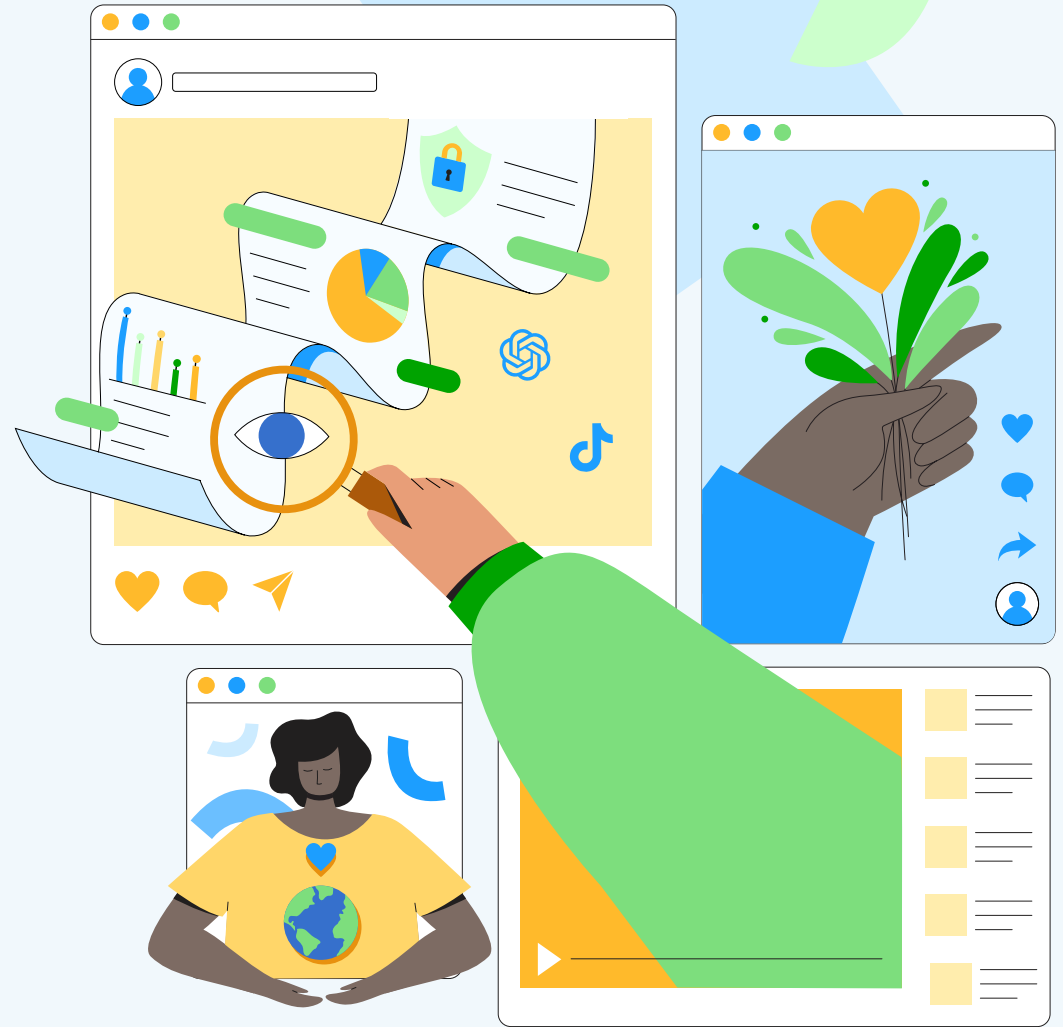# Charity Digital Skills Report 2024
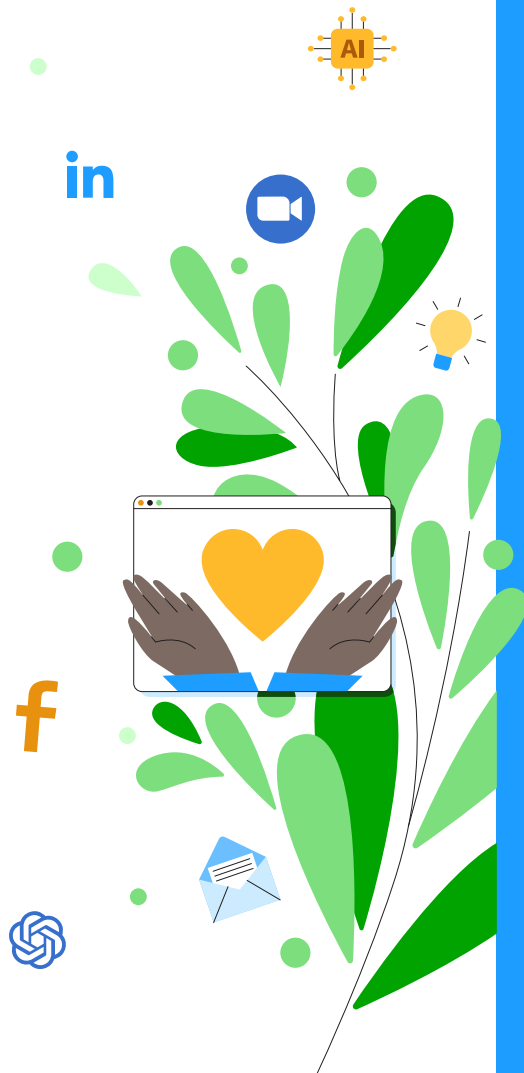
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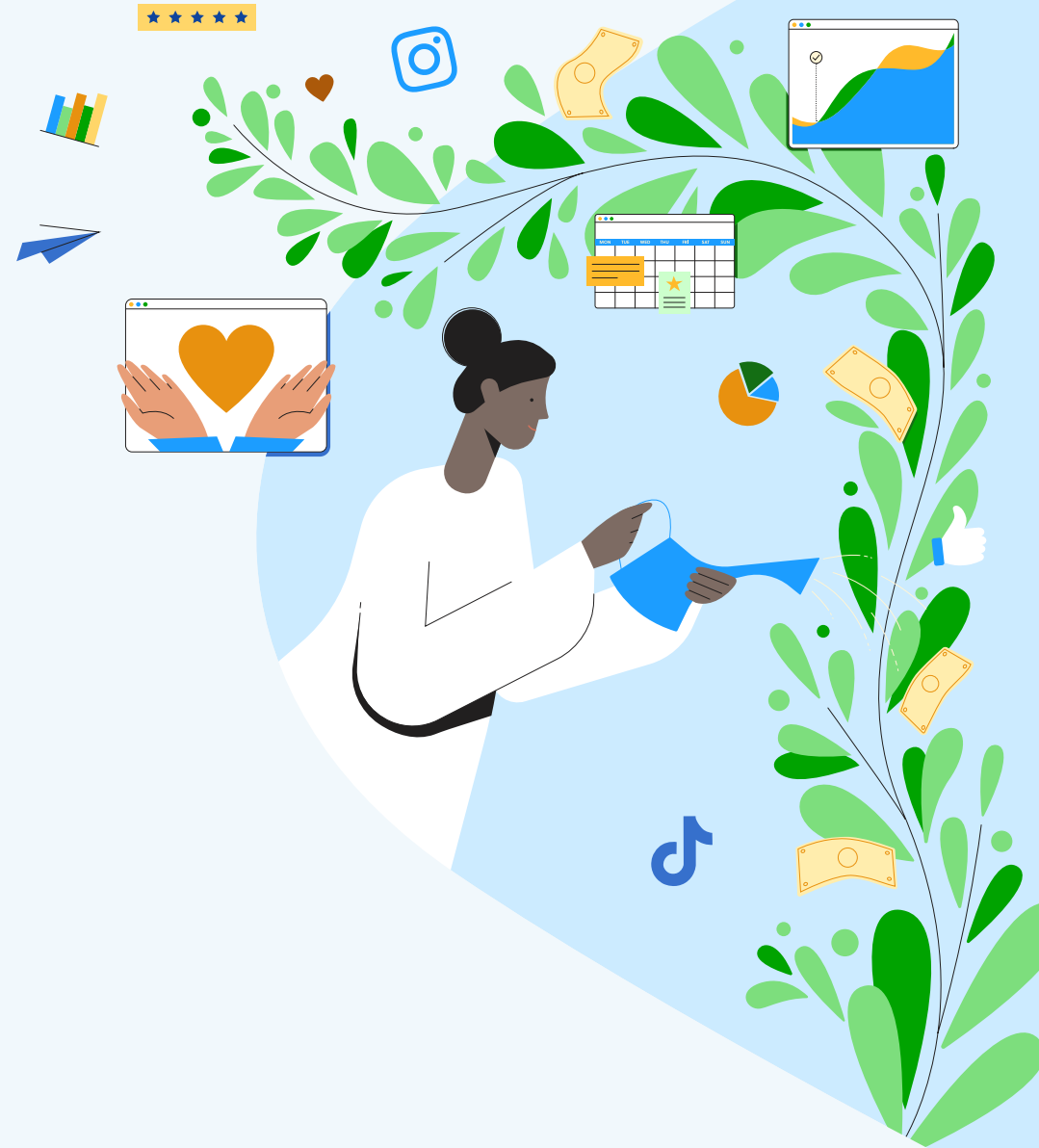
zoe amar
digital

THINK
SOCIAL
TECH

Contents

Introduction

Introduction

This report is the annual barometer of digital adoption, skills, attitudes, funding and support needs across the sector. Every year since 2017, we have asked charities to tell us about their experiences with digital and share their insights to inform funding and support. This year, we are incredibly grateful to the 635 charities who took the time to contribute, as well as the 30 stakeholders and user testers who collaborated with us to ask the right questions.

The 2024 report would not be possible without the support of our partners *Catalyst*, *Microsoft*, *Pixeled Eggs* and *Stopgap*, all of whom have helped shape and make the report a helpful resource for the sector. We are very grateful to have their support.

In 2024 our aims were to:

Track charities' changing digital priorities, skills, confidence and attitudes.

Understand how charities are engaging with AI.

Identify the support and funding charities need to move forward with digital.

Build further insights about the needs of small charities.

Understand specific priorities and barriers facing charities led by marginalised groups.
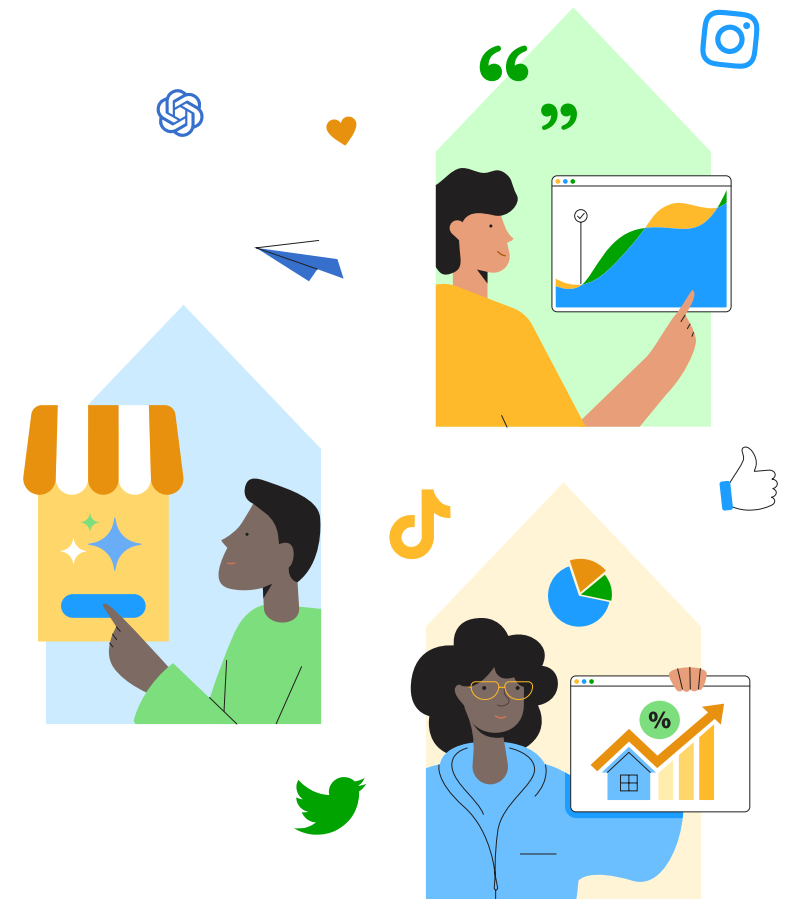
In 2024 we have built on our diversity, equality and inclusion approach developed with our consultant *Eshe Kiama Zuri*. They also helped us undertake targeted outreach with specific marginalised groups so that we can gather data about their digital funding and support needs. We are again very grateful for Eshe's support, guidance and challenge.

If we had to summarise the 2024 Charity Digital Skills Report, it is a year when tech use across the sector has evolved and yet overall digital progress remains static. We can clearly see the impact of the cost of living crisis on charities and their organisational development. A lack of capacity, headspace and financial pressures are all preventing progress with digital.

Yet despite these challenges, it's promising to see half of charities are approaching digital strategically and 80% of charities see digital as an organisational priority. Our data also shows us that charities are getting to grips with AI tools and technology.

Once again, our report shows how charities need time, capacity, people, support and funding. This is vital to develop their digital and data skills, leadership and use of digital tools and infrastructure. We can see that there is a significant gap between the digital capacity in large and small charities. In turn, the smaller charities in our sample are more likely to be led by people with lived experience and specific marginalised groups.

The contrast we see in the report between AI adoption, perennial gaps in skills, leadership challenges, and funding needs indicates how emerging tech adoption across the sector may be held back by systemic issues in the sector. Now is the time to tackle, and close, these gaps, or the sector will run the risk of being left behind in the AI revolution.
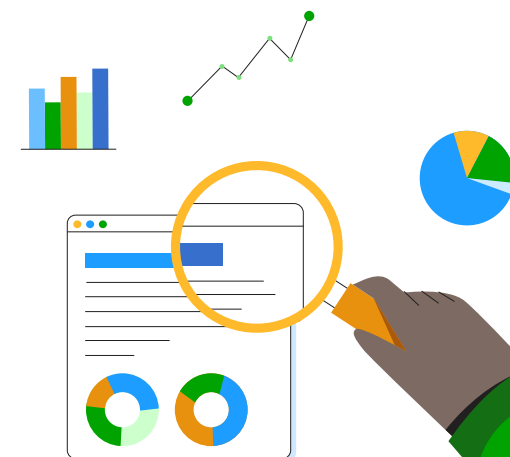
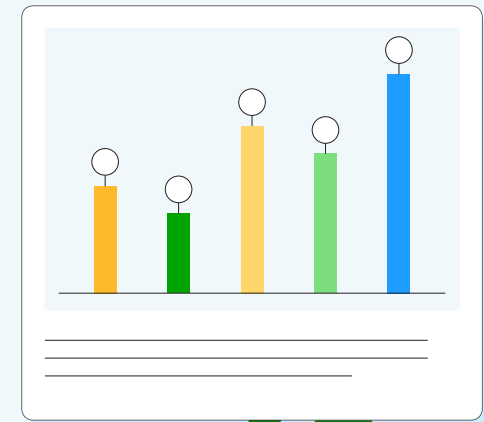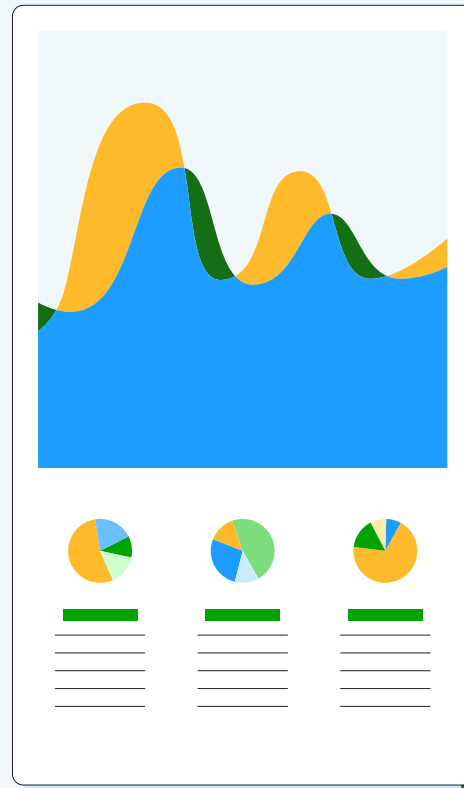Thank you for supporting our report.

Zoe Amar and Nissa Ramsay

We'd love to hear what you think about the report, how you are using the findings and how we might build on this next year in our *feedback form*.
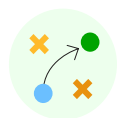
You can find all our data tables and further support on the resources section of our *website*.

Key findings

Key findings

Strategy

- Overall, half (50%) of charities have a strategy in place for digital (advanced or advancing categories). This is very similar to the 48% last year, indicating that digital progress has been static since 2023.

- Furthermore, 45% say that their digital strategy is a priority this year.

- A quarter of charities say that digital is one of their top organisational priorities (27%).

- Three quarters of charities (76%) have made progress with digital this year, for example through increasing their profile and reach.
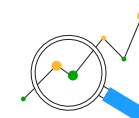
Data

- Data is a high priority for 1 in 4 charities. Charities give a similar level of priority to digital and data. Large charities are more likely to prioritise data, with 37% saying this is a high priority, compared to 18% of small charities.

- 48% say using data to improve services or operations is a priority.

- 42% rate themselves as excellent at GDPR compliance, up from 34% last year, and a further 48% say they are fair (90% in total are good or excellent).

- 22% are excellent at cybersecurity, comparable to last year. Overall, three quarters (74%) say they are good or excellent.

- Continuing a trend from previous years, charities still lack confidence with data. 31% of charities are poor or not engaging with collecting, managing and using data. In addition, a third (34%) are poor or are not using data to inform decision making.

- Charities most need external support to improve their storytelling with data (48%) and to better analyse and make sense of their data (45%). A third of charities (32%), both small and large, would like support with data, to focus on how to choose a CRM or review their needs for it.

Digital marketing

- The top digital priority for charities is building online presence and social media engagement (54% of charities see it as a priority). However, this has decreased significantly from 79% last year to 54% this year.

- 48% say that growing reach is a priority.

- Almost a third (29%) of charities are poor at making the most of their website. This has barely changed since 2023, indicating untapped potential. A third (31%) say they are poor at website and analytics data.

- Nearly a third of charities say their skills are poor (30%) at search engine optimisation (SEO).

- Despite volatility on X (formerly Twitter), almost half (48%) are continuing to use social media as they always have.

- Just 14% are taking steps to protect staff using social media, only 14% are spending more time monitoring social media (e.g. for misinformation) and a mere 10% have developed their crisis management plans.

Digital fundraising

- 52% say increasing digital fundraising is a priority for them this year.

- 4 out of 10 (41%) are poor at digital fundraising and a further 25% don't fundraise digitally, giving a total of 66%. This is a worrying increase on the 55% who said they were poor at this last year.

Digital skills

- The top 3 skills are the same as last year:

  - **Social media:** 27% rate themselves as excellent at social media.

  - **Creating engaging content:** 1 in 4 (25%) are strong at creating engaging digital content, whilst a further 54% are fair at this.

  - **Email marketing:** 15% say they are excellent at this, whilst 41% feel they are fair.

- Growing staff/volunteer digital skills is a priority for 46% of charities.

- Charities struggle most with digital fundraising, website and analytics data and search engine optimisation (see Digital marketing section above).

- 90% of charities still rate themselves as fair or excellent at basic digital skills. However, only a small proportion rate themselves as excellent (24%), compared to 64% last year who said their basic digital skills were excellent.

Barriers to digital progress

- Almost 7 out of 10 charities (68%) are struggling to progress digitally due to their finances, headspace and capacity.

- Charities are facing many constraints to digital progress in the current climate and the cost of living crisis, with an increase in need for digital funds this year.

- The most significant barriers to progressing with digital are: squeezed organisational finances (68%) and lack of headspace and capacity (66%). Last year, only 27% said the cost of living crisis was affecting their progress.

- Last year, the top challenge faced by 49% of charities was 'finding funds to invest in our devices, software and infrastructure'. This challenge has increased to 60% this year and has been surpassed by the challenge of organisational finances and capacity.

IT and infrastructure

- 45% rate their IT provision as good or excellent and not a barrier to their development. This is similar to 2023.

- Finding funds to invest in infrastructure, systems and tools is a barrier for 60% of charities, a significant increase on the 49% last year.

- This year, only a third (32%) of charities are prioritising investing in infrastructure and systems, significantly less than 45% last year.

- There is a clear difference between large and small here, with only a quarter (24%) of small charities prioritising this, compared to nearly half of large charities (47%).

- 30% of small charities do not have a CRM, compared to 13% of large charities.

- 24% of large charities say that their CRM does not meet their needs.

- 33% say their skills to resource digital effectively are poor and 5% don't do this at all.

Digital service delivery

- A third of charities are poor at or not using digital tools in service delivery (36%). Nearly half (45%) say they are fair at this, similar to 2023.

- 81% of charities are using digital tools in service delivery, either behind the scenes, in a supportive role or as an integral role. When we compare by size, 88% of large charities are delivering digital services, compared to 56% of small charities.

- Only 32% of charities say they are undertaking user research to inform their service design. This is not surprising given that 33% say they have poor user research skills and 15% say they don't do this (48% in total). This is similar to the 43% who said they were poor at this in 2023.

- It is promising to see that 37% of charities say they are co-designing their services with users. This rises to 42% of charities that are providing frontline services.

Digital inclusion

- Only 16% of charities providing frontline services offer digital inclusion support.

- There are minimal differences between large and small charities here.

- 26% of charities supporting older people as a main target group are providing digital inclusion support and 30% see this as a top priority this year.

- Over a quarter of charities providing frontline services (27%) see digital inclusion as a top priority for their organisation this year. This is the same as the 27% who saw this as a priority last year. However, only 17% say that improving digital inclusion is a key achievement in the last 12 months.

- We can see a slightly greater prioritisation of digital inclusion support among organisations tackling racial injustice. A third (33%) say this is a key priority for their organisation this year and 29% say this is a key need for funding.
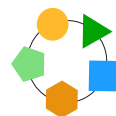
Equality, diversity and inclusion in digital services

- A third (33%) say their digital services are inclusive to a great extent (29% last year), a further 62% say they are inclusive to some extent (95% in total).

- However, only 15% say they are monitoring diversity and inclusion to a great extent and nearly a third (31%) are not doing this at all. This is a key skills gap.

- Only 18% saying their services are informed to a great extent by research with users from diverse communities (compared to 25% last year). Nearly a third of organisations say they are not undertaking user research with diverse groups (30%).

- 74% of charities say their services are developed by diverse teams. However, only 15% say they do this to a great extent.

- 23% say their services are accessible to a great extent (28% in 2023), whilst 65% say they are to some extent, indicating this is a key area for improvement.

- It's surprising to see that a commitment to diversity and inclusion was only important to 52% of charities (and only very important to 18% when choosing suppliers). A similar level of importance is given to how the supplier involved people with lived experience. This is less than 1 in 5 charities.

AI - Emerging tech context

- Over half of charities (56%) are not engaging with emerging tech trends, with 40% saying they have poor skills and capacity and 16% saying they don't do this. When we look at small charities, this rises to 60%. For all charities who say they are at the curious and starting out stage of digital, this rises to 65%.

- 31% want their board to learn about emerging tech and AI tools.

- 39% want their CEO to keep up to date with emerging tech trends and AI tools and 34% want their CEO to understand risks and opportunities for emerging tech.

AI trends

- It is surprising to see that only a third of charities (34%) see using AI tools as a priority this year for their organisation.

- 65% of charities either strongly agree or agree that AI developments are relevant to them. This is less than the 78% who agreed with this statement in our AI poll for the Charity Digital Skills Report in 2023.

- 61% of charities are currently using AI in their day-to-day work or operations. Of these, 45% of charities are using AI tools informally (e.g. trying out tools) whilst only 11% are using AI tools across their organisation and a further 5% are working towards this. This is a significant increase on the 35% using AI tools last year.

- The most popular uses and functions of AI tools are:
  1. Developing online content (e.g. social media posts and generating images) (33%).
  2. Administrative tasks such as summarising meeting notes (32%).
  3. Drafting documents and reports (28%).
  4. Generating ideas/creativity (e.g. to start a project) (27%).
  5. Research and information gathering (e.g. about a topic, current advice) (24%).

- 4 out of 10 (42%) of charities are using or looking to use AI in their service delivery.

- 37% of charities say they are not taking any steps to engage further with AI. This rises to 47% of small charities and falls to only 14% of large charities.

- Half of charities (57%) are looking to take part in external training, support, guidance or informal opportunities to engage further with AI this year.

- Skills gaps are the biggest barriers charities face, with a lack of skills and expertise cited by 50% of charities and a lack of training to upskill by 34%.

- Almost a third (31%) are concerned about data privacy, GDPR and security.

- Charities are also worried about factual accuracy (31%), potential bias and discrimination (31%) and human rights and environmental concerns (31%).

- Costs of AI tools are an issue for 29% of charities.

- Almost 1 in 5 (19%) want to understand the approach from regulators.

- Charities are at exploratory stages with developing their AI skills. Almost two thirds (62%) want to develop a general understanding of AI and how charities are using it, 58% want practical knowledge of how to use AI tools responsibly, and almost half (48%) want to know about use cases in their services.

- 40% are keen to skill up in how to assess AI risks and adopt AI responsibly, with 38% wanting to develop AI policies and governance.

Tech and climate change

- 1 in 4 charities are using digital to reduce their carbon footprint.

- Whilst it is worrying that 26% are not taking steps to use digital to reduce their tech carbon footprint, it is positive that 1 in 4 (25%) are taking steps to address this. A further 19% are informally working on this issue, which is positive.

- Almost 1 in 4 (24%) have a CEO committed to reducing their tech carbon footprint.

- 24% are learning from other charities, suppliers, or organisations.

- 18% are seeking guidance from experts.

- 49% are considering how they use digital tools to deal with their tech carbon footprint (e.g. remote working to reduce travel).

- Barriers to progress include more pressing priorities (52%) and limited knowledge and expertise (39%).

- When charities are choosing digital suppliers, 54% see their environmental principles and approach as an important factor in their decision. However, other factors such as value for money and experience are more important.

Leadership

- For the sixth consecutive year, charities need their leaders to provide a vision of what digital can help them achieve. When asked which digital skills, knowledge or behaviours CEOs needed to change to ensure digital progress, most and more than half (55%) want their CEO to provide a clear vision for digital, similar to last year.

- This is closely followed by 40% saying they want their CEO to develop their vision and plan for improving their data and 39% want their CEO to develop and execute a digital strategy (similar to 43% in 2023).Only 6% say their CEO has relevant digital skills. This rises to 10% for those who are at the advancing or advanced stage with digital and have a strategy in place. This shows that digital learning is always important, regardless of progress.

- 39% want their CEO to keep up to date with emerging trends and AI tools, indicating that CEOs must invest time in horizon scanning. A further 34% want their CEO to understand risks and opportunities for emerging tech.

Trustees

- In total, 62% say their trustees' digital skills are low or could improve.

- Both large (54%) and small charities (66%) say their trustees' digital skills are low or in need of improvement.

- This is a challenge for charities at every stage of their digital journey. Even for charities at the advancing and advanced stages, 51% say their trustees' digital skills are low or in need of improvement.

- This report has found digital skills gaps on boards every year since the report began and it is clearly a systemic challenge.

- 41% of charities do not have a digital trustee, higher than the 35% last year.

- The results are similar by size, with 46% of small and 38% of large charities without a digital trustee.

- It is worrying, however, that for charities that do have digital trustees, 54% still felt digital skills were low or could improve at board level. This shows us that digital trustees are only part of the solution to digital skills gaps on boards.

Funding and support

Accessing funding

- Only a third of charities applied for digital funding this year (34%), whilst a further 18% of charities (and 22% of small charities) applied for funding but did not include any digital costs in their applications.

- A quarter of charities (24%) successfully accessed digital funding. Of these, 6% received funding for substantial digital costs, whilst 19% (1 in 5) accessed funding for some digital costs, such as new devices or staff time.

- 26% of large charities accessed digital funding, compared to 19% of small charities.

Funding needs

- Three quarters of charities need funding to create capacity and time to work on organisational development and digital strategy (73%).

- 50% of charities say their top priority and need for funding is to bring in digital expertise. This includes the charities who want to access external advice and expertise (37%), as well as the charities looking to employ core digital staff (22%), with many charities saying that they needed both.

- 43% of charities (and 49% of small charities) say they most need funding to access training for staff and volunteers. This has increased from 36% last year. This was also a prominent theme in the open responses for over 40 charities.

- Two thirds of charities (66%) need funding for internal technology, hardware, systems and licence costs.

- 42% of charities need funding to develop new or existing digital services.

Funding barriers

- A lack of suitable funding is the biggest barrier faced by 45% of charities, either because their typical funders do not support the costs they have or because they cannot find a funder who supports digital costs. This rises to 49% of small charities, compared to 40% of large charities.

- Capacity is the biggest barrier to seeking digital funding for 46% of charities (and 52% of small charities). This includes the need to prioritise meeting demand and deliver current work, which affects 38% of charities (and 43% of small charities), with 30% of charities saying they need to prioritise paying the bills and other core costs. These issues highlight the pressures that charities are currently under and the impact on organisational development.

- 40% say they do not apply for digital funding because they believe funders are more likely to support applications for face-to-face services or because their core costs will look too expensive if they include digital costs.

- Charities most need external support in the form of training (to upskill themselves) and external advice and guidance. Priorities for development are their core digital and data skills, website, digital marketing and digital strategy development.

Charities

Small charities

- 64% of small charities with an income of up to £1m are at an early stage with digital (curious or starting out), compared to 26% of large charities.

- 36% are advancing or advanced with a strategy in place for digital.

- We can see the smallest charities are most likely to be at the earliest stage of digital. 70% of those with an income of up to £100,000 are at the curious and starting out stage. This falls to 61% of those with an income between £100,001 and £500,000 and 53% of those in the £500,001 and £999,999 income bracket.

- Three quarters of small charities are struggling due to squeezed organisational finances (72%, compared to 63% of large charities), whilst large charities are struggling more with a lack of capacity (72%, compared to 66% of small charities).

- 56% are delivering services built on digital tools in a supportive or integral role, whilst 57% are using digital tools behind the scenes to help run services.

- 53% are using AI in their day-to-day work, compared to 78% of large charities.

- Small charities most need funding for capacity to work on organisational development (59%), as well as digital training for staff and volunteers (47%).

