

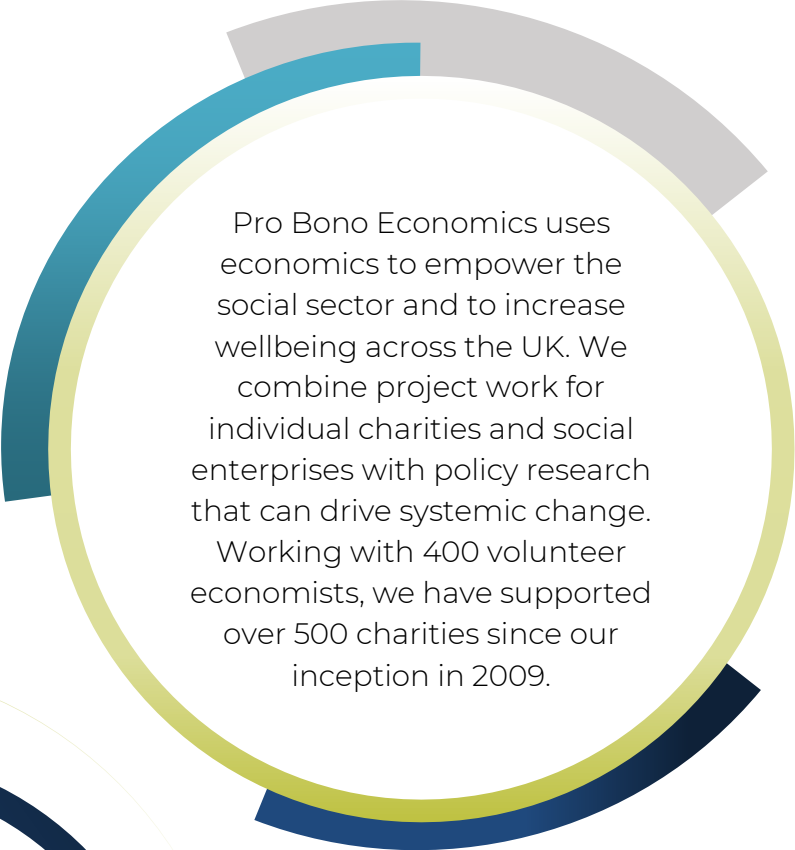


# PBE Charity Tracker

*In partnership with Charity Finance Group and the Chartered Institute of Fundraising*

May 2021





Pro Bono Economics uses economics to empower the social sector and to increase wellbeing across the UK. We combine project work for individual charities and social enterprises with policy research that can drive systemic change. Working with 400 volunteer economists, we have supported over 500 charities since our inception in 2009.



Charity Finance Group is the charity that inspires a financially confident, dynamic and trustworthy charity sector. We do this by championing best practice, nurturing leadership and influencing policy makers.



The Chartered Institute of Fundraising is the professional membership body for UK fundraising. We support fundraisers through leadership and representation; best practice and compliance; education and networking; and we champion and promote fundraising as a career choice. We have over 6,000 individual members and over 600 organisational members who raise more than £10 billion in income for good causes every year.

## Summary

As we gradually emerge from the latest lockdown, there is widespread hope that – variants notwithstanding – the worst of the pandemic is behind us. The past year dramatically transformed many people’s personal, social, and working lives, but as the economy unlocks, there is a sense that much is beginning to return to pre-Covid normality.

This hopefulness is reflected across much of the economy. The most recent OECD business and consumer confidence indices for the UK now exceed pre-pandemic levels, and the latest Bank of England forecasts predict a rapid economic upturn, with almost all GDP losses recovered by the end of 2021.

However, the results of our latest PBE Charity Tracker show that a return to normality is still a long way off for many charities and the general sentiment is not one of optimism. Charity shops might be re-opening and staff may be headed back to offices, but increasing freedoms aren’t creating the same widespread expectation of an uptick seen in the rest of the economy.

Instead, the figures spell out a long road of recovery ahead for much of the sector. There are concerns that financial challenges will not abate. In particular, a slow and cautious return to fundraising events is expected to hold the sector back, as organisations struggle to get events back in the calendar and to fill those already pencilled in.

Short-term cost-saving measures many organisations undertook in order to survive the crisis generally focused on reducing spending on operations and reducing their workforce. As a result, reduced capacity coupled with an ongoing dip in income leaves large parts of the sector without the means to rapidly recover lost ground.

The sector has taken significant steps to manage this. Major operational, strategic, and environmental changes have led to the development of new ways of working. Charities have invested in improving the digital skills of staff and beneficiaries, while new relationships have been forged within and outside of the sector. Many organisations have strengthened bonds with their local

communities and brought many new people into the volunteer workforce.

Yet, with expectations that further growth in demand for services will outstrip supply, some charities fear a continued capacity crunch in 2021. Smaller charities are particularly nervous about this. They have in general been more likely to experience decreases in income and less likely to have accessed targeted financial support. Many small charities have not made the same kind of operational or financial changes as large charities because those options are less readily available. That leaves smaller charities' projections for 2021 gloomier than those of larger ones, with concerns relating to finances and demand significantly higher and a return to pre-pandemic service and fundraising events levels expected to be slower.

Rather than 2021 being the moment for an optimistic return to pre-Covid normality, much of the charity sector fears slipping unnoticed into a new phase in their long Covid crisis.



7 in 10

charities expect Covid to have a negative effect on their ability to deliver their charitable objectives over the next 12 months

49%

of charities reported a decrease in overall income over the past 12 months

46%

of charities expect to be back to pre-pandemic levels of fundraising events by the end of 2021

85%

of charities expect to be delivering services at pre-pandemic levels by the end of 2021, despite demand growing throughout 2020 and beyond.

This report describes the results of our second quarterly survey into the effect of the Covid pandemic on the charity sector in the UK.

It was undertaken between 19 April and 3 May of 2021 and is the 16<sup>th</sup> in a series of surveys that we have conducted of the sector stretching back to April 2020.

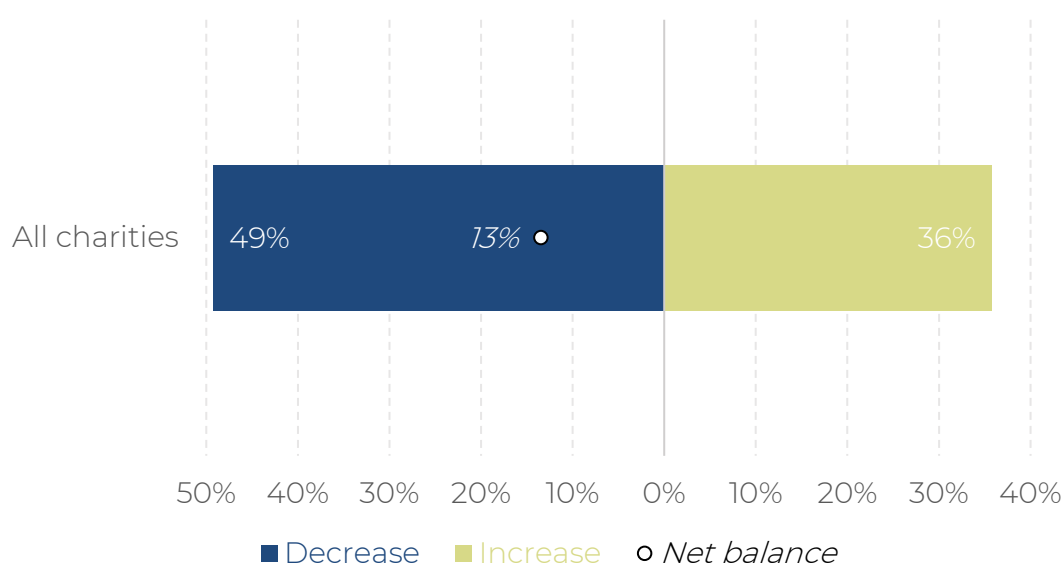
## Reflections

The pandemic has caused major fluctuations in charity finances, with the sector experiencing mixed fortunes...

As Figure 1 shows, just under half (49 per cent) of respondents reported a decrease in their income in the most recent financial year when compared to the previous 'pre-covid' financial year. But not all charities have suffered equally, with over one third (36 per cent) reporting an increase, which seems better than might have expected given the closure of charity retail and the curtailment of the vast majority of fundraising activity for most of the year.

