Third Sector Trends in England and Wales 2025

Technical paper on research methodology and sample structure [third edition]

October 2025

About the Author

Tony Chapman is Director of Policy&Practice, St Chad’s Colleg rham University and Honorary Professor of Social Policy, Department of Sociology, Durham University

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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. Community Foundation North East 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, Lloyds Bank Foundation England and Wales, WCVA and Millfield House Foundation.

More information about Third Sector Trends can be found here:

Third Sector Trends in England and Wales - St Chad's College Durham

All publications from the Third Sector Trends study are available free to download at this address: https://www.stchads.ac.uk/research/third-sector-trends-in-england-and-wales/publications-from-third-sector-trends/

Current and previous reports are also lodged on the Community Foundation North East website:

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

Front and rear cover designs

Tower Design Workshop

Published by

Policy&Practice
St Chad’s College
Durham University
18 North Bailey
Durham DH1 3RH

https://www.stchads.ac.uk/category/research/

October 2025

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1 Introduction

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

This is an independent and authoritative study of the voluntary, community and social enterprise sector which works on a large scale so that analysis can be undertaken on types of organisations which operate in areas with distinctive characteristics.

The purpose of this working paper is to provide a brief overview of the project's approach to collecting evidence (Section 1), to describe the research methodology employed in the quantitative elements of the study (Section 2) and to detail the 2025 study's sample structure (Section 3).

This paper does not explain the analytical approaches used to produce research findings. This can be found in a separate working paper: ***Third Sector Trends in England and Wales: technical paper sector structure and analytical techniques.*** The most recent version of that working paper was published in October 2025.

History of the study

The study was commissioned by *Northern Rock Foundation* in 2008 to look at the third sector from an 'independent' and as far as possible, an 'objective' point of view by producing findings that complement those of NCVOs annual ***UK Civil Society Almanac*** and reports from the ***Charity Commission***.

As such, the study aims to offer insights about sector strengths and weaknesses from a critical perspective by collecting quantitative and qualitative evidence to explore issues of interest to government, local public sector and health organisations, the private sector, grant-making foundations, third sector infrastructure organisations at national, regional and local levels and, of course, individual voluntary and community organisations and social enterprises.

At the outset, the project was conceived as a collaborative exercise which commissioned several universities and agencies to work on the project. As an interdisciplinary and cross-institutional research project, Third Sector Trends initially involved several universities (Durham, Teesside and Southampton) and agencies including (Guidestar and NCVO).

It was intended that the project should serve the interests of the third sector together with those of government, public authorities, health authorities and charitable trusts and foundations. So a study advisory group was established in 2008 to achieve of this objective. This was chaired by Professor Cathy Pharoah of City University and included members from regional government and national agencies (including the Economic and Social Research Council, NCVO amongst others).

To engage third sector infrastructure organisations in the study, its first phase of work involved working with all 29 agencies in North East England and Cumbria which existed at that time.[1] And to forge a direct link with sector practitioners, three 'foresight panels' were set up in Cumbria, in the north and south of North East England.[2]

In tandem with regular surveys, an intensive qualitative study of 50 third sector organisations (TSOs) was established in 2008 to provide in depth analysis and understanding of how organisational leaders adapted to a continually changing financial, political and social environment. Findings from the qualitative work fed ideas into the development of subsequent surveys. This element of the overall longitudinal study ran from 2008 to 2022.[3]

The earliest rounds of the survey were administered using postal-questionnaires to lists of organisations which had been collated by Guidestar, NCVO and Southampton University. As time went on, internet and email usage became more commonplace and the use of the Online Surveys[4] platforms became more feasible. The first attempt at complete reliance on this approach was undertaken in Yorkshire and Humber in 2013 in collaboration with *Involve Yorkshire and Humber*,[5] then the regional Third Sector representative agency which has since closed.

The strategic importance of holding good local data on third sector energy and impact has grown. Many public bodies such as local authorities, combined authorities and, more recently, NHS Integrated Care Boards express strong interest in understanding sector capacity and strengths. Consequently, it was decided by *Community Foundation North East* to continue with the study beyond 2015. Working with St Chad's College, at Durham University, the aim was to continue with survey work on a triennial basis and to sustain the in-depth qualitative study of 50 organisations to 2022.

Upon continuation of the study, its scope broadened to include the whole of the North of England in 2016, involved working with other funding bodies including *Garfield Weston Foundation, Joseph Rowntree Foundation, Charity Bank* and *Power to Change*.

From 2019-2022, the study expanded again to the whole of England and Wales with continuing support from *Community Foundation North East* and *Power to Change*. In addition, *Barrow Cadbury Trust* and *Millfield House Foundation* also lent support to the study. In 2025, *Lloyds Bank Foundation England and Wales* and *WCVA* have supported the study together with *Community Foundation North East* and *Millfield House Foundation.*

While core elements of the quantitative study have not changed to sustain time-series analysis, shifts in elements of the study's focus have been led by the interests of core funding bodies (who invest at the development stage and fieldwork) –

[1] See: Chapman, T. Robinson, F., Brown, J. Ford, C., Shaw, S. Crow, R. and Bailey, E. (2009) *Third Sector Trends 2009 Mosaic, jigsaw or an abstract Getting a big picture perspective on the Third Sector*, Newcastle: Northern Rock Foundation.

[2] See: Bell, V., Robinson, F., Chapman, T., van der Graaf, P., Shaw, S., Brown, J. and Chinaka, G. (2010) *Forearmed with Foresight: speculations on the future development of the Third Sector in North East England and Cumbria*, Newcastle: Northern Rock Foundation.

[3] While the qualitative work in this element of the project ended in 2022, the financial analysis underpinning the work continues. The final report was updated in 2025 to include update the financial situation of the remaining organisations in the initial sample. The report is available here: https://www.stchads.ac.uk/research/third-sector-trends-in-england-and-wales/publications-from-third-sector-trends/

[4] Online Surveys has been used since 2013 by Third Sector Trends. For detail on the functionality of the platform, see: https://www.jisc.ac.uk/online-surveys

[5] The report from the first Third Sector Trends Yorkshire and Humber study can be located here: https://www.stchads.ac.uk/wp-content/uploads/2017/07/Third-Sector-Trends-in-Yorkshire-and-the-Humber-May-2014.pdf

together with other organisations which commission other aspects of analysis subsequently. Here are some examples:

