

Policy&Practice Briefing Papers

**Third Sector Trends in
England and Wales 2022**

Survey response, Initial findings from the
survey and an outline of latest qualitative
report findings



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Policy&Practice Third Sector Briefing Papers

This series of briefing papers draws on data from a range of sources including the Charity Commission Register, NCVO Civil Society Almanac and the Third Sector Trends study. It was established to make further use of Third Sector Trends data prior to the 6th iteration of the major study to be undertaken in 2022. Now that the 2022 research phase is complete, the papers provide details on technical issues and preliminary findings prior to the completion of full reports which will be published by Community Foundation Tyne & Wear and Northumberland.

Third Sector Trends Study

The Third Sector Trends study was conceived and originally commissioned by Northern Rock Foundation with research conducted by the Universities of Southampton, Teesside and Durham. The Community Foundation Tyne & Wear and Northumberland was a co-founder of the research and is now responsible for its legacy.

The Community Foundation is now collaborating with partners including St Chad's College at the University of Durham, Power to Change, Barrow Cadbury Trust and Millfield House Foundation.

All publications from the Third Sector Trends study are available free to download at this address:

<https://www.communityfoundation.org.uk/knowledge-and-leadership/third-sector-trends-research/>

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Third Sector Trends

The aim of the Third Sector Trends research programme is to get a better understanding of the structure, dynamics, purpose and impact of the local voluntary, community and social enterprise sector across England and Wales.

In order to understand the local Third Sector more fully, it is necessary to undertake the study at scale so that comparative analysis is possible between places. It is not possible fully to understand what the Third Sector achieves in one locality by studying it in isolation because there is no scope to assess which aspects of its activities are typical and which are extraordinary.

The study has two elements: a long-term qualitative study of a representative sample of 50 Third Sector organisations which began in 2008; and a series of surveys, beginning in 2010, which take place every three years.

Third Sector Trends is an independent and authoritative study of the voluntary, community and social enterprise sector. But it cannot collect data on everything. Consequently, the study is designed to complement findings from other large scale studies by NCVO, the Charity Commission and 360Giving.

Purpose of this paper

Over the next few months there will be a series of detailed reports and briefings on the findings from Third Sector Trends. These will address the following issues:

- Third Sector structure, energy and impact
- People in the Third Sector
- Third Sector income and assets
- Third Sector interrelationships
- The contribution of the Third Sector to localities,
- Social enterprise and Community Business activity

This report has the following aims:

- Section 1: a report on survey sample structure and survey response
- Section 2: initial findings on trends in sector confidence
- Section 3: outline of the key findings from the qualitative study

1 Survey responses 2022

Third Sector Trends received 6,070 responses by its closing date of 1st October 2022. This section presents basic detail on the structure of the data set. For more detail on research methodology, a full report is available [here](#)

Achieving a good response rate for Third Sector Trends involves two processes. First, direct invitations to respondents whose email addresses were obtained from the Charity Commission Register. Second, via responses to an open survey.

Charity Commission Register sample

In 2022, Charity Commission Register data were downloaded for all charities in England and Wales. Once excluded organisations were removed from the data set, a sample frame was established for 110,930 organisations where both a postcode and contact email address were available.

Table 1.1 presents the original sample frame, number of responses and percentage response rates for each English region and Wales.

| Region / nation | Charity Commission Register sample frame | Number of completed surveys | Percentage response rate |
|---|---|------------------------------------|---------------------------------|
| North East England and Cumbria ¹ | 4,796 | 333 | 6.9 |
| North West England (excluding Cumbria) | 9,882 | 370 | 3.7 |
| Yorkshire and Humber | 8,039 | 429 | 5.3 |
| West Midlands of England | 8,940 | 405 | 4.5 |
| East Midlands of England | 8,138 | 356 | 4.4 |
| East of England | 12,754 | 580 | 4.5 |
| London | 19,994 | 497 | 2.5 |
| South East England | 19,865 | 821 | 4.1 |
| South West England | 12,933 | 677 | 5.2 |
| Wales | 5,588 | 341 | 6.1 |
| England and Wales | 110,930 | 4,809 | 4.3 |

Working with many CVSs has been especially successful in areas where we have been working for a long time (North East England, North West England and Yorkshire and Humber) because they know about the survey, expect it to be repeated and know that the data are well used.

In 2022, we also engaged with CVSs in the West Midlands, South West England and Wales – with considerable success. We anticipate that in 2025, commitment and support will widen as is the case in our ‘home regions’ in the North of England. Support in Wales has been particularly strong from local CVSs, WCVA, Wales

¹ Third Sector Trends began as a study of North East England and Cumbria, so this has remained the case when the survey campaign is underway. When the dataset is collated, Cumbria responses are returned to the North West England region.

Government, TNLCF and Community Foundation Wales producing a good response rate (see Section 3.6 for details of response rates).

Encouraging high volume grant makers such as Community Foundations and TNLCF is a priority because TSOs are more likely to respond to their requests than they are to those of CVSs or from us as researchers. Where support has been provided in 2022, responses have been boosted considerably. Whereas general enthusiasm for the study has been high amongst funders, actual engagement in direct emailing recent or current grantees has remained patchy – often for procedural reasons rather than principled objection.

As can be seen in Figure 1.1, in areas where we have been working with stakeholders more intensively (North East England, North West England, Yorkshire and Humber, West Midlands of England, South West England and Wales) more responses come in via these routes. The stronger performance in the Northern regions of England is due to the longevity of the research in those areas running back to 2010.