Figure 1. Just under half of charities' income declined in 2020-21 while just over one-third experienced an increase

*Proportion of charities reporting change in overall income over the past 12 months (April 2020 to March 2021) compared to the previous 12 months (April 2019 to March 2020)*



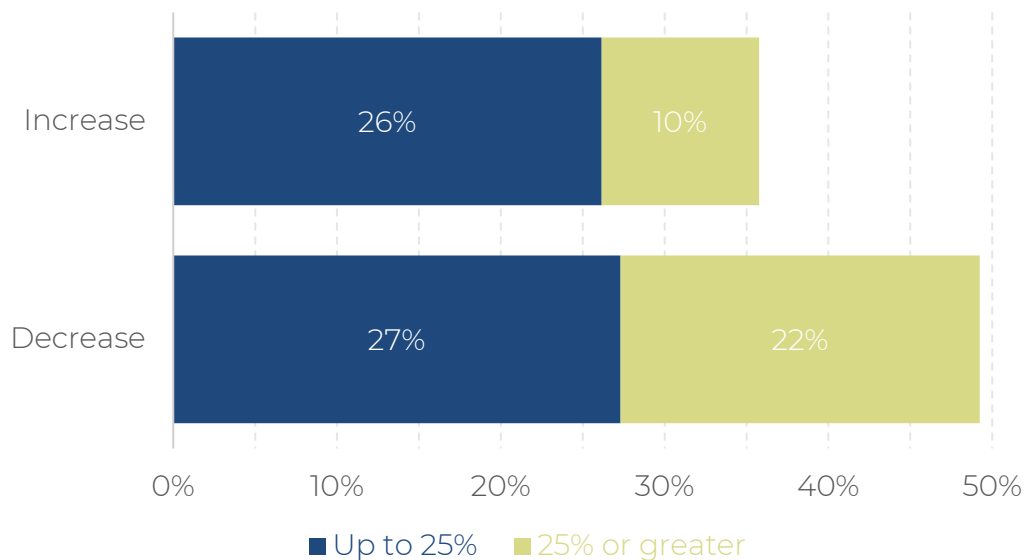
Notes: n= 260. Residual is 'No change'  
Source: PBE Charity Tracker, 19 April-3 May, 2021

...but in general, the negative significantly outweighed the positive

Taking the magnitude of those changes into consideration we are left with a more worrying picture. Figure 2 highlights how the scale of income decreases significantly outweigh the increases, with only one-in-ten (10 per cent) charities reporting increases of 25 per cent or greater, while over one-fifth (22 per cent) reported decreases of 25 per cent or more.

Figure 2. The scale of the decreases were significantly larger than the increases

*Scale of change in overall income over the past 12 months (April 2020 to March 2021) compared to the previous 12 months (April 2019 to March 2020)*

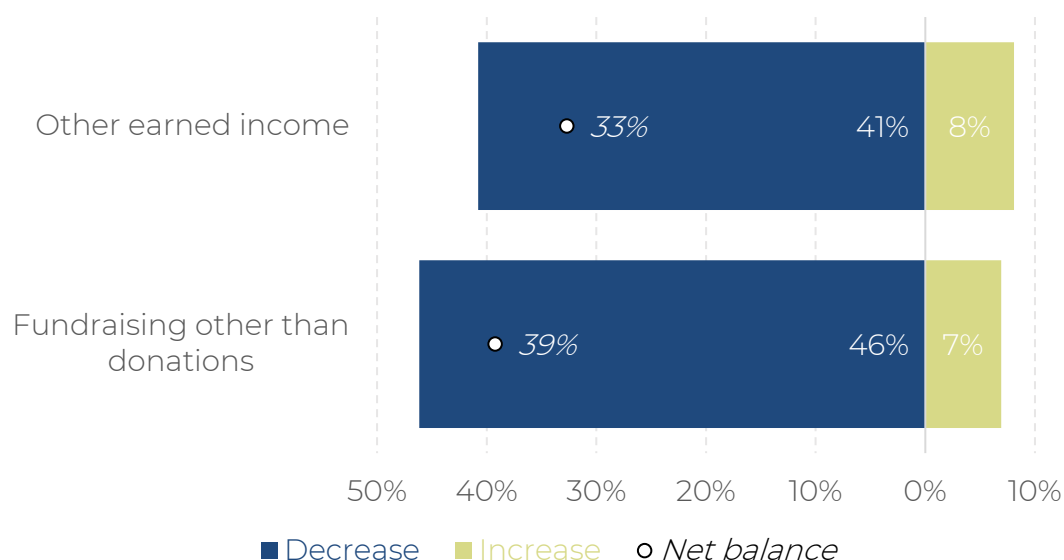


Notes: PBE Charity Tracker, 19 April-3 May n = 260, residual is 'No change'

Most income streams were down on the previous year, with some taking significant hits

Many charities have seen decreases across the majority of their income streams with the most pronounced losses from earned income such as ticket sales, lotteries, and auctions and charity retail as we can see from Figure 3.

Figure 3. Many charities experienced declines in the same income streams  
*Proportion of charities reporting change in selected income sources over the past 12 months (April 2020 to March 2021) compared to the previous 12 months (April 2019 to March 2020)*



Notes: n=260 'Other earned income' includes income from activity such as charity retail. Residual is 'No change' – 27%, 'Don't know' – 3%, 'N/A' – 22%. 'Fundraising other than donations' includes income from fundraising events, ticket sales, lotteries, auctions etc. n=260. Residual is 'No change' – 18%, 'Don't know' – 1%, 'N/A' – 28%

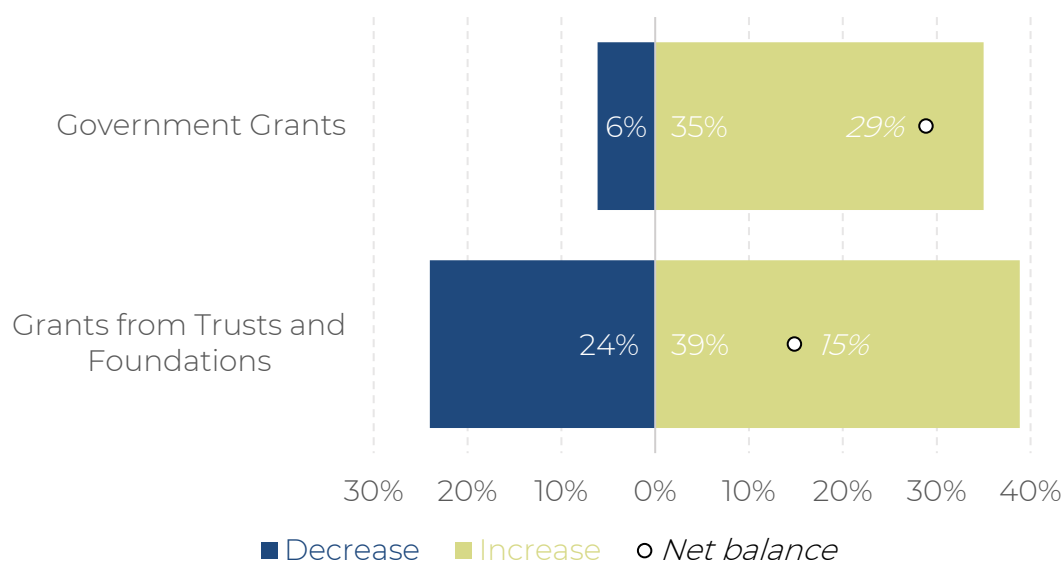
Source: PBE Charity Tracker, 19 April-3 May 2021

And while increased support from government, Trusts and Foundations has helped many charities survive, the future picture looks more uncertain

For some charities, these losses have been balanced out with growth in external financial support. Figure 4 shows 35 per cent of respondents reported an increase in income from government grants. This is likely to have been driven by the Coronavirus Job Retention Scheme (usually referred to as furlough) and the £750m charity support package.



Figure 4. Many charities received increased targeted financial support  
*Proportion of charities reporting change in selected income sources over the past 12 months (April 2020 to March 2021) compared to the previous 12 months (April 2019 to March 2020)*



Notes: n=260. For 'Government Grants' residual is 'No change' – 23%, 'Don't know' – 1%, 'N/A' – 35%. For 'Grants from Trusts and Foundations' residual is 'No change' – 25%, 'Don't know' – 1%, 'N/A' 12%  
 Source: PBE Charity Tracker, 19 April-3 May 2021

With no further financial support included in March's Budget and furlough gradually winding down throughout 2021, higher levels of income from government grants seen over the past 12 months are now likely to decline.

Figure 4 points also to an overall picture of funding from Trust and Foundations which, while positive, is slightly more mixed. While almost four in ten (39 per cent) report an increase in income, almost one quarter (24 per cent) report a decrease.