Large charities

- 74% are advancing or advanced, with a strategy in place, compared to 36% of small charities. They are significantly further ahead on their digital journey.

- The cost of living crisis is affecting large charities. Key barriers to digital progress are a lack of headspace and capacity (72%), squeezed organisational finances (63%) and finding funds to invest in infrastructure, systems and tools (54%).

- 88% are delivering services built on digital tools, in a supportive or integral role.

- 78% are using AI tools in their day-to-day work or operations.

- 53% say that using AI tools is a priority this year.

- 83% agree or strongly agree that AI developments are relevant to them. However, only 21% feel prepared to respond to AI opportunities and challenges.

- Large charities have similar funding needs to small charities. Top funding needs include capacity for organisational development (59%), training for staff and volunteers on digital or data (37%), and to develop our digital strategy (37%).

Wales

- 62 of our responses (10%) are based in Wales.

- 56% are advancing or advanced, with a strategy in place for digital. The higher proportion of large charities in Wales (48%) is likely to play a role in this.

- Capacity and headspace for organisational development is a key challenge in Wales, with 73% saying this is what they most need funding for (compared to 57% of all charities and 59% of large charities).

- 79% are delivering services built on digital tools, in a supportive or integral role.

- 62% are currently using AI in their day-to-day work or operations.

- The top barriers to accessing digital funding are needing to prioritise paying the bills and other core costs (41%) and meeting demand and delivering current work (39%).

- Top priorities are similar to our overall sample for large charities. These are using data to improve services or operations (58%), online fundraising (56%), grow our reach (56%) and invest in their infrastructure and systems this year (46%).

Scotland

- 64 organisations (10%) are based in Scotland. 40% are large, compared to 32% in the main sample, which affects comparisons.

- 41% are at an early stage with digital (8% curious and 33% starting out).

- 59% are advancing or advanced, with a strategy in place for digital.

- 92% see digital as an organisational priority, with 31% saying it is a high priority.

- Key barriers to progress are squeezed organisational finances (72%), finding funds to invest in infrastructure, systems and tools (67%) and lack of headspace and capacity (65%).

- Equipment, hardware and devices (e.g. laptops) are an issue for 30% of charities in Scotland. This is a greater proportion, compared to 18% in our main sample.

- Limited access to the internet and wi-fi connectivity is affecting 13% of charities, compared to 5% in the main sample, indicating this is a bigger challenge in Scotland.

Infrastructure organisations

- 59 respondents (9%) describe themselves as infrastructure or second tier organisations.

- They are slightly further ahead with digital. 43% are at an early stage (14% curious and 29% starting out). 57% are advancing or advanced, with a strategy in place for digital, compared to 50% in our main sample.

- Top priorities are to build online presence and social media engagement (56%), use data to improve services or operations (56%) and grow reach (51%).

- 78% see digital as an organisational priority, with 24% saying it is a high priority.

- 85% are delivering services built on digital tools, in a supportive or integral role.

- 78% are using AI in their day-to-day work, compared to 61% in our main sample.

- The top barriers to accessing funding are: our typical funders do not cover digital costs (27%) or do not cover staff costs/time on digital/data (27%).

- Top funding needs are capacity and headspace for organisational development (64%), revamp our website, content and/or brand (44%) and training for staff and volunteers on digital or data (36%).
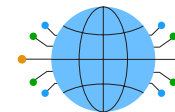
Social enterprises and community businesses

- 53% are at an early stage (22% curious and 31% starting out), whilst 47% are advancing or advanced, with a strategy in place for digital, similar to all charities.

- 85% see digital as an organisational priority, with 31% saying it is a high priority.

- 82% are delivering services built on digital tools, in a supportive or integral role.

- Barriers to moving forward with digital are squeezed organisational finances (72%), finding funds to invest in infrastructure, systems and tools (68%) and lack of headspace and capacity (65%).

- Top funding needs are capacity and headspace for organisational development (55%), training for staff and volunteers on digital or data (43%) and bringing in external advice and expertise (40%).

- The top barriers to accessing funding are prioritising meeting demand and delivering our current work (37%), prioritising paying the bills and other core costs (34%) and not being able to find a funder who will support our digital project (25%).

- 59% are using AI in their day-to-day work or operations.
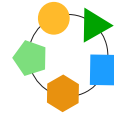
Equality, diversity and inclusion groups

- Black led charities are mainly small, with higher proportions of social enterprises (30%). 61% are at an early stage with digital, but 72% see digital as a top priority and 77% are delivering digital services. However, 65% of black led charities are struggling to find funds to invest in devices, software and infrastructure (an increase on the 54% last year). Furthermore, 41% of black led charities struggle to find a funder who will support a digital project. This is higher than our main sample (21%), all small charities (25%) and charities led by other specific marginalised groups.

- Charities led by LGBTQIA+ people are mainly small. 84% are delivering services built on digital tools, but like all charities, are affected by squeezed finances (72%) and need funding for capacity (56%).

- Charities led by those who are neurodivergent are mainly small, but are significantly further ahead than other small charities. 51% are advancing or advanced, with a strategy in place for digital. This compares to 36% of all small charities.

- For charities led by older people, a smaller proportion are adopting AI tools and less see digital as a priority. This group is also less likely to access digital funding.

- Charities led by d/Deaf and disabled people are largely small and at an early stage with digital. 87% see digital as a top organisational priority. They are struggling with squeezed finances (72%) and need funding for capacity (62%).

- Each of these groups has a higher proportion of small charities and we can see throughout this report that smaller charities struggle to progress with digital, because of squeezed organisational finances and a need for more capacity.

Background to the research

Background to the research

Our survey was open from 6th March 2024 to 26th April 2024 and we are extremely grateful to the 635 people who took the time to respond on behalf of their organisations this year.

The survey is designed for any not-for-profit organisation in the UK voluntary, charity and social enterprise sector at any stage with digital, although some questions are less relevant to very small organisations with no paid staff.

Every year, we work hard to make our survey representative of the huge range of organisations across the UK charity sector. We ask a range of questions about size, location, type of organisation, main target group and whether the organisation is led by specific population groups. In this section, we set out which groups responded and which didn't.

About our sample

- **Small charities**: We have 385 responses from small charities (income less than £1m), representing 62% of our responses overall. Whilst this is a lower proportion than the 73% of small charities responding in 2023, we have a higher number of responses overall (385 in 2024, compared to 360 in 2023).

- **Very small charities:** Half (52%) of respondents have an income of less than £500,000. However, only 8% of respondents are from very small charities, with an annual income under £10,000. We do however specify that some questions in the survey are less relevant for very small organisations with no paid staff.

- **Large charities:** Large charities (annual income of more than £1m) represent 33%, or 206, of our responses. This is higher than the 23% last year.

- **Different digital stages:** 50% are early stage (compared to 52% in 2023 and 43% in 2022), whilst 50% are advanced or advancing (compared to 48% in 2023 and 56% in 2022).

- **Organisations led by lived experience:** 31% say they are led by people with lived experience of the issue they address.

- **Infrastructure and funders:** 9% are an infrastructure/second tier organisation, whilst 7% are a grantmaking trust or foundation.

- **Different models:**
  - 81% are registered charities
  - 17% describe themselves as a social enterprise or community business.

- **Frontline services:** Half (53%) provide frontline services to individuals.

- **Roles:** 70% are CEOs, leadership team or managers, whilst 15% are trustees.

Equality, diversity and inclusion in our sample

This year, we expanded the population groups we ask about in the survey. We outline our approach, terms and rationale surrounding equality, diversity and inclusion in this *blog post*. Our intention is, first, to understand who we are reaching and whose voices are represented in the survey. Second, we examine any differences in digital priorities, barriers, funding and support needs across each different group and highlight these throughout the report.

We provide detailed insights in the report (see the section on *Equality, Diversity and Inclusion*) for organisations led by specific groups, where we have achieved 45 responses. This year includes organisations led by older people, black groups, neurodivergent people, disabled or d/Deaf people and LGBTQIA+ people. The intention is to inform funding, support, research and campaigns that tackle structural inequality, institutional racism and sexism in the sector, which have led to chronic underfunding for specific groups.

Charities typically select four groups to describe who they are working with (and often more). This means that there is a significant overlap between the charities working with each target group. As a result, our analysis discovered very few differences between responses for each target group and the overall responses. For this reason, we do not provide a detailed breakdown of responses for each target group.

Main target groups represented

We asked respondents to identify their main target population groups. We have a very strong representation (over 100 responses) of organisations working with:

- Young people
- Older people (65+)
- Black groups (Black African/Black Caribbean/ Black British/Black Mixed/Black Other)
- Children (under 16)
- Disabled or d/Deaf people
- Specific geographical population/s (e.g. residents in a town)

- People who are educationally or economically disadvantaged
- Neurodivergent people (including those with cognitive differences, learning disabilities and learning difficulties)
- Asylum seekers, refugees and migrants
- LGBTQIA+ people

Organisations led by specific groups

We asked respondents if their organisation is led by specific population groups, with at least 75% of their board and 50% of senior management identifying with that group. Organisations led by the following groups have at least 30 responses:

- **Older people (65+):** 74 responses (12%)

- **Black groups (Black African/Black Caribbean/Black British/ Black Mixed/Black Other):** 61 responses (10%)

- **Neurodivergent people (including those with cognitive differences, learning disabilities and learning difficulties):** 55 responses (9%)

- **Disabled or d/Deaf people:** 45 responses (7%)

- **LGBTQIA+ people:** 45 responses (7%)

- **People who are educationally or economically disadvantaged:** 44 responses (7%)

- **Faith communities:** 36 responses (6%)

- **Marginalised genders:** 36 responses (6%)

- **Young people (16-25):** 31 responses (5%)

We have less than 30 responses from organisations led by asylum seekers, refugees and migrants, people experiencing or affected by domestic abuse, and organisations led by other racialised communities. We will build on this in future reports and work in partnership with networks representing these groups.

Voices included in the survey

Group	Led by this group	Main target group
Faith communities	6%	12%
Marginalised genders	6%	13%
Other racialised communities	4%	14%
People experiencing or affected by domestic abuse	3%	15%
LGBTQIA+ people	7%	16%
Asylum seekers, Refugees and Migrants	2%	19%
Black groups	10%	25%
Older people (65+)	12%	27%
Specific geographical population/s		29%
Disabled or d/Deaf people	7%	30%
Neurodivergent people	9%	31%
Children (under 16)		31%
Our services are open to everyone		37%
People educationally or economically disadvantaged	7%	38%
Young people (16- 25)	5%	41%

● Main target group   ● Led by this group

UK nations and regions in our sample

Responses mirror the distribution of UK charities. We have a good representation across the UK, but with a significant gap in Northern Ireland.

- **Across the UK:** Overall, we have a strong representation of responses from across the UK nations and England regions, apart from in Northern Ireland.

- **UK wide:** 105 charities (17%).

- **Online:** 28 charities (4%).

- **England wide:** 41 charities (10%).

- **Wales:** We have 62 responses from Wales, which is higher than the 42 in 2023. Large charities represent 48% of this group (higher than the 33% in the main sample), compared to 48% of small charities.

- **Scotland:** We have 64 responses from Scotland, which is higher than the 49 in 2023. Large charities represent 40% of this group (higher than the 33% in the main sample), compared to 51% of small charities.

- **Northern Ireland:** Only 14 responses are based in Northern Ireland.

- **England:** 419 charities are based in England, representing 66% of our sample. Of these, 64% are small and 31% are large (similar to the main sample).

- **England representation:** Our representation mirrors the locations of UK voluntary organisations, detailed in the *NCVO Almanac 2023*. For example, nearly half (46%) of our 419 responses working in England are based in the South. The NCVO Almanac similarly reports that over half (51%) of all English voluntary organisations are based in the South (South East, South West and London). However, see the data notes below for the differences in how these figures are calculated.

- **England regions:** We have a good representation of charities across England, with over 30 responses for every region in England. We have combined some regions to aid the analysis (noting that charities will work across multiple regions).

  - **Main sample:** 635 charities, of which 62% are small and 33% are large.

  - **London (77 responses):** 68% are small (slightly higher than main sample).

  - **Midlands (76 responses):** Combining West Midlands (45) and East Midlands (31). 59% are small (slightly lower than the main sample).

  - **South (171 responses):** Combining East of England (38), South West (54), South East (79). 72% are small (much higher than the main sample).

  - **North (129 responses):** North West (54), Yorkshire and the Humber (44), North East (31). A slightly smaller proportion of 55% are small.

Overview of survey respondents

17%
UK wide

66%
England

10%
England wide

4%
All our work is online

635
responses

64
Scotland

31
North East

44
Yorkshire and Humber

14
Northern Ireland

31
East Midlands

54
North West

38
East of England

45
West Midlands

62
Wales

77
London

54
South West

79
South East
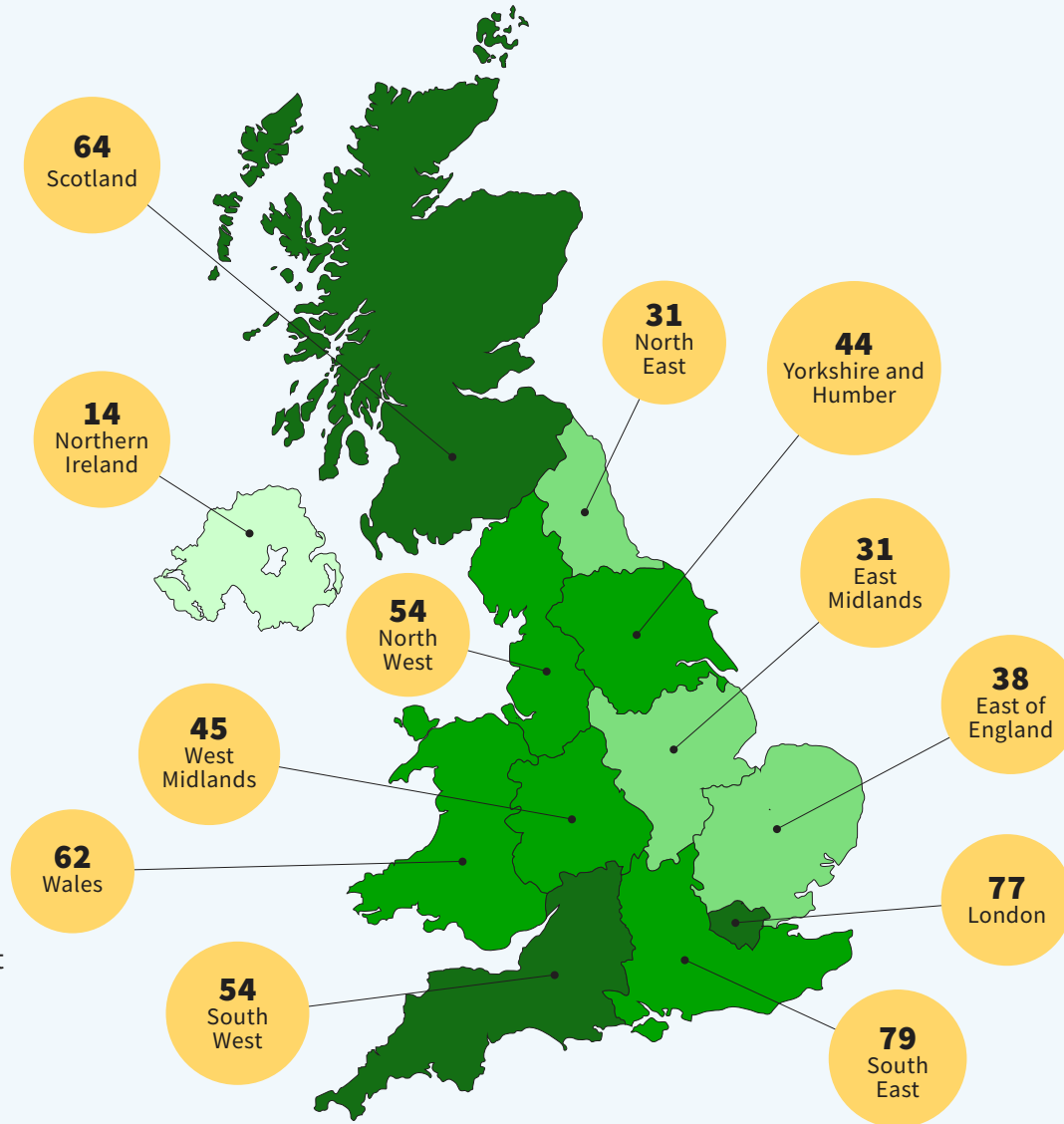
The map shows the number of organisations based or working in each region and country. Participants could select multiple locations, including options for UK wide, England wide and online. As a result, the numbers do not correspond with our overall sample size of 635.

Geographical location data notes

- Where charities deliver their work across the UK, across England or entirely online, they were not asked to specify a further geographical focus (in our previous surveys they ticked all countries or regions).

- Throughout this report, you will see that size plays a crucial role in digital capacity and the responses given. The proportion of large and small charities varies significantly in each region or country and in comparison to our main sample. For this reason, any comparisons between regions should be made with care and also take size into account.

- *The NCVO Almanac* looks at where organisations are based, using Charity Commission data for main office location. In comparison, we asked respondents to think about where their work is delivered and they could specify multiple regions. They only needed to answer this question if their work had a geographical focus.

Representation of UK voluntary organisations

	UK voluntary organisations (NCVO Almanac 2023)	Responses to CDSR 2024
England	79%	66%
Scotland	13%	10%
Wales	4%	10%
Northern Ireland	4%	2%
South of England	51%	46%
North of England	21%	19%
Midlands (England)	16%	17%
East of England	12%	9%
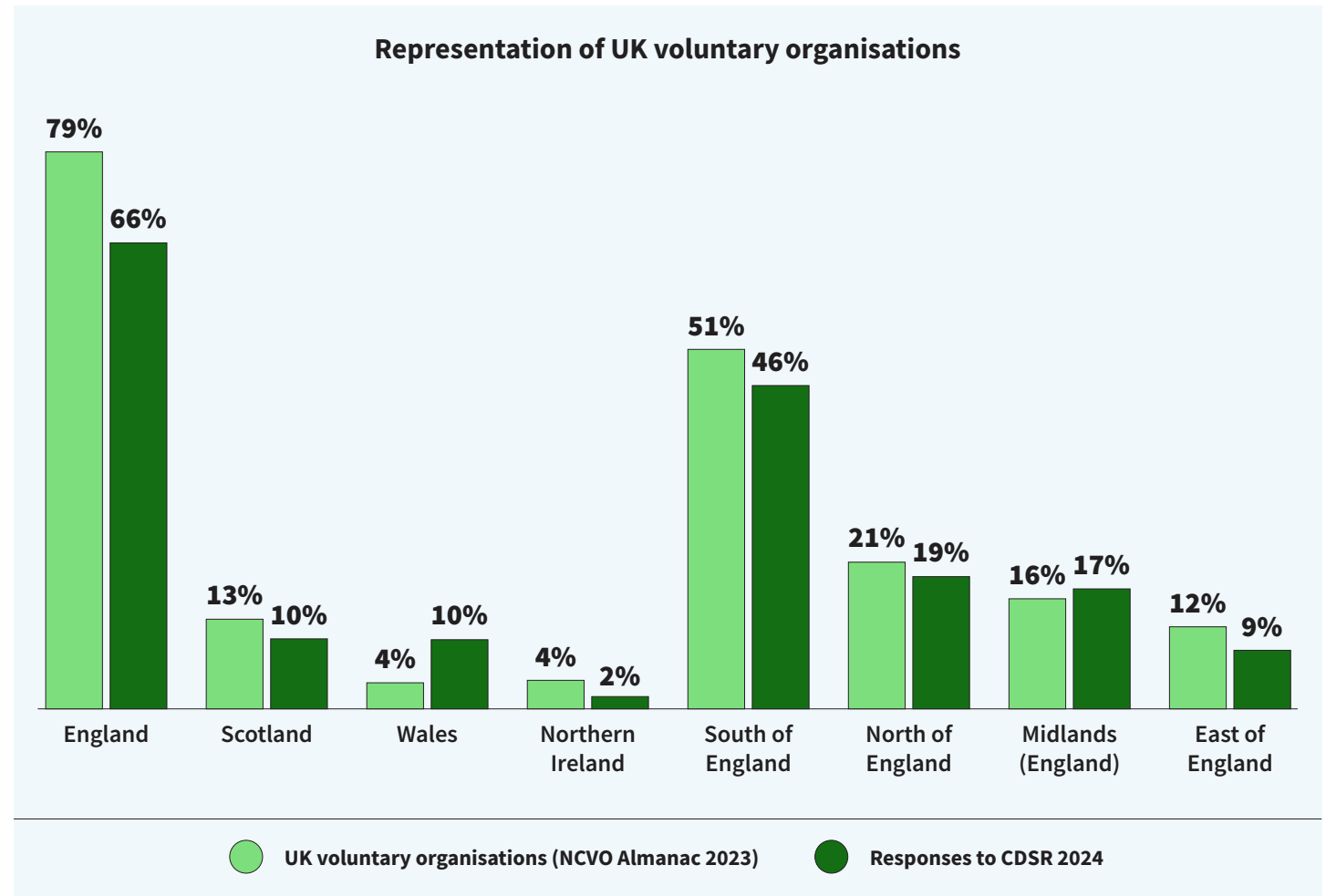
Our definitions

Digital

We ask about digital in a holistic way. We cover specific digital skills and tools, IT systems, data and digital services. We also include general digital culture, attitudes, understanding and ways of working, including at board and CEO level.

Size

Small charities
Respondents specifying an annual turnover of **up to £1 million**.

Large charities
Respondents specifying an annual turnover of **£1 million or more**.

Digital stage

We asked charities to select which stage of digital development was the best fit for them from the following statements. We found a clear relationship between digital stage and digital skills responses, showing these stages are relevant and meaningful.

Curious	Starting out	Advancing	Advanced
We have some digital basics in place, such as social media or remote working, and recognise we could do more.	We're developing our use of digital across the organisation but we don't have a strategy in place yet.	Digital is part of our strategy, but we've not embedded this yet. We're investing in technology and developing our skills.	Digital is integral to our organisational strategy and embedded in everything we do.

Charities

We use the term 'charity' in this report as shorthand to refer to the range of nonprofit and social sector organisations completing the survey, rather than to refer solely to registered charities (which make up 81% of respondents).

Rounding data

All survey data was rounded up or down to the nearest whole number. Percentages may not total 100 due to this process.

Overview of survey respondents

Types of organisation

- 81% are registered charities
- 17% are a social enterprise or community business
- 7% are a grantmaking trust or foundation
- 9% are an infrastructure/ second tier organisation
- 53% provide frontline services

Representation of UK voluntary organisations

23% CEO

20% Leadership team

20% Staff member

18% Management

12% Trustee, board member or Non Executive Director

3% Freelancer / contractor

2% Volunteer

Charity income

8% Micro **£0 to £10,000**

18% Small **£10,001 to £100,000**

26% Small/Medium **£100,001 to £500,000**

9% Medium **£500,001 to £999,999**

23% Large **£1m to £10m**

10% Major **£10m to £100m**
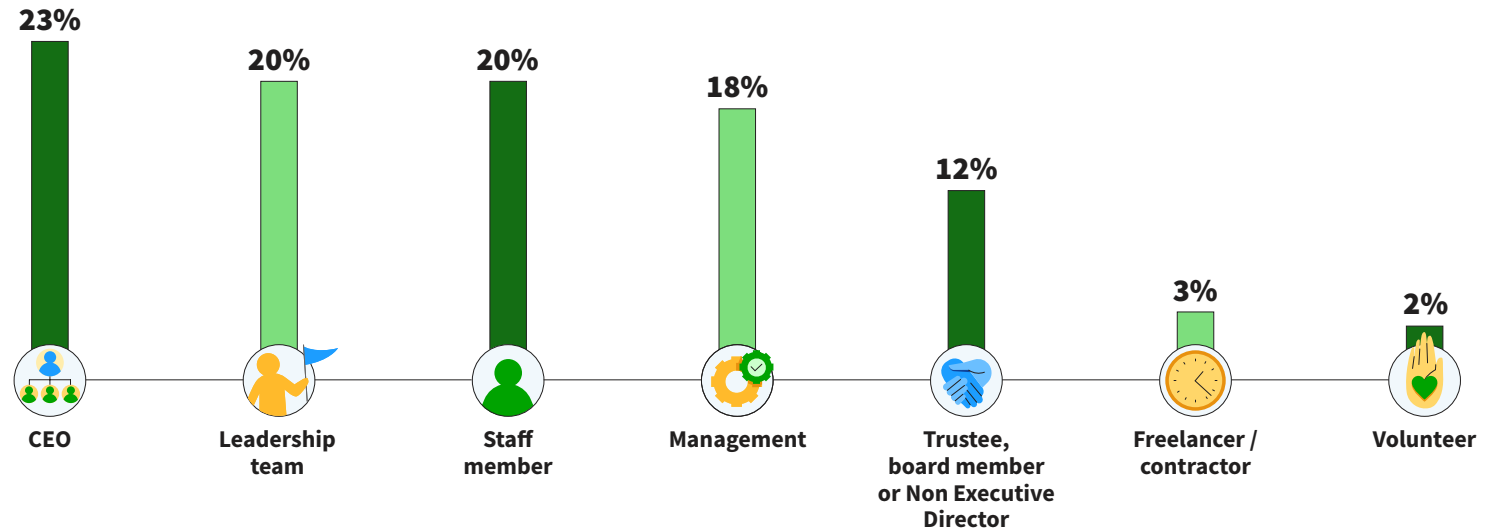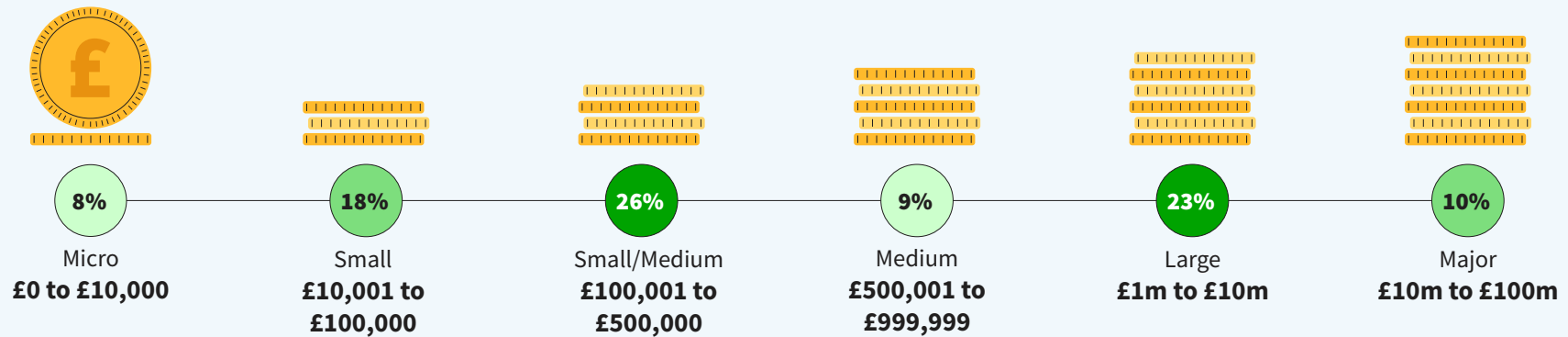
7% didn't know or preferred not to say

Detailed findings

Overall digital progress

Digital stage

1 in 5 charities are at the earliest stage with digital, with only some basics in place (20%).

We describe four stages of digital development in our survey and ask respondents to select which is the best fit for their organisation (see *our definitions*). From this we can see:

- 1 in 5 charities are at the earliest 'curious' stage with digital and only have some basics in place (20%).

- Nearly a third of charities are starting out with digital (30%).

- Overall, 50% of charities are at an early stage with digital (curious and starting out).

- A third of charities are advancing with digital (36%), whilst 14% are advanced.

- Half (50%) of charities have a strategy in place for digital (advanced or advancing categories). This is very similar to the 48% last year, indicating that digital progress has been static since 2023.

- We find that these four digital stages give a useful indication of overall digital progress, skills, priorities and support needs. We also find that there is a strong correlation between the stage selected and subsequent ratings of specific digital skills. For example, those at the curious stage rate their skills lower than those who have progressed to other stages of digital.

- Whilst overall digital progress remains largely unchanged, it is worth noting that in other questions, three quarters (76%) of respondents indicate how they have made progress with digital this year. Furthermore, 45% say that their digital strategy is a priority this year.

- Our results highlight that it takes time to develop and embed strategy. We are likely to see this trend continue, particularly given the barriers charities are currently facing (see barriers to digital progress).

How charities rate their digital progress overall
What stage is your organisation at with digital?

| Curious | Starting out | Advancing | Advanced |
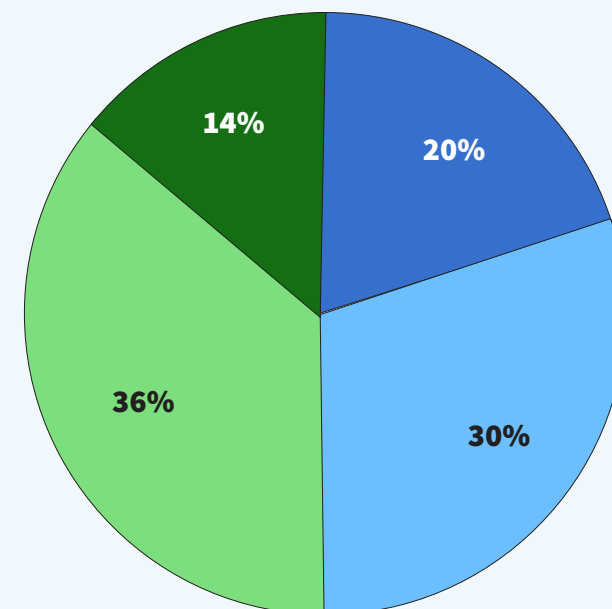
The gap between large and small charities

Larger charities are significantly further ahead with digital than smaller charities.

- Overall, 64% of small charities with an income of up to £1m are at an early stage with digital (curious or starting out), compared to 26% of large charities. In comparison, 74% of large charities have a strategy for digital (advancing or advanced stage), compared to 36% of small charities.

Digital stages of large and small charities
What stage is your organisation at with digital?

