

SCOTTISH THIRD SECTOR TRACKER

Sharing today. Thriving tomorrow.

Scotland's third sector organisations continued to face challenges in spring 2022, particularly in regard to staffing, volunteer recruitment and management, and finances. Spring 2022 also saw the cost of operating increase for most organisations. For many, this impacted their ability to deliver core services and activities.

Impact on third sector organisations

Most third sector organisations continued to face challenges (93%) into April 2022. The most common challenges faced were:

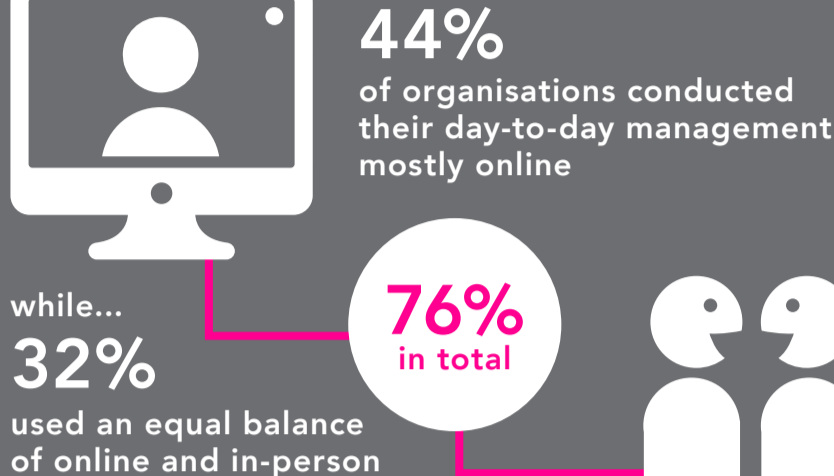


Half (50%) of organisations met or exceeded their planned programme of services in the three months to April 2022. A further 43% partially achieved their plans.



For the majority of third sector organisations, online played a large part in their day-to-day management in March/April 2022.

While many expected an increase in in-person management into the summer, most expected online to remain a large part of what they do.



65% of organisations expected to be conducting their day-to-day management either mostly online (28%) or as an equal balance of online and in-person (37%) in August 2022.

However, **more than half** of third sector organisations conducted most or all of their programmes or services **in-person** in March/April 2022, with many believing the proportion of in-person delivery would **increase** in the coming months.

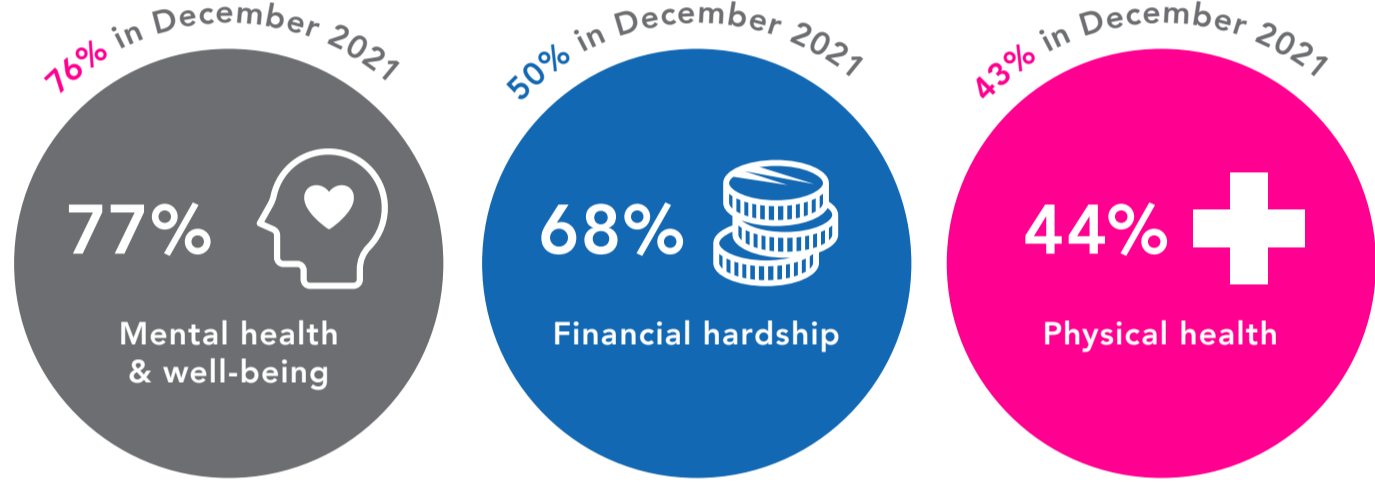


Figures exclude 'not applicable'

This was expected to increase to 67% of organisations by August 2022.