- In 2023 three inter-related reports on the contribution of the Third Sector to local health and wellbeing were commissioned by ***NHS Integrated Care Boards and health authorities, local authorities and combined authorities*** in **Cumbria, Yorkshire and Humber** **and** **Buckinghamshire, Berkshire and Oxfordshire**.
- In 2023, ***Essex Community Foundation*** commissioned a localised report which drew on comparative data with statistical stranger and neighbour areas. Download here
- In 2022 ***Kernow NHS Clinical Commissioning Group*** via VSF Cornwall commissioned a study on the structure and dynamics of the sector in Cornwall and Isles of Scilly. Download here
- In 2021 ***West Yorkshire Combined Authority*** (together with two regional health and care partnerships, *Two Ridings Community Foundation* and *Yorkshire Sport*) invested in a study to explore the extent of sector capacity and capability to contribute to social and economic wellbeing and estimate the added value produced. Download here
- In 2021 ***Pro Bono Economics/Law Family Commission on Civil Society*** invested in new analysis at a national level from Third Sector Trends to explore the relationship between the private sector and Third Sector. Download here
- In 2019, ***Power to Change*** invested in the development of new questions to examine TSOs perceptions of social and economic impact in localities and also added questions on the types of trading activities of local organisations in a community context. Download here
- In 2019, ***Community Foundation North East*** invested in new questions on diversity in organisational leadership which led to the production of the first national study at scale on this issue. Download here
- In 2019, ***Garfield Weston Foundation / IPPR North*** invested in new analysis on the social and economic impact of the Third Sector across the North of England, with a special emphasis on the energy produced by regular volunteers. Download here
- In 2018, ***Community Foundation North East*** invested in new qualitative and quantitative work on the interactions between grant makers and Third Sector organisations involving interviews with 25 national and regional foundations. Download here
- In 2018, ***Power to Change*** invested in a new qualitative study on trading interactions between community businesses and social enterprises in their local context in Bradford and Teesside which led to the development of new survey questions in 2019. Download here
- In 2017, ***Economic and Social Research Council*** invested in a collaborative study on how the public and health sectors could work more effectively with the third sector in North East England. Download here
- In 2016, ***Joseph Rowntree Foundation*** invested in the development of new questions to explore the extent to which the Third Sector addresses issues surrounding poverty in local community context. Download here
- In 2016 ***Lloyds Bank Foundation England and Wales*** invited us, on the strength of TSTS work, to evaluate a new capacity building programme. This

resulted in the development of new insights on the 'social process of supporting small charities'. Download here

- In 2016, ***Garfield Weston Foundation / IPPR North*** invested in new questions and analysis on the relationship between private sector business and the Third Sector – this was the first large scale study of its kind. Download here
- In 2013 ***Charity Bank*** invested in new questions on the relationship between organisational practice, capability and assets and their propensity to borrow money or engage in social investment programmes. Download here

In 2025, with a much enlarged dataset, it is anticipated that there will be more scope to undertake area-based studies or those with thematic orientation in addition to planned national reports.

2 Research methodology

2.1 Third Sector Trends survey fieldwork

To assess how representative survey samples are, baseline population data of third sector organisations (TSOs) were initially collated by NCVO and Southampton University from 2008-10 for North East England, Cumbria and Yorkshire & Humber. This has subsequently been undertaken at national level by Durham University in 2020 and 2025 to produce combined registers.[6]

Surveys have taken place in 2010, 2012, 2013/14 (in North East England and Cumbria), 2013 (in Yorkshire and Humber), 2016 (across Northern England) and in 2019, 2022 and 2025 (in England and Wales). Initially, surveys were distributed entirely by post. Progressively the study has moved from postal to online surveys. In 2019, 2022 and 2025 the survey was undertaken entirely online.

In the month prior to launch in 2025, all known local infrastructure organisations and community foundations were contacted to elicit their support to send invitations directly to their lists of organisations so as to capture CICs, CASCs, Registered Societies and un-registered organisations. Coverage is dependent upon the interest and willingness of those organisations to assist in collecting local data.

Since 2016, fieldwork has followed the same pattern - running from early-June to the middle of July (with support from local Third Sector infrastructure organisations). Than after a pause in the fieldwork campaign in August, surveying resumes in September for four more weeks (with support from community foundations).

2.2 Survey questionnaire

In each iteration of the survey a core set of questions is maintained for comparative analysis[7] – these constitute about two-thirds of the questionnaire. New questions can be introduced into subsequent waves of the study providing that others are dropped or suspended (see Appendix 4 for further detail).

Permanent questions include those which collect data on organisational age, size, legal form, geographical location and spatial range of work; purpose, beneficiaries and perceived impact of TSO activity; sources and uses of income and assets; changes in the number of employees and volunteers; and, inter-organisational relationships.

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[6] The baseline study was based on 2016-17 data and needed to be fully rebuilt in 2020. For full details on how this was done, see the companion methodology paper: *Structure and dynamics of the Third Sector in England and Wales: Technical paper on working definitions and baseline data analysis*: Newcastle upon Tyne: Community Foundation North East.

[7] It is vital that these questions are identical to ensure that respondents have no room to interpret the question differently. Early experience between 2020 and 2012 surveys demonstrated that even very minor changes in text or format could affect responses. For example, in one question from 2010, the positioning of the category 'not applicable' was moved which had a significant impact on responses. None of the questions we use are perfect and sometimes we wish that we had asked things differently at the outset – but once question wording and format is established we must stick it them exactly.

As a longitudinal study, it is possible to suspend some questions if their relevance has waned or if responses are consistent from wave to wave of the study. In such circumstances, standardised multipliers can be adopted to produce estimates. These questions can be reintroduced from time to time to ensure that multipliers remain valid.

New questions are carefully designed to work in a complementary way with existing questions. Often they address specific issues (such as organisational borrowing for *Charity Bank* or specific aspects of trading activity for *Power to Change*) and remain in the survey just once. Some are retained in future rounds of the survey if it is anticipated that they will provide useful trend analysis and/or serve as core independent variables.

In 2025, three new questions were introduced on: ***the devolution of powers to local government, the experience of leadership*** and ***the environmental contribution voluntary organisations make***. The questions have worked well and response rates to these questions were as follows.

- ***Devolution question***: in-survey response rate 99.5% (first of five options) 98.1% (final option).
- ***Leadership question***: in-survey response rate 99.0% (first of six options) 98.4% (final option).
- ***Environment question***: in-survey response rate 99.3% (first of five options) 98.9% (final option).