Large charities

Curious	Starting out	Advancing	Advanced
7%	19%	54%	20%

Small charities

Curious	Starting out	Advancing	Advanced
27%	37%	27%	9%
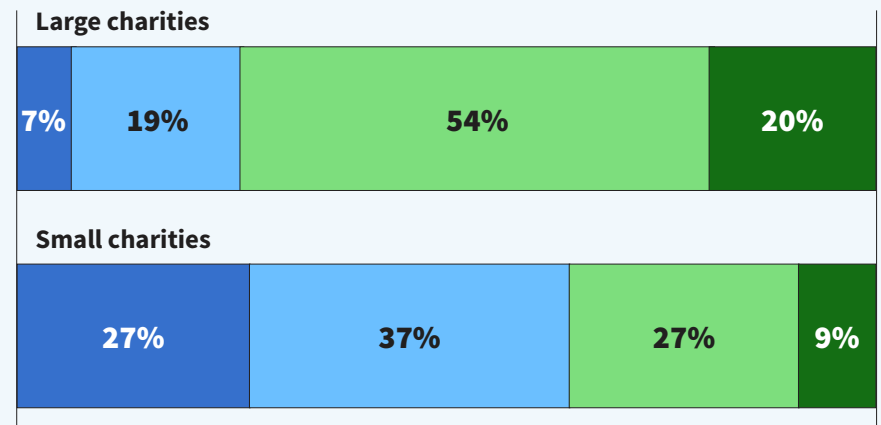
- Curious
- Starting out
- Advancing
- Advanced

Size can play a crucial role in digital capacity

- We found that income plays a significant role in digital maturity.

- When we look in detail at different income brackets and stages of digital progress, we can see the smallest charities are most likely to be at the earliest stage of digital.

- For the smallest charities, with an income of up to £100,000, 70% are at the curious and starting out stage. This falls to 61% of those with an income between £100,001 and £500,000 and 53% of those in the £500,001 and £999,999 income bracket.

- When we look at the digital stages of specific groups of charities, we can see again that size is a key factor. For example, the greater proportion of black led charities that are at an early stage with digital is, in part, because a greater proportion are small. Overall, 61% of black led charities are at the curious and starting out stage, compared to 50% of all charities. However, when we take size into account, 67% of small black led charities are at an early stage with digital, which is similar to 64% of all small charities.

Comparing digital stage for different size charities
What stage is your organisation at with digital?

£0-£100k

Curious	Starting out	Advancing	Advanced
35%	35%	20%	9%

£100,001 to £500,000

Curious	Starting out	Advancing	Advanced
23%	38%	28%	10%

£500,001 to £999,999

Curious	Starting out	Advancing	Advanced
16%	37%	42%	5%

£1m to £10m

Curious	Starting out	Advancing	Advanced
10%	23%	48%	19%

£10m+

Curious	Starting out	Advancing	Advanced
10%		67%	24%

● Curious   ● Starting out   ● Advancing   ● Advanced
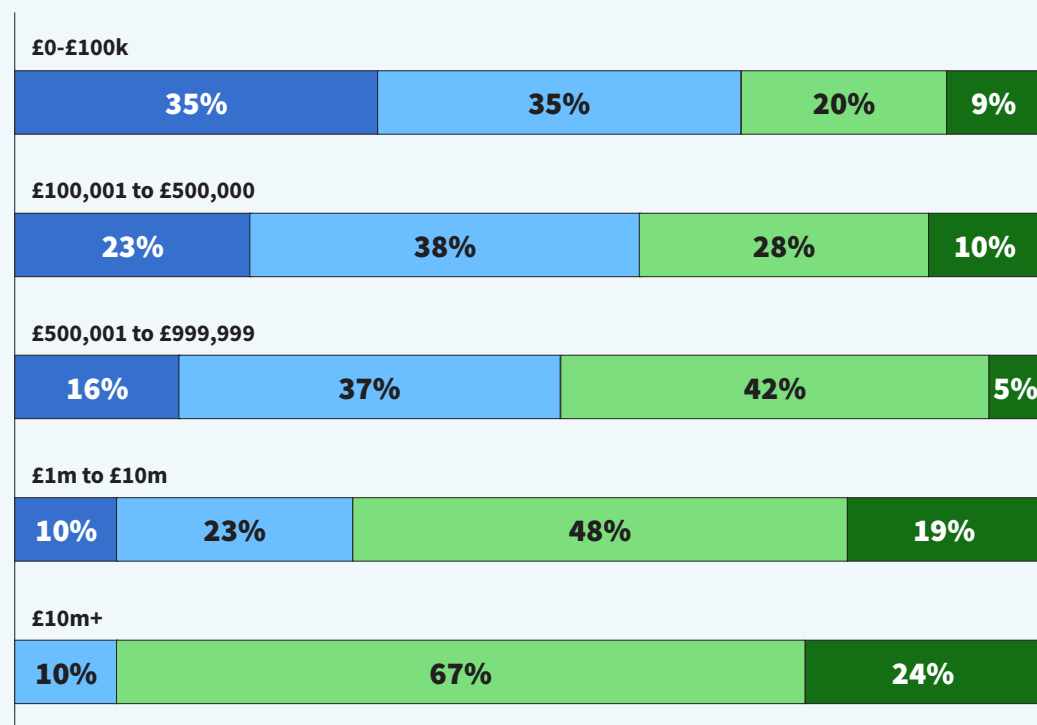
The gap between the digital progress of large and small charities looks to be growing

- There is a significant difference between the proportions of small and large charities at an early stage with digital (curious and starting out). Furthermore, this difference has increased since last year.

- Last year, 58% of small charities were at an early stage with digital, compared to 32% of large charities, a difference of 26%.

- This year, 64% of small charities are at an early stage with digital, compared to 26% of large charities. This is a difference of 38% and a significant increase on the 26% difference in 2023. We can already see that size has a significant impact on the use of AI across the sector elsewhere in our report. This gap may grow wider if the appropriate support is not made available to small charities.

Charities at an early stage with digital
Charities specifying they are at the curious or starting out stage with digital

	Small	Large	Difference
2024	64%	26%	38%
2023	58%	32%	26%

2023   2024
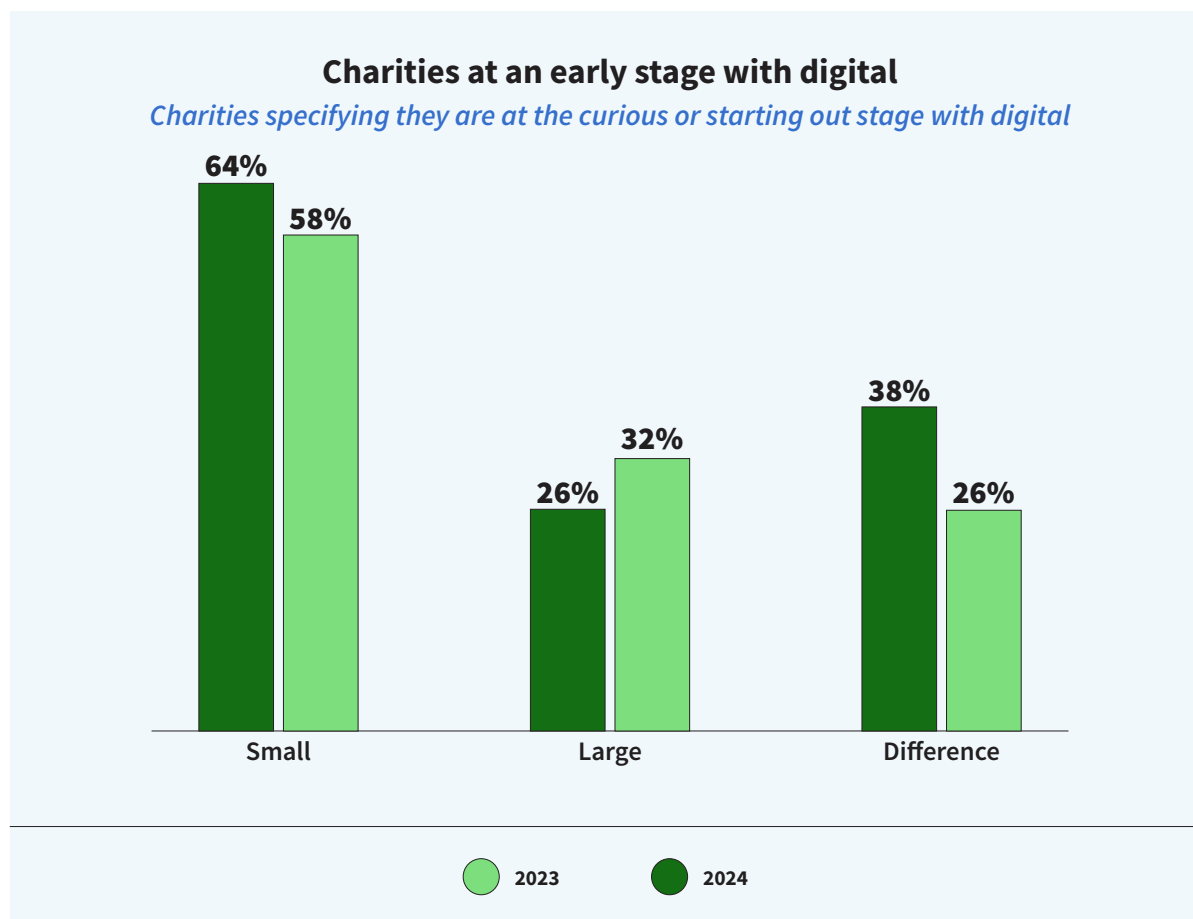
Digital achievements

Three quarters of charities (76%) have made progress with digital this year.

This new question helps us understand how charities are seeing the impact and value of making digital progress in their organisation. Overall, three quarters (76%) of respondents indicate they have made progress with digital this year.

The top 3 outcomes, achieved by 4 out of 10 charities are:

1 Increased profile and brand (44%)

2 Increased reach online (41%)

3 Developed staff/volunteer digital skills (40%)

Differences by size:

Small charities
The top outcome for 43% of small charities has been to raise their profile and improve their brand.

Large charities
The top outcome for 55% of large charities is having found useful insights from data.

The impact of progressing with digital

If you have made progress with digital this year, has this helped your organisation achieve any of the following outcomes?

Outcome	%
Raised our profile / improved our brand	44%
Expanded our reach online	41%
Developed staff / volunteer digital skills	40%
Found useful insights from data (internal or external)	35%
Spent less time on administrative tasks	31%
Supported more people	31%
Improved our services	30%
Recruited people with digital skills	24%
Delivered our strategy more effectively	24%
Reached more diverse users	21%
Attracted more donations	21%
Shared our message with policy makers and the media	19%
Attracted more funding	18%
Offered new services	17%
Improved digital inclusion	16%
Given better support to volunteers	16%

Digital and data priorities

Digital as an organisational priority

Digital is a top organisational priority for 1 in 4 charities, but over half say that whilst digital is important, other priorities demand attention.

- Digital is a priority (medium or high priority) for 80% of charities.

- A quarter of charities say that digital is one of their top organisational priorities (27%). This is similar to 26% last year.

- Half see digital as medium priority (53%), saying it is important, but there are other pressing priorities.

- Almost 1 in 5 (20%) say digital is low priority or not a priority at all.

- Small and large charities gave similar responses and prioritise digital similarly.

Prioritising digital
How important is your progress with digital compared to other priorities in your organisation?

1.6%
0.8%
18%
27%
53%
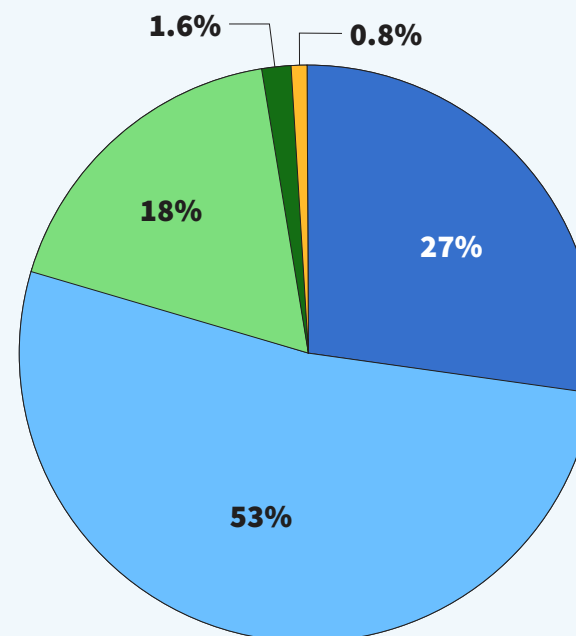
- I don't know
- High priority (It's one of our top organisational priorities)
- Medium priority (It is important, but we have other pressing priorities)
- Low priority (We're working on this, but it's not a key priority)
- Not a priority

Data as an organisational priority

Data is a priority for 72% of charities and a top organisational priority for 1 in 4 charities.

We wanted to find out how much of a priority data is for charities, particularly with the uptake of AI this year.

- Almost half (47%) say it is a medium priority - important, but other pressing priorities need addressing.

- However, data is a high priority for 1 in 4 charities (25%).

- It is worrying that data is a low priority for 1 in 5 charities (21%).

- It is worth noting that large charities are more likely to prioritise data, with 37% saying this is high priority, compared to 18% of small charities.

- Charities give digital and data a similar priority level. For example, with 25% saying data is a high priority, compared to 27% saying digital is a high priority.

Prioritising data
How important is your progress with data compared to other priorities in your organisation?

1.8%

5%

25%

21%

47%

- I don't know
- High priority (It's one of our top organisational priorities)
- Medium priority (It is important, but we have other pressing priorities)
- Low priority (We're working on this, but it's not a key priority)
- Not a priority

Digital priorities this year

More than half of charities say their top priorities are to grow their online presence (54%) and increase digital fundraising (52%).

Top priorities

- Building online presence and social media engagement (54%)
- Increasing digital fundraising (52%)
- Using data to improve services or operations (48%)
- Grow our reach (48%)
- Grow staff/volunteer digital skills (46%)

Lower priorities (for less than a third of charities)

- Develop or scale our digital services (26%)
- Improve diversity and inclusion in digital work (24%)
- Improve board/leaders' digital skills (23%)
- Support clients with devices, data or digital skills (digital inclusion) (22%)
- Offer new digital services (18%)
- Recruit a digital role (10%)
- Recruit a data role (5%)

The top priorities are similar to 2023. However, the top priority of building online presence and social media engagement has decreased significantly from 79% last year to 54% this year.

Significantly less charities are prioritising investing in infrastructure and systems (32% this year, compared to 45% last year). However, there is a clear difference between large and small here, with only a quarter (24%) of small charities prioritising this, compared to nearly half of large charities (47%).

It is surprising to see that using AI tools is only a priority for a third of charities (34%). However, there is also a clear difference between large and small charities here. Half of large charities (53%) say this is a priority. This compares to only a quarter of small charities (26%).

Priorities for large charities

Large charities indicate a higher and wider range of priorities than small charities. Top priorities are using data to improve services or operations (58%), closely followed by using AI tools (53%) and increasing online fundraising (53%).

Priorities for small charities

Top priorities are building online presence and social media engagement (58%), increasing online fundraising (54%) and using data to improve services and operations (48%).
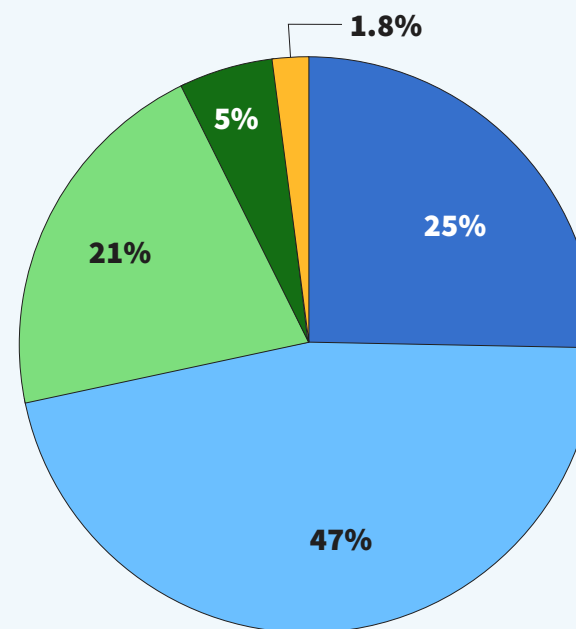
Prioritising digital

How important is your progress with digital compared to other priorities in your organisation?

Priority	All	Small	Large
Build our online presence and social media engagement	54%	54%	49%
Increase online fundraising	52%	52%	53%
Use data to improve services or operations	48%	48%	58%
Grow our reach	48%	48%	51%
Grow staff / volunteer digital skills	46%	46%	52%
Develop our digital strategy	45%	45%	49%
Revamp our website	41%	41%	40%
Improve data security, privacy or GDPR	36%	36%	34%
Develop our data strategy	35%	35%	46%
Using AI tools	34%	34%	53%
Invest in infrastructure and systems	32%	32%	47%
Develop or scale our digital services	26%	26%	32%
Improve diversity and inclusion (in digital work)	24%	24%	32%
Improve board / Leaders digital skills	23%	23%	25%
Support clients with devices, data or digital skills (digital inclusion)	22%	22%	22%
Offer new digital services	18%	18%	24%
Recruit a digital role	10%	9%	13%
Recruit a data role	5%	3%	11%
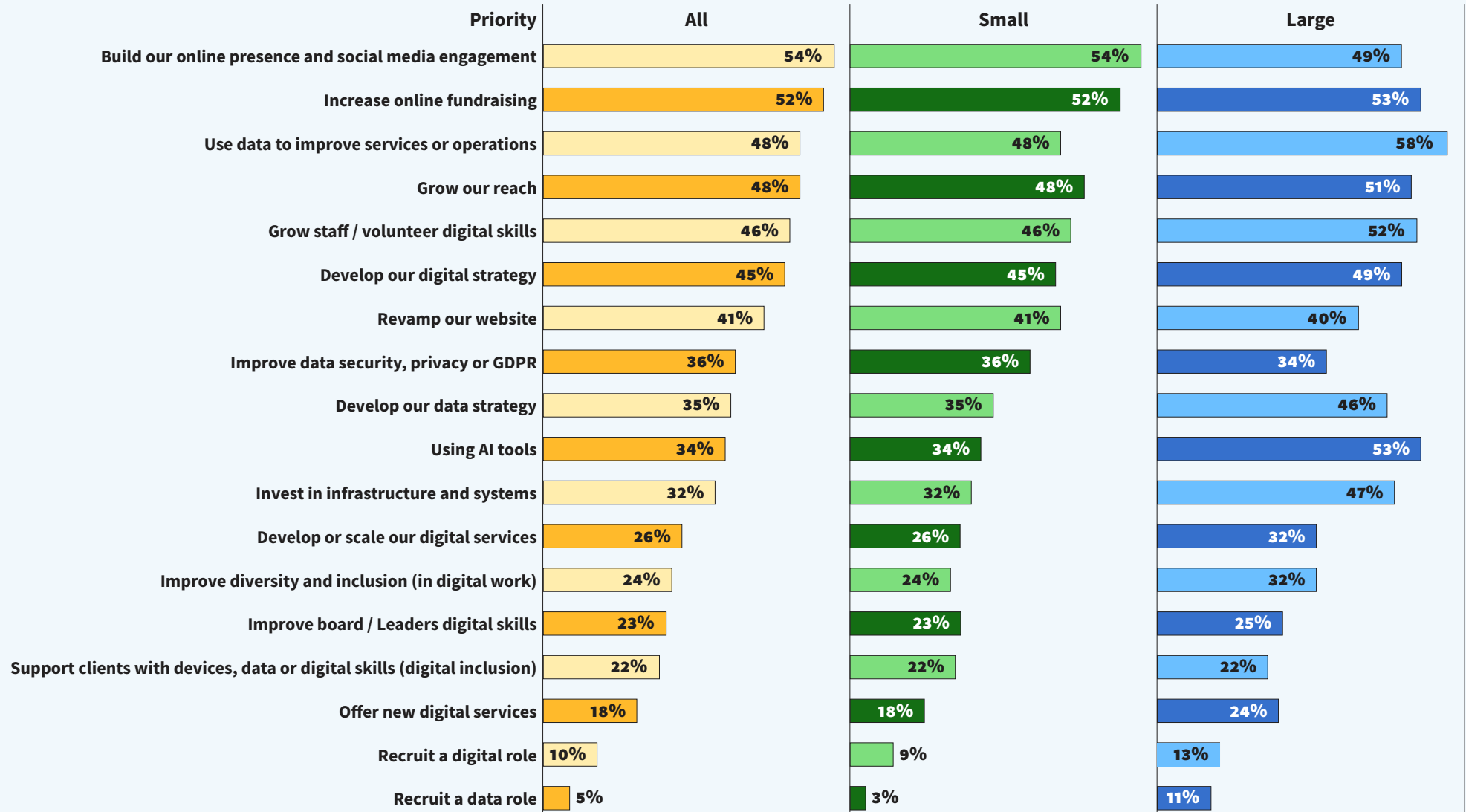
Barriers to digital progress

Almost 7 out of 10 charities (68%) are struggling to progress digitally due to their finances, headspace and capacity.

Charities are facing many constraints to digital progress in the current climate and the cost of living crisis, with an increase in need for digital funds this year. The most significant barriers to progressing with digital are:

1. Squeezed organisational finances (68%)
2. Lack of headspace and capacity (66%)
3. Finding funds to invest in infrastructure, systems and tools (60%, a significant increase on 49% last year)
4. Staff/volunteer digital skills (47%, up from 41% in 2023)
5. Lack of technical expertise or someone to lead on digital (44%)

Financial challenges have increased significantly and this is having a greater impact on digital progress. Last year, only 27% said the cost of living crisis was affecting their progress. Instead, the top challenge faced and highlighted by 49% of charities was 'finding funds to invest in our devices, software and infrastructure'. This challenge has increased to 60% and has been surpassed by the challenge of organisational finances and capacity.

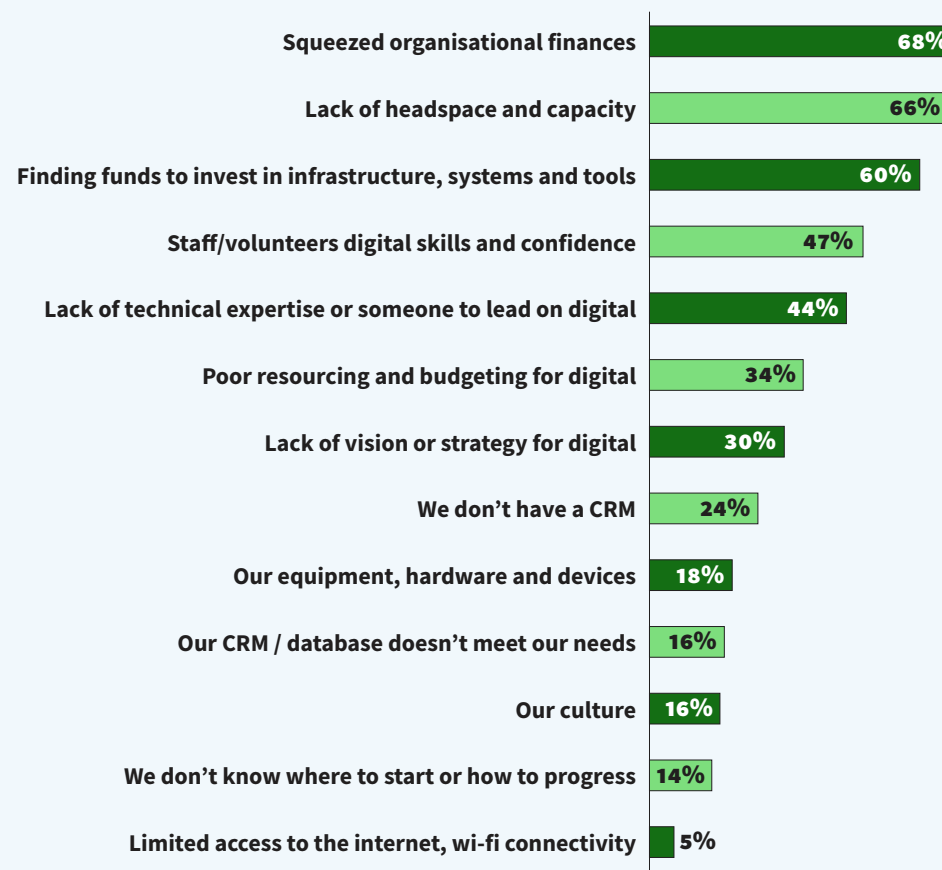These barriers are the same for small and large charities, but are affecting a greater proportion of small charities. We can see that three quarters of small charities are struggling due to squeezed organisational finances (72%, compared to 63% of large charities), whilst large charities are struggling more with a lack of capacity (72%, compared to 66% of small charities).

Barriers to moving forwards with digital and data
Are any of the following creating a significant barrier to your organisation from moving forwards with digital and data?

Barrier	Percentage
Squeezed organisational finances	68%
Lack of headspace and capacity	66%
Finding funds to invest in infrastructure, systems and tools	60%
Staff/volunteers digital skills and confidence	47%
Lack of technical expertise or someone to lead on digital	44%
Poor resourcing and budgeting for digital	34%
Lack of vision or strategy for digital	30%
We don't have a CRM	24%
Our equipment, hardware and devices	18%
Our CRM / database doesn't meet our needs	16%
Our culture	16%
We don't know where to start or how to progress	14%
Limited access to the internet, wi-fi connectivity	5%

Digital skills and capabilities

Core digital skills and capacity

Charities are struggling to engage with emerging tech. Many are not resourcing digital effectively. Data skills and user research continue to be a challenge.

This year we expanded our focus and asked about capacity together with skills. We also added a new rating of 'we don't do this' to our scale, to differentiate with the 'poor' rating.

Top core digital skills

- **Basic digital skills:** 90% of charities still rate themselves as fair or excellent in this area. However, we are surprised to see that only a small proportion rate themselves as excellent (24%), compared to 64% last year who said their basic digital skills were excellent. There is a clear need to return to basic digital skills and charities need to be more intentional about fostering effective communication and collaboration.

- **Data protection and GDPR compliance:** 42% rate themselves as excellent at GDPR compliance, up from 34% last year, and a further 48% say they are fair (90% in total are good or excellent).

- **Cybersecurity:** 22% are excellent at cybersecurity, comparable to last year. Overall, three quarters (74%) say they are good or excellent.

- **Safeguarding users of digital services:** 68% say they are good or excellent at this.

Key areas for development

The areas in which the highest proportions of charities are saying they are poor or don't use that skill are:

- **Engaging with emerging tech trends:** 40% are poor at this and 16% say they don't do this. This means that over half of charities (56%) are not engaging with emerging tech trends. When we look at small charities, this rises to 60%. For all charities who say they are at the curious and starting out stage of digital, this rises to 65%.

- **Undertaking user research:** 33% are poor at this and 15% don't do this (48% in total). This is greater than the 43% who said they were poor at this in 2023.

- **Resourcing digital effectively:** 33% are poor at this and 5% don't do this.

- **Websites:** Almost a third (29%) of charities are poor at making the most of their website. This has barely changed since 2023, indicating untapped potential.

- **Data skills and capabilities:** 31% of charities are poor or not engaging with collecting, managing and using data. In addition, a third of charities (34%) are poor or are not using data to inform decision making. Continuing a trend from previous years, charities still lack confidence with data.

- **Digital service delivery:** A third of charities are poor at or not using digital tools in service delivery (36%). Nearly half (45%) say they are fair at this, similar to 2023.

Skills gaps at the early stages of a digital journey

Those at the curious and starting out stage of digital struggle most with:

1. **Engaging with emerging tech trends**
(65% are poor at this or don't do this)

2. **Undertaking user research**
(60% are poor at this or don't do this)

3. **Resourcing digital effectively**
(57% are poor at this or don't do this)

4. **Using digital tools in service delivery**
(52% are poor at this or don't do this)

5. **Making the most of their website**
(46% are poor at this or don't do this)

Core digital skills

How would you rate your organisation's skills and capacity in the following areas?

	Excellent	Fair	Poor	We don't do this	I don't know
Data protection / GDPR compliance	42%	48%	6%	1%	3%
Using digital tools in everyday work	24%	66%	10%		1%
Cybersecurity	22%	52%	16%	5%	5%
Safeguarding users of digital services	21%	47%	13%	11%	8%
Collecting, managing and analysing data	17%	50%	26%	2%	5%
Using data to inform decision making and strategy	17%	47%	30%	2%	4%
Using digital tools in service delivery	16%	45%	27%	9%	3%
Making the most of our website	15%	51%	29%	4%	1%
Undertaking user research	11%	37%	33%	15%	4%
Resourcing digital effectively	10%	45%	33%	5%	6%
Engaging with emerging tech trends	7%	35%	40%	16%	3%

- **Excellent**
- **Fair**
- **Poor**
- **We don't do this**
- **I don't know**

Skills: Engaging audiences

Where charities are most confident

The top three skills where charities are most confident are the same as last year:

- **Social media:** Similar to last year, 27% rate themselves as excellent at social media.

- **Creating engaging content:** 1 in 4 (25%) are strong at creating engaging digital content, whilst a further 54% are 'fair' at this.

