



Third Sector Trends 2025

Key information for local and national voluntary sector
infrastructure organisations and community foundations

June 2025



Community
Foundation
North East

LLOYDS BANK
FOUNDATION
England & Wales



WcVA
CgGC



Millfield House
Foundation

What is the Third Sector Trends Study about and why do we need it?

Only by doing studies on a large scale can a representative view of sector practice as a whole be achieved. If studies do not capture a balanced picture of what is happening, then their findings cannot be taken too seriously.

And to assess whether things are changing, such studies must be longitudinal. That can also tell us whether some parts of the sector are thriving, whereas others may be struggling.

The Third Sector Trends Study is the largest and longest running survey of the voluntary, community and social enterprise sector in the UK. As a longitudinal study, it was designed to explore the structure, dynamics,

purpose, energy and impact of the sector in the context of change.

The study is designed to complement rather than compete with existing studies such as *NCVO's Civil Society Almanac* and build on data produced by *360 Giving* on sector grant funding.

The study was initiated in 2008 by Northern Rock Foundation. Community Foundation North East is now responsible for its legacy.

In 2025 the study is being supported financially by *Community Foundation North East, Lloyds Bank Foundation England and Wales, Wales Council for Voluntary Action* and *Millfield House Foundation*

Since 2012, the research programme has been run by Policy&Practice, St Chad's College, Durham since when, its geographical coverage expanded, first to Yorkshire & Humber in 2013, to the whole of the North of England in 2016 and to England and Wales in 2019.

An independent study

The study was devised to look at the Third Sector from an 'independent' and as far as possible, an 'objective' point of view.

As such, the study collects and analyses quantitative and qualitative data to explore issues of interest to national and local Third Sector infrastructure organisations, grant-making foundations, national governments, local public sector and health organisations and the private sector and, of course, the thousands of individual charities and social enterprises that take part.

In 2022, Third Sector Trends produced a fully representative sample of over 6,000 responses and led to the publication of seven substantive national reports. Their findings were covered in over twenty journalistic articles in the voluntary sector press. Findings are well-used in local contexts and many locally based studies have been produced using data from the national samples.

What will be explored in 2025

In this seventh iteration of the study, the aim is to get at least 6,000 responses (and a minimum of 500 responses in each English region and in Wales if we can) to produce comparable data for time-series analysis - but we're hoping for 7,500 responses.

The proposed study will focus on the following issues:

- **How has sector structure changed?** This will include analysis by organisational location, organisational size, age, legal form, purpose, and spatial range of activity. Special emphasis will be placed on changes in patterns of sector funding.
- **Are there signs of change in sector purpose?** The study has assessed the impact of a long period of government austerity policy in the last decade, the Coronavirus pandemic in 2020-21 and currently 'cost of living crisis' (2025 survey). We will be in a unique position to examine how responsive the Third Sector has been to changing needs.
- **Has the 'people energy' of the sector changed?** In 2022, it was clear that the sector was struggling to recruit and retain employees. We need to see how organisations are faring with more pressures imposed upon them with raised National Insurance cost, rising wages and lower levels of labour market participation. The regular volunteer workforce declined after Covid-19, we need to know whether the sector has recovered – and if not, to identify critical areas of decline.
- **Relationships with trusts and foundations.** During the Covid-19 crisis, many trusts and foundations relaxed their grant-making practices. In 2025 we intend to examine how the quality and depth of relationships with trusts and foundations has changed – or has reverted to previous patterns prior to the pandemic.

- **Relationships with public sector and health organisations** It is often claimed that there has been a progressive shift towards devolved decision making in the public and health sectors. In tandem, such policies claim to be committed to involve the Third Sector. But how does that feel on the ground to voluntary sector organisations? We intend to find out.
- **Relationships within the Third Sector** In the aftermath of the pandemic, the extent of intra-sector working declined to some extent. We need to know whether this has bounced back now that organisations are free to work without restriction. More importantly, we need to look at how *productive* those relationships are in impact terms
- **Third Sector campaigning, advocacy and influencing.** New themes were developed in 2022 to explore influencing. This was ground-breaking analysis raised new questions on the extent, depth and impact of influencing. So in 2025, we will be looking at that in more depth.
- **Sector social impact.** Crucially, the study will update its analysis on sector impact at both national and regional levels using the well-established methodology developed by this study.