Figure 1.1 Responses received via the open survey and direct email invitations

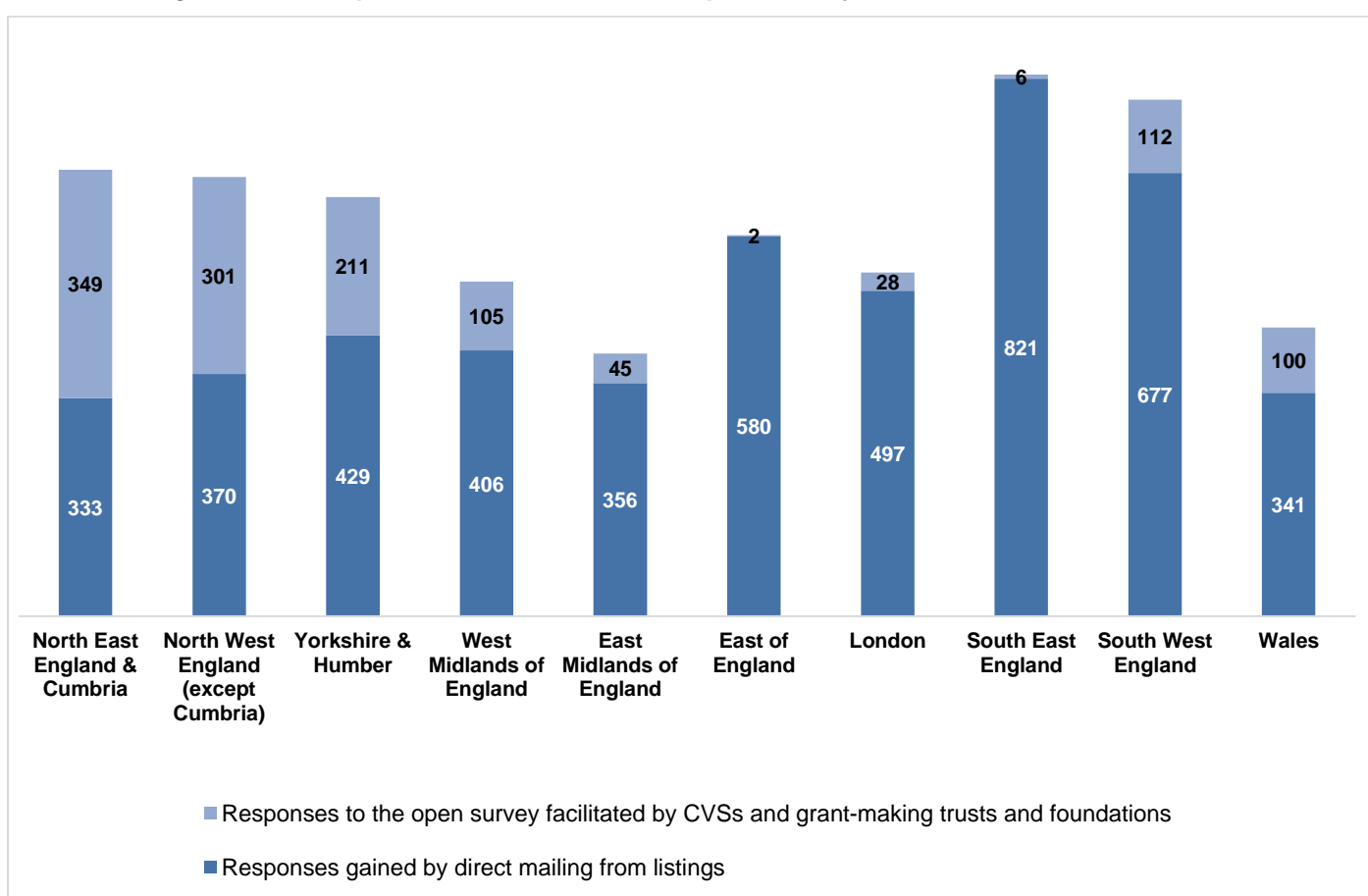


Table 1.2 lists direct and indirect responses to the survey in 2022. And to test comparability with previous rounds of the study, Table 1.3 presents data on the distribution of the sample in twelve income categories. These are closely matched.

| Table 1.2 Third Sector Trends direct and indirect invitation response rates in Wales and English Regions 2022 | | | |
|--|--|---|--------------------------|
| Region / nation | Responses gained from CVSSs and Community Foundations | Responses from use of Charity Commission Register emails | Total respondents |
| North East England and Cumbria | 349 | 333 | 682 |
| North West England (excluding Cumbria) | 300 | 370 | 670 |
| Yorkshire and Humber | 211 | 429 | 640 |
| West Midlands of England | 104 | 405 | 509 |
| East Midlands of England | 45 | 356 | 401 |
| East of England | 2 | 580 | 582 |
| London | 28 | 497 | 525 |
| South East England | 6 | 821 | 827 |
| South West England | 112 | 677 | 789 |
| Wales | 100 | 341 | 441 |
| <i>No location provided</i> | 6 | 0 | 6 |
| England and Wales | 1,263 | 4,809 | 6,072 |

| Table 1.3 Comparisons of sample structure by income 2016, 2019 and 2022 | | | | | | |
|--|------------------------------|--------------|--------------|---|--------------|--------------|
| | <i>Number of respondents</i> | | | <i>Percentage distribution of respondents</i> | | |
| | 2016 | 2019 | 2022 | 2016 | 2019 | 2022 |
| No income | 117 | 72 | 136 | 3.2 | 1.8 | 2.2 |
| £1 - £2,000 | 377 | 312 | 560 | 10.4 | 7.6 | 9.2 |
| £2,001 - £5,000 | 299 | 283 | 493 | 8.3 | 6.9 | 8.1 |
| £5,001 - £10,000 | 324 | 433 | 626 | 9.0 | 10.6 | 10.3 |
| £10,001 - £25,000 | 487 | 625 | 961 | 13.5 | 15.3 | 15.8 |
| £25,001 - £50,000 | 344 | 423 | 684 | 9.5 | 10.4 | 11.3 |
| £50,001 - £100,000 | 360 | 492 | 752 | 10.0 | 12.0 | 12.4 |
| £100,001 - £250,000 | 424 | 517 | 733 | 11.7 | 12.7 | 12.1 |
| £250,001 - £500,000 | 296 | 331 | 445 | 8.2 | 8.1 | 7.3 |
| £500,001 - £1m | 199 | 188 | 251 | 5.5 | 4.6 | 4.1 |
| £1,000,001 -£5m | 211 | 242 | 290 | 5.8 | 5.9 | 4.8 |
| £5m - £25m | 87 | 90 | 84 | 2.4 | 2.2 | 1.4 |
| Missing data | 88 | 75 | 55 | 2.4 | 1.9 | 0.9 |
| Total sample | 3,163 | 4,083 | 6,070 | 100.0 | 100.0 | 100.0 |

Table 3.4 shows that samples have similar structures from 2013/14 onwards. When the survey was based only in North East England and Cumbria, the proportion of larger TSOs was comparatively lower due to the use of postal questionnaires which produced more responses from very small organisations and groups.

| Table 1.4 Third Sector Trends sample structures by size of organisations 2010-2022 | | | | | | | |
|---|--|--|---|--------------------------------------|---------------------------------------|---------------------------------------|-------------------------------|
| | 2010 North East England and Cumbria | 2012 North East England and Cumbria | 2013/14 North East England and Cumbria, Yorkshire & Humber | 2016 North of England | 2019 England and Wales | 2022 England and Wales | All years' average |
| Micro (income £0-£9,999) | 30.1 | 29.7 | 27.9 | 31.7 | 26.9 | 30.2 | 29.6 |
| Small (income £10,000-£49,999) | 34.9 | 35.0 | 23.1 | 23.6 | 25.7 | 27.4 | 27.0 |
| Medium (income £50,000-£249,999) | 18.5 | 18.4 | 20.7 | 22.2 | 24.7 | 24.7 | 22.9 |
| Large (income £250,000-£999,999) | 11.0 | 12.0 | 17.5 | 14.0 | 12.7 | 11.6 | 13.1 |
| Big (income above £1million - £25million) | 5.6 | 4.8 | 10.8 | 8.5 | 8.1 | 6.2 | 7.5 |
| N= | 1,027 | 1,595 | 2,288 | 3,525 | 4,011 | 6,070 | 18,516 |

Comparing survey structure with register data

The representativeness of the survey sample can be tested by comparing it with the registers data collected in 2022. By size of organisations it is clear from Table 1.5 that micro organisations are under-represented, but these variations are very small.

By types of urban location a similar pattern emerges. Micro organisations are the least well represented in ‘town and country’ areas (-7%). While medium, large and big organisations are slightly over-represented in all types of locations, there is no obvious relationship between this and the type of urban area.

Sample distribution by areas of relative affluence or deprivation can be compared directly with register data as shown in Table 1.6. Organisations were more likely to respond in the least affluent areas (+4%) and less likely to respond in the most affluent areas (-3%). And so, while the sample has a very large number of responses from affluent areas, this is due to the density of the population of organisations in those areas, not a skewed research sample.