- **Email marketing:** 15% say they are excellent at this, whilst 41% feel they are 'fair'.
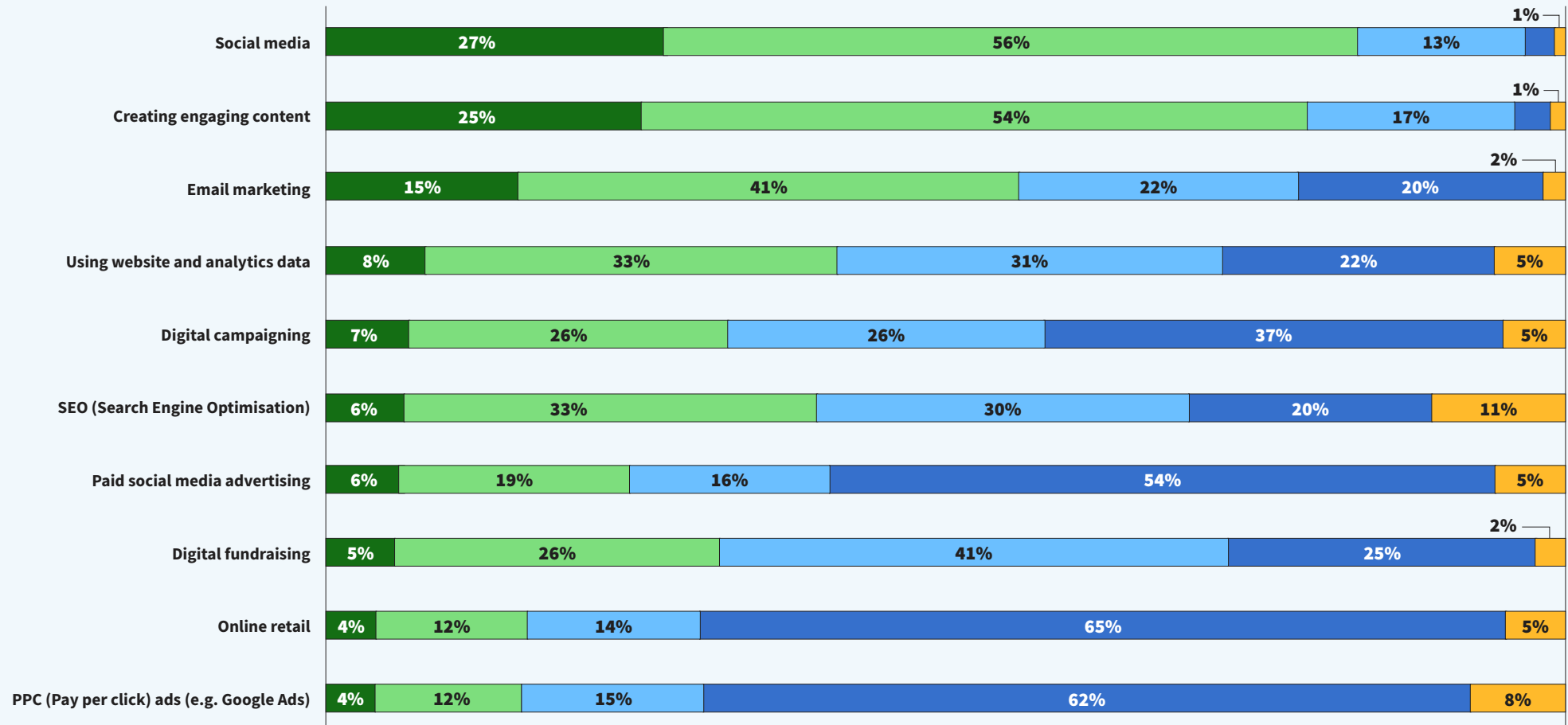
Where charities struggle most

The areas in which the highest proportions of charities are rating themselves as 'poor' are:

- **Digital fundraising:** 4 out of 10 (41%) are poor at digital fundraising. A further 25% don't do this, giving a total of 66%. This is worrying, particularly compared to the 55% who said they were poor at this last year. It is noteworthy that 52% say that this is a key priority for their organisation this year. This is a key area of support that charities both need and want.

- **Website and analytics data:** A third (31%) say they are poor at this.

- **Search engine optimisation (SEO):** Nearly a third (30%) of charities say their skills are poor in this area. A further 20% do not do this.

- **Paid social media advertising:** 16% are poor at this, whilst 54% don't do this.

- **Online retail:** 14% are poor at this. A further 65% don't do this.

- **Pay Per Click ads (e.g. Google ads):** 15% are poor at this, whilst 62% don't do this.

There are high proportions of charities saying that they do not have online retail (65%), Pay Per Click ads (e.g. Google ads) (62%) and paid social media advertising (54%).

Skills: Engaging audiences

How would you rate your organisation's skills and capacity in the following areas?
By audiences, we mean your external supporters or stakeholders

	Excellent	Fair	Poor	We don't do this	I don't know
Social media	27%	56%	13%		1% (1%)
Creating engaging content	25%	54%	17%		1% (1%)
Email marketing	15%	41%	22%	20%	2%
Using website and analytics data	8%	33%	31%	22%	5%
Digital campaigning	7%	26%	26%	37%	5%
SEO (Search Engine Optimisation)	6%	33%	30%	20%	11%
Paid social media advertising	6%	19%	16%	54%	5%
Digital fundraising	5%	26%	41%	25%	2%
Online retail	4%	12%	14%	65%	5%
PPC (Pay per click) ads (e.g. Google Ads)	4%	12%	15%	62%	8%

Legend: ● Excellent ● Fair ● Poor ● We don't do this ● I don't know
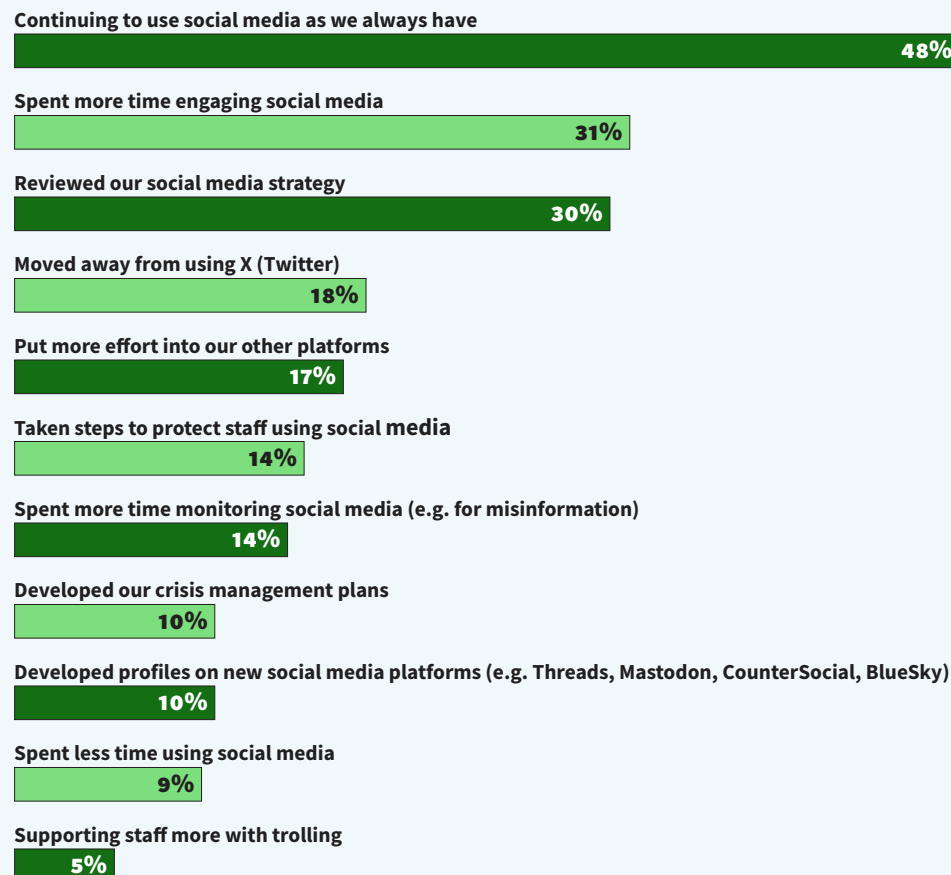
Social media use

Close to 50% of charities haven't changed how they use social media, despite X's volatility.

In the light of changes to X (formerly Twitter), we wanted to find out if charities have changed their approach to social media. However, we haven't seen as much change as we anticipated. We can see that:

- Almost half (48%) are continuing to use social media as they always have.

- A third (31%) are spending more time engaging with audiences and 14% spending more time monitoring social media (e.g. for misinformation).

- It's surprising that only 17% have put more effort into their other platforms, whilst 10% have developed profiles on new social media platforms (e.g. Threads, Mastodon, CounterSocial, Bluesky).

- It is worrying that only 14% are taking steps to protect staff using social media, only 14% are spending more time monitoring social media (e.g. for misinformation) and a mere 10% have developed their crisis management plans.

- There is very little difference between the responses from large and small charities.

- Those who are advancing or advanced with digital have responded more. We can see that for this group, 40% have reviewed their social media strategy, 30% are engaging more with other platforms or testing alternative platforms and 21% are supporting staff more (protecting staff or providing support with trolling).

Changes to social media use

In light of how social media platforms have evolved this year, has your organisation taken any of the following actions?

Continuing to use social media as we always have
48%

Spent more time engaging social media
31%

Reviewed our social media strategy
30%

Moved away from using X (Twitter)
18%

Put more effort into our other platforms
17%

Taken steps to protect staff using social media
14%

Spent more time monitoring social media (e.g. for misinformation)
14%

Developed our crisis management plans
10%

Developed profiles on new social media platforms (e.g. Threads, Mastodon, CounterSocial, BlueSky)
10%

Spent less time using social media
9%

Supporting staff more with trolling
**5%**

Systems, procurement and IT

IT provision

45% rate their IT provision as good or excellent and not a barrier to their development. This is similar to 2023.

This year we revised this question and expanded our rating scale to improve the validity of our results.

- 41% of charities say their IT is fair. It works for where they are currently, but could be much better.

- 45% of charities give a positive assessment of their IT, with 31% saying that it is 'good, well managed and not a barrier to our development', whilst a further 14% indicate their IT provision is 'excellent, we are confident that it meets our needs'.

- 13% have poor, very poor or no IT provision.

- This is slightly more optimistic than last year, when 1 in 5 said their IT provision was poor (20%) and 36% said it was sufficient.

- There are only minor differences for size of charity and stage of digital.

How charities rate their IT provision
How do you rate your IT provision (technical support, hardware setup, internet access)?

● Very Poor	● Poor
● Fair	● Good
● Excellent	● We don't have any
● I don't know	

1% 2% 4% 7% 14% 41% 31%
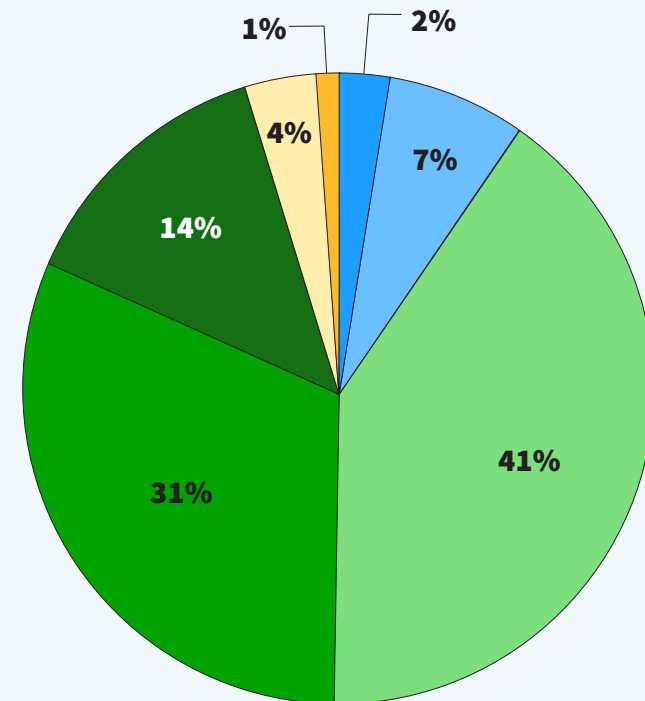
Customer Relationship Management systems (CRMs)

Charities are struggling to prioritise or invest in their systems, databases and CRMs.

Last year, 54% of respondents said their CRM was causing significant challenges for their organisation and 49% said the biggest barrier they faced to making progress with digital was finding funds to invest in devices, software and infrastructure. Whilst 45% planned to invest in their digital or data infrastructure or systems as a top priority, this continues to be a challenge.

This year, responses from a range of questions tell us:

- 60% say that finding funds to invest in infrastructure, systems and tools is the biggest barrier they face to progressing with digital, along with squeezed organisational finances (68%).

- Only a third (32%) are currently prioritising investing in infrastructure and systems. This rises to 47% of large charities, compared to only 24% of small charities.

- 30% of small charities do not have a CRM, compared to 13% of large charities.

- 24% of large charities say that their CRM does not meet their needs.

- A third of charities (32%), both small and large, would like support with data, to focus on how to choose a CRM or review their needs for it.

- Whilst a quarter of charities (25%) say they most need grant funding to implement a CRM, both large and small, more charities identify other needs for funding, such as capacity and headspace.

Procurement and choosing digital suppliers

When choosing suppliers, less than 1 in 5 charities (17%) say that a supplier's commitment to inclusion is very important, whilst two thirds (67%) say cost and value for money is key.
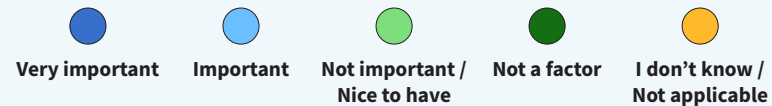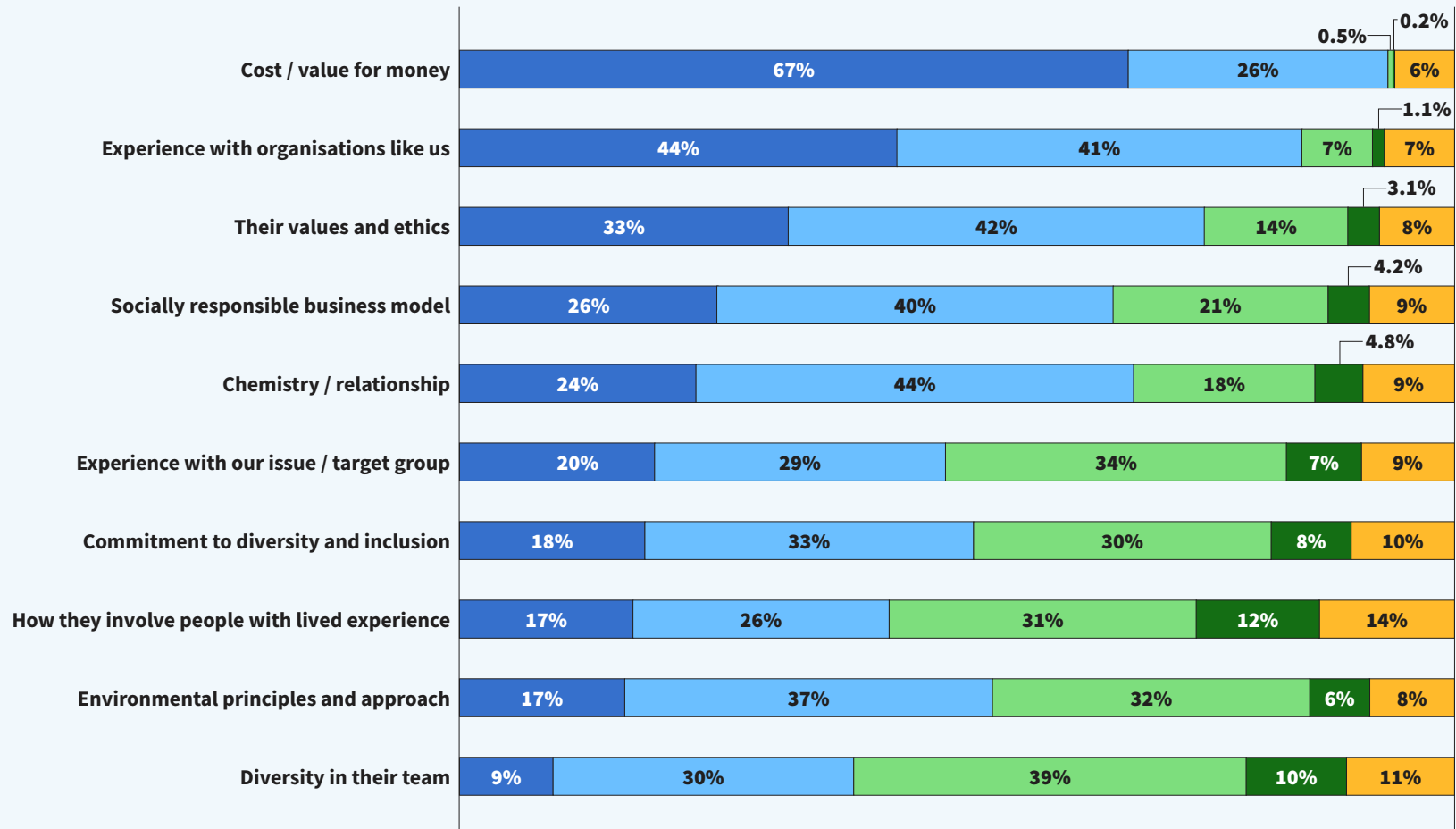
The top criteria that are important or very important to charities when they are choosing suppliers are:

1. Cost/value for money (93%)

2. Experience with organisations like us (85%)

3. Their values and ethics (75%)

4. Chemistry/relationship (68%)

5. Socially responsible business model (66%)

It's surprising to see that a commitment to diversity and inclusion was only important to 52% of charities (and only very important to 18%). A similar level of importance is given to how the supplier involved people with lived experience (only very important to 19%). This is less than 1 in 5 charities. This indicates that inclusion is not being widely prioritised in procurement when choosing digital suppliers.

Choosing a digital supplier

When you are choosing a digital supplier, how important are the following factors?

Factor	Very important	Important	Not important / Nice to have	Not a factor	I don't know / Not applicable
Cost / value for money	67%	26%	0.5%	0.2%	6%
Experience with organisations like us	44%	41%	7%	1.1%	7%
Their values and ethics	33%	42%	14%	3.1%	8%
Socially responsible business model	26%	40%	21%	4.2%	9%
Chemistry / relationship	24%	44%	18%	4.8%	9%
Experience with our issue / target group	20%	29%	34%	7%	9%
Commitment to diversity and inclusion	18%	33%	30%	8%	10%
How they involve people with lived experience	17%	26%	31%	12%	14%
Environmental principles and approach	17%	37%	32%	6%	8%
Diversity in their team	9%	30%	39%	10%	11%

Legend:
- ● Very important
- ● Important
- ● Not important / Nice to have
- ● Not a factor
- ● I don't know / Not applicable

Leadership

62% of boards have low digital skills and need to develop their digital skills, whilst 4 out of 10 charities (41%) do not have a digital trustee. Digital skills gaps on boards is an ongoing and systemic challenge.

Trustees' digital skills

- Just over a quarter have a board with good or excellent digital skills (28%), slightly lower than the 32% last year.

- 1 in 5 charities (19%) say their board has low digital skills, with little digital interest, understanding or support. A further 43% say they could improve on their interest and develop more skills.

- In total, 62% say their trustees' digital skills are low or could improve. This is higher than the 57% in 2023.

- Both large (54%) and small charities (66%) say their trustees' digital skills are low or in need of improvement.

- This is a challenge for charities at every stage of their digital journey. Even for charities at the advancing and advanced stages, 51% say their trustees' digital skills are low or in need of improvement.

- This report has found digital skills gaps on boards every year since the report began and it is clearly a systemic challenge.

Trustee digital skills
How would you rate your digital skills and understanding overall on your board?
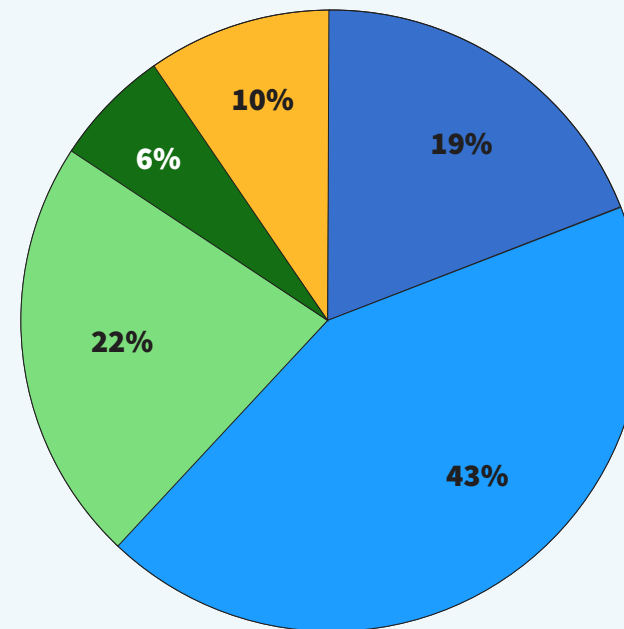
- **Low** There is little digital understanding, interest or support from our board
- **Could improve** They have some interest in digital but need to develop more skills
- **Good** They are engaging with digital and have some digital skills
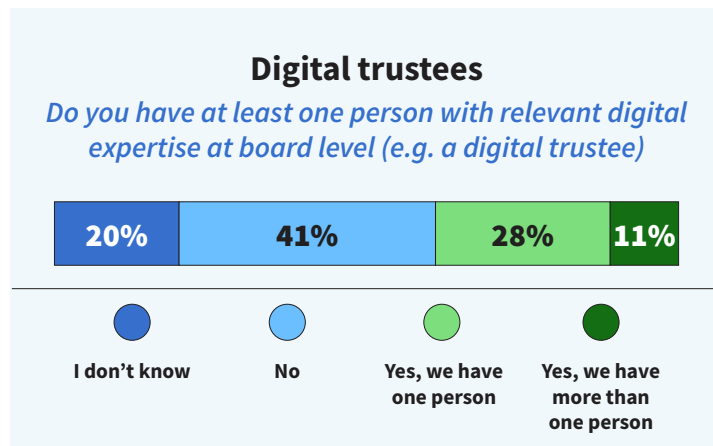- **Excellent** They are digitally savvy and see digital as a priority
- **I don't know what digital skills they have**

Digital trustees

- 39% of charities have a digital trustee. Of these, 11% have more than one person acting as a digital trustee.

- However, 41% of charities do not have a digital trustee, higher than the 35% last year.

- The results are similar by size, with 46% of small and 38% of large charities without a digital trustee.

- It is worrying, however, that for charities that do have digital trustees, 54% still felt digital skills were low, or could improve at board level. This group felt their board most needed to learn more about digital (38%), rely less on one person as the digital expert (35%) and learn more about emerging tech and AI tools. This shows us that digital trustees are only part of the solution to digital skills gaps on boards.

Digital trustees

Do you have at least one person with relevant digital expertise at board level (e.g. a digital trustee)

20%	41%	28%	11%
I don't know	No	Yes, we have one person	Yes, we have more than one person

Improvements at board level to drive digital progress

A third (31%) of charities want trustees to learn about emerging tech and AI tools.

In order to move forward with digital, most want their board to improve their skills and knowledge in the following five areas:

1. Learn more about digital (40%)

2. Recruit a digital trustee (40%)

3. Understand risks such as cybersecurity and data protection (33%)

4. Learn about emerging tech and AI tools (31%)

5. Better resourcing in investment in digital and IT (29%)

These results are very similar for both large and small charities and echo our findings in 2023. They are also similar for charities at any stage of their digital journey. Charities that are advancing or advanced with digital have a different top priority and most want their board to learn more about emerging tech and AI tools (rising slightly to 35%).

Improving skills at board level

Would any of the following improvements at trustee / board level help your organisation progress with digital?

Learn more about digital
40%

Recruiting a digital trustee (person with relevant digital expertise)
40%

Understand risks (cybersecurity, data protection, safeguarding)
33%

Learn more about emerging tech and AI tools
31%

Better resourcing and investment in digital and IT
29%

Greater buy-in to our digital progress / strategy
28%

Engage with data to inform decisions
26%

Less reliance on one person as the digital expert / trustee
20%

Greater buy-in to our data progress /strategy
18%

Better use of the digital expertise on the board
16%

Less risk averse decision making
14%

Engage with our user research to inform decisions
13%

Not applicable (e.g. our board has relevant digital skills)
11%

CEO digital skills

For the sixth consecutive year, charities need their leaders to provide a vision of what digital can help them achieve.

- Only 6% say their CEO has all relevant digital skills. This rises to only 10% for those who are at the advancing or advanced stage with digital and have a strategy in place. This shows that digital learning is always important, regardless of progress.

There are two key areas CEOs need to focus on:

- A vision and strategy for digital and data: When asked which digital skills, knowledge or behaviours CEOs needed to change to ensure digital progress, more than half (55%) want their CEO to provide a clear vision for digital, similar to last year. This is closely followed by 40% saying they want their CEO to develop their vision and plan for improving their data and 39% want their CEO to develop and execute a digital strategy (similar to 43% in 2023).

- Learn more about digital tools, AI tools and emerging tech trends: Reinforcing the trend we can see at trustee level, 39% want their CEO to understand digital tools and ways of working, an increase from 30% last year. In addition, 39% want their CEO to keep up to date with emerging trends and AI tools, indicating that CEOs must invest time in horizon scanning. A further 34% want their CEO to understand risks and opportunities for emerging tech.

Small charities

The top skills, knowledge and behaviours CEOs need to develop are:

1. A clear vision of what we could achieve with digital (56%)
2. Understand digital tools and ways of working (44%)
3. A clear vision and plan to improve our data (42%)
4. Ability to develop and embed a good digital strategy (42%)
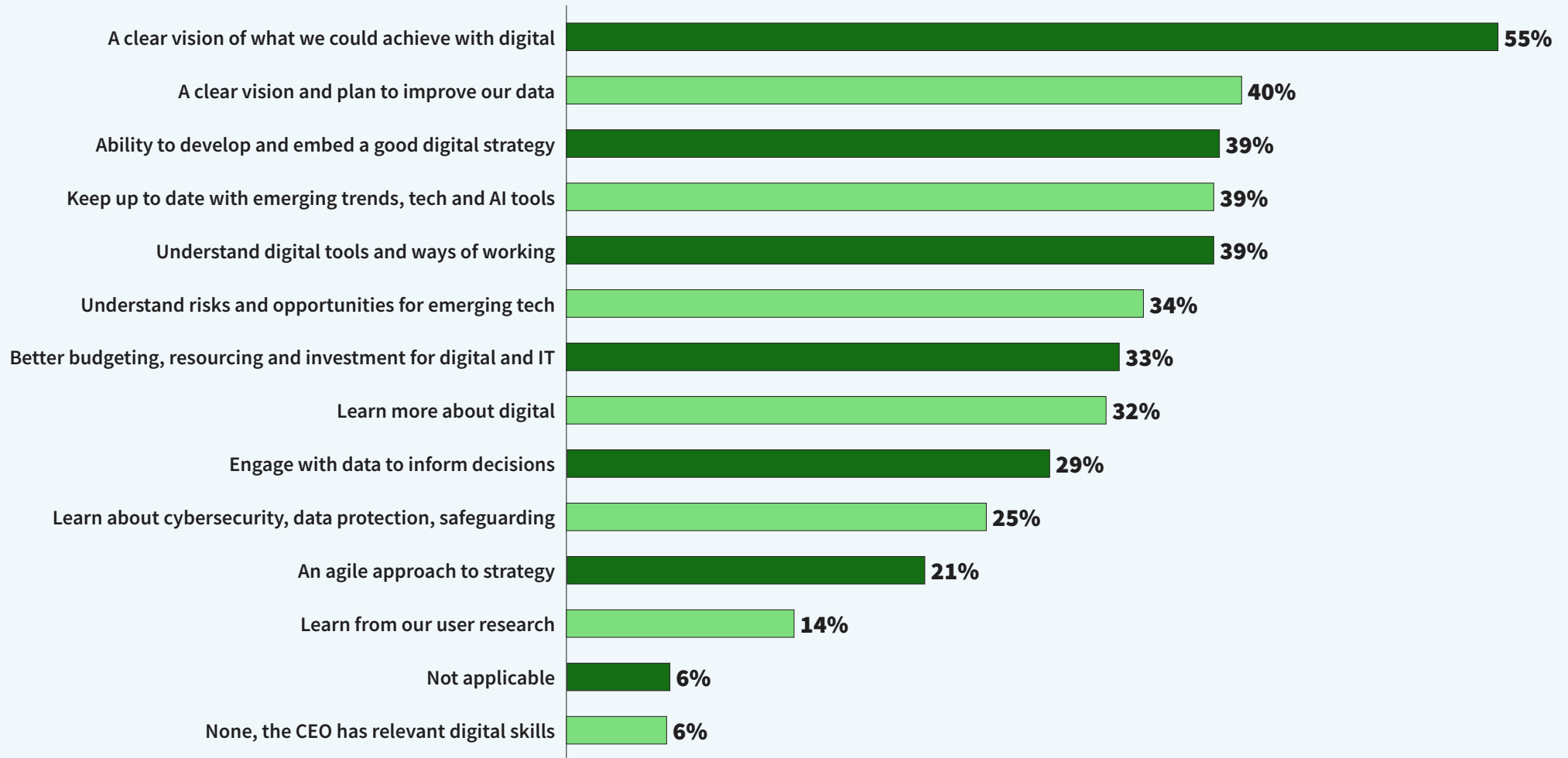5. Keep up to date with emerging trends, tech and AI tools (38%)

Large charities

The top skills, knowledge and behaviours CEOs need to develop are:

1. A clear vision of what we could achieve with digital (55%)
2. Keep up to date with emerging trends, tech and AI tools (38%)
3. Understand risks and opportunities for emerging tech (38%)
4. Better budgeting, resourcing and investment for digital and IT (38%)
5. A clear vision and plan to improve our data (35%)

Improving skills at CEO level

What skills, knowledge or behaviour would you most like your CEO (or yourself if you are the CEO) to develop in order to progress further with digital?

Skill	Percentage
A clear vision of what we could achieve with digital	55%
A clear vision and plan to improve our data	40%
Ability to develop and embed a good digital strategy	39%
Keep up to date with emerging trends, tech and AI tools	39%
Understand digital tools and ways of working	39%
Understand risks and opportunities for emerging tech	34%
Better budgeting, resourcing and investment for digital and IT	33%
Learn more about digital	32%
Engage with data to inform decisions	29%
Learn about cybersecurity, data protection, safeguarding	25%
An agile approach to strategy	21%
Learn from our user research	14%
Not applicable	6%
None, the CEO has relevant digital skills	6%

Digital services and inclusion

Digital service delivery

81% of charities are using digital tools in service delivery, either behind the scenes, in a supportive role or in an integral role.

Four years on from lockdown, the use of digital tools in service delivery has evolved significantly across the sector. Digital tools, software, data and devices are now largely interwoven in many aspects of delivery and operations. As such, we can no longer differentiate clearly or meaningfully between digital, hybrid and face-to-face services as we have in previous surveys. This year, we set out to understand the variety of ways in which charities are using digital tools in service delivery. Note that charities could select a range of options here, to reflect multiple services and approaches to using digital tools.

- Two thirds (62%) use digital tools behind the scenes (e.g. for project management or administration).

- More than half (57%) use digital tools as part of service delivery (e.g. video calls).

- Overall, most charities are now using digital tools in their services, with 81% saying this plays a supportive, significant or integral role in their delivery. This figure combines all charities that are either using digital tools behind the scenes or in a supportive role in service delivery (note that many do both).