All three questions included a response option to state that the question was not relevant to them (which provides evidence on the 'absence' of activity which can be as significant as that of its 'presence'). The 'not relevant' response was worded differently in each question as follows: '*this doesn't really apply to us', 'we don't do this' and 'this issue doesn't concern us'.*

In the devolution question, for example, 43% of respondents stated that the issue of collaborative working with public sector agencies was *not* relevant to them. It was vital to know the limits of the marketplace for such work. The explicitly 'personal' association with non response is designed to determine that inactivity is a decision not an oversight by leaving the question incomplete (purposefulness can never be 'assumed' if a question is skipped).

2.3 The respondent survey experience

In a large-scale long-running survey of this kind, it is crucial to ensure that respondents see the point in doing the study and can, as far as possible, enjoy the experience of participating. This has involved a lot of learning over the years which has been bolstered by careful evaluation of respondent comments on the study.

We did not start from scratch. Studies had already been undertaken in North East England and North Yorkshire under different commissions which gave us an opportunity to try out questions.[8] Some of these questions were subsequently adopted in the Third Sector Trends survey.

[8] In North East England, a study was undertaken in 2006 (Chapman, T., Crow, R. Brown, J. and Ward, J. (2006) *Facing the Future: A Study of the Impact of a Changing Funding Environment on the Voluntary and Community Sector in the North East of England*, Middlesbrough: Social Futures Institute). Questions were developed from this study in a second study in York and North Yorkshire in 2008 (Chapman, T. and Crow, R. (2008) *A Thriving Third Sector: a study of North Yorkshire and City of York*, Middlesbrough: Social Futures Institute). Additionally, qualitative studies of sector dynamics in Tees Valley were undertaken in 2007 which helped inform the development of the Third Sector Trends survey instrument (see Chapman, T., Crow, R. and Brown, J. (2008) 'Entering a Brave New World? An assessment of Third Sector readiness to tender for the delivery of public services', *Policy Studies*, Vol. 28,

Initially, some questions were replicated or adapted from the ***National Survey of Third Sector Organisations*** which was undertaken by Ipsos Mori,[9] or from, what was then known as the ESRC 'question bank'.[10] The adoption of pre-piloted survey questions is not a straight-forward process, however, and most were subsequently dropped either because they had been designed to serve different purposes from those of Third Sector Trends, or because they did not work as well as hoped.

In Third Sector Trends, in-survey response rates are checked every time the study is undertaken. Questions are asked only if we can be confident that at least 95% of in-survey respondents will answer. Wasting people's time by asking irrelevant questions is a perilous step for researchers as participants may lose interest or become irritated and leave the survey mid-way. And from an analytical point of view, if responses to individual questions are low, then the reliability of findings is seriously undermined.

There has been one exception to this rule which arose in 2019 when questions were asked about the ethnicity of chief officers and chairs of TSOs. At the piloting phase, it was recognised that response rates would be lower as some people were offended by these questions. In 2019, the response rate for the ethnicity questions was 77%, while questions about age, class, gender and disability were above 80% (see Table 3.1).

Low levels of response to ethnicity questions was troubling as it was not possible to discern if non-response was due to perceived irrelevance or that offence had been taken to our enquiry. Nonetheless, the question was repeated in 2022 – partly to see if recent campaigns, such as *Charity So White* had awakened people the importance of monitoring the issue.[11]

In 2025 a risk was taken to move the question to the centre of the survey rather than leaving it to the end as in 2019 and 2022. Response rates held up well, although slightly fewer people provided responses to the questions about ethnicity and disability as shown in Table 2.1.

On reflection, putting the question at the end of the survey in 2019 and 2022 was probably a mistake as it inadvertently drew attention to the issue rather than allow it to meld in amongst other questions about people in organisations.

No 1, pp. 1-17; Chapman, T., Forbes, D. and Brown, J. (2007) 'They think they have God on their side': the impact of public sector attitudes on the development of social enterprise', *Social Enterprise Journal,* Vol. 2, No. 1, pp. 78-89).

[9] The NSTSO survey was renamed by the Office for Civil Society, as the *National Survey of Charities and Social Enterprises* but the original name has been retained in this paper because available documentation is searchable by its original name in the National Archives. A technical report on the methodology of the study is still available online. Access to the raw data and its detailed findings appears to be no longer possible (unless previously archived by research units, as is the case with Policy&Practice). http://doc.ukdataservice.ac.uk/doc/6381/mrdoc/pdf/6381userguide.pdf.

[10] For links to currently available question banks provided by UK Data Services, see this website: https://ukdataservice.ac.uk/help/other-data-providers/question-banks/

[11] For full explanation of these problems of no response in relation to ethnicity, see: Chapman, T. (2020) Diversity and Inclusion in organisational leadership: evidence from Third Sector Trends 2020, Newcastle upon Tyne: Community Foundation North East. https://www.communityfoundation.org.uk/wordpress/wp-content/uploads/2020/10/THIRD-SECTOR-TRENDS-BRIEFING-DIVERSITY-AND-INCLUSION-IN-ORGANISATIONAL-LEADERSHIP-OCTOBER-2020.pdf

Table 2.1 Response rates to questions on class, gender, disability, ethnicity and employment status of chairs and CEOs

Chairs of board of trustees / committees / directors	2019 response rate	2022 response rate	2025 response rate	Chief officer / most senior member of paid staff	2025 response rate[12]
Graduate Chair	86.5	94.4	97.4	Graduate chief officer	98.7
Female Chair	85.9	93.8	97.2	Female chief officer	97.0
Chair with disability	82.8	89.9	95.4	Chief officer with disability	95.6
Ethnic minority Chair	76.9	89.9	95.7	Ethnic minority chief officer	95.6
Retired Chair	81.5	95.1	97.5		

When assessing the respondent experience, it is helpful to track at what point some participants leave the study. This could be done using *Online Surveys'* monitoring tools in 2016, 2019 and 2022. This was vital information because, if such a point was identified where respondents were lost, it needed to be remedied in future waves. Sadly, that facility has not yet been included in Version 3 of *Online Surveys*.[13]

For example, in 2019, the survey used drop-down boxes to collect data on the name of the local authority where TSOs were based. Significant numbers of in-survey respondents were lost at that point – presumably because they felt that it was too much fuss to complete – especially so if they were responding on a mobile phone with a smaller screen and more limited functionality. In 2022, no drop down boxes were used and in future their use will not be considered. Instead, a calculated risk was taken to rely wholly upon postcode data to allocate respondents to local authorities retrospectively using ONS look-ups.

Such a decision would have been a disaster in the earlier stages of the study. In 2010, for example, fewer than one third of respondents provided full postcode details.[14] In 2013, the Yorkshire and Humber survey was undertaken entirely online, so it was vital to get hold of postcode data.[15] To ensure that this was achieved, the question was asked twice, at the start and end of the survey. This worked well, because the second question mopped up most of those respondents who were reluctant to respond initially or gave partial post codes. This also served to demonstrated that the survey was working well, because respondents' trust was built as it progressed.