Smaller charities have in general come off significantly worse than their larger counterparts

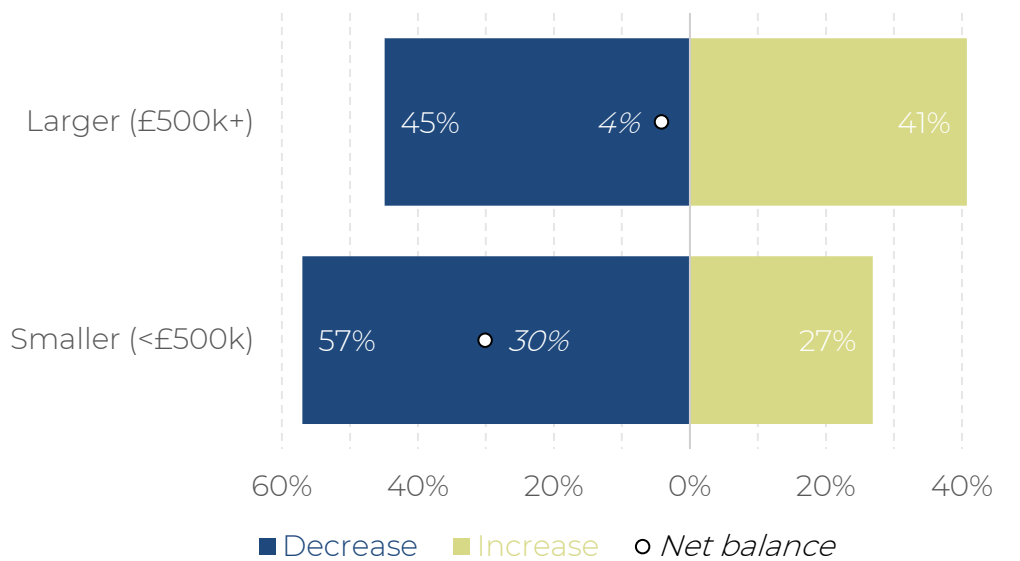
The financial challenges identified in the aggregate data do not seem to be evenly distributed throughout the sector, with smaller charities significantly more likely to have suffered overall decreases in overall income.

As Figure 5 shows, while almost as many large charities experienced income increase as decrease (41 per cent vs 45 per cent respectively), the

picture for smaller charities is significantly worse, with almost six in ten (57 per cent) experiencing decreases while just over a quarter (27 per cent) reported increases.

Figure 5. Smaller charities were more likely to have experienced income decreases

*Proportion of larger and smaller charities reporting changes in overall income over the past 12 months (April 2020 to March 2021) compared to the previous 12 months (April 2019 to March 2020)*



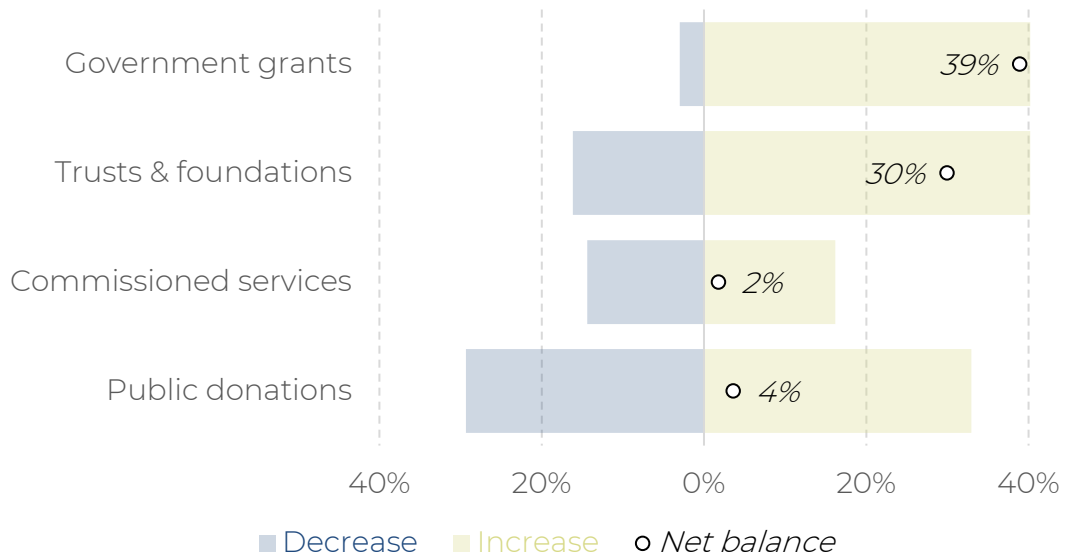
Notes: n=167 for Larger (£500k+), residual is 'No change' – 14%. n=93 for Smaller (<£500k), residual is 'No change' – 16%

Source: PBE Charity Tracker, 19 April-3 May 2021

As we can see from Figure 6, larger charities responding to our survey were more likely to have seen *increases* in income from government grants, trusts and foundations, commissioned services, and public donations. But the story for smaller charities seems to be different as can be seen in Figure 7. Those responding to our survey were more likely to have seen *decreases* in income from trusts and foundations, commissioned services and public donations, while the growth in income from government grants was considerably smaller.

Figure 6. A large number of larger charities experienced income growth from certain sources

*Proportion of larger charities reporting changes in selected income streams over the past 12 months (April 2020 to March 2021) compared to the previous 12 months (April 2019 to March 2020)*



Notes: n=167. For Government grants residual is 'No change' - 22%, 'Don't know' - 1%, 'N/A' - 32%. For Trusts and foundations residual is 'No change' - 28%, 'Don't know' - 1%, 'N/A' - 9%. For Commissioned services residual is 'No change' - 30%, 'Don't know' - 4%, 'N/A' - 35%. For Public donations residual is 'No change' - 22%, 'N/A' - 16%.  
 Source: PBE Charity Tracker, 19 April-3 May 2021

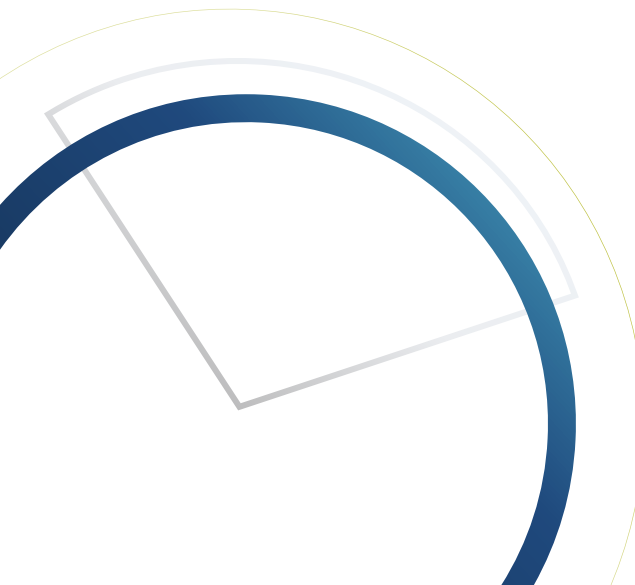
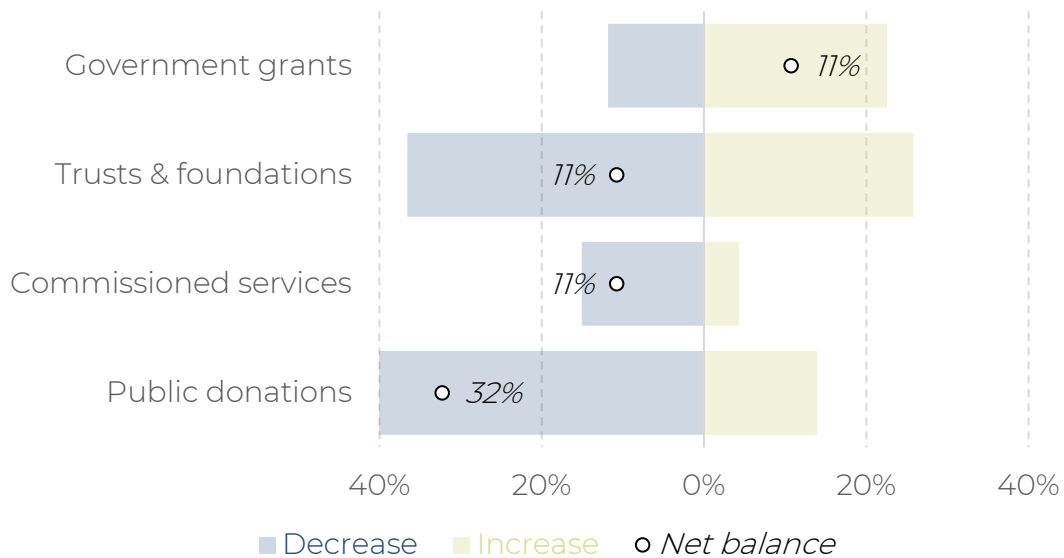


