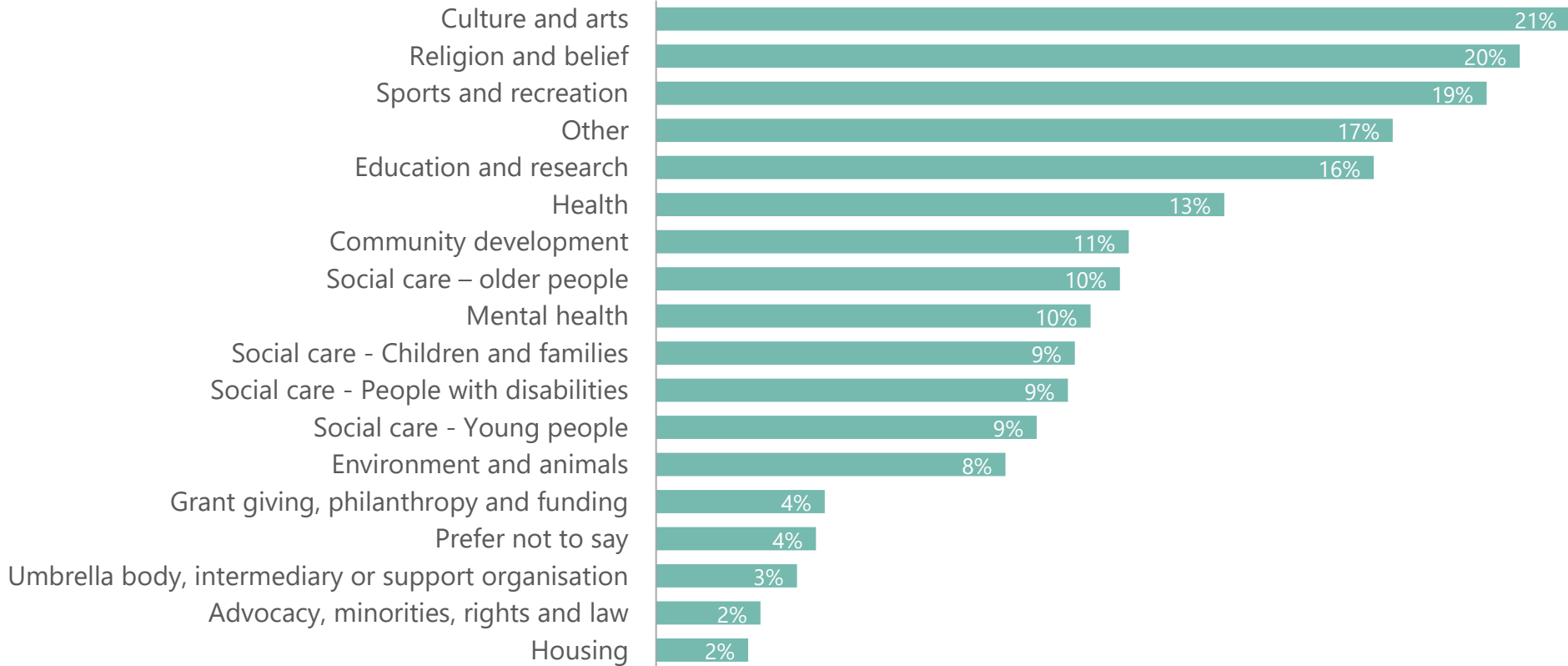
Q15a How many paid staff members (including both full and part time paid staff are normally employed at your charity?
 Respondents N 2,548. Scottish Charity Register 25,153