By 2019, 98% of respondents provided a full postcode in the first or second question, so it was a risk worth taking to drop complicated questions on regional and local

[12] It is not possible accurately to define the response rate in 2019 and 2022 because the question format did not allow respondents to record that they had no CEO. In 2025 changes to the Online Surveys platform meant that it was not possible to ask the question in exactly the same format – which means that now we give the option of stating 'no, we don't have employees'.

[13] At present the 'respondent progress' function is not included in Version 3 of Online Surveys although the issue is still being explored (see https://www.onlinesurveys.ac.uk/help-support/what-is-respondent-progress/). It would be highly valuable to re-instate this function for longitudinal researchers who need to anticipate problems in the next round of their surveys.

[14] In 2010, 2012 and 2014, the survey relied primarily on postal surveys. If respondents did not provide a postcode, we could glean this from the individual survey number (unless the it was cut off by the respondent – which did happen on occasion).

[15] It would have been possible to take the option of asking people to type in the name of their local authority (which was tried in the England and Wales pilot in 2019). But this did not work well – partly because of the time taken recoding answers. The main reason, however, was non-response.

authority location. Over 99% of respondents provided full post-code data in 2022 and in 2025.[16]

The use of translation in surveys can produce problems of comparability as respondents are not, strictly speaking, engaging in a like-for-like survey experience. It was anticipated that an assessment of variation between English and Welsh responses may be possible if there were sufficient numbers to do so. However, the take up of the Welsh language version was too low (41 responses, constituting 5.7% of responses from Wales) for analysis to be feasible.

2.4 Open text questions

Early in the research process it was decided that open text boxes should not be used. This is the right decision for several reasons.

- Open text boxes slow progress through the survey and can result in respondents feeling that expectations are too demanding on their time and result in them leaving the survey when it takes too much time to complete.
- The completion of open text boxes requires careful thought and can distract or deflect respondents from the purposeful 'conversational' flow of the survey which relies on building trust and eliciting fast 'intuitive' responses to attitudinal questions.[17]
- Open text boxes implicitly assume that an opinion is held or that detail is to hand which can feel intrusive or insulting to respondents who do not want to, or cannot answer the question.[18]

At the end of the Third Sector Trends questionnaire, respondents are offered an opportunity to tell us anything they choose. About 30% of respondents take this option (28% in 2025).

The status of open text boxes in evidential terms has to be treated very carefully. Comments provide background insights into people's thoughts and experiences but must not be and are not used as 'qualitative evidence'. These are random statements that respondents have chosen to make – so it is not appropriate to simply 'pick and choose' to suit our own purposes. Nonetheless, we welcome these comments as they provide clues on the survey experience, what issues to think about thematically next time around and helps to inform current lines of analysis.

For example, in 2025, many comments were received from organisations struggling to retain and attract volunteers and trustees. Invariably, these comments came from organisations which had been established for thirty or more years and the people who ran them, or benefitted from them were ageing. Of their own admission, many said that they were quite literally 'running out of steam' or 'withering away'. It is worth presenting a series of quotations to illustrate how people responded.

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[16] In 2022 an exception to the principle of dropping the local authority question was made in Wales. This was to ensure that the survey felt more 'relevant' to Welsh speakers as there was insufficient funding available for full questionnaire translation. The question was asked in bilingual open format, not a drop down box and over 99% of respondents answered the question. In 2025, the sample frame of emails drawn from the Charity Commission Register was aligned with post codes and used ONS Lookups to identify local authority location and region. These data were used in 'hidden questions' on the survey (using pre-population parameters) to track in-survey response rates.

[17] Purposefully devising techniques to improve flow through the study was first developed in 2013 in Yorkshire and Humber. The study is indebted to Judy Robinson, then CEO of Involve Yorkshire and Humber (now Chair of NAVCA), who thought up the idea of adding encouraging lines in the study to reassure respondents about how much longer it would take, and when things would get more interesting if they were engaging with one of the more 'boring' sections on organisational structure.

[18] Use of data from open text questions is common in reports. But we have misgivings about doing so. If fewer than half of respondents answer then we cannot judge whether comments are typical or extraordinary. There is also a temptation to 'cherry pick' quotations which match the interpretation of the researcher rather than reflect a general view.

> ***"Our greatest expense is people giving freely of their time. We worry that we as a group are getting older and recruiting "fresh blood" is difficult."***
>
> ***"The real issue for us is succession. Our trustees are getting older and more infirm. I have been Chair of Trustees since 2008. We struggle to recruit new younger trustees. We may need to collapse the organisation in order for people to sit up and take notice!"***
>
> ***"We are finding it increasingly difficult to find people willing to take on trustee roles. The existing trustees are ageing, we keep trying to get new blood. We are financially viable with good reserves and income meeting costs and our property is in good condition, but no-one is coming forward despite our pleas and advertising. The charity may well have to close if/when a few key people become unavailable."***
>
> ***"Our colleagues are all getting older and many are now unable to attend meetings. We are considering closing our branch and going to a smaller meeting arrangement for the*** [club name removed]. ***This will help. But numbers are decreasing."***
>
> ***"The strong point from us is the growing difficulty in obtaining volunteers to fill committee positions. We find this to be a common problem with other local voluntary organisations where committee members are getting older and older. One local group has disappeared for this reason and another - a village hall - has had to be taken over by its local parish council."***

The volume of quotations indicate that longer-established organisations may be struggling with recruitment and retention of volunteers and trustees than newer TSOs. Only by undertaking statistical analysis can such a statement be made with confidence (after all, other organisations could be struggling just as much with retention and recruitment, but perhaps as younger people, this did not prey on their minds so much?). On this occasion, however, as will be shown in subsequent reports – there is a statistical association between these factors – but trustee retention and recruitment problems are only slightly more severe in older organisations.

So far, on only one occasion have statements such as these been used to add colour to the statistical findings of a Third Sector Trends report. This was in an interim study between 2019 and 2022 to look at the immediate impact of the Covid-19 pandemic on sector optimism. These statements were fascinating and illuminating – but could not be 'analysed' as qualitative data because too little was known about context.[19]

It seems a bit unfair to those respondents who have taken the time to write about their experiences, to keep their comments hidden from view – and especially so if they provide meaningful insights and put flesh on the dry bones of the statistical findings. At present we are undecided, but providing that a clear statement is made that quotations are purely illustrative, it may be permissible to use quotations such as those provided above more regularly in reports.