When comparing the sample survey with registers by income bands, it is clear from Table 3.7 that the data are representative. In only two income categories does the survey sample approach a 5 per cent variation.

| Table 1.5 Comparing survey sample with register data | | | | | | |
|--|------------------------------------|--|---|--|---|---------|
| | Micro - income below £10,000 | Small - income £10,000- £49,000 | Medium - income £50,000 - £249,999 | Large - income £250,000- £999,999 | Big - income £1million - £25million | |
| Register data | | | | | | |
| Metropolitan areas | 27.1 | 25.7 | 26.2 | 13.0 | 8.1 | 45,082 |
| Major urban areas | 31.2 | 29.6 | 24.5 | 9.4 | 5.4 | 33,585 |
| Town and country areas | 43.0 | 29.9 | 18.7 | 5.5 | 2.8 | 55,795 |
| All organisations | 34.7 | 28.4 | 22.7 | 9.0 | 5.2 | 134,833 |
| Survey data | | | | | | |
| Metropolitan areas | 24.4 | 22.8 | 27.9 | 15.7 | 9.2 | 1,747 |
| Major urban areas | 26.1 | 27.7 | 25.5 | 13.5 | 7.2 | 1,505 |
| Town and country areas | 36.1 | 30.1 | 22.2 | 7.9 | 3.8 | 2,735 |
| All organisations | 30.1 | 27.4 | 24.7 | 11.6 | 6.2 | 5,987 |

| Table 1.6 Comparing survey sample with register data | | | | | | |
|--|-----------------------------|---------|-------------------------|---------|---------------------------|---------|
| | Least affluent - IMD 1-2 | IMD 3-4 | Intermediate IMD 5-6 | IMD 7-8 | Most affluent IMD 9-10 | |
| Register data | | | | | | |
| Metropolitan areas | 26.9 | 27.0 | 19.8 | 15.9 | 10.4 | 66,997 |
| Major urban areas | 17.2 | 16.4 | 16.9 | 21.2 | 28.4 | 46,634 |
| Town and country areas | 4.6 | 13.8 | 27.8 | 29.3 | 24.5 | 72,837 |
| All organisations | 15.8 | 19.2 | 22.2 | 22.4 | 20.4 | 186,521 |
| Survey data | | | | | | |
| Metropolitan areas | 36.1 | 23.3 | 16.6 | 14.1 | 9.9 | 1,722 |
| Major urban areas | 23.9 | 18.4 | 16.4 | 19.4 | 21.9 | 1,493 |
| Town and country areas | 7.3 | 16.2 | 27.9 | 27.9 | 20.7 | 2,726 |
| All organisations | 19.8 | 18.8 | 21.7 | 21.8 | 17.9 | 5,941 |

| Table 1.7 Distribution of TSTS survey sample compared with register data 2022 | | | | | |
|---|-----------------------|---------------------|-----------------------|---------------------|---|
| | Register data 2022 | TSTS Survey 2022 | Register data 2022 | Survey data 2022 | Percent over or under representation in survey |
| £1 - £2,000 | 19,139 | 560 | 14.2 | 9.5 | -4.7 |
| £2,001 - £5,000 | 14,823 | 493 | 11.0 | 8.4 | -2.7 |
| £5,001 - £10,000 | 12,435 | 626 | 9.3 | 10.6 | 1.4 |
| £10,001 - £25,000 | 28,278 | 961 | 21.1 | 16.3 | -4.7 |
| £25,001 - £50,000 | 9,942 | 684 | 7.4 | 11.6 | 4.2 |
| £50,001 - £100,000 | 14,680 | 752 | 10.9 | 12.8 | 1.9 |
| £100,001 - £250,000 | 15,886 | 733 | 11.8 | 12.5 | 0.6 |
| £250,001 - £500,000 | 7,521 | 445 | 5.6 | 7.6 | 2.0 |
| £500,001 - £1m | 4,559 | 251 | 3.4 | 4.3 | 0.9 |
| £1,000,001 - £5m | 5,115 | 290 | 3.8 | 4.9 | 1.1 |
| £5,000,001 - £25m | 1,939 | 84 | 1.4 | 1.4 | 0.0 |
| All organisations | 134,317 | 5,879 | 100.0 | 100.0 | |

2 Initial findings on sector confidence about the future

There's a good deal of nervousness amongst leaders of Third Sector organisations just now about the impact of the cost-of-living crisis on their ability to meet the needs of their beneficiaries. Inevitably, these worries also make them think hard about the wellbeing of their own organisations

Third Sector Trends has been tracking sector mood every three years since 2010. We started at a time when the impact of the 2008 financial crash was still rebounding around the economy. By 2013 government had adopted dramatic austerity policies which were tearing into local authority budgets. In 2016, the survey returned to a nation convulsed with excitement or anxiety about Brexit.

By 2019, thankfully, things were looking better in the economy and government was talking about 'levelling up' and investing heavily in 'left behind places'. But little did we know that Covid would turn everything upside down again by spring 2020.

We've returned to do the survey again in 2022 just at the point where the cost-of-living crisis was starting to consume people with worry. The scale of this challenge to the sector may prove to be as great – if not greater – than anything we have seen since 2010. And as in the past there are fears for the sector's future.

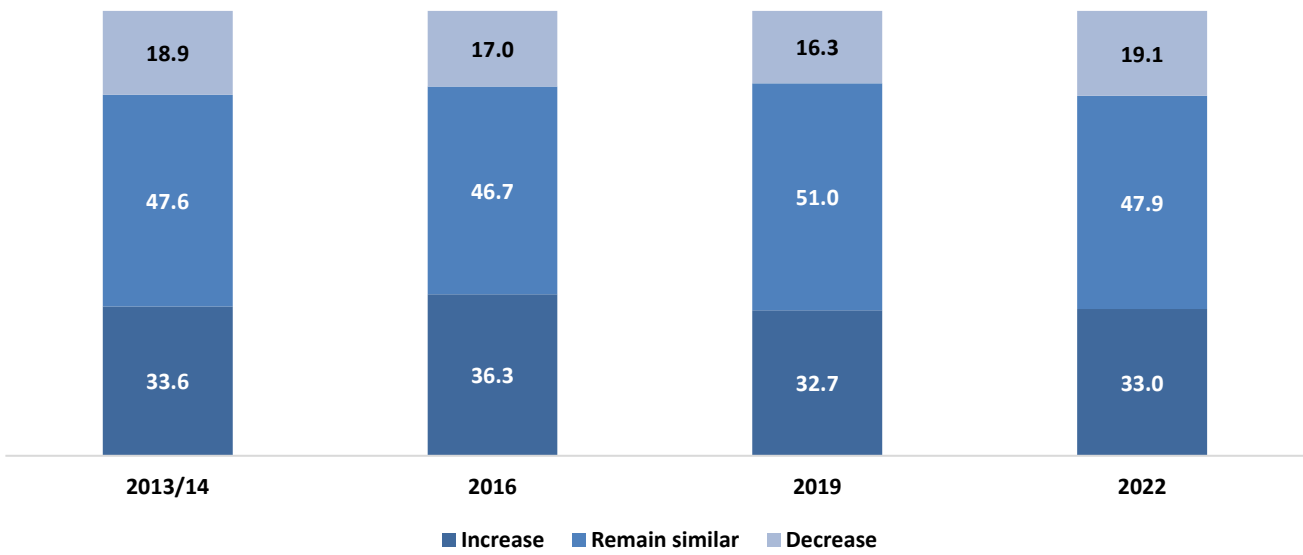
The advantage of a long-term study such as Third Sector Trends is that it offers some insight into how events may play out. And in facing an uncertain future, we find considerable comfort in the Third Sector's track record of self-confidence, resilience and adaptability.