Figure 7. Smaller charities generally experienced declining income from those same sources

*Proportion of smaller charities reporting changes in selected income streams over the past 12 months (April 2020 to March 2021) compared to the previous 12 months (April 2019 to March 2020)*



Notes: n=93. For Government grants residual is 'No change' - 26%, 'N/A' - 40%. For Trusts and foundations residual is 'No change' - 20%, 'Don't know' - 1%, 'N/A' - 16%. For Commissioned services residual is 'No change' - 27%, 'N/A' - 54%. For Public donations residual is 'No change' - 25%, 'Don't know' - 1%, 'N/A' - 14%

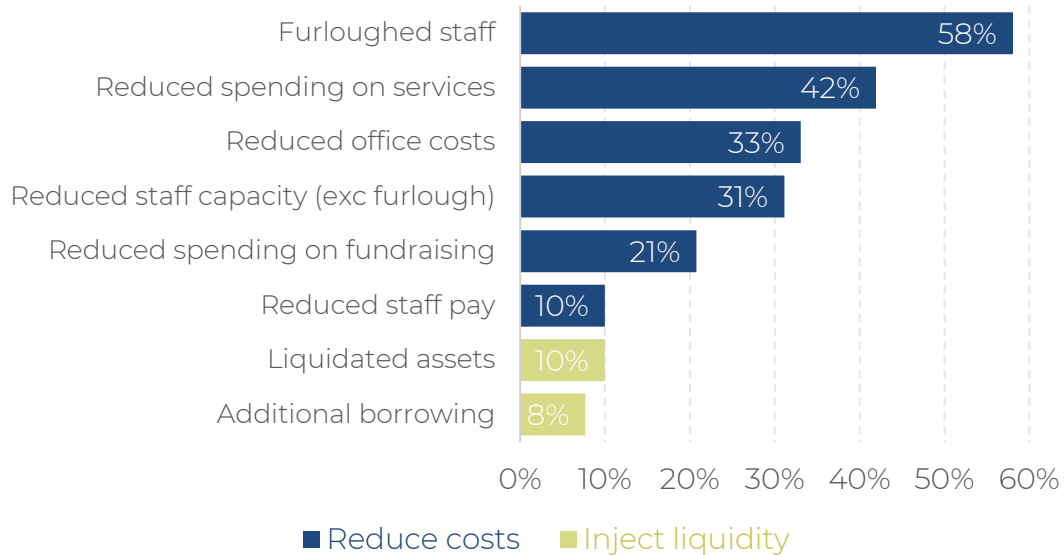
Source: PBE Charity Tracker, 19 April-3 May 2021

In response to financial challenges, many organisations pared down their operations while simultaneously facing increased demand

In order to survive the financial impact of the pandemic, many charities were forced to make drastic changes to their operating models. As Figure 8 shows, this resulted in significant cost savings aimed at reducing costs rather than taking the riskier option of injecting liquidity.

As a consequence, many charities have managed financial risks but at the expense of operational capacity. Over 4 in 10 (42 per cent) have reduced spending on service delivery, over one fifth (21 per cent) have reduced spending on fundraising activities, nearly 6 in 10 (58 per cent) have furloughed staff and almost one third (31 per cent) have reduced non-furloughed staff capacity.

Figure 8. Charities undertook significant cost-reduction exercises  
*Proportion of charities undertaking changes to ensure financial viability over the past 12 months (April 2020 to March 2021)*



Notes: n=260. Respondents could select as many options as were relevant.  
 Source: PBE Charity Tracker, 19 April-3 May 2021

Other measures taken to manage costs varied from pay freezes, delaying projects and staff recruitment, to taking steps to reduce electricity bills.

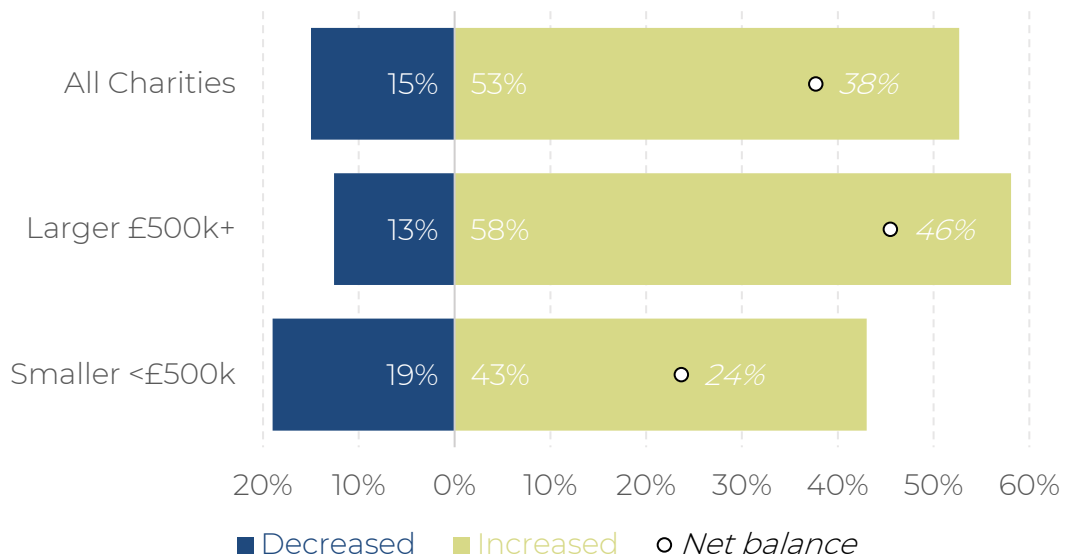
*“Staff left and restructuring meant we didn't replace everyone, our income fell, but so did our costs”*

Response to survey free text box

As demonstrated in Figure 9, a large proportion of charities responding to our survey reported significant changes in demand for their services in the past year. Over half of respondents (53 per cent) experienced an increase and only 15 per cent saw a decrease.

Figure 9. Charities reported increasing demand, with larger charities more likely to experience this

*Proportion of charities reporting changes in demand for services over the past 12 months (April 2020 to March 2021) compared to the previous 12 months (April 2019 to March 2020)*

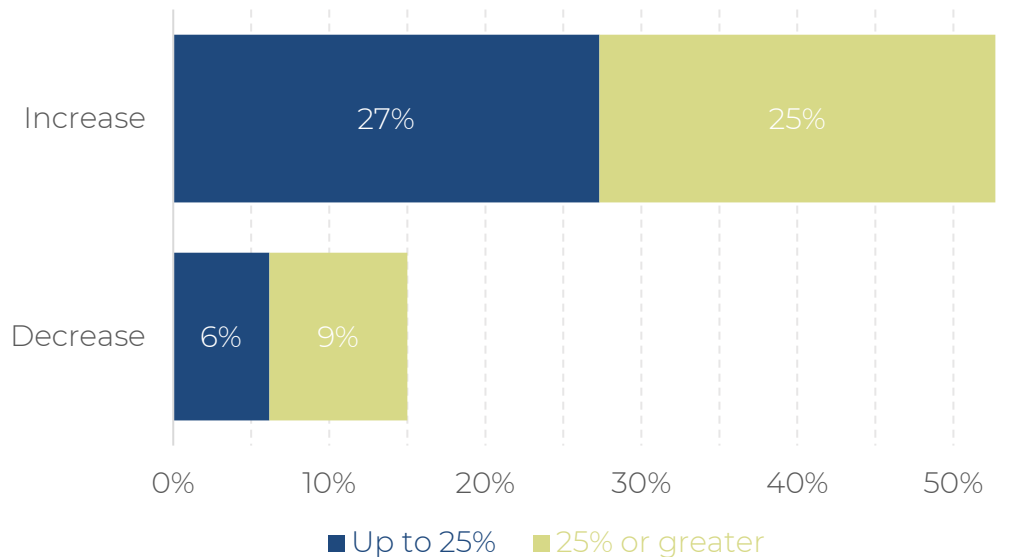


Notes: All Charities, n=260, residual is 'About the same' – 21%, 'N/A – we don't work directly with beneficiaries' – 2%, 'N/A – we've been closed due to social distancing requirements' – 8%, 'Don't know' – 2%. Larger £500k+, n=167, residual is 'About the same' – 20%, 'N/A – we don't work directly with beneficiaries' – 4%, 'N/A – we've been closed due to social distancing requirements' – 4%, 'Don't know' – 2%. Smaller <£500k, n=93, residual is 'About the same' – 22%, 'N/A – we've been closed due to social distancing requirements' – 15%, 'Don't know' – 1%

Source: PBE Charity Tracker, 19 April-3 May 2021

And Figure 10 highlights how the *scale* of these changes is a cause for concern. One-in-four (25 per cent) charities said they had seen demand rise by 25 per cent or more.

