How fundraising changed in the month after lockdown
Virgin Money Giving is committed to supporting its charity partners during these turbulent times and we thought you might find our analysis of online fundraising patterns since the start of the pandemic helpful in order to put your own experiences into context.

Many vital charities have been impacted hard with reduced income during Covid-19, and it remains critical that they have support as we move into the first phase of recovery. These are the charities that will be providing vital support to those people who have suffered most during lockdown, including those affected by cancer treatment delays and increases in mental health issues, domestic abuse and child poverty.

Whilst we have seen some truly inspiring fundraising stories over recent months and the growth of supporter lead virtual fundraising, what is clear from the report is that donation behaviour has changed dramatically over recent weeks, both in terms of the amount given and the causes supported.

Jo Barnett
Executive Director at Virgin Money Giving

We broke fundraising records

<table>
<thead>
<tr>
<th>1.15m</th>
<th>151%</th>
</tr>
</thead>
<tbody>
<tr>
<td>donations</td>
<td>increase in average donation value</td>
</tr>
<tr>
<td>£19m</td>
<td>donated in total</td>
</tr>
</tbody>
</table>

We’re right behind the causes helping people during the pandemic

<table>
<thead>
<tr>
<th>2000+</th>
<th>3000+</th>
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<tbody>
<tr>
<td>rise in donations to NHS causes</td>
<td>rise in donations to food banks</td>
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</table>

However, excluding NHS causes, donations fell by;

<table>
<thead>
<tr>
<th>93%</th>
<th>44%</th>
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<tbody>
<tr>
<td>across the top 50 charities</td>
<td>across the total charity sector</td>
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With some causes seeing a significant drop

- 96% for brain disease causes
- 87% for cancer related causes
- 85% for mental health causes
- 79% for children related causes
**Key Impact Dates**

**December 31, 2019**
Chinese authorities tell the World Health Organisation about a respiratory illness in the city of Wuhan.

**January 31, 2020**
The first people in the UK – two members of the same family – test positive for coronavirus.
Britons arriving on flights from Wuhan are taken into quarantine.

**March 4, 2020**
A woman in her 70s dies at the Royal Berkshire Hospital in Reading, the first person in the UK to die of coronavirus.

**March 13, 2020**
The Virgin Money London Marathon is postponed to Sunday 4th October.

**March 23, 2020**
The Prime Minister announces unprecedented lockdown measures in a dramatic TV address.
People can only leave home for limited reasons and Britons overseas are told to return to the UK.

Full data range used in the report is 21st Jan to 17th May. There are stages referred to that are driven by Marathon postponement (13th March), U.K Lockdown (23rd March), 2.6 event (26th April) and Post Marathon / 2.6 period.
The story

— Overall fundraising during the Covid-19 lockdown period has remained strong - this reflects the amount of goodwill and generosity shown by the public. It’s been strongly directed towards the NHS via a number of standout campaigns. This includes big single donations and huge donations through large-scale engagement, such as the Run For Heroes social media challenge.
  - Virgin Money Giving processed a record breaking 1.15m individual donations in the 4 weeks from the start of lockdown to 21 April.
  - Run For Heroes alone generated over 650,000 donations in April.
  - Beyond the NHS, however, Covid-19 has had a significant and sustained impact on the UK charity market.
  
— As well as the impact seen in offline fundraising, like the closure of charity shops and cancellation of local charity fundraising initiatives, the value of online fundraising has decreased significantly for the established charity sector. This has coincided with two important events.
  - **March 13, 2020** - Virgin Money London Marathon is postponed until 4 October.
  - **March 23, 2020** - The PM announces unprecedented lockdown measures. People can only leave home for limited reasons and Britons overseas are told to return to the UK.

— Online fundraising has historically had a strong link to mass participation or larger charity own events which tend to start in the Spring and run through to the Autumn. The cancellation or postponement of events combined with a lockdown period fundamentally has changed fundraiser and donor behaviour over recent months.

— Large and established charities are more affected by event cancellations in year-on-year performance.
The story

- Event cancellations and postponements, and a move away from established charity fundraising, has had a negative year-on-year impact on important charity sectors. For example, the cancer, children, disability and mental health areas.