There's much more continuity than change in voluntary sector opinion

Third Sector Trends' large-scale surveys examine sector mood about future prospects every three years. Figure 2.1 looks at expectations about income in four waves of the study. In 2022, the sector is a little more optimistic about rising income than it was in 2019, standing at 33 per cent. And certainly confidence has recovered since the depths of the pandemic when we found that only 13 per cent of organisations felt that this would be the case.

There's a hint that confidence has fallen to some extent since 2019 when 16 per cent of organisations felt income would fall. Now it is 19 per cent. But generally, about half of the sector feels that things will stay the same – and as NCVO data on sector income demonstrates – this is how things usually are (see Figure 2.2).

Figure 2.1 Expectations about income in the next two years

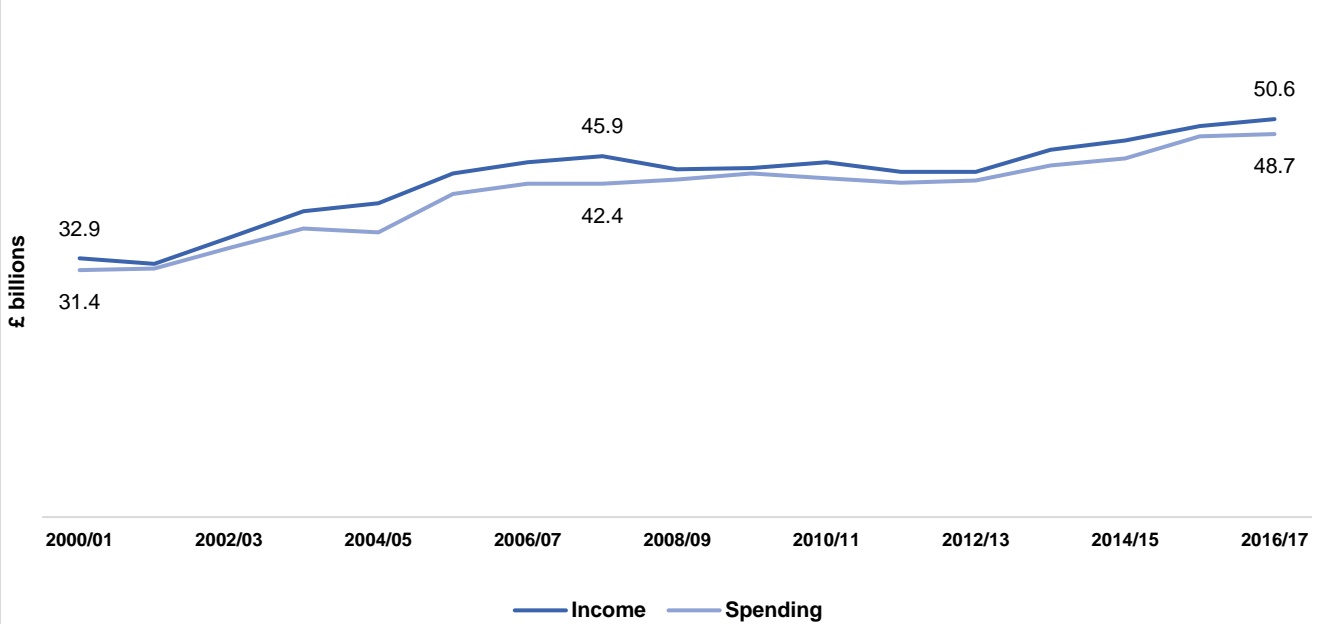


Indeed, NCVO Almanac data shows that sector income has risen steadily for the last twenty years from about £49billion to £56billion. Furthermore, they show that the sector knows how to look after its finances because on no occasion since 2000 has spending exceeded income.

What we don't yet know yet is the extent to which the current economic and cost of living crises will impact on sector finances or their ability to meet the needs of their beneficiaries. Much will depend on whether these can be mitigated by the actions of government and funding partners, as during the Covid pandemic.

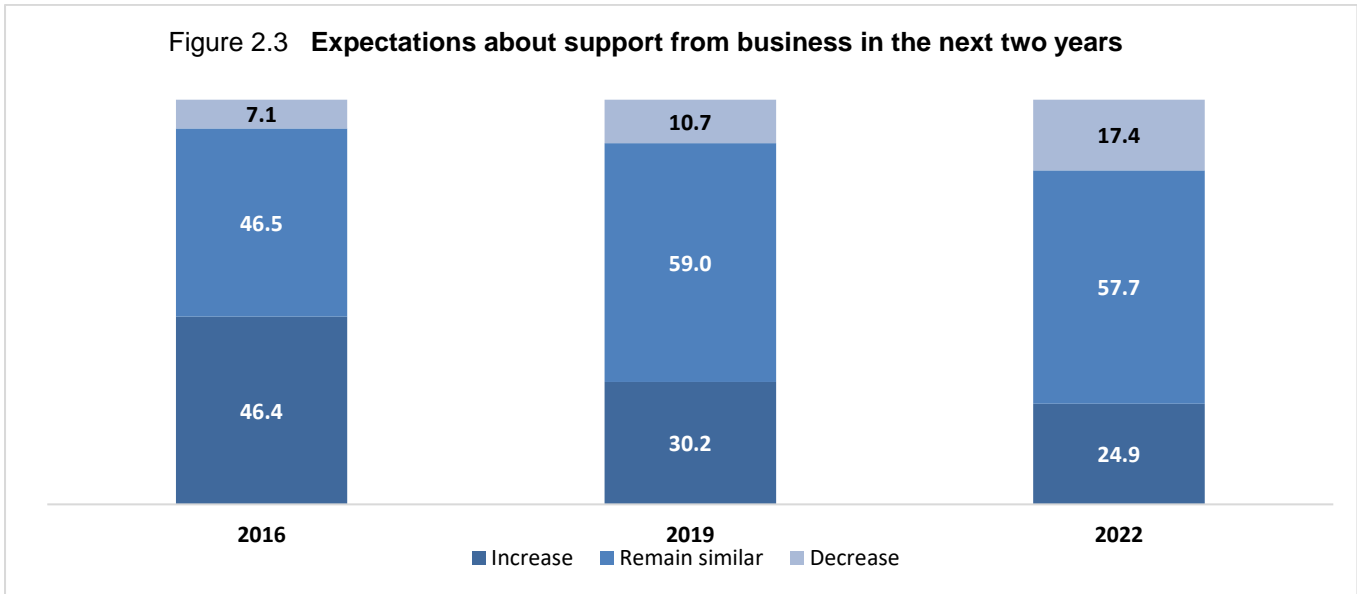
Figure 2.2 Third Sector income and expenditure

(Source: NCVO Almanac 2021 £bns: adjusted for inflation)