Experiences of communities

The majority, **86%**, of organisations highlighted that there were emerging needs that were worsening in their communities, consistent with December 2021 (86%):



There were notable increases in the proportion of organisations reporting:



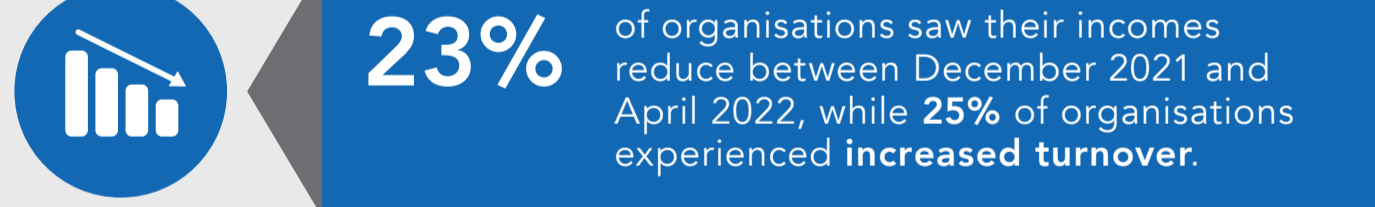
Staffing & volunteers



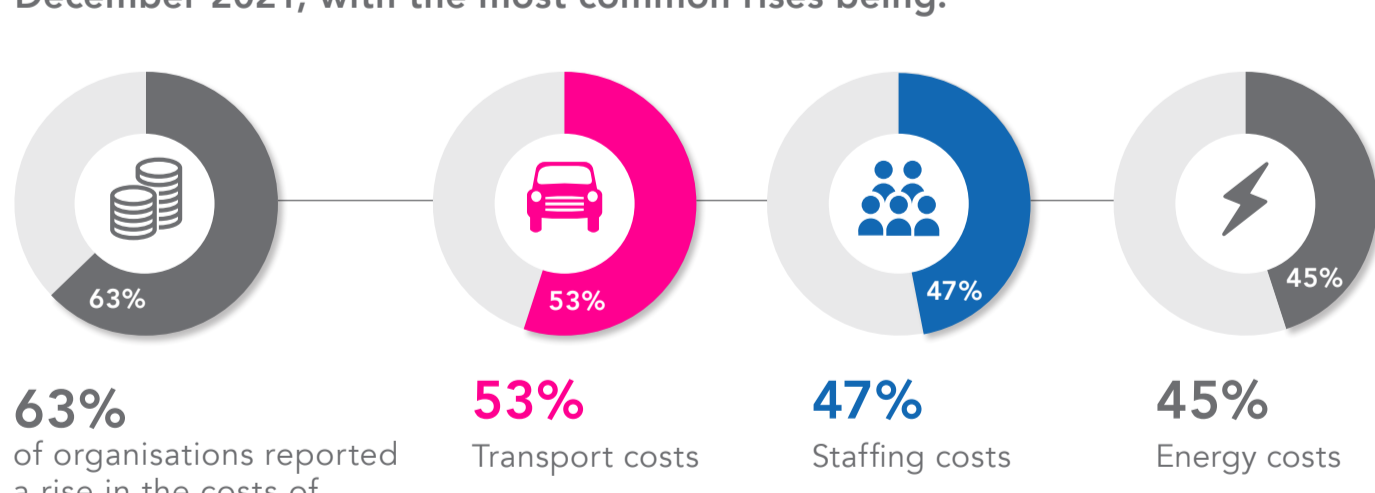
Between December 2021 and April 2022, volunteer numbers remained **relatively stable** for most organisations.



Finances



86% of organisations reported rising costs since December 2021, with the most common rises being:



Of organisations seeing rising costs of any kind, **42%** felt this affected their ability to deliver their core services or activities.



Most in the sector are relatively confident of their future. In April 2022, **92%** of third sector organisations were confident that they would still be operating in 12 months' time, in line with December 2021 at **92%**.

These results are based on a survey of 457 third sector organisations based or operating in Scotland. Interviews were conducted online. The research took place between March and April 2022. 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 wave three of a longitudinal survey intended to run quarterly for a further three waves. Research and design by djsresearch.co.uk.