About 12% of statements from respondents concern the survey itself. They raise a mix of issues that bothered them about the way they felt that we had portrayed the voluntary sector. In most cases, criticism centred upon the relevance of the research itself together with concerns about the fieldwork process and the quality of the research instrument.

[19] A fuller discussion of the methodological shortcomings surrounding the use of random statements is provided in the report from the interim study: Chapman, T. (2020) *Third Sector Trends Covid Impact Study*, Newcastle, Community Foundation North East https://www.communityfoundation.org.uk/wordpress/wp-content/uploads/2020/08/Third-Sector-Trends-Covid-19-Impact-Survey-August-2020.pdf

> ***"Many of the questions are not relevant as we are an*** [purpose removed] ***providing a social outlet for our members and putting on shows for the public."***

Some are sceptical about the value of all surveys of this kind:

> ***"Surveys like this are a complete waste of space. No one listens anyway. Absolutely pointless."***

Others offered constructive criticism on those parts of the survey which did not work for them and why they found that they could not adequately answer the questions. All such comments are taken seriously and noted for future rounds of the survey if it seems that the questionnaire is not working as well as it should. More often than not, however, criticism is focused on the survey not directly addressing their own purpose, concerns or interests.

Fair comments are often made about the 'generality' of the study and how difficult that can make it to give an accurate answer.

> ***"Some of the questions are difficult to answer, e.g. relationships with businesses - I answered based on our current relationships - however, we would really value opportunities to increase this - it might appear that we don't think this is important - it really is, but we don't currently have capacity to develop this."***

> ***"Some questions were very difficult to answer due to limited response options. For example, Question 22 regarding importance. I had to tick 'not important' when actually it was 'not relevant'. Clearly these are not the same! In other cases, I needed a 'don't know' option which wasn't there and had to choose 'not applicable'. So at least 10% of my responses are not really valid."***

The most common critical observation is that the survey is not tailored more precisely to what *they* do as an organisation. As a generalised survey, this is inevitable. Often, for example, respondents complain that organisational beneficiary categories and aspects of impact are far too broad. Addressing this issue seriously would raise the spectre of employing endless drop-down lists of organisational purposes which would surely deter many from sticking with the survey.

In 2022 an attempt was made to offset this criticism by adding line to the survey *'We know that these questions don't cover all the things that organisations and groups do, but there's space at the end of the survey to tell us if you'd like to.'*

It is much better to put the issue off until later to ensure that it does not slow people down – but also to reassure them that we are interested in what they have to say – which we are. That stated, new categories are added if sufficient numbers of respondents share the same/similar opinion.

For example, in 2016 and 2019 several respondents commented that the list of beneficiaries did not include 'learning disabilities' as a category. In 2022 that category was added – to which 1,027 respondents aligned. In 2025, 'animals' (n=236 responses) and 'overseas aid - e.g. famine relief, education, development work' (n=397 responses) were added to the list of beneficiaries.

Even when there is a general category related to their work, some respondents are dissatisfied with the definition because it does not directly mirror their distinctive interests.

> ***"This is an impossible survey for a*** [purpose removed]***. It's very nature is fickle, unstable, creative and successful."***

> ***"This Survey is not applicable to our organisation it is a*** [purpose removed ***based in*** [location removed] ***with thousands of members in UK and some in Europe and Australasia."***
>
> ***"Charities like ours which support a very niche area of*** [purpose removed ***and are unlikely to be of much relevance to your survey."***

Occasionally, comments are received on a thematic area of exploration that respondents feel that have been missed. This can lead to the introduction of new questions if sufficient numbers of respondents seem to share the same/similar opinion. For example, in 2019 and again in 2022, several respondents commented on the lack of questions associated with aspects of environmental impact of organisational practice and purpose.

> ***"Surprised there's nothing in survey about energy or climate change, esp. 'cos Power to Change involved!"***
>
> ***"This survey seems to largely ignore the conservation/environment sector, where we sit. This is a fast growing area as we focus to respond to climate change at increasingly larger scale. The more traditional CVS type models of infrastructure support are probably not currently equipped to support this type of organisation and consider beneficiaries and outcomes in different ways. The public and private sector are more on board."***

As noted above, a question has now been introduced on this topic.

Getting people through the survey quickly is vital to the study's success. But getting them to open the survey in the first place is a matter of even greater importance. Winning their attention, trust and eliciting commitment to proceed is a vital first step. Three elements are included in the letter. First it is stated that the study is big, that it has run a long time and that it's findings are well used:

> ***The study is big (6,000+ responses in 2022) and runs right across England and Wales. But its focus is still very local – looking at how the voluntary sector develops and works in areas like yours – whether the interests you serve are focused in a neighbourhood/village – or span national/ international boundaries.***

Secondly, it is made clear that the study is relevant to all types of organisations:

> ***Whether you're big or small – thriving, struggling or just going along as normal – we need to hear from you. It's quick and easy to do, interesting and really helps to build a picture about how the voluntary sector responds to change and initiates change in society.***
>
> ***So if you're an amateur sports, dance or gardening club, a village hall, a carers' group, an arts, music or heritage society, a campaigning trust; or if you deliver social or health services, care for the environment or run a hostel, refuge or food bank – whatever you do, it's important to us.***

Thirdly, reassurances, are offered that the study is entirely confidential and anonymous and the project leader's name and email address are provided so that they can be contacted if potential respondents have any further worries about taking part.

> ***It's completely confidential, incredibly relevant to the voluntary sector and those who support it and only happens every three years. So please tell us how it's going and have your say on what you think the future holds.***

As the fieldwork progresses, fresh email invitation letters are written each time to entice respondents to take part - but nothing is changed on the official introductory page of the survey where there are links to documents about ethics, confidentiality and privacy nor any other aspect of the research instrument.

When marketing the study, it is also asserted that it is ‘easy to do’, ‘interesting and thought provoking’. In 2022, one respondent took exception and complained that:

> ***“You said the survey was interesting. It was mind-numbingly BORING!!!!!!!!.”***

Admittedly, it was only one response but nonetheless, it touched a nerve. Consequently, in the 2025 study a new question about the policy environment was introduced early on in the survey to get people thinking actively (but without asking them to elaborate at that stage). Shortly afterwards, a more personally challenging question on the ‘experience of leadership’ was introduced.