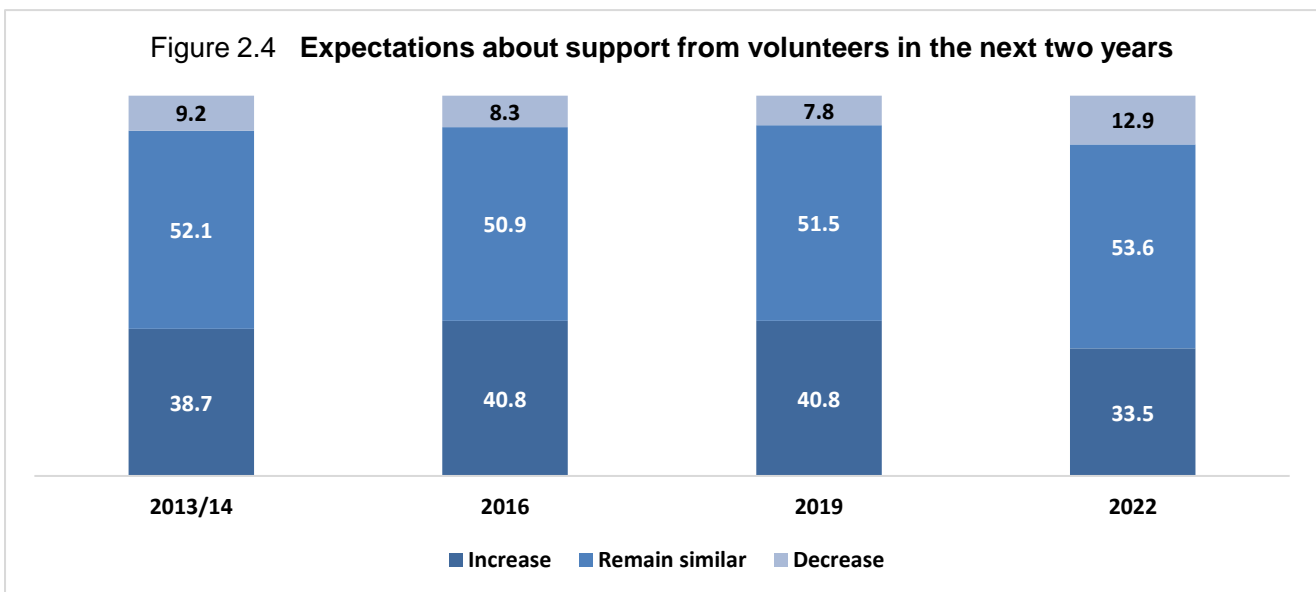


Taking the temperature

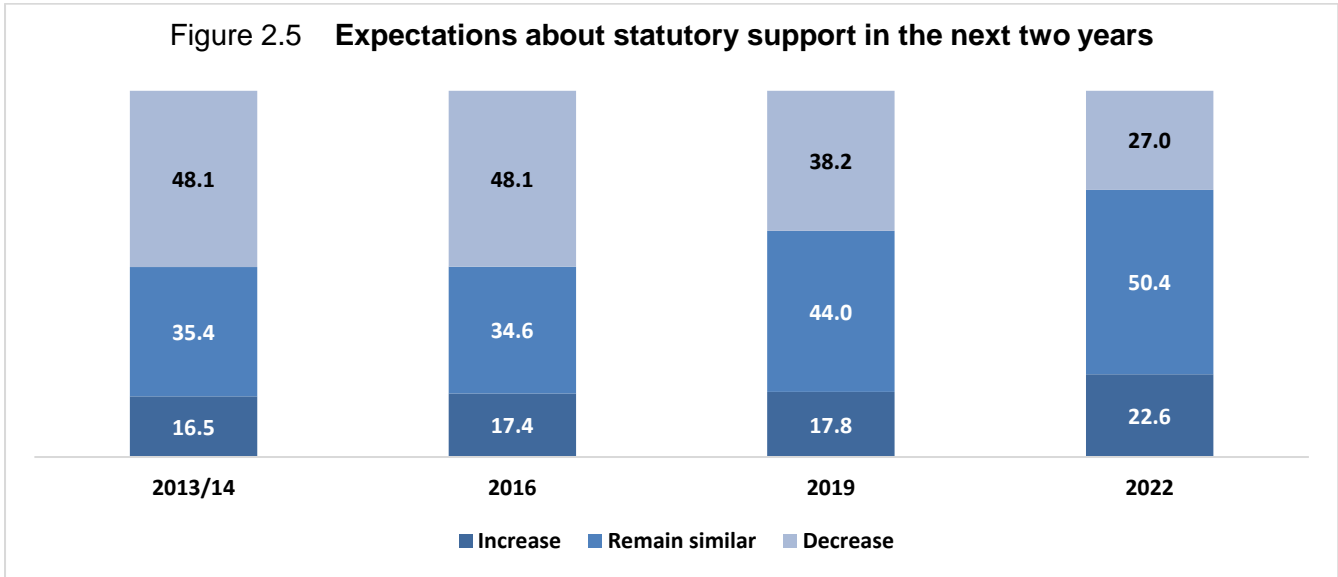
In some aspects of sector expectation there is evidence of change. As Figure 2.3 shows, confidence about support from business has steadily declined since 2016 (when we first asked this question). And the fact that 17 per cent of organisations think that support from business will fall further makes sense as the private sector itself is struggling to make ends meet with rising prices. That said, a quarter of organisations still feel that support from business will grow.



It’s not all about money. About 70 per cent of voluntary sector organisations rely extremely heavily on volunteer time because they have no employees. In the post-Covid world, as would be expected, confidence about maintaining volunteer support has fallen. But not dramatically so - the sector remains optimistic on the whole with a third of organisations expecting support from volunteers to rise again and more than a half anticipating that support will remain the similar (see Figure 2.4).

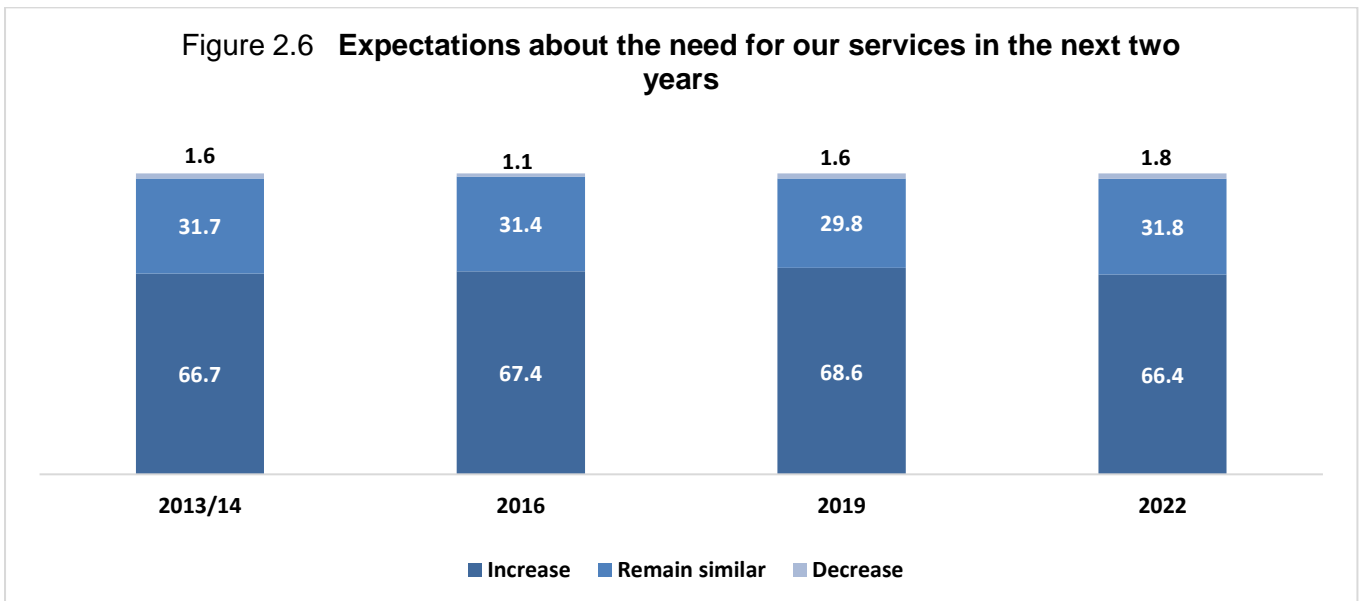


In the worst days of government austerity programmes, sector mood about financial support from statutory bodies was on the floor. Nearly half of organisations felt that support would fall. The mood has improved progressively through the last four phases of the study (see Figure 2.5). Now only 27 per cent think that statutory support will fall – but of course, that’s still a lot and the value of existing contracts may be eroded by inflation. On the whole, the voluntary sector never feels especially confident about statutory support, though it has risen a little to 23% in 2022.