Figure 10. One-in-four charities reported a very significant rise in demand  
*Proportion of charities reporting differing scales of change in demand for services over the past 12 months (April 2020 to March 2021) compared to the previous 12 months (April 2019 to March 2020)*



Notes: PBE Charity Tracker, 19 April-3 May. n=260, residual is 'About the same' – 21%, 'N/A – we don't work directly with beneficiaries' – 2%, 'N/A – we've been closed due to social distancing requirements' – 8%, 'Don't know' – 2%  
 Source: PBE Charity Tracker, 19 April-3 May 2021

The combination of financial challenge and increased demand has prompted the vast majority of charities to make transformations to the way they operate...

While financial pressures led to a reduction in operational capacity at the same time as many were faced with increased demand, charities did more than just ensure their survival. The vast majority of organisations used their agility and determination to implement positive changes to their ways of working.

As Figure 11 clearly demonstrates, operational transformations were the most common. Over three-quarters of respondents (76 per cent) tried new delivery models, nearly six in ten (59 per cent) improved the digital skills of their workforce and almost half (48 per cent) experimented with new approaches to fundraising.

Figure 11. The majority of charities undertook operational and strategic transformations in order to survive

*Proportion of charities reporting changes in ways of working over the past 12 months (April 2020 to March 2021) compared to the previous 12 months (April 2019 to March 2020)*



Notes: n=260. Respondents could select as many options as were relevant

Source: PBE Charity Tracker, 19 April-3 May 2021

Strategic changes also played a significant role. Over four in ten (42 per cent) respondents reported increased levels of collaboration with other charities while almost one in four (23 per cent) collaborated more with local government. Meanwhile, four in ten (40 per cent) forged closer ties with local communities including almost one in three (31 per cent) welcoming new people into their volunteer workforce.

*“(Our biggest achievement has been) completing a new strategy and changing our culture away from amateurism to professional working”*

Response to survey free text box

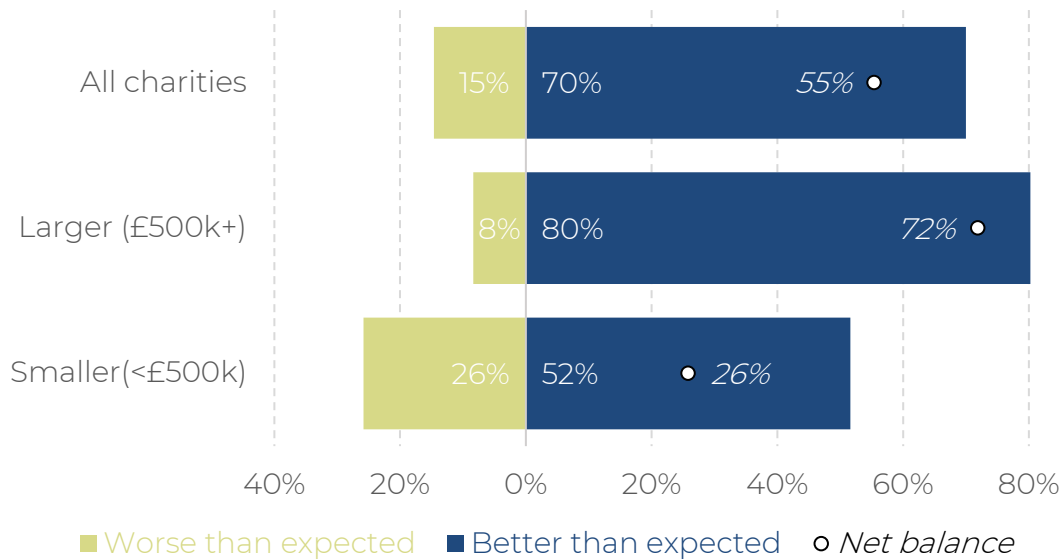
...which goes some way to explaining why things turned out better than most expected at the start of the crisis...

Figure 12 shows how, when reflecting on the past year, most charities report that it was better than they initially expected at the start of the pandemic.



Figure 12. Charities reflected that they generally performed better than they expected at the start of the pandemic

*Actual performance versus what charities expected at the start of the pandemic*



Notes: All Charities, n=260, residual is 'About as well as expected' – 15%. Larger £500k+, n=167, residual is 'About as well as expected' – 11%, 'Don't know' – 1%. Smaller <£500k, n=93, residual is 'About as well as expected' – 23%

Source: PBE Charity Tracker, 19 April-3 May 2021

This is perhaps understandable, given most initial projections will have been made before many organisations had developed and implemented their transformational plans. They will also have been formed ahead of announcements around furlough and the government's £750m charity sector support package. Undoubtedly however, the ability of charities to adapt and find new ways of responding during an extremely challenging period will have played a role too.

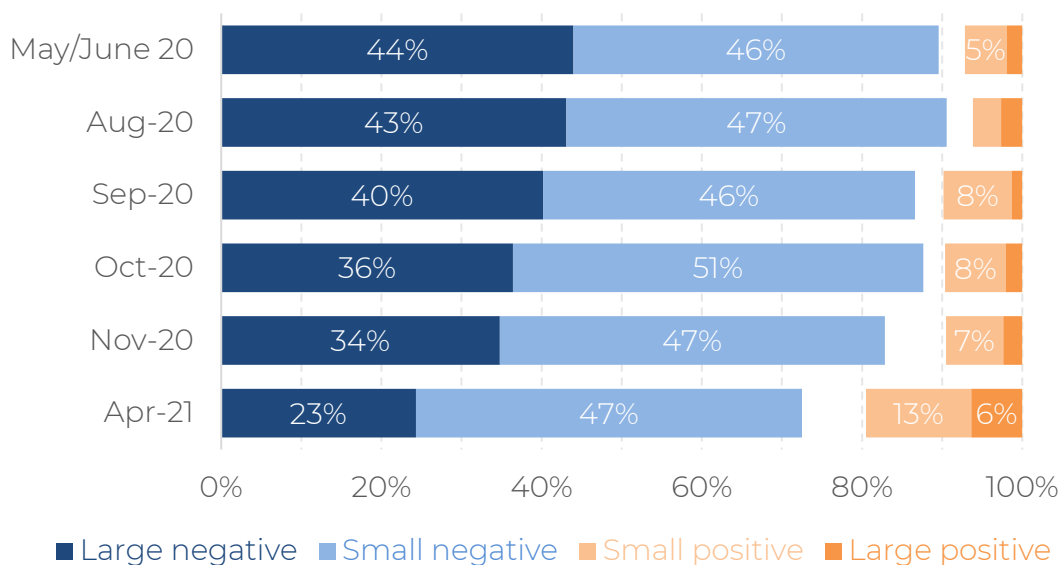
## Projections

With many charities so dramatically impacted by the pandemic over the last 12 months what are the prospects for their recovery?

The sector is overwhelmingly, but decreasingly pessimistic

Despite external financial support and successful operational and strategic transformation, sentiment about the next 12 months is overwhelmingly pessimistic, as we can see from Figure 13. While this negativity has gradually faded since the early days of the pandemic, it remains the case that seven in ten (70 per cent) charities surveyed believe the crisis will have a negative impact on their ability to deliver their objectives over the next 12 months.

