Impact of COVID-19 on the Third Sector in Scotland

Summary presentation of volunteering data from TSI Scotland Network Survey - June 2020
**TSI Scotland Network Survey**

- **Objective** – ‘To gain a deeper understanding of the impact of COVID-19 on the third sector

- **Method** – online survey conducted during April – May 2020

- **Response** – 1,184 organisations responded with representation from all 32 local authorities

- **Acknowledgement** – Volunteer Scotland would like to thank the TSI Scotland Network for providing access to their data and GCVS for supporting this analysis on volunteering

Link to the national TSI Scotland Network Survey results: [https://www.gcvs.org.uk/blog/tsi-coronavirus-survey/](https://www.gcvs.org.uk/blog/tsi-coronavirus-survey/)

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**Third sector respondents**

- **25%** Community groups
- **61%** Voluntary organisations
- **14%** Social enterprises

Source: TSI Scotland Network Survey – June 2020
Impact of COVID-19
Understanding the wider business context
Impact of COVID-19 on operational activity

- 91% of organisations have been impacted in one way or another

- Impact on volunteering is likely to be significant:
  - 30% have stopped ‘meaningful delivery’
  - 36% have modified their ‘delivery model’
  - 16% have completely changed what they do

Organisations' responses to COVID-19

- Our activities are essential and continue roughly as before but with additional safety precautions (9%)
- Our activities aren’t able to be done right now and have stopped any meaningful delivery (30%)
- We are doing similar activity but have modified our delivery model (e.g. using digital, telephone) (36%)
- We have completely changed what we do to support our community / service users (16%)
- Other (10%)

Source: TSI Scotland Network Survey – June 2020
Impact of COVID-19 on financial position

- 2/3rd of organisations are likely to experience a deteriorating financial position (68%)
- For 36% of organisations this will give them challenges
- Only 3% are likely to experience an improving financial position

Likely impact on organisations' financial position

- Worsen, and this will cause us challenges: 36%
- Worsen, but within our capacity to handle: 32%
- Remain the same: 30%
- Improve: 3%

Source: TSI Scotland Network Survey – June 2020
Impact of COVID-19 on financial position

• The major negative financial impacts relate to organisations’ income (actual or potential):
  o 45% - less income from fundraising
  o 36% - less income from trading
  o 24% - less income from memberships/fees

• 86% of organisations are seeing or anticipate some form of negative financial effects

• Only for ‘change in costs’ do more organisations consider this a positive rather than a negative (26% vs. 17%)

Effects organisations are seeing/anticipating on their finances

<table>
<thead>
<tr>
<th>Effect of Change</th>
<th>Negative effects</th>
<th>Positive effects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in income from memberships/fees</td>
<td>24%</td>
<td>1%</td>
</tr>
<tr>
<td>Change in income from fundraising</td>
<td>45%</td>
<td>2%</td>
</tr>
<tr>
<td>Change in income from trading</td>
<td>36%</td>
<td>8%</td>
</tr>
<tr>
<td>Change in costs</td>
<td>26%</td>
<td>17%</td>
</tr>
<tr>
<td>Change in value of/income from investments</td>
<td>29%</td>
<td>8%</td>
</tr>
<tr>
<td>Change in income from funding applications</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>None</td>
<td>47%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Source: TSI Scotland Network Survey – June 2020
Impact of COVID-19 On Volunteering
Impact of COVID-19 on volunteering recruitment

- Only 13% of organisations have recruited more volunteers reflecting the problems of social distancing, reduced operations, etc.
- However, a significant minority (11%) would like to recruit more volunteers.
- And 7% are struggling to recruit.
- The conclusion is that despite the widely recognised issue of an excess supply of volunteers, there are still pockets of unfilled demand.

![Volunteer recruitment during COVID-19](chart.png)

Source: TSI Scotland Network Survey – June 2020
Impact of COVID-19 on volunteer management

- Advice on volunteer management was the least cited issue facing organisations at only 6%.

- Compare this to the 47% looking for help with funding and 29% with advice on funding/fundraising.

- Also, most organisations that do need support with volunteer management can find it. Only 2% are struggling to access it.

Source: TSI Scotland Network Survey – June 2020
Positive impacts in communities

- 45% of organisations thought that ‘people looking to volunteer’ was having a positive impact on their community.

- As important are the positive community level impacts:
  - People looking out for each other (84%) i.e. informal volunteering
  - New connections and better relationships (45%)

Source: TSI Scotland Network Survey – June 2020
Impact of COVID-19 On Society
Impact of COVID-19 on society

The effects organisations are most concerned about for their communities

- Mental health
- Loneliness
- Loss of income
- Increased poverty
- Physical health
- Missing out on opportunities
- Access to digital
- Access to food
- Safety, abuse or neglect
- Challenges accessing employment
- Family relationships
- Increased use of drugs/alcohol
- Housing
- None

If there is a significant economic downturn

<table>
<thead>
<tr>
<th>Effect</th>
<th>Right now</th>
<th>If there is a significant economic downturn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mental health</td>
<td>80%</td>
<td>100%</td>
</tr>
<tr>
<td>Loneliness</td>
<td>90%</td>
<td>80%</td>
</tr>
<tr>
<td>Loss of income</td>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>Increased poverty</td>
<td>70%</td>
<td>70%</td>
</tr>
<tr>
<td>Physical health</td>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>Missing out on opportunities</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Access to digital</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Access to food</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Safety, abuse or neglect</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Challenges accessing employment</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Family relationships</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Increased use of drugs/alcohol</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Housing</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>None</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: TSI Scotland Network Survey – June 2020
Impact of COVID-19 on society

Health and wellbeing

- Mental health and loneliness are the two impacts organisations are most concerned about ‘right now’ (86% and 83% respectively)
- They also don’t believe they will go away during an economic recession – they are here to stay
- There are other health and wellbeing concerns:
  - 52% are concerned about physical health now (56% during a recession)
  - 35% are concerned about ‘safety, abuse or neglect’ now (38% during a recession)
  - 27% are concerned about ‘family relationships’ now (28% during a recession)
  - 18% are concerned about ‘increased use of drugs/alcohol’ (21% during a recession)

Economic impacts

Organisations believe that a significant economic recession will exacerbate the following issues they are most concerned about for their communities (comparing ‘now’ to ‘significant economic recession’)

- Increased poverty – from 53% to 75% of orgs
- Loss of income – from 53% to 74% of orgs
- Missing out on opportunities – from 46% to 54% of orgs
- Access to food – from 36% to 51% of orgs
- Gaining employment – from 30% to 56% of orgs
- Housing – from 7% to 14%