In the leadership question, respondents were asked to look at a series of statements and say what made them excited (‘*gets me up in the morning*’) or worried (‘*keeps me awake at night*’). Topics included, for example, *‘managing difficult interpersonal relationships’, ‘bidding for funding to do something new’, ‘managing with the financial resources we have to hand’* and *‘putting ourselves forward for awards to show how well we’re doing’*. When the survey was launched (and even after two rounds of piloting, with some trepidation) response rates were carefully monitored: 99% responded to the first of six statements and 98.4% to the final statement.

If an impression is being given that most of the comments received (of which there were 2,387 in 2025) are about the quality of the research instrument – that is not the case. The vast majority write to share with us more detail on what they do, or say something much more substantive about their experiences of running their organisation. Nonetheless, it is also reassuring that, quite often, respondents take the time to say some nice things about the survey too.

> ***“The email text requesting support for this survey is probably the best I've ever seen. The most important bit was just explaining where you got our data from and that the Professor has shared his own email for queries.”***
>
> ***“The questions are rather better than other surveys received! Well done in thinking it through and testing the answers.”***
>
> ***“Useful to know how progressing through survey - ensured I didn't drop out mid way!”***
>
> ***“An excellent well-informed survey, shows you are very well aware of how various groups/organisations work; quite unusual!!”***
>
> ***“Excellent survey - looking forward to seeing resulting data.”***
>
> ***“Probably one of the most relevant surveys that I've been asked to complete.”***
>
> ***“This felt like a more relevant survey than other voluntary sector surveys which often seem more leading and focus almost entirely on money.”***
>
> ***“This was a very sensible survey and thank you for the opportunity to give a view.”***

2.5 Fieldwork dynamics in 2025

Prior to launch date there is always some anxiety as to whether people will be willing to respond as enthusiastically as in the previous round. As anticipated in the shadow of the Covid 19 pandemic, in 2022, response rates were lower. This was likely due to many organisations hibernating for a while during lockdowns together with the glut of surveys undertaken during the coronavirus pandemic by academic institutions and think tanks. Leaders of TSOs may well have felt overwhelmed by so many demands and that this reduced response levels.

In 2025 a potential threat to Third Sector Trends response rates was the newly established three-monthly VCSE Barometer study run by *Nottingham Trent University, Pro Bono Economics and NCVO*.[20] While the study only attracts small numbers of respondents in each wave (an average of around 650) it has a high profile and impressive interactive dashboard to disaggregate data. The principle underpinning the VCSE Barometer study is to keep a regular check on sector mood in the short term and explore immediate issues quickly and produce rapid response headline sector-wide reports.

There is a place for both studies because Third Sector Trends' focus, by contrast, is to produce large-scale triennial representative datasets on longer-term change and largely avoids reference to 'immediate' newsworthy issues (such as the 'cost of living crisis' or the rise in employers' *National Insurance* contributions imposed by the Chancellor in 2025).[21]

It was feared, nonetheless, that the VCSE Barometer study may confuse or undermine wider interest in TSTS. It was reassuring, therefore, that response rates to Third Sector Trends did not fall, but have increased substantially in all areas.

Inevitably, in a national study, there will be clashes with other surveys. Some such studies were spotted in advance and compromises were struck to reschedule work. In some areas local infrastructure organisations and community foundations shelved or abandoned the idea of doing their own study and instead put their energies into supporting TSTS (with the prospect of producing localised reports if sufficient responses could be obtained to do so).

To expect that everything goes smoothly in a big study like this is unrealistic and not far into the fieldwork process – it became apparent that competing studies had started up which threatened to undermine response rates in some local authority areas. That can be disappointing, especially in areas where Third Sector Trends has been running and reporting for many years. Thankfully, all four community foundations in that region came to the rescue and boosted numbers by nearly a fifth.

[20] VCSE Barometer Survey | Nottingham Trent University

[21] Working with Policy&Practice, VONNE produced a paper on the impact of the rise in Employer contributions to National Insurance using a new 12 income band statistical model: https://www.vonne.org.uk/impact-higher-employer-nics-north-east-charity-sector

3 Sample structure and response rates

When the survey closed at the end of September 2025, 8,692 complete responses had been received by Third Sector Trends. After a cleaning process to remove submissions which lacked core data for independent variables, there were 8,680 valid cases.

3.1 Sample frame

In 2022 Charity Commission Register (CCR) 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.

In 2025, the process was repeated which increased the number of available emails to 133,161. This was largely due to improved quality of CCR data, but also because it was decided that organisations should not be excluded if they were based in England and Wales but worked overseas.

Table 3.1 presents the original regional sample frame, number of responses and percentage response rates. The overall response rate for England and Wales is 5.4%, but there are wide variations across regions / nations. In North East England and Yorkshire & Humber, where the study has run the longest – response rates were highest. London 2025 response rates have remained unaccountably low at 2.8% (compared with 2.5% in 2022).

Table 3.2 **Response rates by sample frame in Wales and English regions 2022 and 2025**

	Charity Commission sample frame 2022	Responses 2022	Charity commission sample frame 2025	Responses 2025	Response rates 2022	Response rate 2025	Difference (plus or minus)
North East England	4,796[22]	333	4,199	382	6.9	9.1	+2.2
North West England	9,882[23]	370	12,555	640	3.7	5.1	+1.4
Yorkshire and Humber	8,039	429	9,864	720	5.3	7.3	+2.0
East Midlands of England	8,940	405	9,276	569	4.5	6.1	+1.6
West Midlands of England	8,138	356	11,174	648	4.4	5.8	+1.4
East of England	12,754	580	15,360	843	4.5	5.5	+1.0
London	19,995	497	25,293	713	2.5	2.8	+0.3
South East England	19,865	821	22,688	1,089	4.1	4.8	+0.7
South West England	12,933	677	15,360	1,055	5.2	6.9	+1.7
Wales	4,999	341	6,200	504	6.8	8.1	+1.3
England and Wales	**110,341**	**4,809**	**131,969**	**7,163**	**4.4**	**5.4**	**+1.0**

[22] Included Cumbria in 2022

[23] Excluded Cumbria in 2022

3.2 Additional response via the open survey

Third Sector Trends makes contact with all known local and nation third sector infrastructure organisations and community foundations to ask that they support the study and try to help build the sample in their areas.

While the level of help offered varies from area to area, the overall sample is bolstered substantially by 1,517 additional responses (see Table 3.3). In regions where we have worked for many years (North East England, North West England and Yorkshire & Humber) an additional 671 responses were produced by CVSs and Community Foundations.

In East of England, community foundations were particularly enthusiastic about supporting the study together with very strong help from some local CVSs. An additional 275 responses were gained.