Figure 13. The outlook on the impact of the pandemic on charities has been consistently pessimistic, though that sentiment has softened over time  
*Tracked expected impact of Covid-19 on charities' ability to deliver on its objectives over the next 12 months*



Notes: n=260, residuals are 'No impact' and 'Don't know' n= 216 in November, 291 in October, 224 in September, 445 in August, 1,727 responses in May-June (cumulative). The May-June and September figures relate to a question that asked about "the next six months", the August figures relate to "this financial year"

Source: PBE Charity Tracker, 19 April-3 May 2021

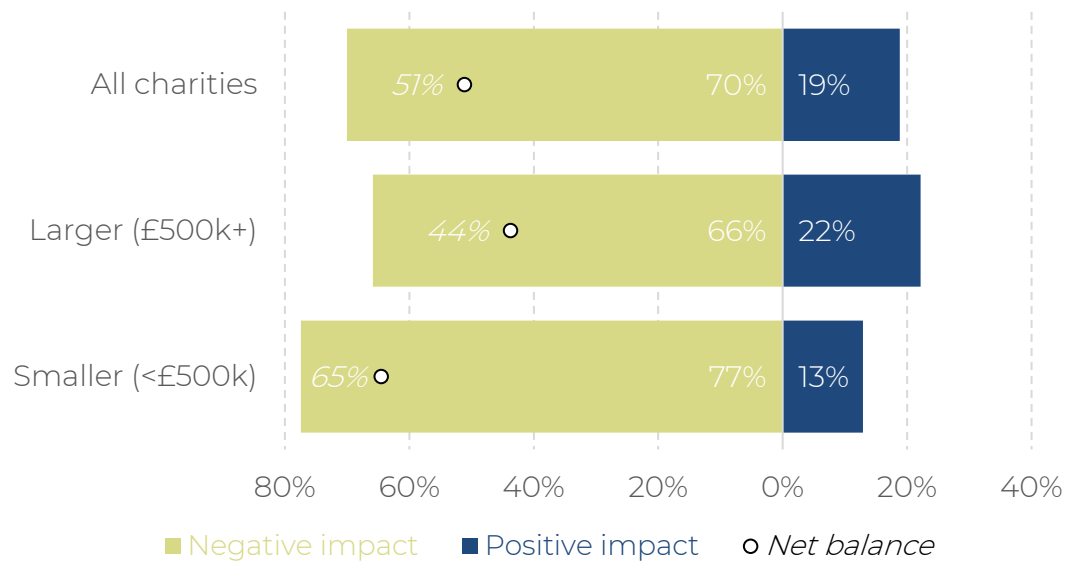
This pessimism is more acute among smaller charities

Figure 14 demonstrates the divergence between larger and smaller charities' projections for the coming 12 months. Given differences in the degree of financial challenges over the pandemic illustrated in Figure 5, it is

perhaps unsurprising that this pessimism is more severe among smaller charities. Over three-quarters (77 per cent) expect a negative impact and just over one in ten (13 per cent) expect a positive impact.

Figure 14. Smaller charities are in general more pessimistic about the year ahead

*Expected impact of Covid-19 on charities' ability to deliver on its objectives over the next 12 months*



Notes: All charities, n=260, residual is 'No impact' – 8%, 'Don't know' – 4%. Larger (£500k+), n=167, residual is 'No impact' – 9%, 'Don't know' – 3%. Smaller (<£500k), n=93, residual is 'No impact' – 5%, 'Don't know' – 4%

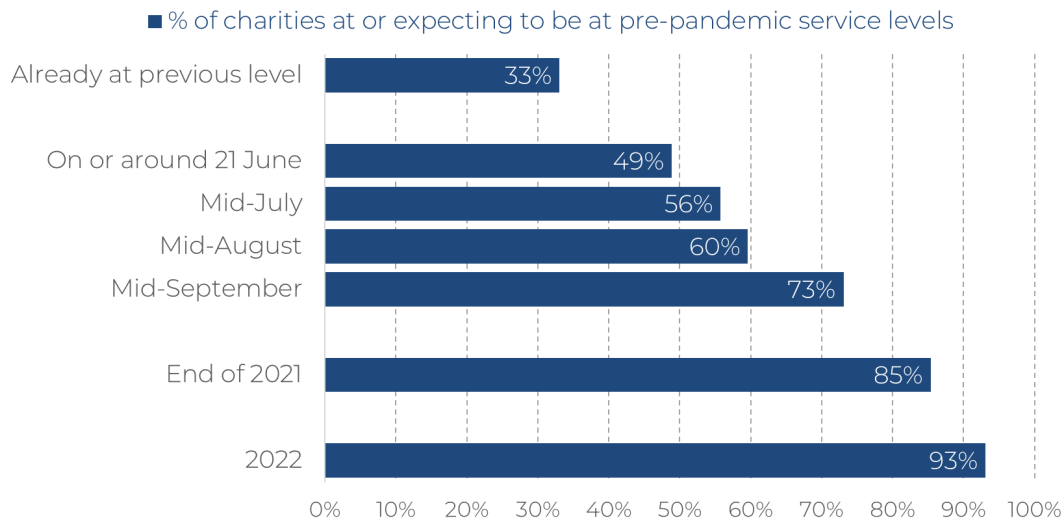
Source: PBE Charity Tracker, 19 April-3 May 2021

### The capacity crunch looks set to continue

Many of the changes that charities have had to take to mitigate financial risk are likely to weaken their ability to recover to pre-covid levels of service delivery, ultimately depleting the amount of social impact delivered by the sector as a whole. As Figure 15 shows, it is likely to take some time for the sector to scale back up: currently only one-third (33 per cent) of respondents are operating at pre-crisis levels of activity, with this figure rising to just 85 per cent even by the end of the 2021.

Figure 15. Many charities expect a gradual recovery to pre-covid levels of service throughout the year

*Percentage of charities at or expecting to be back at pre-pandemic levels of service delivery*



Notes: n=260, residual is 'We do not anticipate returning to pre-crisis delivery levels' – 3%, 'Don't know' – 4%

Source: PBE Charity Tracker, 19 April-3 May 2021

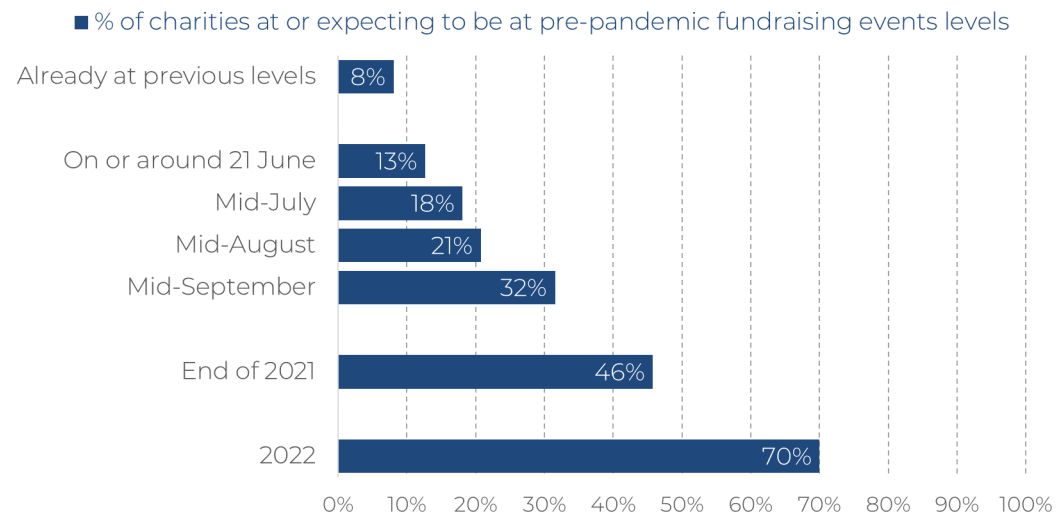
In addition to this, 4 in 10 (40 per cent) respondents are expecting to face increased demand over the coming three months, with over one-third (34 per cent) expecting to face an increase in demand that they do not have the capacity to meet. A further 6 per cent expect demand to remain stable but to see their capacity reduced.

While a slow and cautious return to fundraising events risks putting more pressure on finances

On top of the continued capacity crunch, the levels of fundraising events being undertaken are significantly lower than normal. Figure 16 shows that fewer than half of respondents (46 per cent) that usually hold fundraising events project they will return to previous levels of activity by the end of 2021.

Figure 16. Fewer than half of charities expect to be undertaking fundraising events at pre-Covid levels by the end of the year

*Proportion of charities at or expecting to be back at pre-pandemic fundraising events levels*



Notes: n=260, residual is 'We do not anticipate returning to pre-crisis fundraising events levels' – 5%, 'Don't know' – 25%

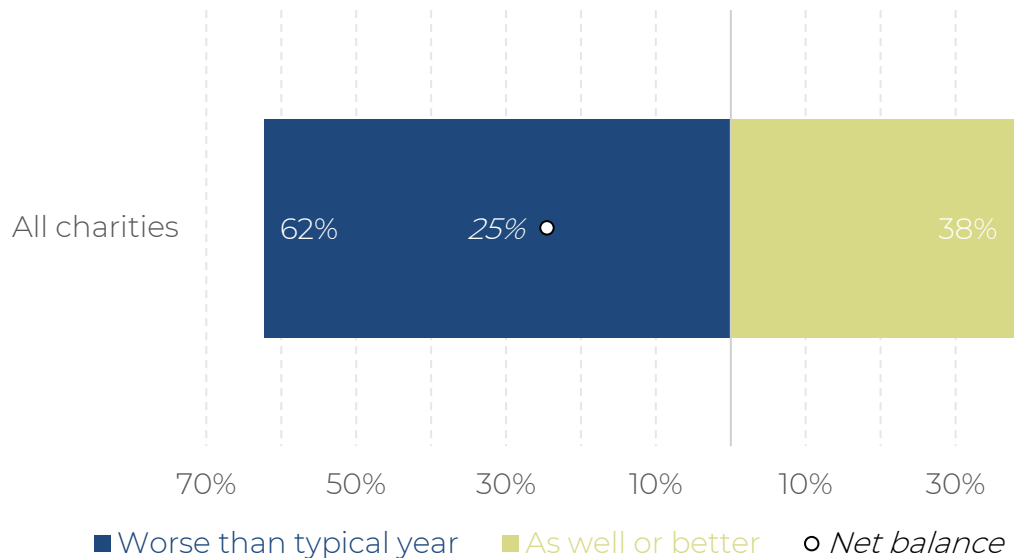
Source: PBE Charity Tracker, 19 April-3 May 2021

This is particularly true for smaller charities, with only 4 per cent currently undertaking fundraising events at pre-crisis levels compared with 10 per cent of larger charities.