- When we look at the results by size of charity, 88% of large charities are delivering digital services, compared to 56% of small charities.

- A third (29%) say they are prioritising face-to-face service delivery. For those providing frontline services, this rises to 35%.

- A smaller proportion of charities has developed their use of service delivery, with 14% having developed their own products and platforms for digital services, and 5% being entirely platform based. This is similar to 2023.

Digital service delivery
What role/s do digital tools or approaches typically have in your services?

Behind the scenes. Digital tools help with delivery, project management or organisation (e.g. online registration)
62%

Supportive. Digital tools form part of service delivery or compliment core services (e.g. video calling, an online community)
57%

Minimal. We prioritise face to face service delivery
29%

Significant. We develop our own in-house digital products, platforms and tools to provide services
14%

Digital inclusion. We support people or organisations to get online
12%

Integral. We are platform based, operating solely online
5%

Digital inclusion

Digital inclusion services (such as providing devices, training and data) remain a priority for a quarter of charities, but there is a gap in capacity to provide this support.

Data notes: In our analysis for this section, we only look at the 336 responses for charities delivering frontline services to individuals. All percentages relate to this 336.

For charities delivering frontline services to individuals

- Only 16% offer digital inclusion support services. There are minimal differences between large and small charities here.

- 26% of charities supporting older people as a main target group are providing digital inclusion support and 30% see this as a top priority this year.

- Over a quarter (27%) see digital inclusion as a top priority this year. This is the same as the 27% who saw this as a priority last year.

- However, only 17% say that improving digital inclusion is a key achievement in the last 12 months.

- We can see that the need for funding to provide digital inclusion services has declined from 24% in 2022, to 18% in 2023, to 16% this year. Instead, internal funding needs for digital costs are the priority (such as capacity and training for staff and volunteers). Barriers such as capacity are clearly affecting how charities can deliver on their priorities.

- We can see a slightly greater prioritisation of digital inclusion support among organisations tackling racial injustice. A third (33%) say this is a key priority for their organisation this year and 29% say this is a key need for funding.

Collaboration and reuse in digital service design

Peer learning

- 42% of charities do discuss digital choices and challenges with other nonprofits, whilst 20% say they are talking to peers to learn about AI.

- Later in this report, we can see that 38% of charities progressed with digital as a result of direct advice from peers.

Collaborating on digital and data

- Whilst less than 1 in 5 (18%) say they are collaborating with other nonprofits to create shared digital solutions, this is equivalent to 104 charities and has the potential to create more effective services.

- Only 15% of charities share and combine data with other nonprofits. Whilst only 16% of charities contribute to open or sector data, this rises to a quarter (25%) of large charities.

- Only 16% of charities share their learning openly online for others to benefit from.

Sector best practice

- Nearly a quarter (23%) of charities adopt sector digital standards or design principles. This rises to 39% of large charities.

Equality, diversity and inclusion in digital services

Nearly all charities (95%) say their digital services are inclusive to some extent, however, only a third (33%) say their digital services are fully inclusive.

Diversity and inclusion in digital services

- A third (33%) say their digital services are inclusive to a great extent (29% last year), a further 62% say they are inclusive to some extent (95% in total).

- 84% say their services reach diverse communities, but only 17% say they are reaching diverse communities to a great extent.

- However, only 15% say they are monitoring diversity and inclusion to a great extent and nearly a third (31%) are not doing this at all. This is a key skills gap.

Developing and designing services with users

- **Undertaking user research:** Only 32% of charities say they are undertaking user research to inform their service design. This is not surprising given that earlier in the survey, 33% say they have poor user research and 15% say they don't do this.

- **Undertaking user research with diverse groups:** Only 18% say their services are informed by research with users from diverse communities to a great extent (compared to 25% last year). Nearly a third of organisations say they are not undertaking user research with diverse groups (30%).

- **Co-designing services with users or people with lived experience:** It is promising to see that 37% of charities say they are co-designing their services with users. This rises to 42% of charities that are providing frontline services.

- **Assessing co-design skills in procurement:** When charities are commissioning a digital agency or supplier, 52% assess how they involve people with lived experience as a very important or important factor in their decision.

- **Improving services:** A quarter of charities are following good practice and improving their services based on feedback and evaluation to a great extent (25%). A further 62% are doing this to some extent (total of 87%).

Developing and designing services with diverse teams

- 74% of charities say their services are developed by diverse teams. However, only 15% say they do this to a great extent.

- Half (54%) say that when they are choosing a digital supplier, commitment to diversity and inclusion is important or very important. However, only 39% said that diversity in the team was a key factor in their decision.

Accessibility of digital services

- 23% say their services are accessible to a great extent (28% in 2023), whilst 65% say they are to some extent, indicating this is a key area for improvement.
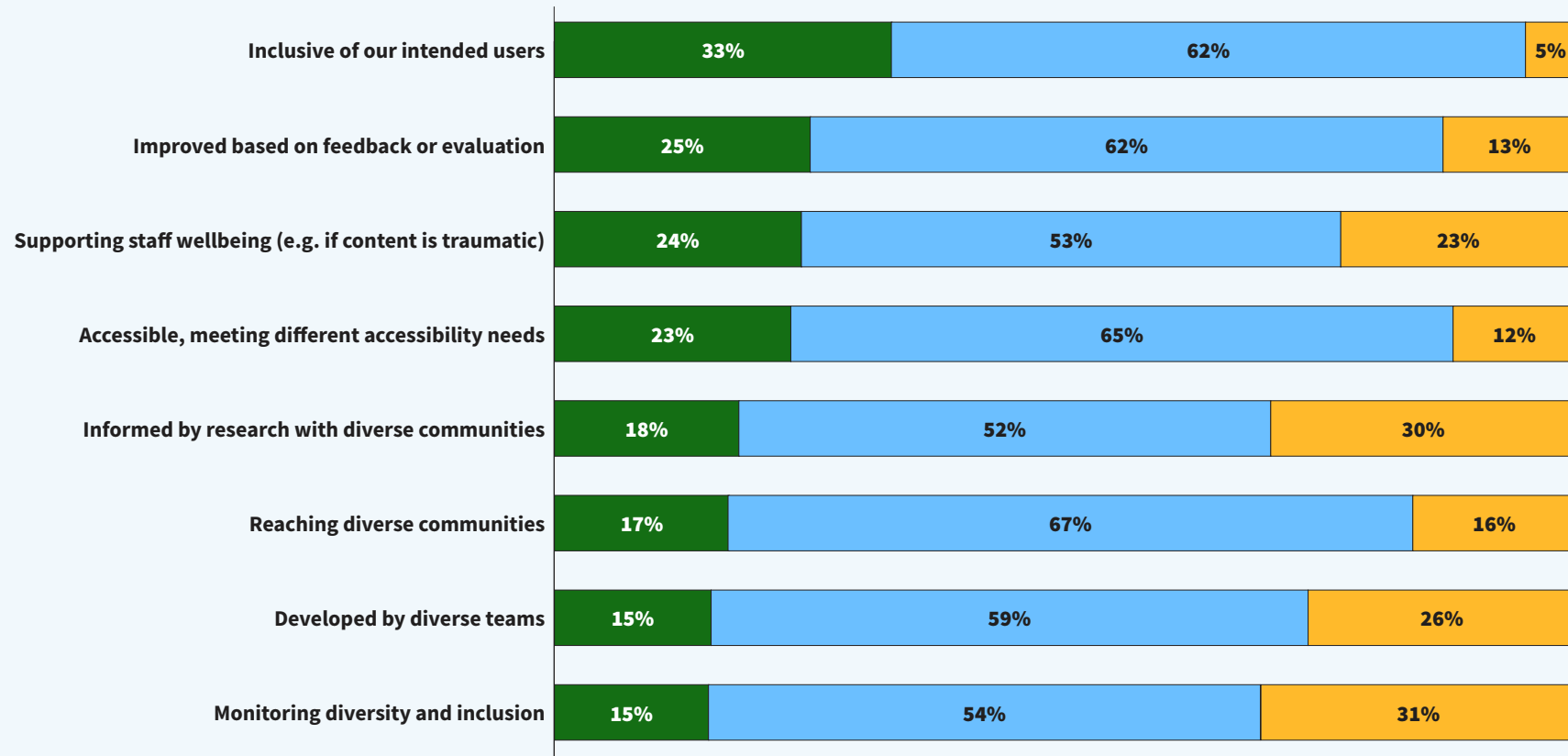
Equality, diversity and inclusion in digital services

If you offer any online, digital or hybrid services, to what extent do you feel they are:

● Very important

● Not important / Nice to have

● I don't know / Not applicable

	Very important	Not important / Nice to have	I don't know / Not applicable
Inclusive of our intended users	33%	62%	5%
Improved based on feedback or evaluation	25%	62%	13%
Supporting staff wellbeing (e.g. if content is traumatic)	24%	53%	23%
Accessible, meeting different accessibility needs	23%	65%	12%
Informed by research with diverse communities	18%	52%	30%
Reaching diverse communities	17%	67%	16%
Developed by diverse teams	15%	59%	26%
Monitoring diversity and inclusion	15%	54%	31%

Artificial intelligence (AI)

Recap: What we know about AI skills and capacity so far

We can see elsewhere in this report that there is appetite to engage with AI, particularly among large charities and those with a strategy in place. This section of the report delves into the specific questions about how charities are using AI tools, their views on AI, the steps they are taking to move forwards and the barriers they face. As a recap we have seen that:

Skills and capacity to engage with emerging tech trends are low

- Charities rate their skills and capacity to engage with emerging tech lower than all the core digital skills we asked about. Overall, 40% say that they are poor at engaging with emerging tech trends, whilst a further 16% say they don't do this, a total of 56%.

- For small charities, this rises to 60% saying they have poor skills and capacity to engage with emerging tech trends, or are not currently doing this.

- For charities at an early stage with digital (curious or starting out), 65% say they have poor skills or do not engage with emerging tech trends.

- 7 out of 10 charities (68%) say they are struggling to progress digitally overall, due to their finances, headspace and capacity.

Leaders needs to develop AI knowledge

- 39% want their CEO to develop their digital skills by keeping up to date with emerging trends and AI tools. In addition, 34% want their CEO to understand risks and opportunities for emerging tech.

- Nearly a third (31%) want their board to learn about emerging tech and AI tools (34% of large and 30% of small charities).

AI is a greater priority for large charities

- It is surprising to see that only a third of charities (34%) see using AI tools as a priority this year for their organisation.

- There are clear differences between large and small charities. Half of large charities (53%) say that AI tools are a priority, whilst only a quarter of small charities do (26%).

Skills to engage with emerging tech
How would you rate your organisation's skills and capacity in the following area?

- Excellent — 7%
- Fair — 35%
- Poor — 40%
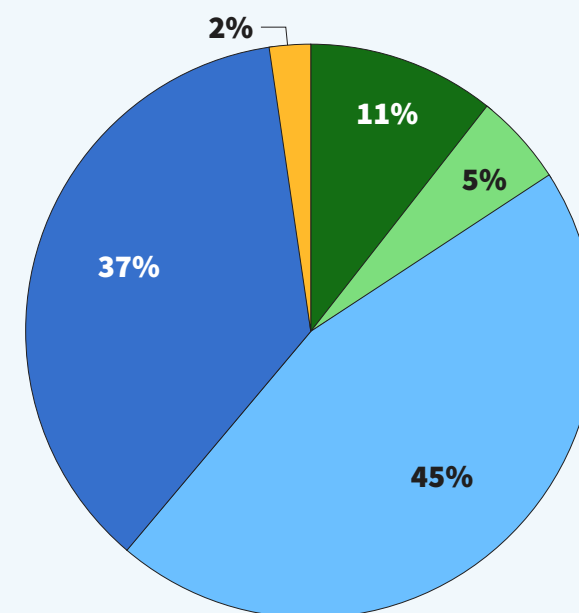- We don't do this — 16%
- I don't know — 3%
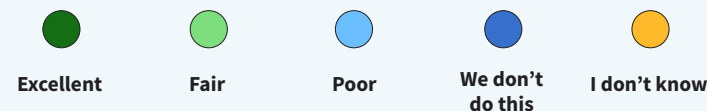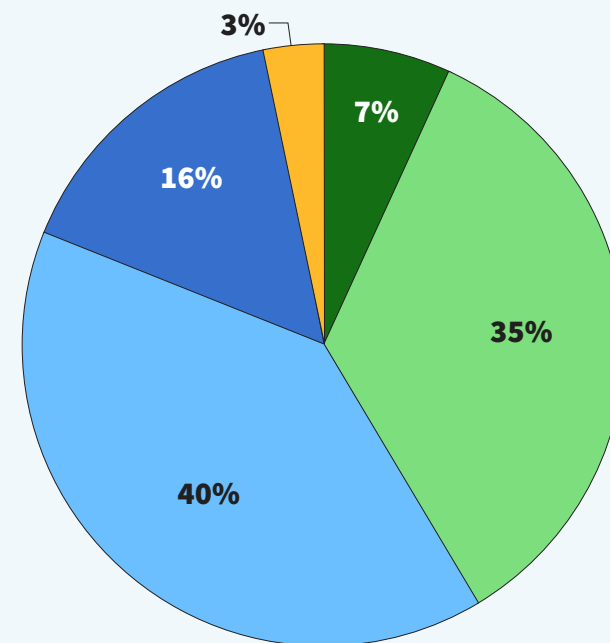
Use of AI

Are charities using AI tools?

61% of charities are using AI tools in their day-to-day work or operations.

- 61% of charities are currently using AI in their day-to-day work or operations. Of these, 45% of charities are using AI tools informally (e.g. trying out tools), whilst only 11% are using AI tools across their organisation and a further 5% are working towards this. This is a significant increase on the 35% who were using AI tools last year.

- More than a third (37%) are not using AI tools day-to-day.

- Whilst half of small charities (53%) are using AI tools, this is much less in comparison to three quarters (78%) of large charities.

- We can see higher proportions of charities using AI tools at each higher digital stage:
  - **Curious:** 38%
  - **Starting out:** 54%
  - **Advancing:** 73%
  - **Advanced:** 78%

- Interestingly, 78% of infrastructure organisations and 83% of grantmaking trusts and foundations are using AI tools. This could link to their role in supporting other charities and the associated administration and data work.

- This shows us that income and digital skills are key factors in the uptake of AI tools.

Are charities using AI tools?
Are you or your organisation currently using AI in day to day work or operations?

2%	
11%	
5%	
37%	
45%	

Legend: Yes we are · We are working towards this · Informally (e.g. trying out AI tools) · No · Not sure

Use of AI

How charities are using AI tools

A third of charities are using AI tools for administrative tasks and developing online content.

Data note: This section is based on questions that were only asked of the 345 charities who said that they were using AI tools in their work. However, we have calculated the percentages out of the respondents who answered the AI question at the start of this section (566 charities) to give a meaningful view of the extent of AI use in the charity sector.

The most popular uses and functions of AI tools are:

1. Developing online content (e.g. social media posts and generating images) (33%).

2. Administrative tasks such as summarising meeting notes (32%).

3. Drafting documents and reports (28%)

4. Generate ideas/creativity (e.g. to start a project) (27%)

5. Research and information gathering (e.g. about a topic, current advice) (24%)

Small proportions are using AI tools in the following ways:

- **Grant fundraising:** One in five charities (19%) are using AI tools for tasks such as writing bids and researching funders. Of the 110 charities using AI tools for grant fundraising, two thirds are small charities (66%) whilst a third are large (32%).

- **Service delivery:** 5% are offering services built on AI tools, whilst 12% say they are using AI tools behind the scenes. Overall, 15% of charities are using AI tools in their service delivery.

- **Finding numerical insights in data:** Only 8% were using AI tools for data analysis and 4% are using predictive analytics such as for targeting donors. This may speak to the data skills and capacity gap in the sector.

- **Supporting others with AI and influencing change:** 9% of charities are currently supporting others to understand, critically engage with or use AI tools, whilst 5% are influencing the responsible and ethical development of AI technology and 4% are supporting people and communities who are negatively affected by AI technology.
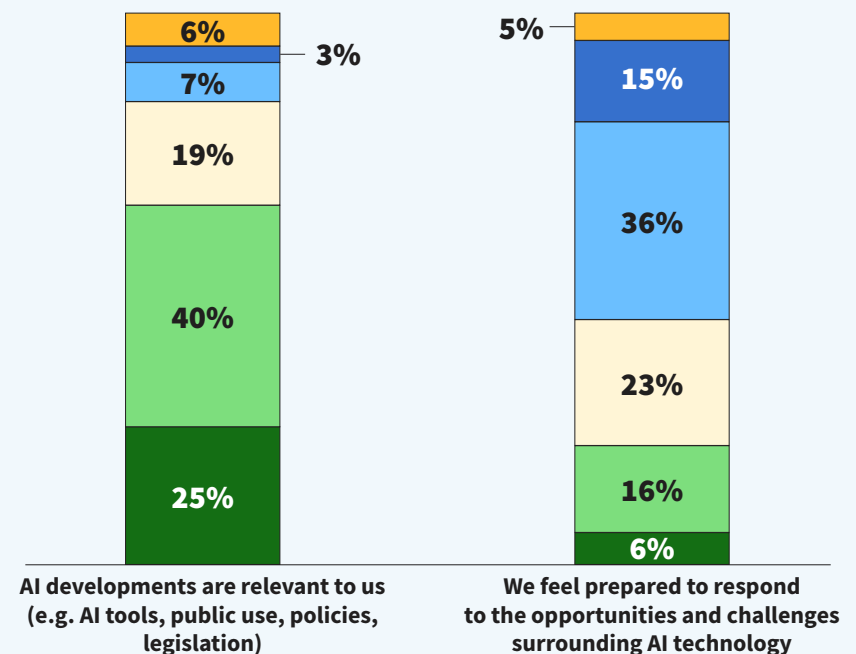
Use of AI

How charities feel about AI being relevant and how prepared they are

Almost two thirds of charities see AI as relevant to them, but less than a quarter feel prepared to respond to the opportunities and challenges.

- 65% of charities either strongly agree or agree that AI developments are relevant to them. This is less than the 78% who agreed with this statement in our AI poll for the Charity Digital Skills Report in 2023 (noting that this poll only had 100 respondents).

- A third of charities are not certain about whether AI developments are relevant to them (35%). This includes 19% who feel neutral and 6% who don't know.

- However, large charities are significantly more positive about AI. 83% strongly agree or agree that AI developments are relevant to them, compared to 56% of small charities. This looks to be linked to digital capacity as well as size.

- Despite this interest, only 22% of charities agree or strongly agree that they feel prepared to respond to AI opportunities and challenges. The responses are similar for both large and small charities (23% of small and 21% of large charities agree or strongly agree that they feel prepared). Overall, most charities feel unprepared for AI developments.

Feeling prepared and ready to engage with AI tools
To what extent do you agree with the following statements?

AI developments are relevant to us (e.g. AI tools, public use, policies, legislation)
- 6%
- 3%
- 7%
- 19%
- 40%
- 25%

We feel prepared to respond to the opportunities and challenges surrounding AI technology
- 5%
- 15%
- 36%
- 23%
- 16%
- 6%

Legend: Strongly agree · Agree · Neither · Disagree · Strongly Disagree · I don't know
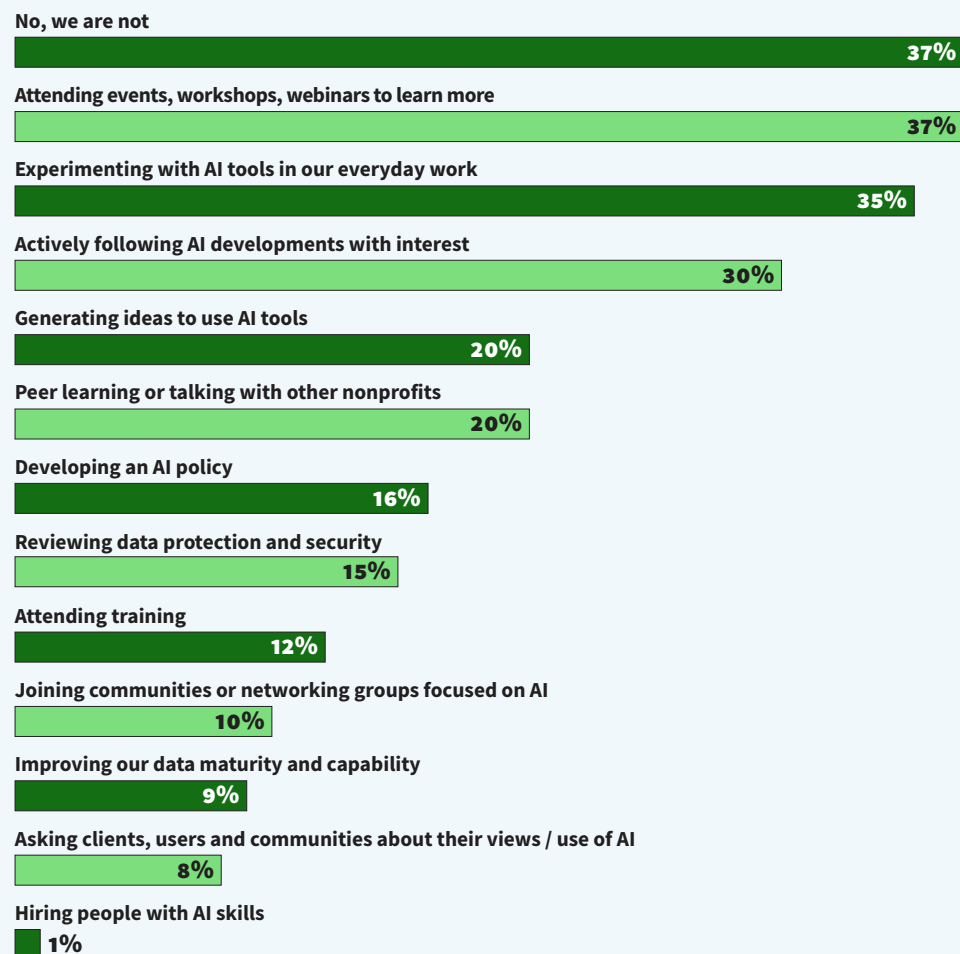
Moving forward with AI

What steps are charities taking to move forward with AI?

In order to learn about AI, a third (35%) of charities are experimenting with AI tools in their everyday work.

- We were surprised to find that 37% of charities say they are not taking any steps to engage further with AI. This rises to 47% of small charities, compared to only 14% of large charities who are not looking to move forward with AI.

- Charities are primarily taking steps to learn about AI, with a third (37%) attending workshops, events and webinars, 30% following AI developments with interest, and 1 in 5 (20%) engaged in learning with their peers at other nonprofits.

- Others are adopting a test and learn approach, with 35% experimenting with AI tools and 20% generating ideas to use AI tools.

- Less than 1 in 5 are putting in the building blocks needed for AI use such as developing an AI policy (16%), reviewing data protection and security (15%), and improving data maturity and capability (9%). More large charities are focusing on these, with 34% developing an AI policy and 25% reviewing data protection and security.

- Charities need to take a user-led approach to adopting AI, so it is a concern that just 8% are asking clients, users and communities about their views and use of AI.

- Despite a lack of skills and knowledge in the field of AI, very few charities (1%) are looking to hire people with these skills.

Taking steps to move forward with AI

Are you or your organisation taking any of the following steps to engage further with AI?

No, we are not
37%

Attending events, workshops, webinars to learn more
37%

Experimenting with AI tools in our everyday work
35%

Actively following AI developments with interest
30%

Generating ideas to use AI tools
20%

Peer learning or talking with other nonprofits
20%

Developing an AI policy
16%

Reviewing data protection and security
15%

Attending training
12%

Joining communities or networking groups focused on AI
10%

Improving our data maturity and capability
9%

Asking clients, users and communities about their views / use of AI
8%

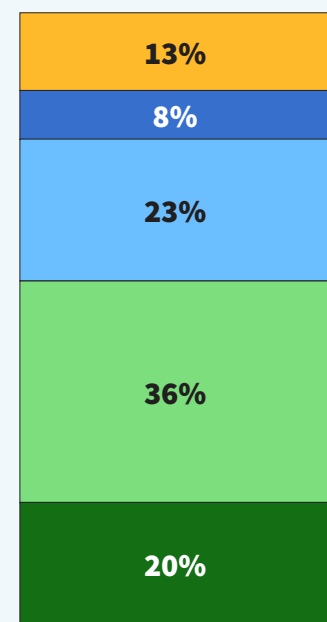**Hiring people with AI skills**
1%

Moving forward with AI

Are charities looking for external AI training and support?

Half of charities are looking for external training, support, guidance or opportunities to engage further with AI this year.

- We wanted to find out how many charities were committed to seeking AI training, guidance, support or informal opportunities to engage further with AI this year. Results were mixed.

- Overall, half of charities are definitely or probably looking for external AI training, guidance or support (56%).

- However, the picture is incredibly varied. Whilst 1 in 5 (20%) will definitely be seeking out these opportunities, 36% say they probably will and 23% think they probably won't. Taken together, the data indicates a variable picture of charities committed to seeking help to engage further with AI, and those who aren't sure about next steps.

- Again, we can see that large charities are more committed to moving forwards with AI, with 77% saying they definitely (30%) or probably (44%) will access external training or support. This compares to 50% of small charities saying they definitely (16%) or probably (34%) will look for external training or support.

Intention to access external AI training or support

Are you (or others in your organisation) looking to take part in external training, support, guidance or informal opportunities to engage further with AI this year?

13%	Not sure
8%	Definitely not
23%	Probably not
36%	Probably
20%	Definitely

Legend: Definitely · Probably · Probably not · Definitely not · Not sure
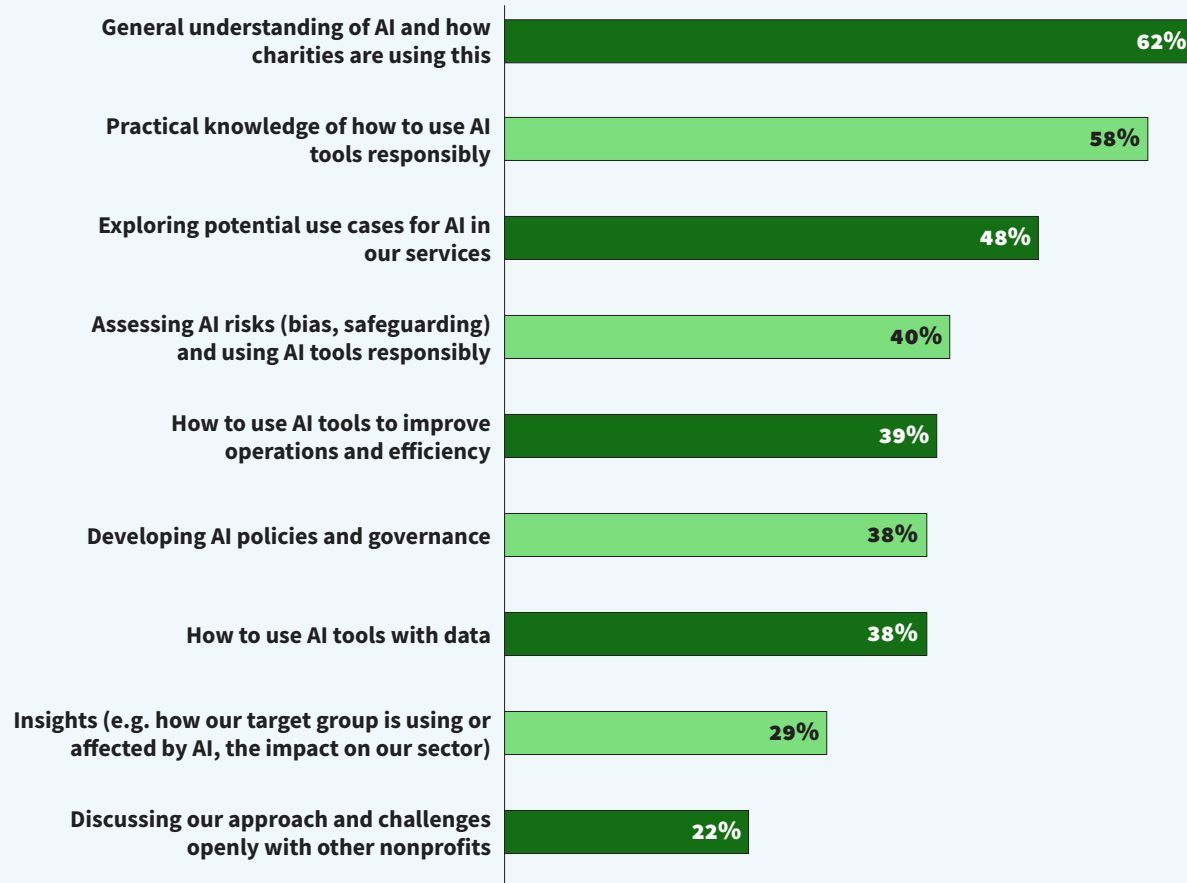
Moving forward with AI

Which AI skills are charities planning to develop?

Almost two thirds (62%) of charities want to grow their general understanding of AI and how charities are using it.

- Charities are at exploratory stages with developing their AI skills.

- Almost two thirds (62%) want to develop a general understanding of AI and how charities are using it, whilst 58% want practical knowledge of responsible use of AI tools and almost half (48%) want to know about use cases in their services.

- 40% are keen to skill up in how to assess AI risks and adopt AI responsibly, with 38% keen to develop AI policies and governance.

- 39% are interested in how to use AI to improve operations and efficiency, indicating an interest in productivity.

- Some charities are interested in developing skills to get more from data and to gain insights, with 29% seeking to understand how their target audience is impacted by AI.

- Large and small charities have similar responses here in terms of the skills they most want to develop, although for larger charities the proportions are higher for every skill in comparison to smaller charities.

AI skills development needs
What areas of skills or knowledge are you looking to develop?

Skill area	Percentage
General understanding of AI and how charities are using this	62%
Practical knowledge of how to use AI tools responsibly	58%
Exploring potential use cases for AI in our services	48%
Assessing AI risks (bias, safeguarding) and using AI tools responsibly	40%
How to use AI tools to improve operations and efficiency	39%
Developing AI policies and governance	38%
How to use AI tools with data	38%
Insights (e.g. how our target group is using or affected by AI, the impact on our sector)	29%
Discussing our approach and challenges openly with other nonprofits	22%

Moving forward with AI

What is holding charities back when it comes to AI?

50% of charities say the biggest barrier they face to moving forward with AI is a lack of skills and expertise.