Community foundations and CVSs in all areas were contacted with equal effort but only produced patchy levels of support. In South East England, for example, very strong support was gained in Buckinghamshire, Berkshire and Oxfordshire where previous work has been undertaken and they were keen to update the data, but elsewhere support was weaker.

Support in the West Midlands was strong in Staffordshire, Shropshire and Herefordshire thanks to their Community Foundations, but was limited elsewhere. In South West England and East Midlands (apart from Lincolnshire Community Foundation) support was very limited.

The study in Wales was backed by WCVA who helped to encourage local CVCs to support the study. An additional 206 responses were produced raising overall numbers to 710.

Table 3.3 **Third Sector Trends responses via Sample frame and invitations from CVSs and community foundations in England and Wales 2025**

	TSTS sample frame invitation responses	Reponses via invitations from CVSs and community foundations	Total responses	Percentage distribution
North East England	382	279	661	7.6
North West England	640	160	800	9.2
Yorkshire and Humber	720	233	953	11.0
East Midlands of England	569	44	613	7.1
Weast Midlands of England	648	91	739	8.5
East of England	843	279	1,122	12.9
London	713	61	774	8.9
South East England	1,089	123	1,212	14.0
South West England	1,055	42	1,097	12.6
Wales	504	205	709	8.2
England and Wales	7,163	1,517	8,680	100.0

Table 3.2 shows how representative the 2025 sample is compared with Charity Commission Register data for England and Wales (as included in the Third Sector Trends Combined Register, May 2025).

The percentage breakdowns for Charity Commission and Third Sector Trends are very close, with the exception of organisations with income between £1-£2,000. It may be either that Register data exaggerates numbers because some of these organisations may be dormant/inactive and in line to be removed from the register, or the survey is not picking up enough very small organisations in the sample.

Table 3.3 shows sample sizes and percentage composition of samples from 2016 to 2025. Sample structures are sufficiently consistent to give provide confidence for comparative analysis. It should be noted, however, that as sample sizes have grown the relative proportion of larger organisations has fallen to some extent (while the sample structure has become closer to register data).

As much of the analysis uses five income bands to compare organisational practices and experiences, that circumvents the problem of slight change in the proportion of larger organisations (See Table 3.4).

By Indices of Deprivation, the national samples are very close – never diverging by more than 1.5%. By region, the match between combined register and survey samples is also very close, except in West Midlands of England where representation of TSOs in the poorest areas is too low (-11.4%) and in London where representation in the richest areas is too high (+4.9%).

3.2 Representativeness of the TSTS 2025 survey sample against combined register by organisational size

Organisational income bands	**Register data 2025**	**TSTS Survey 2025**	**Register data 2025**	**Survey data 2025**	**% over or under representation in survey**
£0 - £2,000	20,972	719	14.3	8.3	*-6.0*
£2,001 - £5,000	14,675	841	10.0	9.7	*-0.3*
£5,001 - £10,000	16,635	945	11.4	10.9	*-0.5*
£10,001 - £25,000	26,116	1,536	17.9	17.7	*-0.2*
£25,001 - £50,000	15,387	1,141	10.5	13.1	*2.6*
£50,001 - £100,000	14,798	992	10.1	11.4	*1.3*
£100,001 - £250,000	16,582	1,093	11.3	12.6	*1.3*
£250,001 - £500,000	7,885	599	5.4	6.9	*1.5*
£500,001 - £1m	4,995	357	3.4	4.1	*0.7*
£1,000,001 - £5m	5,567	323	3.8	3.7	*-0.1*
£5,000,001 - £25m	2,103	104	1.4	1.2	*-0.2*
Over £25million	539	30	0.4	0.3	*-0.1*
All organisations	**146,254**	**8,680**	**100.0**	**100.0**	***0.0***

Table 3.3	Comparisons of sample structures by income 2016, 2019, 2022 and 2025							
	Number of respondents				*Percentage distribution of respondents*			
Organisational income bands	**2016**	**2019**	**2022**	**2025**	**2016**	**2019**	**2022**	**2025**
No income	117	72	136	128	3.2	1.8	2.2	1.5
£1 - £2,000	377	312	560	591	10.4	7.6	9.2	6.8
£2,001 - £5,000	299	283	493	841	8.3	6.9	8.1	9.7
£5,001 - £10,000	324	433	626	945	9.0	10.6	10.3	10.9
£10,001 - £25,000	487	625	961	1,536	13.5	15.3	15.8	17.7
£25,001 - £50,000	344	423	684	1,141	9.5	10.4	11.3	13.1
£50,001 - £100,000	360	492	752	992	10.0	12.0	12.4	11.4
£100,001 - £250,000	424	517	733	1,093	11.7	12.7	12.1	12.6
£250,001 - £500,000	296	331	445	599	8.2	8.1	7.3	6.9
£500,001 - £1m	199	188	251	357	5.5	4.6	4.1	4.1
£1,000,001 -£5m	211	242	290	323	5.8	5.9	4.8	3.7
£5m - £25m	87	90	84	104	2.4	2.2	1.4	1.2
Missing data / larger organisations	88	75	55	30	2.4	1.9	0.9	0.3
Total sample	**3,163**	**4,083**	**6,070**	**8,680**	**100.0**	**100.0**	**100.0**	**100.0**

Table 3.4 **Third Sector Trends sample structures by size of organisations 2010-2025**

Organisational income bands	**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**	**2025 England and Wales**	**All years' crude average** (numerical average in parentheses)
Micro (income £0-£9,999)	30.1	29.7	27.9	31.7	26.9	30.2	29.0	29.4 (29.4)
Small (income £10,000-£49,999)	34.9	35.0	23.1	23.6	25.7	27.4	30.9	28.7 (28.2)
Medium (income £50,000-£249,999)	18.5	18.4	20.7	22.2	24.7	24.7	24.1	21.9 (23.3)
Large (income £250,000-£999,999)	11.0	12.0	17.5	14.0	12.7	11.6	11.1	12.8 (12.4)
Big (income above £1million - £25million)	5.6	4.8	10.8	8.5	8.1	6.2	4.9	7.0 (6.7)
N=	**1,027**	**1,595**	**2,288**	**3,525**	**4,011**	**6,070**	**8,650**	**27,166** (100.0)

Table 3.5 **2025 Survey sample representation measured against Third Sector Trends Combined Register 2025: by Indices of Deprivation**