RESPONDENTS: VOLUNTEERS



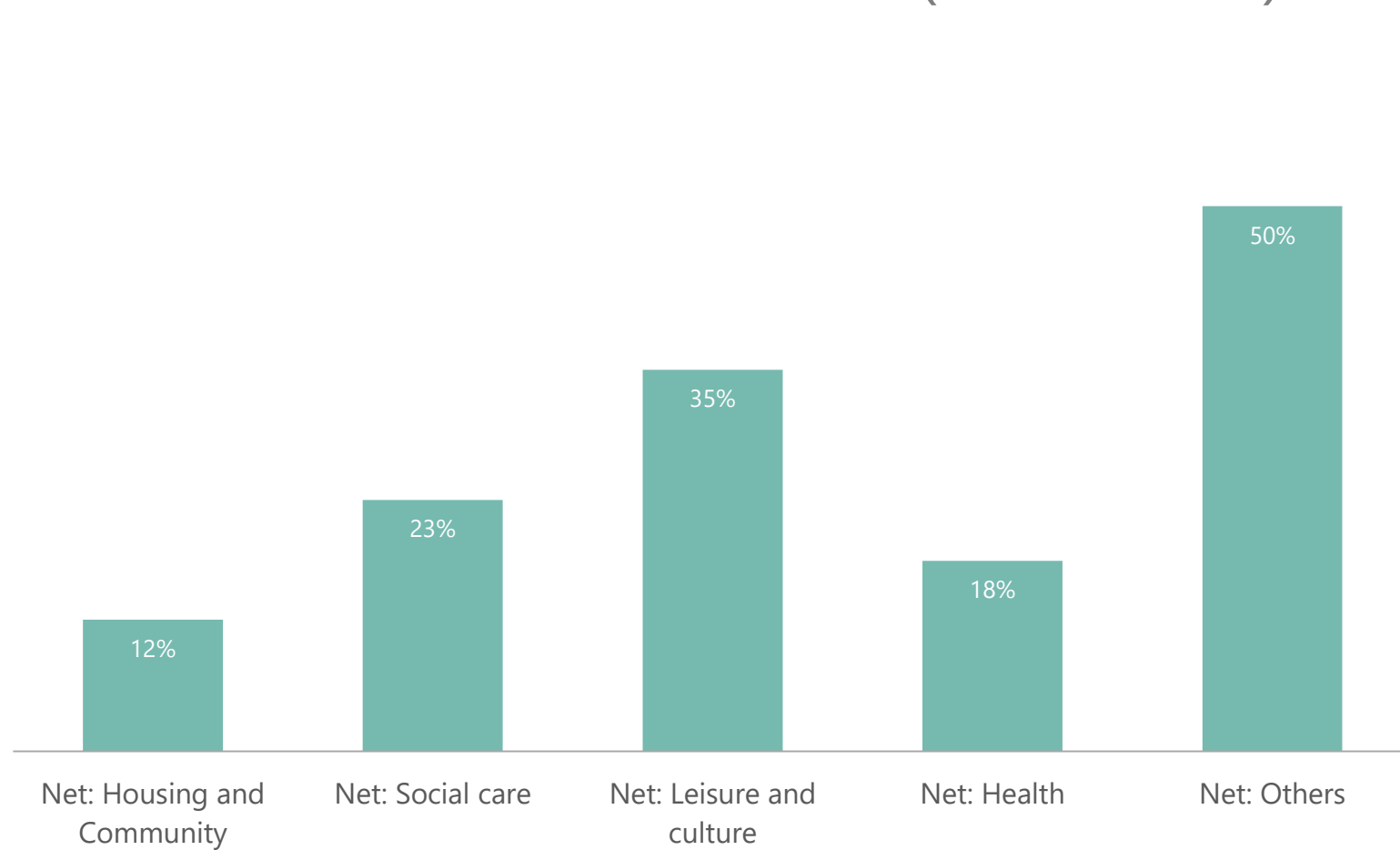
Q15b How many volunteers are normally engaged by your charity (not including charity trustees)?
Respondents N 2,548.

RESPONDENTS: SECTOR



Q16 In which sector or sectors does your charity mainly operate? Respondents N 2,548. Scottish Charity Register 25,153

RESPONDENTS: SECTOR (SUMMARY)



Q16 In which sector or sectors does your charity mainly operate? Respondents N 2,548.

THANK YOU

To the Scottish Charity Sector

We would like to thank all charities who took the time to share their views, and everyone who provided feedback on the survey before it was issued. OSCR will continue to analyse the data to inform our work and to help others working to support the sector.

