

# SCOTTISH THIRD SECTOR TRACKER

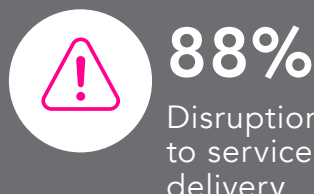
*Sharing today. Thriving tomorrow.*

The findings from this first wave survey highlight just how disruptive the pandemic has been for third sector organisations in Scotland. Many could not deliver fully on their work plan across the previous year. However, the sector has responded by adapting and creating new services to meet increased demand and emerging needs.

## Impact on third sector organisations

Nearly all third sector organisations have faced challenges since the start of the pandemic (98%).

Most commonly:



As a result of these challenges:



Despite disruption to service delivery, many organisations have faced big increases in demand.

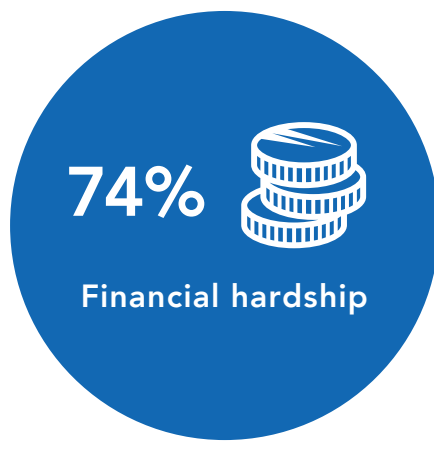
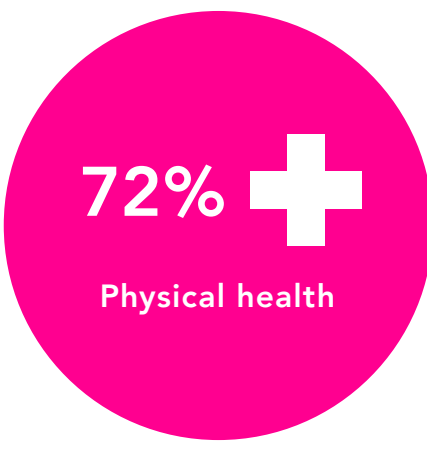


**71%** of these were able to rise to the challenge, meeting most or all increased demand.



## Changes to services & planned work

96% of organisations saw emerging need in their communities, including:



**99%** nearly all organisations had to make changes to their services or planned work in some way.

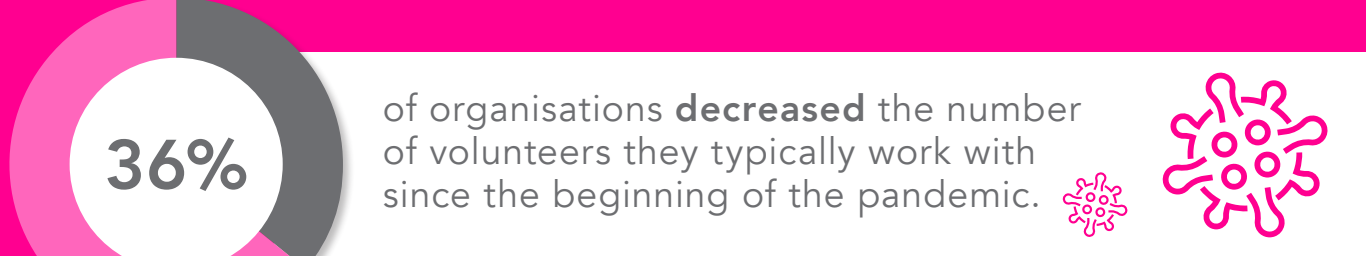
**90%** increased or adapted certain services. However, a similar proportion (86%) had to reduce some services, indicating a shift in focus.

## Staffing & volunteers

**9%** of organisations have made redundancies since the beginning of the pandemic.

**29%** of organisations made use of the furlough scheme.

One in ten (10%) organisations still had staff on furlough in summer 2021.



Only **17%** had **increased** the number of volunteers they work with across this time.