- The biggest barrier charities face to moving forwards with AI is a lack of technical skills and expertise, cited by 50% of charities. This is a sector wide challenge, shared by both large (55%) and small (48%) charities.

- This is compounded by a lack of training to upskill, identified as the second biggest barrier by a third of charities (34%). Again, this is a sector wide challenge and both large (31%) and small charities (35%) agree.

- Almost a third (31%) are concerned about data privacy, GDPR and security.

- Large charities are particularly worried about data privacy, GDPR and security. This is a top concern for 47% of respondents, compared to 24% of small charities.

- Charities are also lacking confidence in AI tools, citing key barriers as factual accuracy (31%), the potential for bias and discrimination (31%), and human rights and environmental concerns (31%).

- Costs of AI tools are an issue for 29% of charities, which is likely to be affected by the cost of living crisis. The results here are identical for small and large charities.

Barriers to adopting AI tools

Are any of the following creating a significant barrier to your organisation adopting AI tools or preparing to use AI more?

Barrier	Percentage
Lack of technical skills and expertise	50%
Lack of training to upskill ourselves	34%
Data privacy, GDPR and security concerns	31%
Issues with factual accuracy in AI generated answers	31%
The potential for bias and discrimination	31%
Ethical, human rights and environmental concerns	31%
Costs of AI tools and how to resource these	29%
We don't see a strong use case	26%
Our data maturity needs attention first	23%
We need to understand the approach from regulators	19%
Our CRM or data collection and reporting	15%
Lack of buy-in from our board / leaders	12%
We don't trust AI companies and tools	10%
The potential impact on jobs	5%

Climate change

Using digital and technology to reduce carbon footprints

1 in 4 charities are using digital to reduce their carbon footprint.

- 61% of charities are mindful of their use of digital tools and technology and the role this plays in their carbon footprint.

- Whilst only 25% are actively using digital tools and technology to reduce their carbon footprint as an organisation, it is positive that a further 17% plan to and 19% are informally working on this issue.

- A quarter (26%) are not taking steps to use digital to reduce their tech carbon footprint.

The top five actions charities are taking, which we would continue to encourage, are:

1. Considering how they use digital tools (e.g. remote working to reduce travel) (49%)

2. Choosing suppliers based on environmental principles (11%)

3. Selecting green web hosting (10%)

4. Factoring sustainability into tech and software choices (10%)

5. Designing websites to minimise energy use (9%)

Elsewhere in the survey, we can also see that when charities are *choosing digital suppliers*, 54% see their environmental principles and approach as an important factor in their decision. However, other factors, such as cost (for 93%), experience with similar organisations (85%) and their values and ethics (75%), are seen as an important factor for more charities.

Are charities using digital tools and technology to reduce their carbon footprint?

Is your organisation taking steps to use digital and tech in ways which reduce your carbon footprint?

● Yes	● No
● Not yet, but we plan to	● Not sure
● Informally we do	

Pie chart values: 25%, 17%, 19%, 26%, 13%
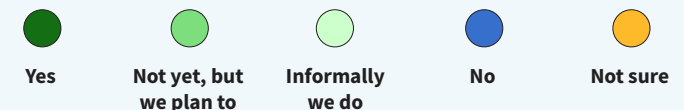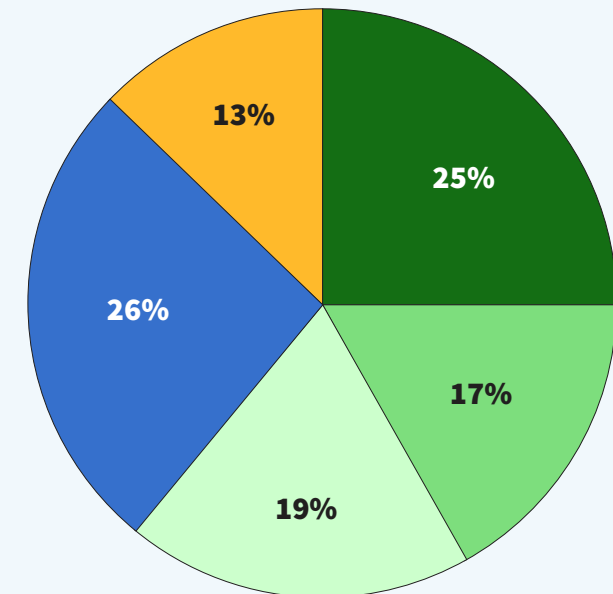
Organisations tackling climate change

This year, we asked organisations if they described themselves as 'tackling climate change' and had 60 responses (9%). Their characteristics (size, stage of digital) mirror the main sample.

We can see this group is more committed to looking at the impact of their digital tools and technology on their carbon footprint.

- 53% are actively using digital tools and technology to reduce their carbon footprint as an organisation, whilst a further 17% are working towards this and 15% are informally doing this. Overall, this is 85%.

- This committed group notes two key barriers to moving forwards: the cost or time to redesign their website/online services to reduce energy consumption (36%) and a lack of transparent information from platforms/tools (26%).

Barriers to reducing tech carbon footprints

More than half of charities (52%) say they have more pressing priorities than tech carbon footprint reduction.

The top five areas holding charities back from doing more to tackle climate change through tech are:

1. More pressing priorities (52%)

2. Limited knowledge and expertise (39%)

3. Cost/time to redesign their website/digital services with energy consumption reduction in mind (20%)

4. 19% of charities have not thought about this issue

5. The cost of tools/suppliers with environmental credentials (19%)

The results are similar for both small and large charities. As with other areas of digital change, charities are being held back by a lack of headspace, skills and resources.

Future plans

Only a third (36%) of charities say they are not planning to reduce their carbon footprint in future.

Charities are beginning to consider tech as part of their carbon footprint reduction. It is encouraging to see that:

1. 24% are learning from other charities, suppliers or organisations.

1. 18% are seeking guidance from experts.

1. 16% are measuring their footprint and tracking progress.
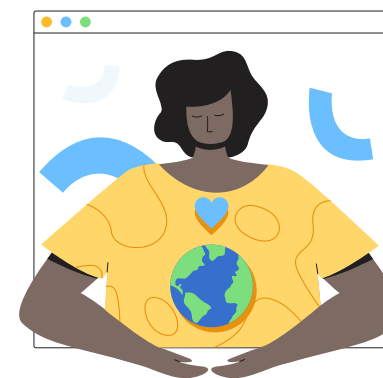
Digital funding

Recap: What we know about funding needs so far

We can see throughout this report that there is a significant need for funding to enable charities to progress with digital and develop their organisational capacity. As a recap:

- **Digital is a priority for charities:** A quarter of charities say that digital is a top priority in their organisation (27%), whilst half say it is important, but there are other more pressing priorities (53%).

- **Digital is integral to service delivery:** 81% of charities are using digital tools in service delivery.

- **Organisations are struggling with finances and capacity:** Squeezed organisational finances and a lack of capacity are creating a significant barrier for two thirds of charities. A further 60% (an increase on the 49% last year) say the biggest barrier they face to progressing with digital is finding funds to invest in infrastructure, systems and tools.

In recent years, our reports have shown that demand for digital funding has outstripped supply. This year, we can see once again that there is limited access to digital funding and that organisations struggle with the digital skills and capacity to apply for this.

Accessing digital funding

Only a quarter of charities have received any digital funding this year.

- **Applications for digital funding:** Only a third of charities applied for digital funding this year (34%), whilst a further 18% of charities (and 22% of small charities) applied for funding, but did not include any digital costs in their applications.

- **Success:** A quarter of charities (24%) accessed digital funding. Of these, 6% received funding for substantial digital costs, whilst 19% (1 in 5) accessed funding for some digital costs, such as new devices or staff time. Note that some charities received both (these have not been double counted). A further 10% of charities were rejected for funding applications that included digital costs.

- **Size and success:** 26% of large charities were successful and received funding for digital costs, compared to 19% of small charities.

- **Digital stage and including digital costs in applications:** Charities at an early stage of their digital journey are less likely to apply for digital funding. We can see that 31% of those at the curious stage did not include digital costs in funding applications, compared to 21% of those starting out with digital and only 12% of those at the advancing and advanced stage.

- **Digital stage and accessing funding for digital costs:** Of those who accessed digital funding, 68% were at the advancing and advanced stages, whilst 23% were at the starting out stage and 8% were at the curious stage.

Funding needs

Three quarters of charities need funding to create time and capacity to work on organisational development and digital strategy (73%).

We asked charities what they most needed funding for. We also asked charities to tell us the one thing they would ask of funders in order to progress with digital. There are five key funding needs.
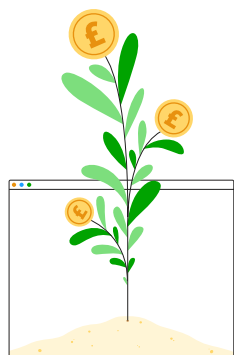
① Time (73%)

The need for funding to create internal capacity has increased significantly. This year, three quarters of charities (73%) need funding for capacity to move forward with digital. This need is similar for 75% of large and 74% of small charities. Last year, 45% of charities needed time and/or support to develop their digital approach or strategy. The 73% of charities identified at least one of the following funding needs(calculated to avoid double counting):

- Organisational development (57%)
- A digital strategy (39%)
- Someone internally to lead on digital change (30%)

> *"What we lack is TIME. Our small management team is so busy delivering services and doing everything to support that there is little time for anything else."*

> *"We would ask them to fund us for 12 months to put our digital plan into place because we know that once in place, it will increase and diversify our income and will reduce our administration and operating expenses as we will be more efficient. It will free up time that our staff team can spend on reaching and supporting more people."*

> *"Funding is always an issue to grow our capacity in this area, yet it underpins all we do."*

> *"To fund a post's time for at least 12 months so we can focus entirely on switching to digital methods of delivery."*

② People with expertise (50%)

A top priority for 50% of charities is a need for funding so that charities can bring in digital expertise. They identified at least one of the following funding needs (and has been calculated to avoid double counting): a need to access external advice and expertise (37%) alongside a need to employ core digital staff and people with digital expertise (22%). This was also a prominent theme in open responses:

> *"Help from a professional to develop a digital strategy and help with security/GDPR."*

> *"To allow us to bring in external expertise to give us capacity to implement an ethical and nature led digital strategy."*

> *"To help us invest in working with reputable and effective digital agencies who can help us move forward in our digital reach and strategy and to see paid advertising as a solid investment."*

Funding needs

3 Training

43% of charities (and 49% of small charities) say they most need funding to access training for staff and volunteers. This has increased from 36% last year. This was a prominent theme in the open responses for 40 charities.

> *"We're a small team so it would be useful for us all to have training sessions for digital technology and funding for IT equipment and services."*

> *"Consultancy support with automation to help us save time and provide bespoke training for staff around AI and other digital tools."*

> *"To employ someone to update the website and help to put together a strategy and also to train volunteers."*

4 Tech and systems

Two thirds (66%) of charities need funding for internal technology, hardware, systems and licence costs. They identified at least one of the following funding needs (the overall figure has been recalculated to avoid double counting):

- 28% who need funding for IT and infrastructure.
- 26% who need funding for devices and computers.
- 25% who need to implement a new CRM.
- 34% who need funding for subscriptions and licence costs (similar to 33% last year).

Last year, the second biggest need for funding was for computers, devices, IT and infrastructure (37%). Whilst charities need funding for tech and systems, capacity, people and skills development are more important this year.

> *"Invest in our digital infrastructure and help us build a strong and secure technology base. This could improve our services, making them more accessible and efficient, while also ensuring the privacy and security of my users' data."*

> *"To support us with a volunteer management system that would significantly reduce administration time, reduce the number processes we use and streamline our work."*

5 Services

Overall, 42% of charities needing funding for services (this has been recalculated to avoid any double counting). This includes 24% of charities looking to develop existing digital services, 18% who want to develop a new digital service or innovation and 19% are looking to undertake user research, discovery and scoping. The open responses show that charities are no longer able to design inclusive or effective services without additional funding for digital costs.
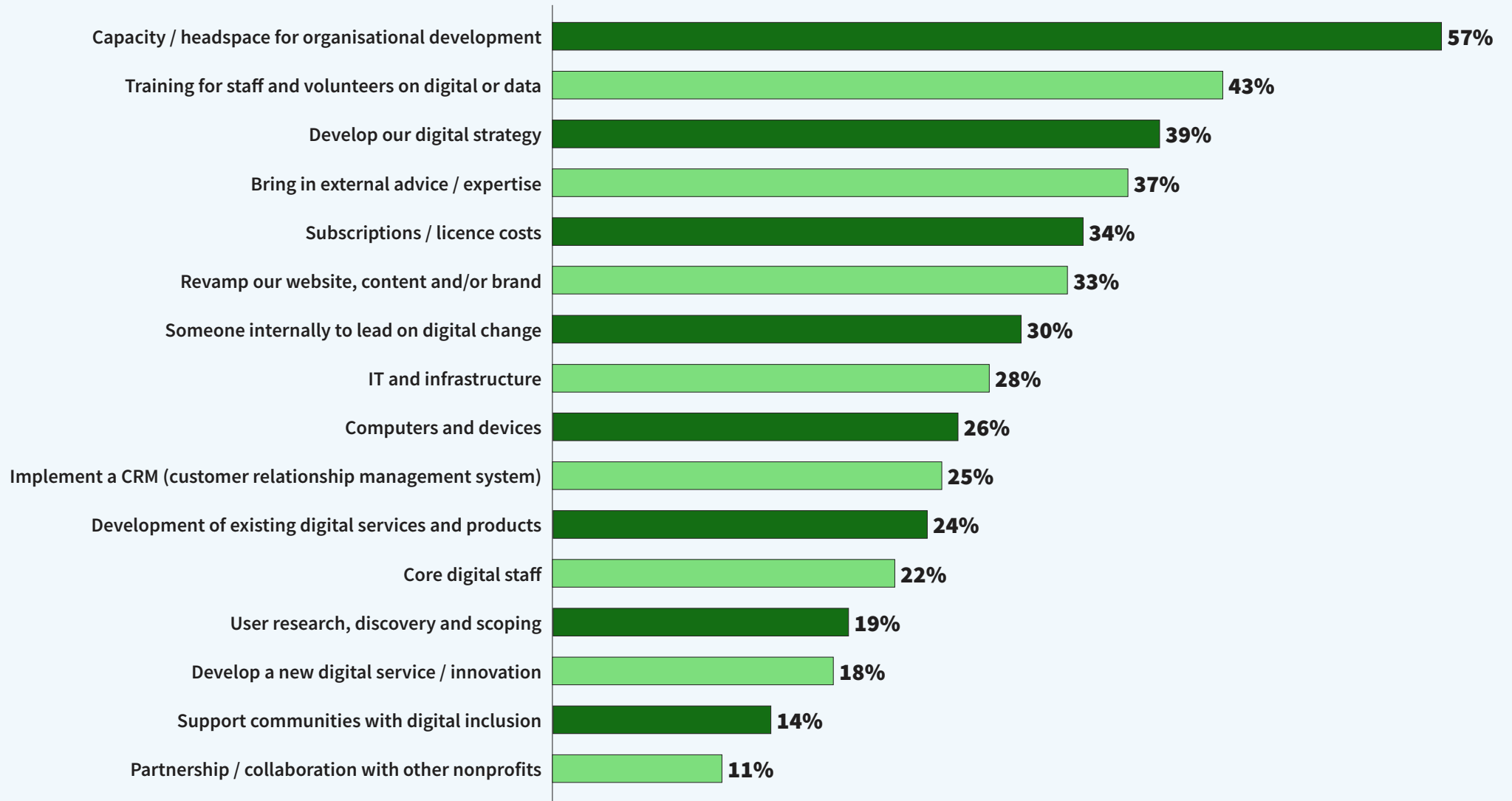
> *"Please recognise that our core costs have risen in line with the cost of everything and don't refuse funding for things we need to deliver our services - websites, platform for newsletters, additional staff time needed to advance our knowledge and understanding."*

> *"Be aware that in order to create inclusive, anti-oppressive digital spaces for our work we need resourcing and support, and to understand that to reach disabled, neurodivergent and queer communities a safe digital experience is critical."*

> *"Provide upfront funding for innovation that will result in more efficient services in future years."*

Funding needs

To progress with digital, what do you most need funding for?

Funding need	%
Capacity / headspace for organisational development	57%
Training for staff and volunteers on digital or data	43%
Develop our digital strategy	39%
Bring in external advice / expertise	37%
Subscriptions / licence costs	34%
Revamp our website, content and/or brand	33%
Someone internally to lead on digital change	30%
IT and infrastructure	28%
Computers and devices	26%
Implement a CRM (customer relationship management system)	25%
Development of existing digital services and products	24%
Core digital staff	22%
User research, discovery and scoping	19%
Develop a new digital service / innovation	18%
Support communities with digital inclusion	14%
Partnership / collaboration with other nonprofits	11%

Funding barriers

Nearly half of charities (45% of all charities and 49% of small charities) cannot find suitable digital funding for their needs.

The most significant factors affecting charities' access to digital funding are:

1. Prioritising meeting demand and delivering current work (38%)

2. Paying the bills and other core costs (30%)

3. Funders not covering digital costs (28%)

4. Funders not covering staff time spent on digital and data (23%)

5. Not being able to find a funder to support a digital project (21%)

1. Applications for face-to-face services are more likely to succeed (21%)

We can see there are three overall barriers charities face when accessing digital funding:

A lack of suitable digital funding

- Overall, 45% of charities say the biggest barrier they face is a lack of suitable funding. The figure is the unique proportion of charities facing one or more of the following barriers (recalculated to avoid double counting):

  - Their typical funders do not cover digital costs (28%)

  - Their typical funders do not cover staff time spent on digital and data (23%)

  - They cannot find a funder who supports their digital project (21%).

- This rises to 49% of small charities, compared to 40% of large charities.

A lack of capacity to prioritise applying for digital funding

- Looking across the responses, 46% of charities say the biggest factors preventing them from seeking digital funding are linked to capacity. This rises to 52% of small charities. The figure is the unique proportion of charities facing one or more of the following barriers (recalculated to avoid double counting):

  - The need to prioritise meeting demand, which affects 38% of charities (this rises to 43% of small charities and 46% of those providing frontline services).

  - 30% of charities (and 36% of small charities) saying they need to prioritise paying the bills and other core costs.

- This is disproportionately affecting charities in Wales (41%) and in Scotland (44%).

- These highlight the pressures that charities are currently under and the impact on organisational development.

Funding barriers

A lack of confidence that funders will support digital applications

- Overall, 34% say they do not apply for digital funding because of the way they think this will look to funders (recalculated to avoid double counting). The is the proportion of charities facing at least one of the following barriers:
  - Funders are more likely to support face-to-face services (21%)
  - If they include digital costs within their core costs, their application will look too expensive to funders (13%).
- For those delivering frontline services, 28% say they do not apply for digital funding because applications for face-to-face services are more likely to succeed.

The barriers are consistent for charities led by and targeting specific marginalised groups and other demographic groups. However, charities led by or supporting black communities look to be disproportionately affected by a lack of suitable funding:

- **Black led charities:** 41% say their biggest barrier is 'we cannot find a funder who will support our digital project', compared to 21% of all charities.
- **Charities supporting black communities:** The biggest barrier for 35% is that their typical funders do not cover digital costs (compared to 28% of all charities).

> *"Digital development - software/licences, staff provision etc typically fall into core costs and therefore many restricted funds do not cover. Marketing - whether digital or not is very rarely covered within a fund. Recognition from funders that all of the above are required to successfully deliver projects would be a step forward."*

Barriers to applying for digital funding
Do any of the following prevent you from accessing funding for digital projects, or from including digital costs in funding applications?

Barrier	Percentage
We prioritise meeting demand and delivering our current work	38%
We need to prioritise paying the bills and other core costs	30%
Our typical funders do not cover digital costs	28%
Our typical funders do not cover staff costs/ time on digital / data	23%
We cannot find a funder who will support our digital project	21%
Applications for face to face services are more likely to succeed	21%
Our typical funders do not cover annual software / licence costs	20%
Our typical funders do not cover infrastructure and hardware costs	17%
Our core costs will look too expensive if we include digital costs	13%
We don't know how	10%
It doesn't occur to us	7%

Better funding practices: What charities are asking for

When we asked charities to tell us one thing they would ask of funders, 55% explained what they most needed funding for in order to progress with digital (discussed above). A further 40% focused on the need for funders to improve their funding practice in the following ways:

Understand digital costs and why they matter

A clear and consistent theme is a need for funders to learn more about digital costs. Charities want funders to better understand what they are, why they exist and why they are important to fund. More importantly, charities want funders to appreciate the value of funding digital costs to the organisation, service delivery and communities.

"They need to understand digital so they understand our asks … and raise full cost recovery percentages."

"Understand that core digital costs are vitally important to us being able to deliver our services."

"Please understand that our organisation cannot operate without our digital infrastructure, which enables us to reach out to those needing our support. Please fund this!"

"Digital development - software/licences, staff provision etc typically fall into core costs and therefore many restricted funds do not cover. Marketing - whether digital or not is very rarely covered within a fund. Recognition from funders that all of the above are required to successfully deliver projects would be a step forward."

Fund digital costs as a core cost

Overwhelmingly, charities want funders to recognise that digital costs are integral to service delivery. They believe funders should cover the costs of devices, licences, infrastructure and staff time as an integral core cost. Charities asked for full cost recovery, core funding or unrestricted funding to support these effectively.

"Allow us to receive funding for staff devices, core costs and for service user devices. More unrestricted funding, if the funder's due diligence suggests they will fund us then trust us to use it for what we need to do. Our 'bread & butter' provisions that are hard to fund."

"Allocate a proportion of each grant to digital costs."

"Please allow full inclusion of digital costs in our applications."

## Make it easier to include digital costs in application forms

On a practical level, charities are looking for funders to improve their application processes and forms to be more inclusive of digital costs and funding needs. They asked funders to provide clear guidance and budget lines for digital costs.

"Commit to funding digital costs by incorporating it within their grant applications."

"Provide clearer guidance on what they're willing to fund."

"Make it easy to apply for those who don't know what they don't know."

"A space to explain how necessary digital costs are to maximise our reach, efficiency and impact."

Better funding practices: What charities are asking for

Make it easier to include digital costs in application forms

On a practical level, charities are looking for funders to improve their application processes and forms to be more inclusive of digital costs and funding needs. They asked funders to provide clear guidance and budget lines for digital costs.

> *"Commit to funding digital costs by incorporating it within their grant applications."*

> *"Provide clearer guidance on what they're willing to fund."*

> *"Make it easy to apply for those who don't know what they don't know."*

> *"A space to explain how necessary digital costs are to maximise our reach, efficiency and impact."*
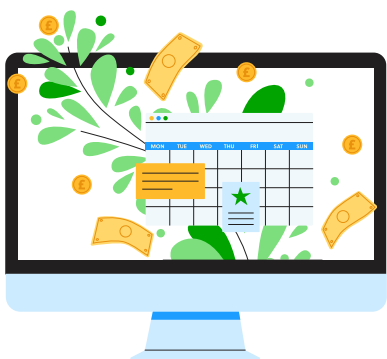
Support us to develop our organisation

Another prominent ask is for funders to support with capacity, through core funding or unrestricted funding. This would give charities time to explore how they want to move forwards with digital and to upskill their staff and volunteers. In addition, many charities ask funders to give them additional support (directly or through signposting) to determine what they need.

> *"Fund our core work so we are no longer working in scarcity, then we will have capacity to explore other areas such as digital."*

> *"To provide funding without us having to know upfront what exactly the funding would be used for in order to apply for the funding in the first place. Allow space for us to receive funding and then find out how it can be used best, perhaps with support or signposting from the funder."*

> *"Funding to appoint a digital worker who will help address our digital weaknesses as an organisation. Current staff and volunteers do not have time/capacity to undertake training because we prioritise service delivery. Without direct developmental investment there can be only minimal progress."*

> *"To award a grant and also to give advice on suitable providers or point us to another organisation who CAN give that help and advice."*

Digital and data support needs

Recap: What we know about funding needs so far

Charities want to learn more about AI

- Charities are still at an early stage with exploring AI and are taking steps to learn about tools and use cases, primarily by attending workshops (37%).

- Almost two thirds (62%) want to develop a general understanding of AI and how charities are using it, whilst 58% want practical knowledge of responsible use of AI tools, and almost half (48%) want to know about use cases in their services.

Charities are struggling with capacity, headspace and squeezed finances

- 7 out of 10 charities (68%) say they are struggling to progress digitally overall due to their finances, headspace and capacity.

Leaders and boards need to learn more about digital

- In total, 62% say their trustees' digital skills are low or could improve.

- Charities want their board to learn more about digital (40%), understand risks such as cybersecurity and data protection (33%), learn about emerging tech and AI tools (31%) and understand resourcing and investment in digital and IT (29%).

- More than half (55%) want their CEO to provide a clear vision for digital, whilst 39% want their CEO to understand digital tools and ways of working. In addition, 39% want their CEO to keep up to date with emerging trends and AI tools, indicating that CEOs must invest time in horizon scanning. A further 34% want their CEO to understand risks and opportunities for emerging tech.

Developing digital skills among staff and volunteers is a key priority

- 46% of charities say their top priority is to grow staff/ volunteer digital skills this year.

- 43% say their key need for funding is to train staff and volunteers with digital.

Key areas for skills development where charities have poor skills

- Engaging with emerging tech trends.

- Undertaking user research.

- Resourcing digital effectively.

- Websites.

- Collecting, managing and using data to inform decision making.

- Using digital tools in service delivery.

Charities want funding to access training

- 43% of charities (and 49% of small charities) say they most need funding to access training for staff and volunteers.

Digital support needs

We asked charities what support they needed most in order to progress digitally. Their responses showed there were two overarching digital support needs: training and access to expert advice. They also emphasised that they can only benefit from digital support if they have capacity (time, people, headspace) to implement what they learn.

Training to develop digital skills and general knowledge

Training is the most prominent theme for digital support. Many expressed a need to learn more about what is possible with digital and to think about where to start. Charities want to upskill staff, volunteers, leaders and trustees in how to use digital tools effectively. They highlighted five areas where they were looking for training:

1. **Data skills and CRM use**
2. **Making the most of their website**
3. **Effective digital marketing**
4. **Understanding AI tools**
5. **Strategy development**

"Training in all aspects of digital tools and support available at a basic level."

"Training on strategy development and implementation."

"Social Media - how to use each platform, creating effective content, analysing data."

"To be honest, I am learning about what digital skills we could use just by doing this questionnaire. We very much prioritise face-to-face interaction, but are also aware that the world has become more digital. We need to engage our younger audience. We would love to learn about where to start, right down to the basics. A good website, good systems, thriving social media accounts. How do we do that and where do we start? How do we even form a digital presence and what can going more digital do for us?"

Expert advice and guidance

The second key need for support was advice and guidance from external consultants or digital experts. Charities want someone (who understands their organisation) to review their current digital setup, skills, strengths and weaknesses and give advice on how to improve or move forwards. Key areas for external advice include where to start with digital, developing a digital strategy, an audit of their digital tools and undertaking a digital maturity assessment.

"Consultancy to assess where we are and what next steps would have the biggest impact in a cost-effective way."

"A website audit, support in getting a better understanding of which analytics are most important to track so we can prioritise effectively and support with best practices for SEO and paid ads."

Data support needs

Charities most need external support to improve their storytelling with data (48%) and to better analyse and make sense of their data (45%).

We asked charities which areas of data they would ideally seek external support for (not including AI tools). Whilst the top three priorities differ for small and large charities, both agree on the need to improve their storytelling with data and to better analyse and make sense of their data.

Top priorities for large charities:
1. Analysing and making sense of data (48%)
2. Building a data culture (47%)
3. Storytelling with data (41%)
4. Data visualisation (41%)

Top priorities for small charities:
1. Storytelling with data (52%)
2. Website and social media analytics (50%)
3. Analysing and making sense of data (43%)
4. Technical skills (e.g. working with spreadsheets, survey design) (36%)

Priorities for data support
In an ideal world, which areas of data would you most like to seek external support for?

Area	%
Storytelling with data	48%
Analysing and making sense of data	45%
Website and social media analytics	43%
Developing a data strategy	34%
Data visualisation	34%
Technical skills (e.g. working with spreadsheets, survey design)	32%
Choosing a CRM or reviewing our CRM needs	32%
Developing data policies and security	31%
Theory of change development / planning data collection	30%
Building a data culture	30%
Using data to influence policy / change	28%
Creating a data dashboard	28%
Equitable or community led approaches (e.g. peer research, codesign)	23%
Assessing our data maturity	15%
Using secondary or sector data	13%

Learning about digital

51% of charities' value sector publications and guides most when learning about digital.

Charities want to access guidance from experts, as well as learning from peers.

We asked charities which forms of digital support and guidance they had accessed in the last year. The most popular forms of digital support and guidance are:

1. Sector publications, reports and guides about digital (51%)

2. Sector newsletters and blogs (42%, significantly up from 23% in 2023)

3. Advice from peers (38%, up from 31% last year)

Small charities are less likely to access learning about digital.

There are some noteworthy differences between large and small charities. Namely, 20% of small charities said they had not accessed any of the guidance listed in the last year, compared to 5% of those representing large charities. The most popular forms of learning were the same. However, large charities were more likely to indicate they had benefited from each source. For example, sector publications, reports and guides were the most popular form of digital support for 70% of large charities, compared to 42% of small charities.

Infrastructure and sector support organisations play a key role.

Only a small proportion of charities are learning about digital directly from local or regional infrastructure (4%), a digital/data specialist organisation (7%) or from national charities, sector bodies, second tier and infrastructure organisations (15%). However, it is worth noting that these infrastructure and sector support organisations are also producing leading sector publications, reports and guides about digital, as well as sector newsletters and blogs.

Given that 43% of charities (49% of small charities) say they most need funding to access training for staff and volunteers, there is clearly an important role for infrastructure organisations to play, which could expand further.

"We need funds and access to the latest advice, training and guidance in the form of reports, videos and low cost training courses."
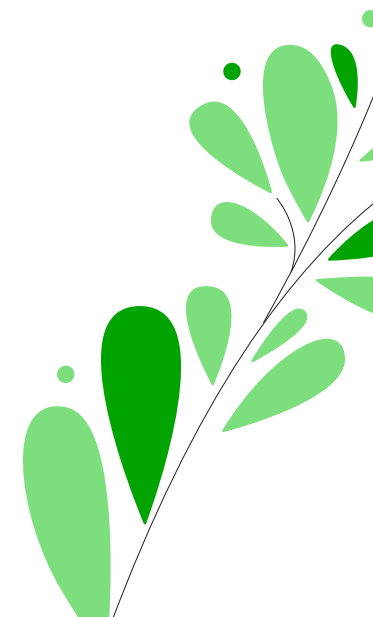
Learning about digital

In the last year, which external sources of advice, guidance or support have helped you to progress with digital?