Another bellwether indicator of sector mood is the extent to which organisations feel that the need for their services will increase. Recent studies have emphasised a big rise in demand for services. But we should interpret these findings carefully if the studies were small or unrepresentative.

Third Sector Trends surveys indicate that the voluntary sector generally feels that demand for their services will rise. But what we can only make educated guesses about, is whether there will be a fundamental change in demand due to the cost-of-living crisis in specific areas of service delivery.



The voluntary sector often prides itself on its culture of partnership working. As Figure 2.7 shows, there is generally a very positive attitude towards partnership working. But things do change.

There are indications that organisations are becoming a little more circumspect about partnership working. Certainly the survey evidence indicates that interest in formal partnership working (to deliver contracts for example) has fallen a good deal over the years and that seems to have continued in 2022 as shown in Figure 2.8.

Figure 2.7 Expectations about partnership working in the next two years

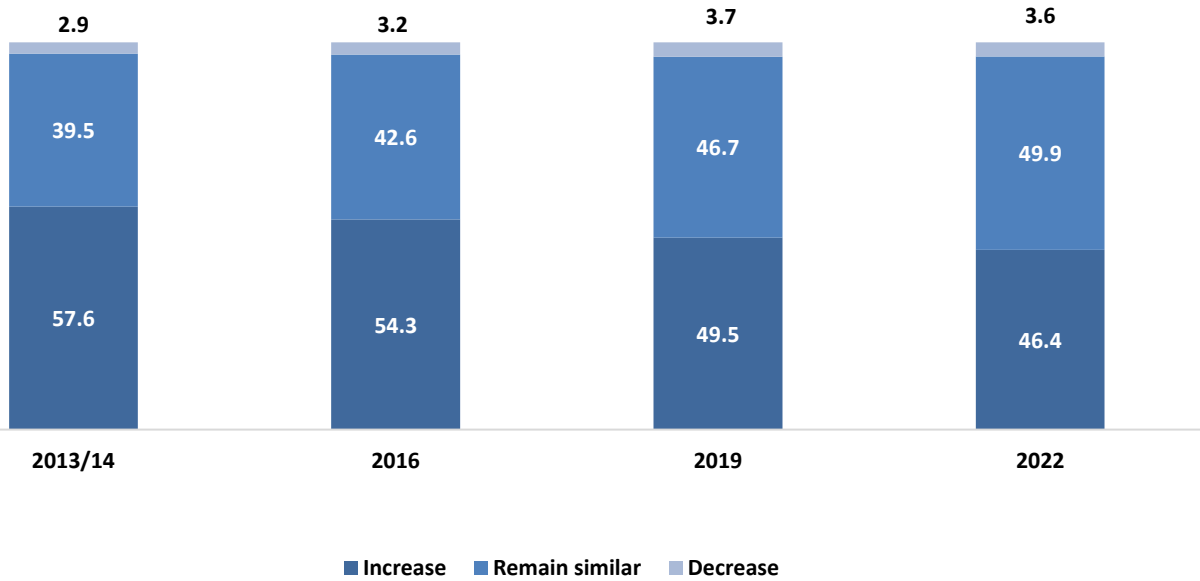
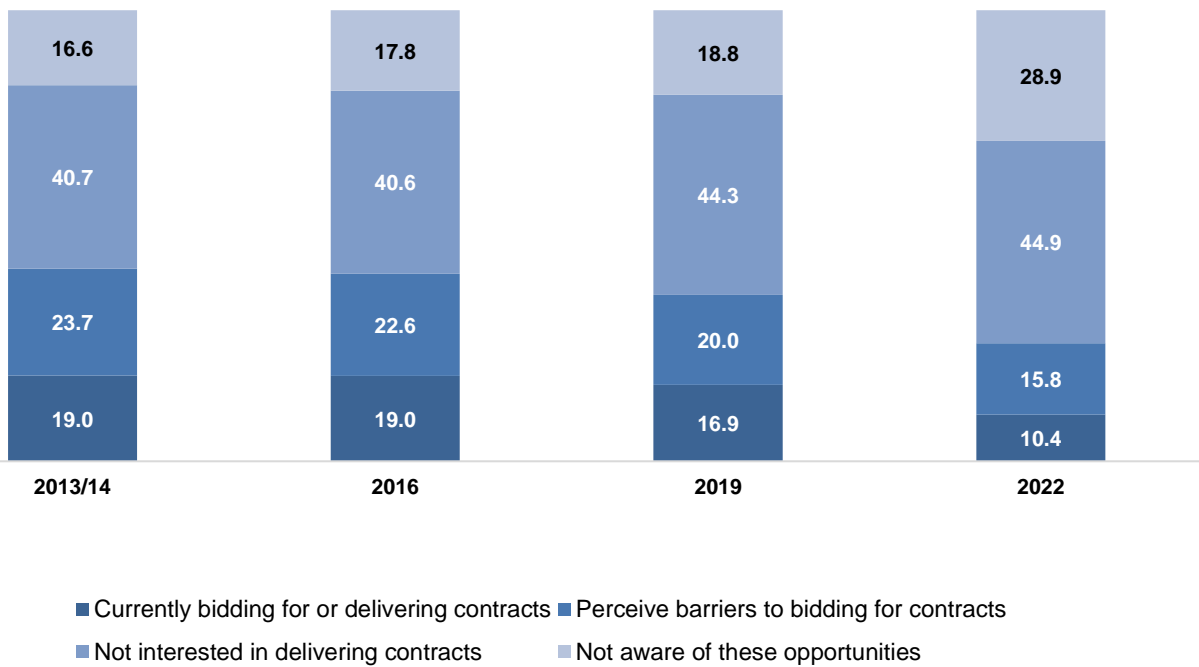
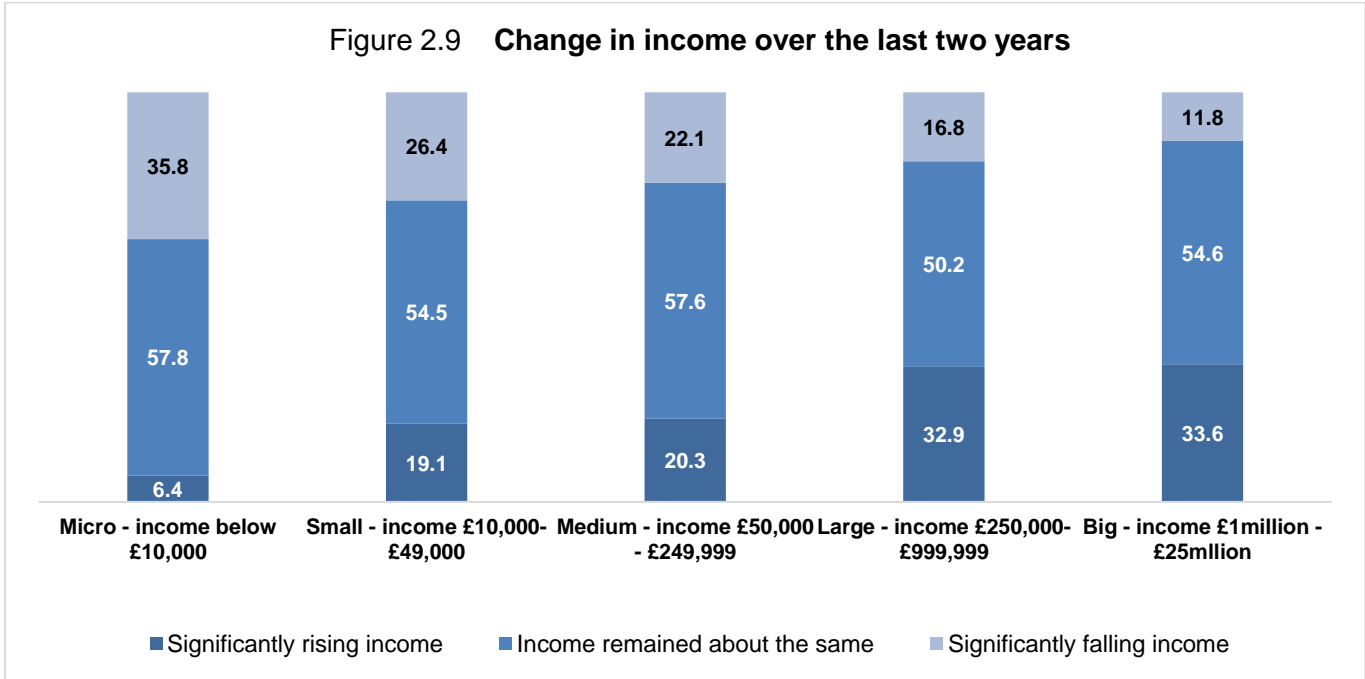