Meanwhile, as we can see from Figure 17, many charities that have already organised in-person fundraising events for this year are seeing lower public demand for places than usual. The public *does* seem to be stepping up in a sizeable minority of cases, with just under 4 in 10 (38 per cent) charities reporting their booking rates as being average or better than usual. But almost two-thirds (62 per cent) are reporting that take-up is slightly or significantly worse than a typical year.

Figure 17. Public demand for places at in-person fundraising events in 2021 is considerably worse than pre-covid normality

*Booking levels for in-person fundraising events that have already been organised for 2021*



Notes: n=53  
 Source: PBE Charity Tracker, 19 April-3 May 2021

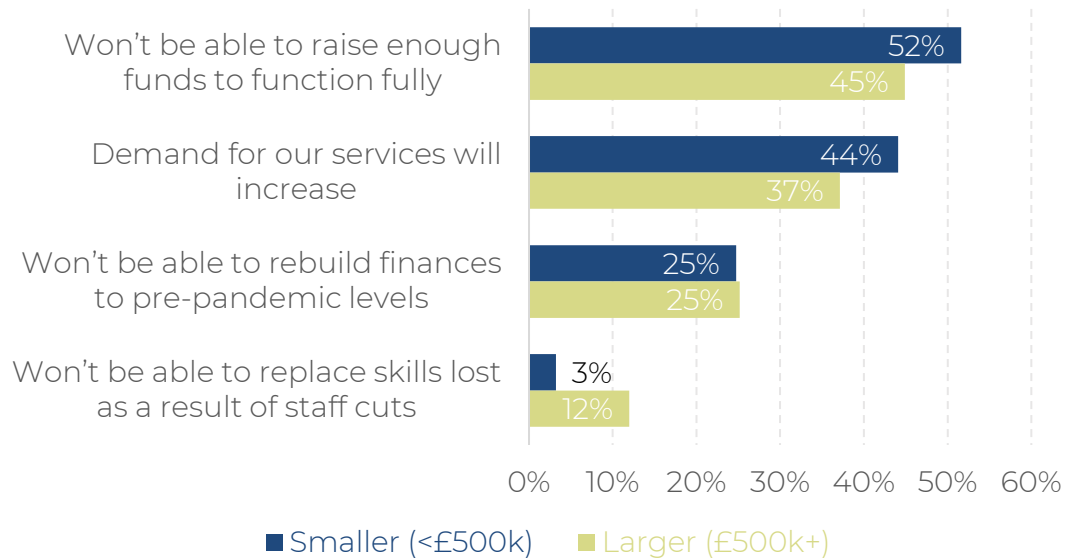
Smaller charities that are running in-person events in 2021 seem to be faring worse than larger charities, with 7 in 10 (71 per cent) reporting that bookings are at lower levels than in a typical year compared to 6 in 10 (59 per cent) larger charities.

Finances and demand growth are the biggest concerns for the year ahead

Figure 18 looks to the year ahead and charities' biggest concerns continue many of the themes we have seen in earlier iterations of the PBE Charity Tracker. Many are worried about fundraising challenges and getting finances back into shape, alongside the pressure of growing demand. Relatively few, though a reasonable minority of larger charities, are worried that skills and experience lost through staff cuts cannot be replaced.

Figure 18. Finances and increased demand continue to be the most pressing concerns for the year ahead

*Biggest concerns for the next 12 months*



Notes: n=260. Respondents could select as many options as were relevant  
 Source: PBE Charity Tracker, 19 April-3 May 2021

A number of organisations also raised concerns about challenges faced by the public services spilling over into the sector. Of primary concern is the sustainability of local government funding and the fear that future cutbacks in public services will push activity onto already overstretched charities.

## Conclusion

For many charities, the past 12 months have been a period of income challenges and demand pressure. While many parts of the economy are now preparing to bounce back as lockdown lifts, most charities expect the cumulative impact of the past year to continue taking its toll.

As a return to normality for the wider economy means that financial support schemes that large parts of the sector have relied on will begin to wind up, coupled with the compromised ability of the sector to plan and execute fundraising events, it's little wonder so many charities remain pessimistic about the year ahead.

Over the past year, 16 iterations of this survey have given us insight into the impact of the pandemic on charities in the UK and we are grateful to those people and organisations who have taken the time to complete them.

The insights we have gleaned from them has enabled us to generate vital evidence of both the scale and nature of the challenges the sector has faced and the changing nature of those challenges over the course of the past year.

This evidence has subsequently contributed to building up a picture of how the sector has fared throughout the pandemic and hopefully contributed to informing decisions that have helped to support the vital work of the UK's charities over the last 12 months.

We will continue to conduct these surveys quarterly to monitor the changing fortunes of the sector as it starts its slow road to recovery from Covid.



## Appendix

### Methodology notes

The PBE Charity Tracker is run by PBE in partnership with Charity Finance Group and Institute of Fundraising. It was live between 19 April and 3 May 2021 and received 260 responses. Charities from across the UK were represented. The results have not been weighted in any way.

For the purposes of the below tables, **smaller** is defined as any organisation with a pre-Covid annual income of less than £500,000, and **larger** as those with £500,000 or more.

All Charities n=260, Smaller <£500k n=93, Larger £500k+ n=167

Percentages may not sum to 100% due to rounding.

### Full results

Table 1. How do you expect Covid-19 to affect your charity's ability to deliver on its objectives in the next 12 months?

	Smaller <£500k	Larger £500k+	All charities
Large positive	5%	7%	6%
Small positive	8%	16%	13%
Small negative	41%	50%	47%
Large negative	37%	16%	23%
No impact	5%	9%	8%
Don't know	4%	3%	3%

Table 2. Thinking back over the past year, how has your organisation fared compared to your expectations at the start of the pandemic?

	Smaller <£500k	Larger £500k+	All charities
A lot better than we expected	25.8%	40.1%	35.0%
A little better than we expected	25.8%	40.1%	35.0%
About as well as we expected	22.6%	10.8%	15.0%
A little worse than we expected	14.0%	7.2%	9.6%
A lot worse than we expected	11.8%	1.2%	5.0%
Don't know	0.0%	0.6%	0.4%

Table 3. How has your income over the past 12 months (April 2020-March 2021) compared to the previous 12 months (April 2019-March 2020)?