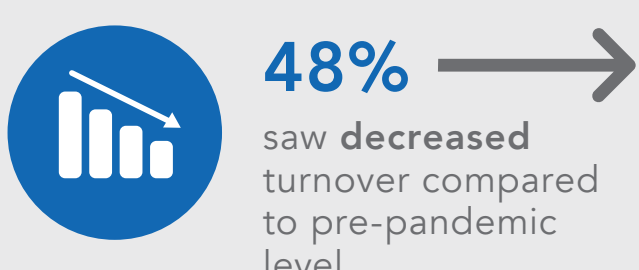
More positively:



Larger organisations have led this recruitment drive, with **87%** taking on new staff and **65%** having redeployed existing staff.



## Finances



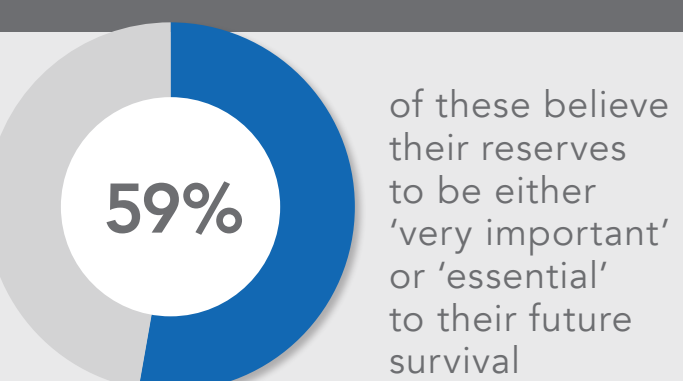
Of these:



**71%** predict **reduced turnover** for at least another three months.

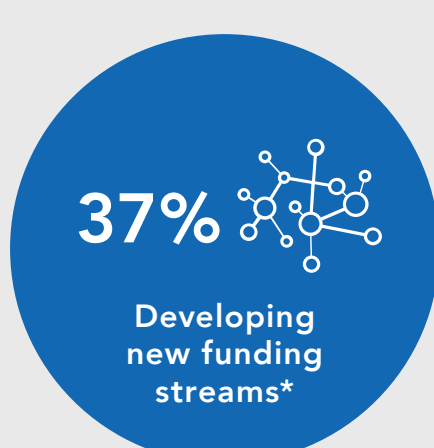
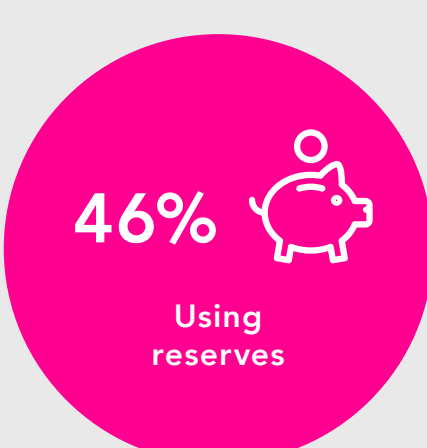
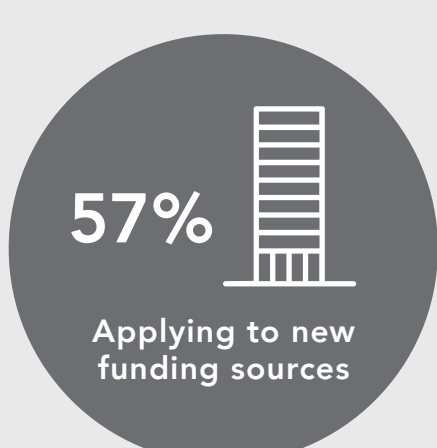
**19%** expect this reduction in turnover to continue for at least another year

**Decreased income** has primarily been the result of reductions in trading turnover (34% of those with decreased income) and fundraising (25%).



Despite this, the sector is relatively confident in its future, with **97% confident** that they'll still be operating in 12 months' time.

The sector is **working proactively to adapt** to the financial challenges it faces, in many cases through innovation in fundraising:



\* including digital donations and online fundraising.

These results are based on a survey of 585 third sector organisations based or operating in Scotland. Interviews were conducted by telephone or online. The research took place between 16th June and 31st August 2021. Quotas and weighting have been used to ensure the final dataset represents the Scottish third sector in regard to organisation location, activity and turnover. This survey forms the baseline for a longitudinal survey intended to run quarterly for a further five waves. Research and design by djsresearch.com

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