Figure 2.8 Interest in delivering public services via contracts

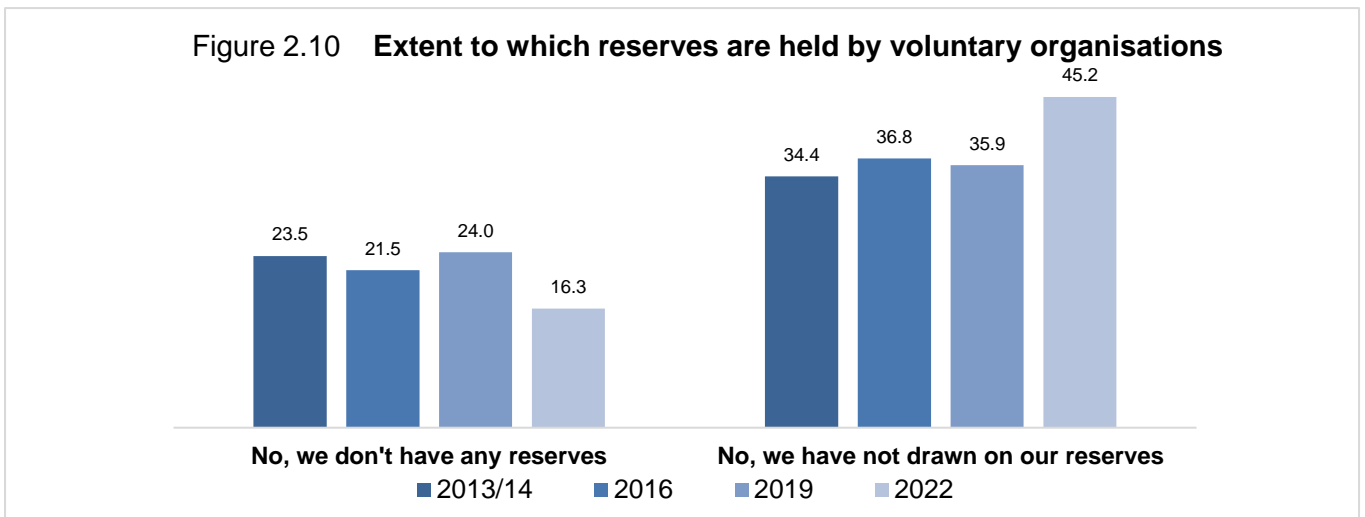


A mixed picture?

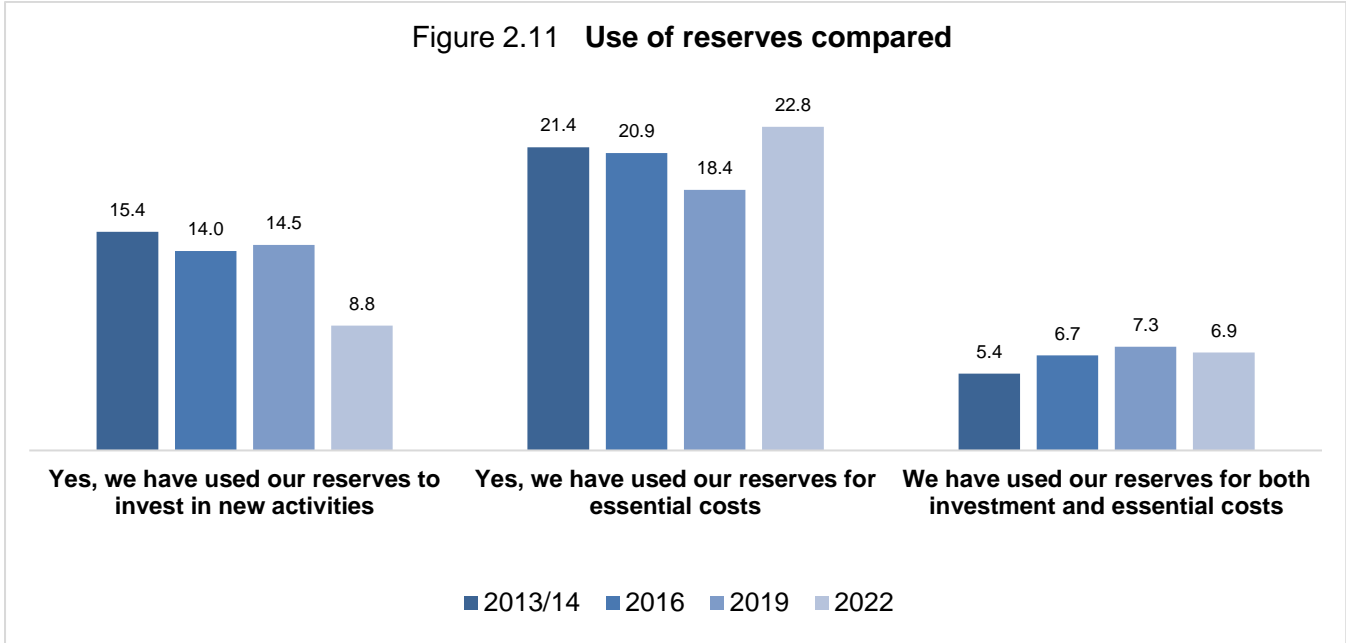
Sector-wide survey findings can mask variations which lay below the surface. The most recent Third Sector Trends data show that patterns of financial change vary depending on the size of organisations. What this seems to indicate is that larger organisations have come out from the pandemic quite well, while very small organisations have been more likely to struggle (see Figure 2.9).