- We’ve been looking at the impact of reduced donations on non-NHS charities as the magnitude of the coronavirus crisis becomes clear.

- The Top-50 group of charities – this is worked out by the donation value received in Jan-Apr 2019 – saw fundraising income drop by 93% (7% performance of same period in 2019) in the month after lockdown.

- This group has since seen a small year-on-year recovery during the period from 20 April to a level closer to 15% of 2019 performance. This is due to initiatives such as the 2.6 campaign, which has helped generate fundraising income that would have been lost because of the Virgin Money London Marathon postponement. However, it can’t replace such an important event.

- The 2.6 Challenge, which was spearheaded by London Marathon Events and other UK mass-participation event providers, was successful and it helped the largest number of charities seen in Virgin Money Giving history for a single event.

- Smaller charities have seen a stronger recovery, with the 2.6 Challenge being a driving factor, as their supporters took part to fundraise for them. However, smaller charities who are less reliant on mass participation events were still affected significantly post lockdown, potentially due to a focus towards Covid-19 related fundraising.

Covid-19 Impact on U.K Charities

We anticipate a loss of 35-50% of our fundraising this year. We’re doing everything we can to help make sure cancer doesn’t become the ‘forgotten C’ during the coronavirus pandemic, but we rely almost entirely on public donations.

Claire Rooney
Executive Director of Fundraising
Macmillan Cancer Support
The VMG total charity performance - excluding specific Covid-19 charities such as NHS, Mail Force and Chronic Disease Research Foundation – reduced to 40% compared to the previous year. This is based upon adjusting the pre-lockdown performance level to 100% of the same period last year, to remove any other underlying performance influences we may have seen.

- The level increased slightly to 46% year on year during the end of April 2.6 Challenge window. The NHS also benefitted from the 2.6 Challenge fundraising so this isn’t a reflection of the event itself. We should also remember that the % year-on-year figure competes against the 2019 Virgin Money London Marathon.

- The post-marathon period seems to be settling at 50% of usual donations year-on-year due to ongoing event cancellations.
Total year on year performance (non Covid-19 related causes).

VMG overall year-on-year donation value % - total three day daily average. Excluding NHS & Chronic Disease Research Foundation & Mail Force.

Value of Daily Donations (£) as % of Previous Year

- Mar 11th: WHO declares Pandemic
- Mar 13th: VMLM Postponed
- Mar 23rd: UK Lockdown
- 2.6 Event Weekend
Total year on year performance (non Covid-19 related causes).

100% base level of last year in terms of key performance
Value of Daily Donations (£) as % of Previous Year
Total year on year performance (non Covid-19 related causes). Charity grouping

Normalised to 100% base level of last year in terms of key performance
Value of Daily Donations as % of 2019 (Normalised to 2019 pre-lockdown)
Pre-lockdown, VMG-registered charities supporting the NHS were performing at a similar level to 2019. In the month following lockdown, donation income increased by 2000% year-on-year.
Pre-lockdown, VMG-registered charities supporting food banks were performing at a slightly stronger level than in 2019. In the month after lockdown, donation income increased by 3000% year-on-year.
Traditional Sector Impact % Change Examples

Cancer

Pre-lockdown, VMG-registered charities supporting the cancer sector were performing at a similar level to 2019. In the month following lockdown (20 March–20 April), donation income fell by 87% year-on-year.
Traditional Sector Impact % Change Examples

Mental Health

Pre-lockdown, Virgin Money Giving registered charities supporting the mental health sector were performing at a similar level to 2019. In the month after lockdown, donation income dropped by 85% year-on-year.
Pre-lockdown, Virgin Money Giving registered charities supporting the children sector were performing at a similar level to 2019. In the month following lockdown (20 March- 20 April), donation income fell by 79% year-on-year.
Disability

Pre-lockdown, Virgin Money Giving registered charities supporting the disability sector were performing at a stronger level to 2019. In the month following lockdown (20 March- 20 April), donation income fell by 60% year-on-year.

Other Impacted sectors include homelessness, brain diseases and education to different degrees. The examples shown for cancer mental health, children and disability were chosen because of the similarity to 2019 performance pre-lockdown.