Source	Percentage
Sector publications, reports and guides about digital	51%
Sector newsletters and blog posts	42%
Direct advice from peers / other nonprofits	38%
YouTube videos, podcasts by sector leaders/experts	28%
Sector training courses in digital, design or data	24%
Advice from our digital agency or IT provider	21%
Conferences, un-conferences, or workshops	19%
Communities of practice on Facebook, Slack, WhatsApp	17%
Digital or data maturity assessment, principles or code	16%
National charities, sector bodies, second tier and infrastructure organisations	15%
Bringing in a digital consultant	9%
A digital / data specialist organisation	7%
Local or regional infrastructure	4%

Nations and regions

In this section of the report, we include some topline data about digital progress across the UK, with specific sections dedicated to Wales and Scotland. The data for all responses for these groups are available on our website for further investigation.

Regional differences in digital maturity

Throughout this report, you will see that size plays a crucial role in digital capacity and the responses given. Overall, larger charities are much further ahead with digital. In our sample, the proportion of large and small charities varies significantly in each region or country (a breakdown can be found in '*UK nations and regions in our sample*'). For this reason, we have compared the digital stages of small charities across each region.

Overall, we can see that there are higher proportions of small charities at the earliest stages with digital in the North of England (combining the North West, North East and Yorkshire and Humber) and South of England (excluding London, including the East of England, South East and South West), compared to the rest of the UK.

- **North of England (North West, North East and Yorkshire and Humber):** 76% of small charities are at an early stage with digital, higher than the 64% of all small charities. A third of small charities in the North East are at the curious stage of digital (33%).

- **South of England (East of England, South East and South West):** 69% of small charities are at an early stage with digital, slightly higher than the 64% of all small charities. A third of small charities in the South are at the curious stage (34%).

- **Midlands (combining East Midlands and West Midlands):** Has the highest proportion of charities (37%) saying they are at the earliest curious stage of digital. Overall, 64% of small charities are at an early stage with digital, in line with the rest of the UK.

- **London:** Half (52%) of small charities are at an early stage with digital, which is lower than the 64% of all small charities across the UK. A quarter (25%) of small charities in London are at the earliest, curious stage with digital.

- **Wales:** Note, this has a small sample size of 30 small charities in Wales, which may affect the results. In this group, 60% are at an early stage with digital.

- **Scotland:** Note, this has a small sample size of 32 small charities in Scotland, which may affect the results. In this group, 57% are at an early stage with digital.

Regional differences in digital maturity

Regional differences in digital progress of small charities

Region	Curious	Starting out	Advancing	Advanced
All small charities (for comparison)	27%	37%	27%	9%
North (North West, North East, Yorkshire and the Humber)	33%	43%	18%	5%
South (South East, South West, East of England)	34%	35%	24%	7%
Midlands (East Midlands, West Midlands)	37%	27%	24%	12%
Wales	27%	33%	30%	10%
Scotland	13%	44%	34%	9%
London	25%	27%	41%	6%
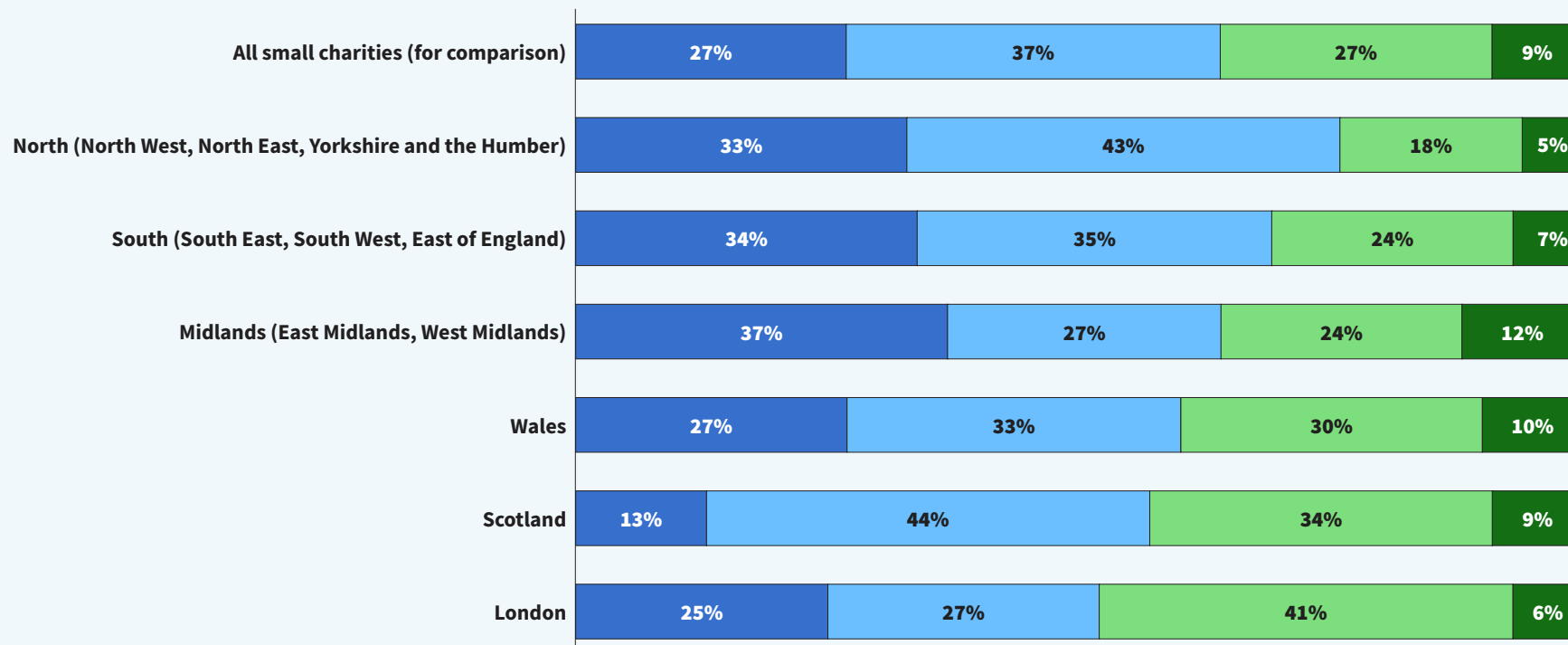
Legend: ● Curious ● Starting out ● Advancing ● Advanced

Wales

Whilst charities in Wales look to be further ahead with digital in comparison to our main sample, this is influenced by the high proportion of large charities. Capacity and headspace for organisational development is a key challenge in Wales, with 73% saying this is what they most need funding for (compared to 57% of all charities and 59% of large charities). Offering or improving digital services, as well as investing in infrastructure and systems, are also key priorities for charities in Wales.

Our sample

- 62 of our responses (10%) are based in Wales. 87% are a registered charity or Charitable Incorporated Organisation (CIO), 8% are a company limited by guarantee.

- 48% are small, 48% are large (the remainder did not specify). This is a greater proportion of large charities compared to the 32% in our main sample.

- 16% describe themselves as a social enterprise or community business.

- 6% are infrastructure or second tier organisations.

- 34% are led by people with lived experience of the issue they address.

- 65% are providing frontline services to individuals, compared to 53% in our main sample.

Digital progress

- 44% are at an early stage with digital (16% curious and 27% starting out), whilst 56% are advancing or advanced, with a strategy in place for digital. This is similar to 2023 and is influenced by the high proportion of large charities responding in Wales.

Barriers to digital progress

1. A lack of headspace and capacity (74%)

2. Squeezed organisational finances (72%)

3. Finding funds to invest in infrastructure, systems and tools (60%)

Digital priorities

- 84% see digital as an organisational priority, with 21% saying it is a high priority.

- 33% say their top priority this year is to develop a digital strategy, whilst 39% say their top priority this year is to develop a data strategy.

- Top priorities are similar to our overall sample for large charities. These are:
  - Use data to improve services or operations (58%)
  - Increase online fundraising (56%)
  - Grow our reach (56%)

- 46% plan to invest in their infrastructure and systems this year.

Services

- 79% are delivering services built on digital tools, in a supportive or integral role.
- 61% are using digital tools behind the scenes to help run services.
- 11% support clients with digital inclusion, whilst 21% say this is a priority.
- 63% feel their services are inclusive to some extent (41%) or a great extent (21%).
- In the next year, 26% say their priority is to develop or scale digital services, whilst 28% plan to offer new digital services. This is greater than the 18% of all respondents.

Funding

- 25% accessed funding for some digital costs, such as new devices or staff time.
- 6% accessed funding for substantial digital costs (such as a digital role or website).
- The top barriers to accessing digital funding are:
  - We need to prioritise paying the bills and other core costs (41%)
  - We prioritise meeting demand and delivering our current work (39%)
  - Our typical funders do not cover digital costs (31%)
  - Our typical funders do not cover staff costs/time on digital/data (24%).

AI

- 62% are currently using AI in their day-to-day work or operations.
- 46% say that using AI tools is a priority this year.
- 24% are using AI tools behind the scenes to deliver services.
- 71% agree or strongly agree that AI developments are relevant to them, whilst only 25% feel prepared to respond to AI opportunities and challenges.

Top funding needs

- Capacity/headspace for organisational development (73%).
- Someone internally to lead on digital change (50%).
- Development of existing digital services and products (40%).
- Bring in external advice/expertise (40%).

Scotland

Whilst charities in Scotland look to be further ahead with digital in comparison to our main sample, this is influenced by the high proportion of large charities. Capacity and headspace for organisational development is a key challenge in Scotland. Equipment, hardware and devices (e.g. laptops) as well as limited access to the internet and wi-fi connectivity are slightly bigger challenges in Scotland, compared to other countries and regions.

Our sample

- 64 organisations (10% of our responses) are based in Scotland.

- 51% are small, whilst 40% are large (the remainder did not specify). This is much greater than the 32% of large charities in our main sample.

- 79% are a registered charity or Charitable Incorporated Organisation (CIO), 19% are a company limited by guarantee.

- 16% describe themselves as a social enterprise or community business.

- 8% are infrastructure or second tier organisations.

- 22% are led by people with lived experience of the issue they address, compared to 31% of our main sample.

- 60% provide frontline services to individuals, compared to 53% in our main sample.

Digital progress

- 41% are at an early stage with digital (8% curious and 33% starting out), compared to 50% of all charities. This is similar to 2023 and is influenced by the high proportion of large charities responding in Scotland.

- 59% are advancing or advanced, with a strategy in place for digital.

- 30% say they are struggling because of their equipment, hardware and devices (e.g. laptops) (30%). This is much higher than the 18% of our main sample.

Barriers to digital progress

- Squeezed organisational finances (72%).

- Finding funds to invest in infrastructure, systems and tools (67%).

- Lack of headspace and capacity (65%).

- Equipment, hardware and devices (e.g. laptops) are an issue for 30% of charities in Scotland. This is affecting a greater proportion of charities, compared to 18% (15% of large and 20% of small charities) of the main sample.

- Limited access to the internet and wi-fi connectivity is affecting 13% of charities, compared to 5% in the main sample, indicating this is a bigger challenge in Scotland.

Scotland

Digital priorities

- 92% see digital as an organisational priority, with 31% saying it is a high priority.
- 35% say their top priority this year is to develop a digital strategy, whilst 44% say their top priority this year is to develop a data strategy.
- Top priorities are:
  - Build our online presence and social media engagement (58%).
  - Increase online fundraising (54%).
  - Use data to improve services or operations (53%).
  - Grow our reach (53%).

Services

- 81% are delivering services built on digital tools, in a supportive or integral role.
- 66% are using digital tools behind the scenes to help run services.
- 16% support clients with digital inclusion, whilst 7% say this is a priority this year.
- 65% feel their services are inclusive to some extent (37%) or a great extent (28%).
- In the next year, 25% say their priority is to develop or scale digital services, whilst 30% plan to offer new digital services. This is greater than the 18% of all respondents.

Funding

- 22% accessed funding for some digital costs (e.g. devices or staff time), whilst 9% accessed funding for substantial digital costs (e.g. a digital role or new website).
- The top barriers to accessing funding are:
  - We need to prioritise paying the bills and other core costs (44%)
  - We prioritise meeting demand and delivering our current work (41%)
  - Our typical funders do not cover digital costs (33%).

AI

- 61% are currently using AI in their day-to-day work or operations.
- 15% are using AI tools behind the scenes to deliver services.
- 70% agree or strongly agree that AI developments are relevant to them.
- 23% agree or strongly agree that they feel prepared to respond to AI opportunities and challenges.

Top funding needs

- Capacity/headspace for organisational development (55%).
- Training for staff and volunteers on digital or data (44%).
- Subscriptions/licence costs (36%).
- Develop our digital strategy (35%).

Small charities

In our main report, we highlight how smaller charities have made wide ranging digital progress. Overall, however, smaller charities have much lower digital skills and capacity than larger charities. Furthermore, this gap looks to be increasing. Here we recap and provide further data specifically relating to small charities. Overall, we can see there is a clear case for targeted support and funding to help small charities with capacity, skills and time to focus on digital and organisational development.

Our sample

- 364 organisations (62% of our responses) are small charities, with an income of up to £1 million. This includes:
  - £0 to £10,000: 49 organisations (8%)
  - £10,001 to £100,000: 114 organisations (18%)
  - £100,001 to £500,000: 164 organisations (26%)
  - £500,001 to £999,999: 58 organisations (9%).

- 39% are led by people with lived experience.

- 75% are registered charities or a Charitable Incorporated Organisation, 15% are a company limited by guarantee, 7% are a Community Interest Company.

- 20% describe themselves as a social enterprise or community business.

- 10% are infrastructure or second tier organisations.

- 53% provide frontline services to individuals.

Digital progress

- 64% are at an early stage with digital (27% curious and 37% starting out).

- 36% are advancing or advanced, with a strategy in place for digital. Last year, 42% of small charities had reached this stage, which is a worrying decline.

- For the smallest charities, with an income of up to £100,000, 70% are at the curious and starting out stage. This falls to 61% of those with an income between £100,001 and £500,000 and 53% of those in the £500,001 and £999,999 income bracket. The same trend was apparent in 2023 and the proportions have increased slightly.

Barriers

1. Squeezed organisational finances (72%).

2. Lack of headspace and capacity (66%).

3. Finding funds to invest in infrastructure, systems and tools (63%).

Skills gaps

1. Engaging with emerging tech trends (60% are poor at this or don't do this).

2. Using digital tools in service delivery (52% are poor at this or don't do this).

3. Resourcing digital effectively (44% are poor at this or don't do this).

4. Undertaking user research (39% are poor at this or don't do this)

5. Make the most of their website (38% are poor at this or don't do this).

Digital priorities

- 77% see digital as an organisational priority, with 23% saying it is a high priority.

- 42% say their top priority this year is to develop a digital strategy, whilst 29% say their top priority this year is to develop a data strategy.

- Top priorities for small charities are:
  - Build our online presence and social media engagement (58%)
  - Increase online fundraising (54%)
  - Grow our reach (47%).

Services

- 56% are delivering services built on digital tools, in a supportive or integral role.

- 57% are using digital tools behind the scenes to help run services.

- 13% support clients with digital inclusion, whilst 15% say this is a priority.

- 64% feel their services are inclusive to some extent (41%) or a great extent (23%).

- 22% plan to develop or scale digital services, 15% want to offer new digital services.

AI

- 53% are using AI in their day-to-day work, compared to 78% of large charities.

- 21% are using AI tools behind the scenes to deliver services.

- 56% agree or strongly agree that AI developments are relevant to them, whilst 23% feel prepared to respond to AI opportunities and challenges.

- 50% of small charities are saying they definitely (16%) or probably (34%) will look for external training or support to move forwards with AI.

Funding

- 19% accessed funding for some digital costs (e.g. devices or staff time) and 4% accessed funding for substantial digital costs (e.g. a digital role or website).

- 22% did not include digital costs in their grant funding applications.

- The top barriers to accessing funding for digital costs are:
  - We prioritise meeting demand and delivering our current work (43%)
  - We need to prioritise paying the bills and other core costs (36%)
  - Our typical funders do not cover digital costs (28%).

- Funding needs:
  - Capacity/headspace for organisational development (59%)
  - Training for staff and volunteers on digital or data (47%)
  - Develop our digital strategy (42%).

Leadership

- 66% say their trustees' digital skills are low or in need of improvement.

- The top skills, knowledge and behaviours CEOs need to develop are:

  1 A clear vision of what we could achieve with digital (56%)

  2 Understand digital tools and ways of working (44%)

  3 A clear vision and plan to improve our data (42%)

  4 Ability to develop and embed a good digital strategy (42%)

  5 Keep up to date with emerging trends, tech and AI tools (38%).

Data support: top priorities for small charities

1 Storytelling with data (52%)

2 Website and social media analytics (50%)

3 Analysing and making sense of data (43%).

Learning about digital

- Sector publications, reports and guides are the most popular form of support (42%).

- 20% said they had not benefited from external sources of digital support this year.
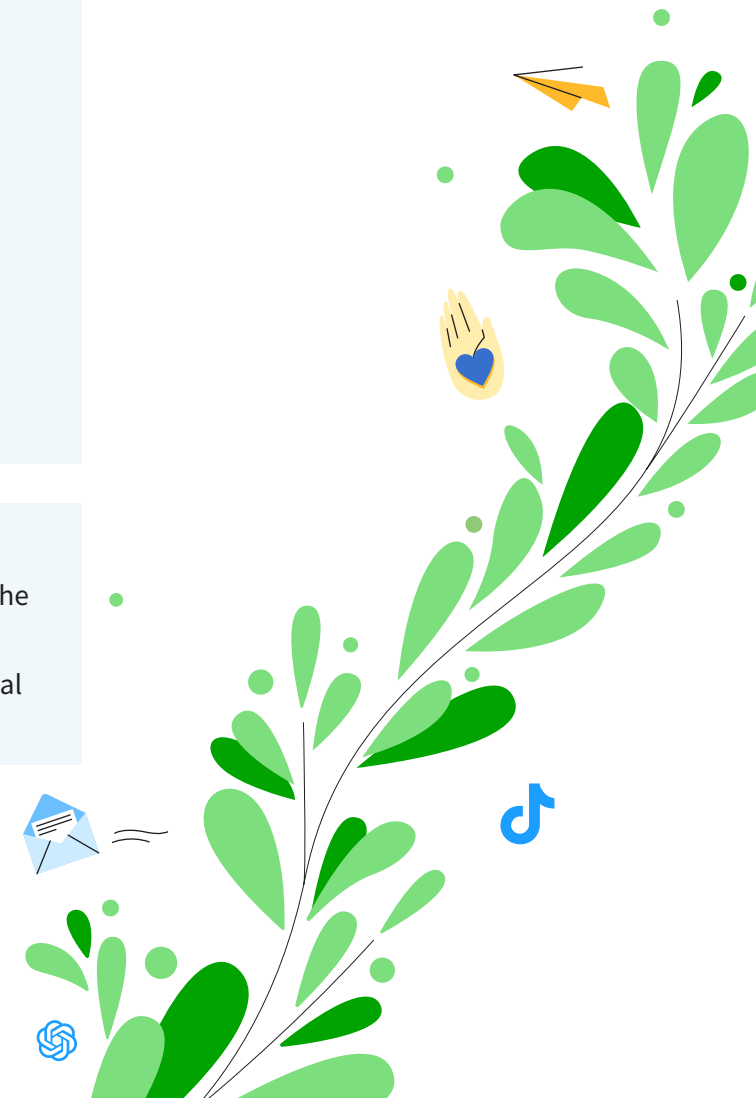
Large charities

Here, we recap and provide further data specifically relating to large charities. Whilst large charities are further ahead with digital in comparison to small charities, they are similarly affected by challenges related to the cost of living crisis. Lack of capacity and headspace, as well as squeezed organisational finances, are affecting their ability to develop skills and move forward. Large charities have a strong appetite to engage with AI, are prioritising data and want to provide more digital services.

Our sample

- 206 (33%) of our responses are from large charities.
- 92% are a registered charity or a Charitable Incorporated Organisation (CIO).
- 11% describe themselves as a social enterprise or community business.
- 9% are infrastructure or second tier organisations.
- 54% provide frontline services to individuals.

Digital progress

- Larger charities are further ahead with digital. 26% are at an early stage with digital (7% curious and 19% starting out). This compares to 50% of all charities.
- 74% are advancing or advanced, with a strategy in place for digital.
- The biggest achievement for 55% of charities this year is having found useful insights from data.

Barriers to digital progress

1. Lack of headspace and capacity (72%)
2. Squeezed organisational finances (63%)
3. Finding funds to invest in infrastructure, systems and tools (54%).

Digital priorities

- 83% see digital as an organisational priority, with 33% saying it is a high priority.
- 37% say their top priority this year is to develop a digital strategy, whilst 46% say their top priority this year is to develop a data strategy.
- 47% are currently prioritising investing in infrastructure and systems.
- Large charities are more likely to prioritise data, with 37% saying this is a high priority, compared to 18% of small charities.
- Top priorities are:
  - Use data to improve services or operations (58%)
  - Using AI tools (53%)
  - Increase online fundraising (53%).

Leadership

- The top skills, knowledge and behaviours CEOs need to develop are:
- A clear vision of what we could achieve with digital (55%)
- Keep up to date with emerging trends, tech and AI tools (38%)
- Understand risks and opportunities for emerging tech (38%)
- Better budgeting, resourcing and investment for digital and IT (38%)
- A clear vision and plan to improve our data (35%).

Services

- 88% are delivering services built on digital tools, in a supportive or integral role.
- 70% are using digital tools behind the scenes to help run services.
- 10% support clients with digital inclusion, whilst 12% say this is a priority.
- 75% feel their services are inclusive to some extent (53%) or a great extent (22%).
- In the next year, 32% say their priority is to develop or scale digital services, whilst 24% plan to offer new digital services, this is greater than the 18% of all respondents.

AI

- 78% are using AI tools in their day-to-day work or operations, compared to 53% of small charities.
- 53% say that using AI tools is a priority this year.
- 17% are using AI tools behind the scenes to deliver services.
- 83% agree or strongly agree that AI developments are relevant to them. However, only 21% feel prepared to respond to AI opportunities and challenges.

Funding

- 22% accessed funding for digital costs (e.g. new devices or staff time), whilst 10% accessed funding for substantial digital costs (e.g. a digital role or new website).
- The top barriers to accessing funding are that typical funders do not cover digital costs (30%) and prioritising meeting demand and delivering our current work (29%).

Top funding needs

- Capacity/headspace for organisational development (59%).
- Training for staff and volunteers on digital or data (37%).
- Develop our digital strategy (37%).

Infrastructure organisations

This year, we can provide specific insights relating to infrastructure and second tier organisations for the first time. We can see that they are slightly further ahead with digital in comparison to other groups, with a stronger focus on data and using AI tools.

Our sample

- 59 (9%) of our responses are from infrastructure organisations, of which 66% are small and 34% are large (the remainder did not specify). This is similar to our main sample.
- 36% also provide frontline services to individuals.
- 78% are a registered charity or Charitable Incorporated Organisation (CIO).
- 24% describe themselves as a social enterprise or community business.

Digital progress and challenges

- Infrastructure organisations are slightly further ahead with digital.
- 43% are at an early stage (14% are curious and 29% are starting out).
- 57% are advancing or advanced, with a strategy in place for digital, compared to 48% in our main sample.

Barriers to digital progress

1. Lack of headspace and capacity (75%).
2. Squeezed organisational finances (65%).
3. Finding funds to invest in infrastructure, systems and tools (58%).

Digital priorities

- 78% see digital as an organisational priority, with 24% saying it is a high priority.
- 28% say their top priority this year is to develop a digital strategy, whilst 29% say their top priority this year is to develop a data strategy.
- Top priorities are:
  - Build our online presence and social media engagement (56%)
  - Use data to improve services or operations (56%)
  - Grow our reach (51%).
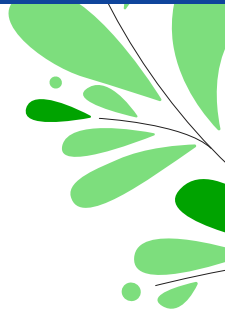
Digital services

- 85% are delivering services built on digital tools, in a supportive or integral role.

- 60% are using digital tools behind the scenes to help run services.

- 12% support clients with digital inclusion, whilst 14% say this is a priority.

- 78% feel their services are inclusive to some extent (41%) or a great extent (36%).

- In the next year, 24% say their priority is to develop or scale digital services, whilst 22% plan to offer new digital services.

AI

- 78% are currently using AI in their day-to-day work or operations, compared to 61% in our main sample. 40% say that using AI tools is a priority this year.

- 21% are using AI tools behind the scenes to deliver services.

- 89% agree or strongly agree that AI developments are relevant to them.

- 31% agree or strongly agree that they feel prepared to respond to AI opportunities and challenges, compared to 22% in our main sample.

Funding

- 29% accessed funding for some digital costs (e.g. devices or staff time), whilst 6% accessed funding for substantial digital costs (e.g. a digital role or new website).

- 15% did not include digital costs in their grant funding applications.

- The top barriers to accessing funding are:
  - Our typical funders do not cover digital costs (27%)
  - Our typical funders do not cover staff costs/time on digital/data (27%)
  - We need to prioritise paying the bills and other core costs (25%)
  - Our core costs will look too expensive if we include digital costs (25%).

- Top funding needs:
  - Capacity/headspace for organisational development (64%)
  - Revamp our website, content and/or brand (44%)
  - Training for staff and volunteers on digital or data (36%).

Social enterprises and community businesses

This year, we can provide specific insights relating to social enterprises and community businesses for the first time. We asked organisations to tell us if this is how they described their organisation. Our sample has a higher proportion of small charities, but digital progress is similar to our main sample. Social enterprises and community businesses see digital as a priority and a high proportion are delivering digital services.

Our sample

- 109 (17%) of our responses are from social enterprises and community businesses.

- 75% are small and 22% are large (the remainder did not specify). This is a much greater proportion of small charities than the 62% in our main sample.

- 55% are a registered charity or Charitable Incorporated Organisation (CIO) and 26% are a Community Interest Company limited by guarantee.

- 13% are infrastructure or second tier organisations.

- 40% are led by people with lived experience of the issue they address, compared to 31% of our main sample.

- 44% provide frontline services to individuals.

Digital progress and challenges

- Digital progress in social enterprises and community businesses is similar to our main sample. 53% are at an early stage (22% are curious and 31% are starting out), whilst 47% are advancing or advanced, with a strategy in place for digital.

Barriers to digital progress

1. Squeezed organisational finances (72%)
2. Finding funds to invest in infrastructure, systems and tools (68%)
3. Lack of headspace and capacity (65%).

Digital priorities

- 85% see digital as an organisational priority, with 31% saying it is a high priority.

- 36% say their top priority this year is to develop a digital strategy, whilst 33% say their top priority this year is to develop a data strategy.

- Top priorities are to build online presence and social media engagement (58%), grow our reach (55%) and grow staff/volunteer digital skills (48%).

Services

- 82% are delivering services built on digital tools, in a supportive or integral role.
- 55% are using digital tools behind the scenes to help run services.
- 11% support clients with digital inclusion, whilst 25% say this is a priority.
- 65% feel their services are inclusive to some extent (42%) or a great extent (23%).
- This year, 27% say their priority is to develop or scale digital services, whilst 17% plan to offer new digital services.

AI

- 59% are using AI in their day-to-day work or operations.
- 33% say that using AI tools is a priority this year.
- 18% are using AI tools behind the scenes to deliver services.
- 67% agree or strongly agree that AI developments are relevant to them.
- 31% agree or strongly agree that they feel prepared to respond to AI opportunities and challenges, compared to 22% in our main sample.

Funding

- 23% accessed funding for some digital costs (e.g. devices or staff time), whilst 11% accessed funding for substantial digital costs (e.g. a digital role or website).
- 22% did not include digital costs in their grant funding applications.
- The top barriers to accessing funding are:
  - We prioritise meeting demand and delivering our current work (37%)
  - We need to prioritise paying the bills and other core costs (34%)
  - We cannot find a funder who will support our digital project (25%).

Top funding needs

- Capacity/headspace for organisational development (55%).
- Training for staff and volunteers on digital or data (43%).
- Bring in external advice/expertise (40%).
- Subscriptions/licence costs (39%).

Equality, Diversity and Inclusion groups

In this section of the report, we provided detailed insights about digital progress for organisations led by specific and marginalised groups, where we have achieved at least 45 responses.

We outline our approach, terms and rationale surrounding equality, diversity and inclusion further *in this blog post*. We asked respondents to define their organisation as 'led by' a specific group if at least 75% of their board and 50% of senior management identify with that group. The intention is to inform funding, support, research and campaigns that tackle structural inequality, institutional racism and sexism in the sector, which have led to chronic underfunding for specific groups. The data for these groups is available on our website for further investigation.

The groups we focus on includes:

- **Older people (65+):** 74 responses (12%).

- **Black groups (Black African/Black Caribbean/Black British/ Black Mixed/Black Other):** 61 responses (10%).

- **Neurodivergent people (including those with cognitive differences, learning disabilities and learning difficulties):** 55 responses (9%).

- **Disabled or d/Deaf people:** 45 responses (7%).

- **LGBTQIA+ people:** 45 responses (7%).

Note, however, that the sample sizes we have are still fairly small and this may be affecting the results.

We also know already from this report that charity income (size) plays a significant role in digital capacity. Smaller charities struggle more with skills, capacity and digital progress overall. For this reason, it is worth noting that each of these groups has a higher proportion of small charities. However, the sample sizes are too small to compare by charity size in this report. Any comparisons between these groups and the main sample should be made with this in mind and we have noted this throughout.

Led by black groups

Our _2023 report_ found that black led charities were disproportionately affected by the cost of living crisis (with 41% saying this affected their digital progress), but were also more likely to be prioritising digital and delivering digital services. This year, challenges related to the cost of living (squeezed organisational finances) are having a much greater impact on black led charities, but are also affecting all charities consistently. More black led charities are struggling to find funds to invest in devices, software and infrastructure, which has increased from 54% last year to 65% this year. 41% of black led charities struggle to find a funder who will support a digital project. This is much higher than our overall sample (21%), all small charities (25%) and charities led by other specific marginalised groups. A higher proportion are providing digital inclusion services (in comparison to all charities), but this is much less of a priority in comparison to 2023.