Research methodology and analytical techniques

Third Sector Trends is an online survey which draws in large numbers of respondents so that in-depth comparative and time-series analysis can be undertaken. But no survey can be big enough to generate accurate data on sector structure or finance.

Consequently, baseline data are constructed from sector registers including the Charity Commission, CIC register, CASC register and Register of Societies (including cooperatives, community benefit societies, credit unions, etc.). These data, which are mapped geographically, can then be used to 'scale up' survey findings. We can do this by types of area such as nations and regions, but also by the indices of multiple deprivation, urban-rural distinctions or by the density of the local ethnic minority population.

The triennial survey involves intensive work over an extended fieldwork period to build a large sample. In 2025 the survey will begin in June and run to the middle of July. It is then paused for the summer and returns in September for four more weeks. The survey will be hosted by Online Surveys which allows people to take part on their PC, laptop, tablet or smartphone.

Online responses are gained via the following methods:

- **Direct appeals from local infrastructure organisations** (only direct email appeals produce responses, newsletter stories and links tend to produce few responses).
- **Direct appeals from Durham University** (with 5 reminders) using email listings searched on the Charity Commission.

- **Direct appeals from Community Foundations** (and where possible other grant-making bodies) to their directories of grantees. This happens in July and September and can uplift responses by up to 25%.
- **Raising awareness through social media** (via Twitter/Bluesky). Social media is not an effective way to gain responses, but it maintains the profile of the study and encourages partner organisations to continue to lend support by contacting their lists of TSOs directly.

It is vital that local infrastructure organisations and community foundations support the study and by sending direct emails throughout the fieldwork period.

Full details on research methodology and analytic techniques can be located here:

[Third Sector Trends in England and Wales 2022 research methodology](#)

[Structure and Dynamics of the Third Sector in England and Wales: technical paper on working definitions and baseline data analysis](#)

A research ethics and privacy statement can be found here:

[Research ethics and privacy statement 2025.](#)

Report schedule for the 2025 Third Sector Trends study

The following reports for the 2025 study are currently planned.

- **A long-term trend report for North East England** for Community Foundation Tyne & Wear and Northumberland, November/December 2025
- **Headline national report on the structure, dynamics, purpose, energy and impact** For all funders, November/December 2025.
- **A report on the vitality of small charities and CICs in England and Wales** for Lloyds Bank Foundation England and Wales, March 2026.
- **A reports on the structure, dynamics, purpose, energy and impact of the Third Sector in Wales** for Wales Council for Voluntary Action to be published February 2026.
- **Leadership, development and organisational wellbeing in the Third Sector** for all funders, funders, March/April 2026.

Analysis of the data will not stop there. Usually, other commissions are received after the main reports are published to explore more specific elements of work such as the work of the Third Sector in discrete spatial areas and/or thematic fields of work.

Publications from Third Sector Trends

A complete annotated archive of freely available Third Sector Trends reports and other closely-related studies is located here:

<https://www.stchads.ac.uk/research/third-sector-trends-in-england-and-wales/publications-from-third-sector-trends/>

New Third Sector Trends Study reports will be freely available at this web address:

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

Key reports from 2022

[*Third Sector Trends in England and Wales 2022: employees, volunteers, diversity and investment in people*, Newcastle upon Tyne: Community Foundation North.](#)

[*Third Sector Trends in England and Wales 2022: structure, purpose, energy and impact*, Newcastle upon Tyne: Community Foundation North East.](#)

[*Third Sector Trends in England and Wales 2022: relationships, influencing and collaboration*, Newcastle upon Tyne: Community Foundation North East.](#)

[*People, places and policy: Third Sector Trends 2023*, Newcastle upon Tyne: Community Foundation North East.](#)

[*Third Sector Trends in England and Wales 2022: finances, assets and organisational wellbeing*, Newcastle upon Tyne: Community Foundation North East.](#)

[*Third Sector Trends in England and Wales 2022: shaping social change through campaigning and influencing*, Newcastle upon Tyne: Millfield House Foundation.](#)

[*Third Sector Trends in England and Wales 2022 research methodology*, Durham: Policy&Practice, St Chad's College, Durham University.](#)

[*Going the distance: how Third Sector organisations work through turbulent times*, Newcastle upon Tyne: Community Foundation North East.](#)



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