	Smaller (<£500k)	(Larger £500k+)	All charities
<b>Overall income</b>			
Fallen by more than 25%	34%	15%	22%
Fallen by up to 25%	23%	30%	27%
No change	16%	14%	15%
Increased by up to 25%	15%	32%	26%
Increased by over 25%	12%	8%	10%
Don't know	0%	0%	0%
N/A	0%	0%	0%
<b>Public donations</b>			
Fallen by more than 25%	25%	16%	19%
Fallen by up to 25%	22%	14%	17%
No change	25%	22%	23%
Increased by up to 25%	5%	25%	18%
Increased by over 25%	9%	8%	8%
Don't know	1%	0%	0%
N/A	14%	16%	15%
<b>Income from fundraising other than donations</b>			
Fallen by more than 25%	46%	20%	30%
Fallen by up to 25%	11%	20%	17%
No change	16%	19%	18%
Increased by up to 25%	4%	8%	7%
Increased by over 25%	0%	1%	0%
Don't know	1%	1%	1%
N/A	22%	32%	28%
<b>Grants from trusts &amp; foundations</b>			
Fallen by more than 25%	23%	4%	11%
Fallen by up to 25%	14%	12%	13%
No change	20%	28%	25%
Increased by up to 25%	17%	38%	30%
Increased by over 25%	9%	8%	8%
Don't know	1%	1%	1%
N/A	16%	9%	12%
<b>Government grants</b>			
Fallen by more than 25%	8%	1%	3%
Fallen by up to 25%	4%	2%	3%
No change	26%	22%	23%
Increased by up to 25%	12%	24%	20%
Increased by over 25%	11%	18%	15%
Don't know	0%	1%	1%
N/A	40%	32%	35%

Corporate giving			
Fallen by more than 25%	15%	10%	12%
Fallen by up to 25%	13%	12%	12%
No change	30%	31%	31%
Increased by up to 25%	4%	14%	10%
Increased by over 25%	4%	7%	6%
Don't know	0%	2%	2%
N/A	33%	23%	27%
Income from commissioned services			
Fallen by more than 25%	9%	7%	8%
Fallen by up to 25%	6%	7%	7%
No change	27%	30%	29%
Increased by up to 25%	3%	12%	9%
Increased by over 25%	1%	4%	3%
Don't know	0%	4%	3%
N/A	54%	35%	42%
Other earned income			
Fallen by more than 25%	28%	20%	23%
Fallen by up to 25%	13%	21%	18%
No change	26%	27%	27%
Increased by up to 25%	4%	7%	6%
Increased by over 25%	1%	2%	2%
Don't know	0%	4%	3%
N/A	28%	19%	22%
Investment income			
Fallen by more than 25%	6%	4%	5%
Fallen by up to 25%	9%	21%	17%
No change	25%	34%	30%
Increased by up to 25%	3%	12%	9%
Increased by over 25%	1%	1%	1%
Don't know	1%	7%	5%
N/A	55%	22%	34%
Other sources of income			
Fallen by more than 25%	13%	8%	10%
Fallen by up to 25%	8%	11%	10%
No change	30%	35%	33%
Increased by up to 25%	1%	7%	5%
Increased by over 25%	0%	2%	1%
Don't know	1%	4%	3%
N/A	47%	32%	38%

Table 4. Thinking about your organisation's average monthly expenses - how many months' reserves do you currently hold?

	Smaller (<£500k)	Larger (£500k+)	All charities
No cash reserves	8%	1%	3%
<1 month	2%	4%	3%
1-3 months	23%	23%	23%
4-6 months	27%	31%	30%
7-12 months	18%	19%	19%
>12 months	22%	19%	20%
Don't know	1%	3%	2%

Table 5. Have you taken any of the following steps to ensure your financial viability over the last 12 months?

	Smaller (<£500k)	Larger (£500k+)	All charities
Used the Coronavirus Job Retention Scheme (furlough)	38%	69%	58%
Reduced spending on service delivery	38%	44%	42%
Reduced your office costs (less/cheaper space)	23%	39%	33%
Reduced staff numbers or hours (excluding furloughed staff)	17%	39%	31%
Reduced spending on fundraising activity	19%	22%	21%
None of the above	32%	13%	20%
Other - Write In	4%	14%	11%
Liquidated assets	3%	14%	10%
Reduced staff pay	11%	9%	10%
Taken on additional or unexpected borrowing	3%	10%	8%
Don't know	1%	0%	0%

Table 6. Do you plan to take any of the following steps to ensure your financial viability over the next 12 months?

	Smaller (<£500k)	Larger (£500k+)	All charities
Use the Coronavirus Job Retention Scheme (furlough)	20%	39%	32%
Reduce your office costs (less space or cheaper space)	12%	37%	28%
Reduce spending on service delivery	16%	23%	21%
None of the above	55%	23%	34%
Reduce staff numbers or hours (not including staff on furlough)	11%	16%	14%
Liquidate assets	2%	8%	6%
Other - Write In	6%	8%	7%
Reduce spending on fundraising activity	6%	6%	6%
Don't know	2%	5%	4%
Take on additional or unexpected borrowing	0%	4%	3%
Reduce staff pay	2%	4%	3%

Table 7. How did demand for your services over the past year (April 2020-March 2021) compare to the previous year (April 2019-March 2020)?

	Smaller <£500k	Larger £500k+	All charities
Increased by more than 25%	20%	28%	25%
Increased by up to 25%	23%	30%	27%
About the same	22%	20%	21%
Fallen by up to 25%	5%	7%	6%
Fallen by more than 25%	14%	6%	9%
N/A – we don't work directly with beneficiaries	0%	4%	2%
N/A – we've been closed due to social distancing requirements	15%	4%	8%
Don't know	1%	2%	2%

Table 8. What do you anticipate will happen to demand for your services over the next three months?

	Smaller <£500k	Larger £500k+	All charities
Increased demand for services – but we will have the capacity to meet it	37%	41%	40%
Increased demand for services – and we will not have capacity to meet it	31%	35%	34%
No change in demand for services - but our delivery capacity will decline	11%	3%	6%
Decrease in demand for services	5%	4%	4%
No impact	9%	10%	9%
N/A - we don't work directly with beneficiaries	0%	3%	2%
N/A – we will remain closed due to social distancing requirements	3%	1%	2%
Don't know	4%	4%	4%

Table 9. If you have had to reduce service delivery/activity levels due to Covid-19, when do you expect to be back to pre-pandemic levels (assuming all social distancing restrictions are lifted on 21 June)?

	Smaller <£500k	Larger £500k+	All charities
Already back to previous levels	26%	37%	33%
Before 21 June	8%	6%	7%
On or around 21 June	14%	7%	9%
Mid-July	4%	8%	7%
Mid-August	4%	4%	4%
Mid-September	15%	13%	13%
End of 2021	12%	13%	12%
2022	9%	7%	8%
We do not anticipate returning to our pre-crisis delivery levels	4%	2%	3%
Don't know	4%	4%	4%

Table 10. If you have had to cancel or cut back fundraising events due to Covid-19, when do you think you will be back to pre-crisis levels of fundraising events (assuming all social distancing restrictions are lifted on 21 June)?

	Smaller <£500k	Larger £500k+	All charities
Already back to previous level	4%	10%	8%
Before 21 June	0%	2%	2%
On or around 21 June	3%	3%	3%
Mid-July	5%	5%	5%
Mid-August	2%	3%	3%
Mid-September	13%	10%	11%
End of 2021	13%	15%	14%
2022	26%	23%	24%
We do not anticipate returning to our pre-crisis fundraising event levels	9%	4%	5%
Don't know	25%	25%	25%

Table 11. If you usually run fundraising events, have you already got events planned for after 21 June?

	Smaller <£500k	Larger £500k+	All charities
Yes – in person events only	10%	10%	10%
Yes – in person and digital events	14%	29%	24%
Yes – digital events only	8%	11%	10%
No	39%	17%	25%
N/A – we don't usually run fundraising events	30%	33%	32%

Table 12. If you have already organised in-person fundraising events for 2021, what are booking levels like?

	Smaller <£500k	Larger £500k+	All charities
Fully/oversubscribed	1%	2%	2%
Slightly more booked than in a typical year, this far in advance	0%	3%	2%
Average compared to a typical year, this far in advance	3%	4%	4%
Slightly less booked than in a typical year, this far in advance	4%	9%	7%
Significantly struggling to sell bookings	6%	5%	5%
Don't know	14%	16%	15%
We have not organised in-person events for 2021	71%	61%	65%

Table 13. What have been your charity's main achievements over the past 12 months?

	Smaller <£500k	Larger £500k+	All Charities
Tried new delivery models	70%	80%	76%
Increased workforce digital skills	48%	65%	59%
Increased support for staff wellbeing	29%	75%	58%
Increased appetite to try new things	44%	65%	58%
Met additional need	44%	65%	57%
Tried new fundraising approaches	41%	52%	48%
Collaborated more with other charities	44%	41%	42%
Deepened connections with community	39%	41%	40%
Board and staff worked more closely	33%	39%	37%
Engaged new volunteers	33%	30%	31%
Increased beneficiaries' digital skills	17%	34%	28%
Collaborated more with local govt.	19%	26%	23%
Collaborated more with businesses	14%	25%	21%
Other - Write In	5%	4%	5%
None of the above	3%	1%	2%

Table 14. What are your biggest concerns for the next 12 months?

	Smaller <£500k	Larger £500k+	All charities
Won't be able to raise enough funds to function fully	52%	45%	47%
Demand for our services will increase	44%	37%	40%
Won't be able to rebuild finances to pre-pandemic levels	25%	25%	25%
None of the above	13%	17%	15%
Other - Write In	14%	16%	15%
Won't be able to replace skills lost as a result of staff cuts	3%	12%	9%





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