Our sample

- 61 (10%) of the responses are from black led organisations.

- 76% are small charities and 15% are large (the remainder did not specify). This is a greater proportion of small organisations compared to the 62% in our main sample.

- 58% are a registered charity or Charitable Incorporated Organisation (CIO). This is much lower than the 81% in our overall sample. 13% are a company limited by guarantee, 12% are unincorporated and 10% are a Community Interest Company limited by guarantee.

- 31% describe themselves as a social enterprise or community business (compared to 17% in our main sample and 20% of small charities).

- 6% are infrastructure or second tier organisations.

- 44% are tackling racial injustice and inequality.

- 52% provide frontline services to individuals.

Digital progress

- 61% are at an early stage with digital (28% are curious and 33% are starting out). This is much higher than the 50% of charities in our main sample. This result is influenced by the higher proportion of small black led charities.

- 39% are advancing or advanced, with a strategy in place for digital.

Barriers to digital progress

1. Squeezed organisational finances (75%)
2. Finding funds to invest in infrastructure, systems and tools (65%)
3. Lack of headspace and capacity (64%)

Led by black groups

Digital priorities

- 72% see digital as an organisational priority, with 34% saying it is a high priority.

- 40% say their top priority this year is to develop a digital strategy. This is much lower than the 54% who said this was a priority last year.

- 32% say their top priority this year is to develop a data strategy.

- Top priorities are:
  - Build our online presence and social media engagement (63%)
  - Increase online fundraising (57%)
  - Grow our reach (57%)
  - Develop our digital strategy (57%).

Services

- 77% are delivering services built on digital tools, in a supportive or integral role. This has increased from 62% in 2023.

- 53% are using digital tools behind the scenes to help run services.

- 20% support clients with digital inclusion (compared to 12% of all charities), whilst 22% say this is a priority. This is higher than 14% of all charities, but has dropped significantly from 2023, when half of black led charities (51%) said it was their top priority.

- 77% feel their services are inclusive to some extent (51%) or a great extent (26%), compared to 69% of the main sample.

- In the next year, 23% say their priority is to develop or scale digital services, whilst 16% plan to offer new digital services.

AI

- 54% are currently using AI in their day-to-day work or operations.

- 39% say that using AI tools is a priority this year.

- 31% are using AI tools behind the scenes to deliver services.

- 62% agree or strongly agree that AI developments are relevant to them.

- 28% agree or strongly agree that they feel prepared to respond to AI opportunities and challenges, compared to 22% in our main sample.

Led by black groups

Funding

- 14% accessed funding for some digital costs (e.g. new devices or staff time), whilst 4% accessed funding for substantial digital costs (e.g. a digital role or website).

- 24% did not include digital costs in their grant funding applications.

- The top barriers to accessing funding are:
  - We cannot find a funder who will support our digital project (41%)
  - We prioritise meeting demand and delivering our current work (37%)
  - Our typical funders do not cover digital costs (31%).

- The challenge of finding a funder for a digital project is affecting black led charities (41%) much more than any other group and compares to 21% in our main sample.

Top funding needs

- Capacity/headspace for organisational development (56%).

- Training for staff and volunteers on digital or data (50%).

- Bring in external advice/expertise (46%).
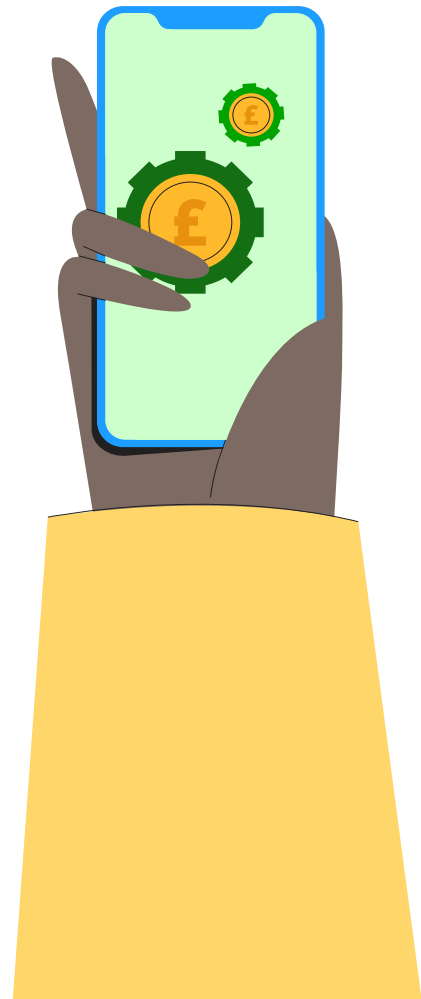
Led by LGBTQIA+ people

This year, we look in-depth at organisations led by LGBTQIA+ people. We cannot compare this to our 2023 data, where we focused on organisations supporting LGBTQIA+ people (due to a lack of responses from LGBTQIA+ led charities). We can see that this group sees digital as a priority and is looking to engage more with providing digital services and using AI tools. Like all charities, squeezed organisational finances is a key challenge. The findings for this group are largely similar to those for all charities in our sample.

Our sample

- 45 (7%) of our responses are from LGBTQIA+ led charities and of these, 58% say they have lived experience of the issue they address.

- 75% are small charities and 11% are large (the remainder did not specify). This is a greater proportion of small charities than the 62% in our main sample.

- 53% are a registered charity or Charitable Incorporated Organisation (CIO). This is much lower than the 81% in our main sample. 13% are unincorporated and 13% are a Community Interest Company limited by guarantee.

- 24% describe themselves as a social enterprise or community business.

- 11% are infrastructure or second tier organisations.

- 42% provide frontline services to individuals.

Digital progress

- 51% are at an early stage with digital (18% are curious and 33% are starting out).

- 49% are advancing or advanced, with a strategy in place for digital, compared to 36% of small charities and 50% in our main sample.

- This mirrors our main sample, despite a high proportion of small charities.

Barriers to digital progress

1. Squeezed organisational finances (72%.

2. Lack of headspace and capacity (67%).

3. Finding funds to invest in infrastructure, systems and tools (60%).

Led by LGBTQIA+ people

Digital priorities
- 87% see digital as an organisational priority, with 29% saying it is a high priority.
- 27% say their top priority this year is to develop a digital strategy, whilst 30% say their top priority this year is to develop a data strategy.
- Top priorities are:
  - Build our online presence and social media engagement (65%)
  - Grow our reach (60%)
  - Increase online fundraising (56%).

Services
- 84% are delivering services built on digital tools, in a supportive or integral role.
- 58% are using digital tools behind the scenes to help run services.
- 19% support clients with digital inclusion, whilst 20% say this is a priority.
- 71% feel their services are inclusive to some extent (39%) or a great extent (32%).
- In the next year, 19% say their priority is to develop or scale digital services, whilst 23% plan to offer new digital services.

AI
- 62% are using AI in their day-to-day work or operations.
- 28% say that using AI tools is a priority this year.
- 27% are using AI tools behind the scenes to deliver services.
- 55% agree or strongly agree that AI developments are relevant to them.
- 33% agree or strongly agree that they feel prepared to respond to AI opportunities and challenges, compared to 22% in our main sample.

Funding
- 22% accessed funding for some digital costs (e.g. new devices or staff time), whilst 2% accessed funding for substantial digital costs (e.g. a digital role or website).
- 27% did not include digital costs in their grant funding applications.
- The top barriers to accessing funding are:
  - We prioritise meeting demand and delivering our current work (41%)
  - We need to prioritise paying the bills and other core costs (31%)
  - Applications for face-to-face services are more likely to succeed (31%).

Top funding needs
- Capacity/headspace for organisational development (56%).
- Revamp our website, content and/or brand (44%).
- Subscriptions/licence costs (39%).

Led by neurodivergent people

This year, we focus on neurodivergent people (including those with cognitive differences, learning disabilities and learning difficulties) as a distinct group to disabled or d/Deaf people. This means comparisons cannot be made with our 2023 data, where both were combined. We wanted to determine if there are any distinctions between their digital progress, funding and support needs, based on previous qualitative responses.

We can see this year that organisations led by neurodivergent people in our sample are overwhelmingly small and yet are much further ahead with digital in comparison to other small charities. This group is providing a high proportion of services online and see digital as a priority. Funding for digital costs and capacity would enable this group to expand and develop more digital services.

Our sample

- 55 (9%) of our responses are from charities led by neurodivergent people (including those with cognitive differences, learning disabilities and learning difficulties) and 38 also specify this is their main target group.

- 62% are led by people with lived experience of the issue they address.

- 91% are small charities and 6% are large (the remainder did not specify). This is a much greater proportion of small charities than the 62% in our main sample. However, many of the responses differ significantly from small charities in our main sample.

- 49% are a registered charity or Charitable Incorporated Organisation (CIO). This is significantly lower than the 81% in our overall sample. 24% are a Community Interest Company limited by guarantee and 14% are unincorporated.

- 42% describe themselves as a social enterprise or community business.

- 51% provide frontline services to individuals.

Digital progress and challenges

- 49% are at an early stage with digital (16% are curious and 33% are starting out).

- 51% are advancing or advanced, with a strategy in place for digital. This is much higher than the 36% of small charities in our main sample.

- It is worth noting that whilst 91% of organisations led by neurodivergent people in this group are small, size does not look to be affecting digital progress.

Barriers to digital progress

1. Squeezed organisational finances (75%)
2. Finding funds to invest in infrastructure, systems and tools (69%)
3. Lack of headspace and capacity (67%)

Led by neurodivergent people

Digital priorities

- 91% see digital as an organisational priority, with 42% saying it is a high priority.

- 33% say their top priority this year is to develop a digital strategy, whilst 42% say their top priority this year is to develop a data strategy.

- Top priorities are to grow reach (58%), online fundraising (57%), build online presence and social media engagement (55%) and grow staff/volunteer digital skills (55%).

Services

- 85% are delivering services built on digital tools, in a supportive or integral role.

- 64% are using digital tools behind the scenes to help run services.

- 11% support clients with digital inclusion, whilst 16% say this is a priority.

- 73% feel their services are inclusive to some extent (39%) or a great extent (33%).

- In the next year, 30% say their priority is to develop or scale digital services, whilst 23% plan to offer new digital services (compared to 18% of all respondents).

AI

- 61% are using AI in their day-to-day work or operations.

- 34% say that using AI tools is a priority this year.

- 29% are using AI tools behind the scenes to deliver services.

- 63% agree or strongly agree that AI developments are relevant to them.

- 46% agree or strongly agree that they feel prepared to respond to AI opportunities and challenges, which is greater than the 22% who feel prepared in our main sample.

Funding

- 33% accessed funding for some digital costs (e.g. new devices or staff time), whilst 12% accessed funding for substantial digital costs (e.g. a digital role or website).

- 16% did not include digital costs in their grant funding applications.

- The top barriers to accessing funding are:

- We prioritise meeting demand and delivering our current work (43%)

- We need to prioritise paying the bills and other core costs (30%)

- Our typical funders do not cover annual software/licence costs (30%).

Top funding needs

- Capacity/headspace for organisational development (51%).

- Revamp our website, content and/or brand (42%).

- Subscriptions/licence costs (42%).

Led by disabled or d/Deaf people

This year, we focus on disabled or d/Deaf people as a distinct group to neurodivergent people (including those with cognitive differences, learning disabilities and learning difficulties). This means comparisons cannot be made with our 2023 data, where both were combined. We wanted to determine if there are any distinctions between their digital progress, funding and support needs, based on previous qualitative responses. This year, we can see that digital progress, priorities and funding needs are consistent with and similar to the main sample of charities. A higher proportion are providing digital inclusion services in comparison to all charities.

Our sample

- 45 (7%) of our responses are from charities led by disabled or d/Deaf people. Of these, 39 also specify that disabled or d/Deaf people are a main target group. This is linked to the 71% who say they are led by lived experience.

- 84% are small charities and 11% are large (the remainder did not specify). This is a much greater proportion of small charities than the 62% in our main sample.

- 56% are a registered charity or Charitable Incorporated Organisation (CIO). This is much less than our overall sample (81%). 22% are a company limited by guarantee.

- 29% describe themselves as a social enterprise or community business.

- 71% provide frontline services to individuals, compared to 53% in our main sample.

Digital progress and challenges

- 58% are at an early stage with digital (27% are curious and 31% are starting out). This compares to 50% of all charities and 64% of small charities.

- 42% are advancing or advanced, with a strategy in place for digital.

Barriers to digital progress

1. Squeezed organisational finances (72%)
2. Finding funds to invest in infrastructure, systems and tools (59%)
3. Lack of headspace and capacity (59%)

Digital priorities

- 87% see digital as an organisational priority, with 27% saying it is a high priority.

- 35% say their top priority this year is to develop a digital strategy, whilst 38% say their top priority this year is to develop a data strategy.

- Top priorities are:
  - Grow our reach (64%)
  - Increase online fundraising (56%)
  - Use data to improve services or operations (49%).

Led by disabled or d/Deaf people

Services

- 73% are delivering services built on digital tools, in a supportive or integral role.
- 55% are using digital tools behind the scenes to help run services.
- 20% support clients with digital inclusion (compared to 12% of all charities), whilst 18% say this is a priority for the next year.
- 54% feel their services are inclusive to some extent (32%) or a great extent (22%).
- In the next year, 31% say their priority is to develop or scale digital services, whilst 18% plan to offer new digital services.

AI

- 43% are using AI in their day-to-day work or operations.
- 18% say that using AI tools is a priority this year.
- 40% are using AI tools behind the scenes to deliver services.
- 43% agree or strongly agree that AI developments are relevant to them.
- 23% agree or strongly agree that they feel prepared to respond to AI opportunities and challenges.

Funding

- 26% accessed funding for some digital costs (e.g. new devices or staff time), whilst 20% accessed funding for substantial digital costs (e.g. a digital role or website).
- 26% did not include digital costs in their grant funding applications.
- The top barriers to accessing funding are:
  - We prioritise meeting demand and delivering our current work (46%).
  - Our typical funders do not cover annual software/licence costs (37%).
  - We need to prioritise paying the bills and other core costs (34%).

Top funding needs

- Capacity/headspace for organisational development (62%).
- Training for staff and volunteers on digital or data (47%).
- Bring in external advice/expertise (41%).

Led by older people

This year, we asked about organisations led by older people (65+). Whilst their responses are broadly consistent with the main sample, a smaller proportion are adopting AI tools and less see digital as a priority. This group is also less likely to access digital funding.

Our sample

- 74 (12%) of our responses are from charities led by older people.

- 86% are small charities and 11% are large (the remainder did not specify). This is a much greater proportion of small charities than the 62% in our main sample.

- 77% are a registered charity or Charitable Incorporated Organisation.

- 26% describe themselves as a social enterprise or community business.

- 41% are led by people with lived experience of the issue they address.

- 50% provide frontline services to individuals.

Digital progress and challenges

- 65% are at an early stage with digital (27% are curious and 38% are starting out). This compares to 51% of all charities and 64% of small charities.

- 35% are advancing or advanced, with a strategy in place for digital.

Barriers to digital progress

1. Squeezed organisational finances (68%)

2. Lack of headspace and capacity (59%)

3. Finding funds to invest in infrastructure, systems and tools (51%)

Digital priorities

- 77% see digital as an organisational priority, with 19% saying it is a high priority.

- 39% say their top priority this year is to develop a digital strategy, whilst 29% say their top priority this year is to develop a data strategy.

- Top priorities are:
  - Build our online presence and social media engagement (56%)
  - Increase online fundraising (51%)
  - Grow staff/volunteer digital skills (56%).

Led by older people

Digital services

- 85% are delivering services built on digital tools, in a supportive or integral role.
- 58% are using digital tools behind the scenes to help run services.
- 19% support clients with digital inclusion, whilst 21% say this is a priority.
- 62% feel their services are inclusive to some extent (40%) or a great extent (22%).
- In the next year, 19% say their priority is to develop or scale digital services, whilst 10% plan to offer new digital services.

AI

- 45% are currently using AI in their day-to-day work or operations.
- 29% say that using AI tools is a priority this year.
- 21% are using AI tools behind the scenes to deliver services.
- 52% agree or strongly agree that AI developments are relevant to them.
- 23% agree or strongly agree that they feel prepared to respond to AI opportunities and challenges.

Funding

- 7% accessed funding for some digital costs (e.g. new devices or staff time). This is significantly less than the average of 19% in the main sample.
- None (0%) accessed funding for substantial digital costs (e.g. a digital role or website), compared to 6% in the main sample.
- 25% did not include digital costs in their grant funding applications.
- The top barriers to accessing funding are:
  - We prioritise meeting demand and delivering our current work (43%)
  - We need to prioritise paying the bills and other core costs (33%)
  - Our typical funders do not cover digital costs (28%).

Top funding needs

- Capacity/headspace for organisational development (51%).
- Training for staff and volunteers on digital or data (49%).
- Bring in external advice/expertise (48%).

Calls to action
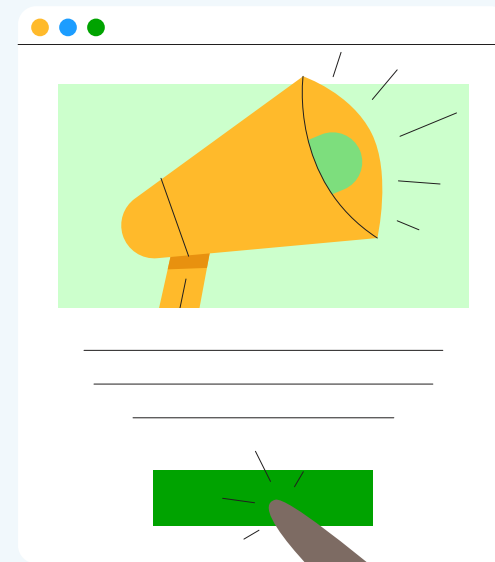
Calls to action

For charities

1

CEOs need a clear vision for digital

For the sixth year running, charities want their leaders to provide a vision of what digital can help them achieve. This needs to be linked to your organisation's strategy, vision and mission. We encourage CEOs to take the reins on defining what digital success looks like for their charities, and what they and their teams need to do to achieve it.

2

Develop a strategy

Half of charities (50%) have a strategy in place for digital, yet only 14% feel they have embedded this in their organisation and are advanced with digital. Having a strategy means that you will have a clear idea of what success looks like for your charity and how to work towards it, meaning that it will be easier to make decisions, track progress and plan where to go next with digital, data and emerging technologies such as AI. Charity Digital has a *useful guide to developing a strategy*.

3

Invest in data capabilities

Data is a high priority for 1 in 4 charities. Improving skills, data collection, management and infrastructure will help organisations use data to inform decision making. This is a vital step to make the most of artificial intelligence opportunities and ensure AI tools are used effectively and responsibly. Take a look at *the Data Collective's resources* to get started.

4

Boards and CEOs need to skill up and be AI ready

62% say their trustees' digital skills are low or could improve. A third want their trustees to learn about emerging tech and AI tools. Use this *AI checklist for charity leaders* to plan your next steps.

5

Explore how to adopt AI tools responsibly

61% of charities are currently using AI, yet only 22% feel prepared to respond to AI opportunities and challenges. Charities need to continue learning about AI. They also need support, guidance and capacity to explore how they adopt AI responsibly and develop their skills. We encourage funders and support organisations to consider this, otherwise ethical, effective implementation will become challenging for the sector. *Charity Excellence's AI Governance Framework* is a good resource for charities.

Calls to action

For funders

6

Create capacity (time, people, training)

Three quarters of charities need funding to create time and capacity to work on organisational development and digital strategy. This has become even more important during the cost of living crisis, with squeezed organisational finances being the biggest barrier that 68% of charities now face when it comes to moving forward with digital. We urge funders to consider how they might meet these needs.

7

Develop inclusive digital funding practices

It is positive that some charities are doing user research, ensuring this involves diverse groups and co-designing their services with communities. We encourage funders to support this good practice and recognise the time this takes to ensure all services are designed inclusively. In addition, we encourage funders to review the needs of small charities and charities led by marginalised groups. These groups are struggling to prioritise organisational development due to the cost of living crisis and meeting demand. Funders also need to create inclusive access to digital funding. For example, 41% of black led groups cannot identify funders who will support their digital projects.

8

Invest in skills development

Charities identify training and access to expert guidance as their key digital support needs. Furthermore, 43% of charities (and 49% of small charities) say they most need funding to access training for staff and volunteers. We encourage funders and support organisations to consider developing comprehensive digital skills training programmes for charity staff and volunteers. This would also address the need for better digital collaboration between charities.

Calls to action

For funders

9

Dedicated support and funding for small charities

We consistently see a digital skills gap between large and small charities. 72% of small charities are struggling due to squeezed organisation finances and this, in turn, means they have very little capacity and headspace to engage with digital. We hope that funders will plan how they can meet the needs of small charities.

10

Recognise that digital costs are vital core costs

Once again this year, we heard from charities that they need funding for core costs. Two thirds (66%) of charities need funding for internal technology, hardware, systems and licence costs. As part of the report, charities have also told us that funding these costs would help them be more efficient and increase their impact. We encourage funders to reconsider their approach to what they fund.
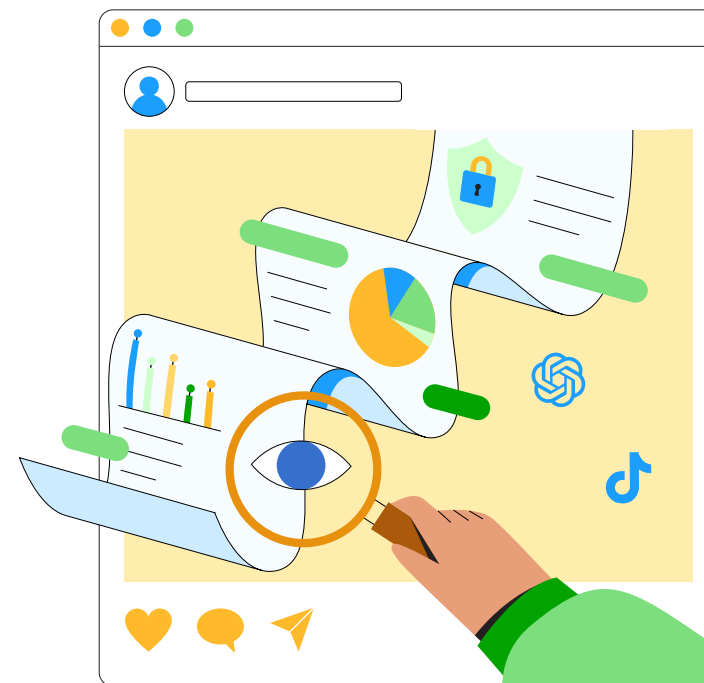
Thank you to our report partners

We are very grateful to our report partners who have made the report possible.

About our report partners

Contributed to
Catalyst

Catalyst is a collective of individuals and organisations (like nonprofits, funders, agencies and freelancers) helping the UK social sector grow in digital. Their mission is to centre community needs in design, digital and data decision making through building collective power. By supporting the annual Charity Digital Skills Report, we hope to continue to uncover what the social sector and their communities need, which is vital for understanding how we can collectively support them in the future.

Microsoft

We are delighted to be working with Microsoft on this year's report.

"Charities are increasingly expected to deliver far more with far less. Generative AI has the potential to help charities to respond to this pressure by supercharging their ability to drive efficiency, support workers and volunteers, and enhance service delivery. But we risk foregoing the vital impact of charities in our communities if they are not supported to make the most of the AI opportunity. Skilling is a key element of this, and as this year's Charity Digital Skills report highlights, is a very real issue especially for smaller charities.

As part of our Get On skilling initiative, which has already helped over 1.3m people in the UK gain digital skills, Microsoft has committed to supporting an additional one million people to gain the AI skills they need to be successful in this new AI era. Employees, volunteers and trustees at charities can help develop their AI skills and knowledge with free, online learning paths from Microsoft and LinkedIn at opportunity.linked.com, and the Microsoft Digital Skills Center for Nonprofits provides a collection of resources, designed specifically for charities to enable you to start using AI to enhance your marketing, donor relations, research capabilities and fundraising."

Thank you to our report partners

We are very grateful to our report partners who have made the report possible.

About our report partners

We're *Pixeled Eggs*, we do purpose-driven digital. By designing smart, modern websites at the heart of purpose-driven organisations, we give every good cause its digital edge.

We partner with organisations making a positive impact, nonprofits and charities to create engaging, accessible and sustainable websites.

We believe that Good People + Good Work = A Better World.

pixeledeggs.com

We're very excited to partner with *Stopgap Recruitment* to support and empower not-for-profit organisations in their quest to build and maximise their digital capabilities and teams so they can deliver their strategic and operational plans.

Stopgap is an independent recruitment agency and trusted advisor with over 30 years of experience of helping not-for-profit organisations to find and secure the best marketing talent and build successful digital teams. They understand the challenges the third sector is facing when it comes to digital transformation and hiring talent, and are able to share thought leadership, actionable market insights and hands on tips.

Acknowledgements

Thank you to all the organisations who took part in the report, including:

Aberdeen Foyer

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Ad'iyah Collective

Adferiad Recovery

Afri Kindness

AGE UK South Gloucestershire

All We Can

Allsports Coaches Coaching Academy CIC

Anna Freud

Ardgowan Hospice

Artiface

Arun Counselling Centre

Association of Charitable Organisations

Asylum Link Merseyside (ALM)

At Birkhill House CIC

Autism at Kingwood

Autistic Children and Carers Together

AzuKo

BARAC UK

Barbara Hamilton, Edinburgh Remakery

Basingstoke Irish Society and Fairfields Community Hall

Be United

Berkshire Digital Infrastructure Group

Betley Cat Rescue

Better Together Community Support Group for Stoke-on-Trent and Newcastle-under-Lyme

Blood Cancer UK

Bloomin' Well CIC

Bond

Bradford Trident

Brighton Unemployed Centre Families Project

BRMTWN

Bumblebee Conservation Trust

Burning Nights CRPS Support

Cambridge Council for Voluntary Service

CAMFED

Campaign For National Parks

Cancer Research UK

Canny Bean CIC

Central Gonounnayan Sangstha -CGS

Centre for Armenian Information & Advice (CAIA)

Centre for Mental Health

Charity Finance Group

Charity IT Leaders

Chartered Quality Institute

Cirencester Opportunity Group

Citizens Advice Westminster

Clear Sky Children's Charity

Climate Spring

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Data4Change

Dawn Sailing Barge Trust Ltd

Diabetes UK

Digital Connect

Diocese of Bristol

Disability Can Do

Disability Huntingdonshire

Disability Sport Yorkshire

Downright Excellent

Dragonfly Cancer Trust

Drum and Brass CIC

Eco Brixs

Ecosystems Knowledge Network

Education and Skills Development Group

Endometriosis South Coast

Equilore

EY Foundation

Family Fund

FEAST With Us

Feline Fur Babies North Wales

Fen Zen cic

FOUNDATION FOR HUMAN SECURITY INITIATIVE

Free Your Mind CIC

FRESH START FUTURE ENTERPRISES LIMITED

Friends of Rosendale

Friends, Families and Travellers

Gene People

Girlguiding Anglia

Global Health Film

Good Vibrations

Groundwork Greater Manchester

Groundwork Yorkshire

Gwent Wildlife Trust

Gypsies and Travellers Wales Limited

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Hope Garden SCIO

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JVN

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Khulisa

Kids

Kidscape

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Kingswinford Christian Centre

LD:NorthEast

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Life Skills Education Charity

Light Foundations

Lincolnshire Action Trust

London Youth

MABY

Macular Society

Maggie's

Maidsafe Foundation

Malvern Special Families

Mental Fight Club

Merseyside Law Centre

MHNC (Mental Health Northants Collaboration)

Ming-Ai (London) Institute

Mobile Herbal Clinic

Mor Media Charity

Move Momentum

Muslim Welfare House MWH

MyBnk

National Centre for Writing

National Rheumatoid Arthritis Society

Neshomo CIO Greater Manchester

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The Wildlife Trusts

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WHISH - Whitby Hidden Impairments Support & Help

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Winston's Wish

Women for Women International - UK

Worcestershire Association of Carers

Word Life Centre

Working Families

Y Care International

YACWAG

About the authors

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Zoe Amar is widely regarded as one of the charity sector's leading digital experts. She founded digital agency and social enterprise *Zoe Amar Digital* in 2013. Their clients have included Sense, Anglia Ruskin University and The School for Social Entrepreneurs. Zoe is Chair of The Charity Digital Code of Practice. She writes for Third Sector about charities and also co-authored The Charity Commission's digital guidance for trustees, 'Making Digital Work'. Zoe has 14 years' experience as a charity trustee and currently sits on the board of Charity Digital Trust. Previously, Zoe worked for 5 years as part of the leadership team at a national charity that advised nonprofits about technology. She was voted one of the top 20 Pandemic Pioneers by Charity Times and has also won an Inspiring Communicator Award from Charitycomms.

Nissa Ramsay

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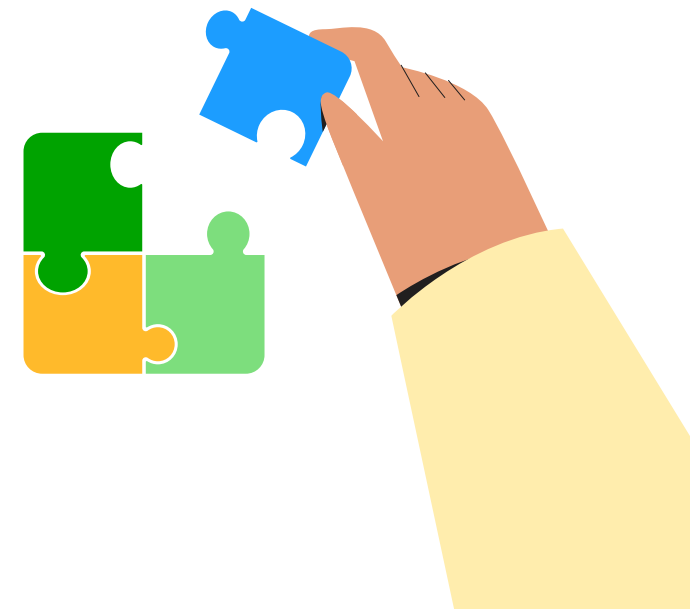
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