A second indicator on financial wellbeing – particularly relevant as income may lag behind increased costs - is whether organisations have reserves, or indeed whether they have increased them in the last two years. Figure 2.10 shows that only 16 per cent of organisations have no reserves now compared with 24 per cent in 2019. This indicates that many charities may have fared better during the Covid pandemic than many expected. It is also clear that many organisations in 2022 have not used reserves in the last two years (45%) compared with 2019 (36%).



As we enter a more difficult operating environment, it is perhaps worrying to note that fewer organisations have invested in their own development given that, as shown in Figure 2.11, they have reserves available to do so. The percentage of organisations using reserves for essential costs has clearly risen since 2019 – but this does not reflect a definite upward trend so much as a return to the situation in 2013/14 and 2016.



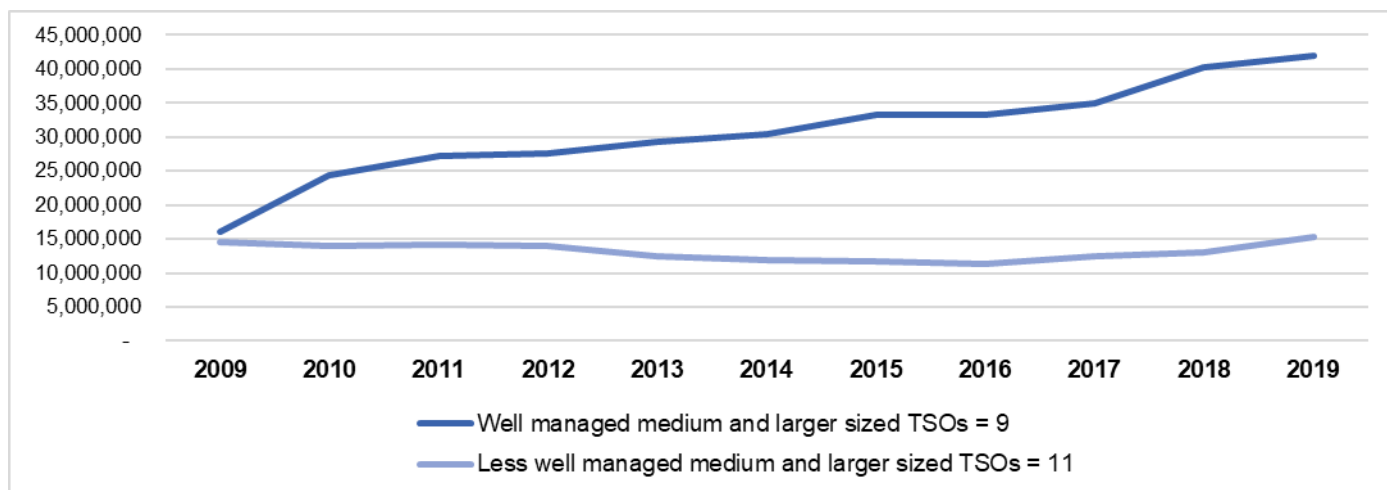
3 Outline of qualitative findings

The voluntary sector has had to contend with its fair share of problems since the financial crash of 2008. In an in-depth study of a representative sample of 50 organisations over the last 15 years in North East England and Cumbria, Third Sector Trends has watched how charity leaders navigate their way through choppy waters.

The latest report, *Going the distance: how third sector organisations work through turbulent times*, has just been released which is available [here](#).

We can now show what happened over the last fifteen years to their finances (see Figure 3.1). Increasing income over the long term is certainly not the only way of assessing how well charities are managed and perform, but it is a useful proxy. Collectively, the organisations which we judged to be well managed more than doubled their income over 15 years. It remained level for less well-managed charities which survived the course. But seven didn't and closed largely because they made bad financial bets or paid insufficient attention to their organisational wellbeing.

Figure 3.1 Relationship between organisational planning and financial stability (adjusted for inflation)



Money isn't always the answer to organisational problems

Even when the going is good financially, charity leaders can make mistakes. Winning a big grant or contract in an organisation which lacks the capability to get things done can cause more harm than good.

Better-managed organisations know that they must take calculated risks. But by learning from experience and thinking it through they are often better able to foresee potential problems. And when the money flows in, they don't lose their heads. Instead, they think about the level of activity they can afford to sustain. And if current levels of income are not thought to be sustainable – they carefully manage the expectations of their staff and they save for rainy days.

This means that when things go wrong, either in their own operating environment due to events such as failure to win contracts or grants (which invariably happens in a competitive social market place) or in their wider operating environment, they don't panic and make risky decisions that could get them into even more trouble.

Embracing change is not easy

Everyone agrees that, to their credit, most voluntary sector organisations turned things around very quickly so that they could tackle the problems that came their way during the pandemic. In the process, aspects of organisational practice were turned upside down.

The pandemic has upset the equilibrium in many organisations. Unwritten rules and unstated expectations have become open for renegotiation as priorities shift, practices change and pecking orders are upset. This has led to a lot of soul searching about what people want from their working lives.

So it is not surprising that quite a lot of people (including bosses) in the organisations studied have asked to continue working from home or work fewer hours. Many have taken the decision to retire or leave to get a better paid job or to do something different. These changes are producing real disturbance in the social dynamics of organisations.

The latest Third Sector Trends data show that 20 per cent of charities which employ staff are finding it harder to hold on to them, and 43 per cent say that they're having trouble recruiting new staff. These are challenges organisations must face up to – by working out how to respond to upward pressure on wages, improve working conditions and invest in their people – and not sweep the issue under the carpet because it's someone else's fault.

The study also shows that change has helped many leaders to crystallise 'solutions' to organisational problems which had been sitting in the waiting room for some while before the pandemic came along.

After being 'pushed out of our comfort zone', many effective charity leaders recognised that aspects of their standard practices neither worked especially well nor fully achieved what was intended. Habits are quite hard to shift in an organisation once everyone has become used to them – so they get left alone.

Alongside the problems that need to be overcome, the cost-of-living crisis may spark innovation. In a tight spot, charities are often good at responding quickly to the issues they face.

Going the distance

People who manage organisations in the voluntary sector are used to turbulence. Certainly it has been shown that fluctuations in income are more or less endemic (though not necessarily mirroring the paths of 'crises'). But uncertainty is dealt with in different ways.

Leaders of more secure organisations put as little to chance as they can. Of the fifty organisations Third Sector Trends started out with, none of these better run organisations have closed or come close to it. But they haven't half had to work at it.

The full report explains in much more detail how they did this, and offers pointers to how they may do it again in response to the current crisis.

Policy&Practice

St Chad's College, Durham University

Policy&Practice is a multidisciplinary research group based at St Chad's College, Durham University. Our staff, research associates and fellows are committed to the promotion of social justice in the United Kingdom and beyond.

Policy&Practice is the banner under which this work is communicated to a wider community of interest. The College is committed to undertaking research, policy analysis and evaluation that makes a difference to the way policy makers and practitioners carry out their work, aimed ultimately at increasing the benefit gained by the people for whom they work. We do this through applied research and evaluation for a wide range of private sector organisations, independent charitable foundations, national and local government, charities and other non-profit organisations.

Our work is heavily embedded in the North of England, but we do not confine our work to this area. Several national and international studies have been undertaken over the years in continental Europe, the United States, South Africa and Japan. What we hope to do is to use our learning to help increase our scope for understanding complex social, economic and political issues and our ability to help people tackle challenges in a positive, pragmatic and effective way in new contexts.

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