	Poorest - IMD 1-2		***IMD 3-4***		***Intermediate - IMD 5-6***		***IMD 7-8***		***Richest - IMD 9-10***		***N=***	
English regions / Wales	**TSTCR**	**Survey**	**TSTCR**	**Survey**	**TSTCR**	**Survey**	**TSTCR**	**Survey**	**TSTCR**	**Survey**	**TSTCR**	**Survey**
North East England	27.9	29.0	23.1	21.6	18.9	20.1	15.1	15.6	15.0	13.6	7,467	661
North West England	30.4	28.6	17.8	18.0	17.3	16.4	18.8	20.3	15.7	16.8	21,724	800
Yorkshire and Humber	25.0	21.3	15.0	16.7	19.9	20.1	21.4	21.7	18.6	20.1	15,760	953
East Midlands of England	14.1	12.2	18.6	16.2	18.9	16.8	24.7	26.9	23.6	27.9	15,330	613
West Midlands of England	24.4	13.0	19.2	20.2	22.4	26.9	19.8	24.5	14.2	15.4	18,318	739
East of England	7.5	7.7	15.4	16.5	25.8	27.5	24.5	25.0	26.8	23.4	23,140	1,122
London	15.2	13.3	29.4	26.1	24.7	24.7	20.0	20.3	10.7	15.6	40,675	774
South East England	6.2	6.7	11.7	9.7	19.7	21.5	27.4	26.9	35.0	35.2	35,565	1,212
South West England	9.3	8.0	19.9	17.6	29.3	29.0	22.9	23.6	18.6	21.8	25,567	1,097
Wales	13.8	16.5	18.6	19.6	23.8	25.1	25.5	22.6	18.3	16.2	10,531	709
England and Wales	**15.5**	**14.6**	**19.2**	**17.6**	**22.6**	**23.2**	**22.5**	**23.0**	**20.3**	**21.5**	**205,000**	**8,680**

4 Planned reporting schedule

In previous rounds of the study, there have generally been more outputs than planned as part of the initial survey proposal. The following outputs for 2025-26 are currently planned, but this may change as analysis proceeds.

- **A national report on voluntary sector inter-relationships** (October 2025)
- **A national report on people in the voluntary sector** (November 2025)
- **A national report on voluntary sector finance and assets** (January 2026)
- **A report on spatial dynamics in the voluntary sector** (February 2026)
- **A report on voluntary sector dynamics in Wales** (February 2026)
- **A Report on the vitality of small charities and CICs in England and Wales** (March 2026).

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

A list of all previous publications from Third Sector Trends and directly related studies can be found in Appendix 1.

Appendix 1

Archive of publications from Third Sector Trends

Sometimes, links to reports are lost when external organisations alter their websites, please consult the online archive at this address: https://www.stchads.ac.uk/research/third-sector-trends-in-england-and-wales/publications-from-third-sector-trends/ or write to tony.chapman@durham.ac.uk.

Phase Seven: 2025-26

The seventh iteration of the study began in 2025. For updates on this phase of the study, see Research News.

Phase Six: 2022-23

The sixth iteration of the study was undertaken intensively across England and Wales, producing a sample of over 6,000 respondents and a minimum of 400 in each English region and 440 in Wales. The principal statistical reports which are listed below are preceded by a link to the final report of the 15 year running qualitative study of 50 organisations in North East England and Cumbria.

Chapman, T. (2022) *Going the distance: how Third Sector organisations work through turbulent times*, Newcastle upon Tyne: Community Foundation Tyne & Wear and Northumberland.

Chapman, T. (2022) *Third Sector Trends in England and Wales 2022: structure, purpose, energy and impact*, Newcastle upon Tyne: Community Foundation Tyne & Wear and Northumberland.

Chapman, T. (2022) *Third Sector Trends in England and Wales 2022: employees, volunteers, diversity and investment in people,* Newcastle upon Tyne: Community Foundation Tyne & Wear and Northumberland.

Chapman, T. (2023) *People, places and policy: Third Sector Trends 2023*, Newcastle upon Tyne: Community Foundation Tyne & Wear and Northumberland.

Chapman, T. (2023) *Third Sector Trends in England and Wales 2022: relationships, influencing and collaboration*, Newcastle upon Tyne: Community Foundation Tyne & Wear and Northumberland.

Chapman, T. (2023) *Third Sector Trends in England and Wales 2022: finances, assets and organisational wellbeing,* Newcastle upon Tyne: Community Foundation Tyne & Wear and Northumberland.

Chapman, T. (2023) *Third Sector Trends in England and Wales 2022: shaping social change through campaigning and influencing*, Newcastle upon Tyne: Millfield House Foundation.

Chapman, T. (2023) *Community Business in England and Wales. New findings from Third Sector Trends (July 2023)*, London: Power to Change.

Chapman, T, (2023) Structure, purpose, energy and impact of the Third Sector in the West Midlands (May 2023), Birmingham, Barrow Cadbury Trust.

Research methodology and analytical techniques.

Chapman, T. (2022) *Third Sector Trends in England and Wales 2022 research methodology*, Durham: Policy&Practice, St Chad's College, Durham University.

Chapman, T. (2022) *Structure and Dynamics of the Third Sector in England and Wales: technical paper on working definitions and baseline data analysis*, *(second revision)*, Durham: Policy&Practice.

This phase of the study had an additional focus on social impact of the Third Sector in the field of public health and health inequalities.

Chapman, T. and Wistow, J. (2023) *Local health and social wellbeing: the contribution of the voluntary, community and social enterprise sector in Buckinghamshire, Oxfordshire and Berkshire West*, Durham: Policy&Practice.

Chapman , T. and Wistow, J. (2023) *Local health and social wellbeing: the contribution of the voluntary, community and social enterprise sector in Cumbria*, Durham: Policy&Practice.

Chapman , T. and Wistow, J. (2023) *Local health and social wellbeing: the contribution of the voluntary, community and social enterprise sector in Yorkshire and Humber,* Durham: Policy&Practice.

Chapman, T. (2022) *The contribution of the voluntary, community and social enterprise sector to health and wellbeing in Humber, Coast and Vale*, Durham: Policy&Practice.

Chapman, T. (2022) *The structure, dynamics and impact of the VCSE sector in Cornwall and Isles of Scilly*. Durham: Policy&Practice.

Chapman, T. (2021) The structure, dynamics and impact of the voluntary, community and social enterprise sector : a study of West Yorkshire Combined Authority, West Yorkshire and Harrogate Health and Care Partnership, and Humber, Coast and Vale Health and Care Partnership areas Durham: Policy&Practice.

See also, our ESRC funded qualitative work on interactions between health authorities, local authorities and the Third Sector:

Chapman, T., Mawson, J., Robinson, F. and Wistow, J. (2018) *How to work effectively with the Third Sector: a discussion paper for public sector organisations*, Durham: Institute for Local Governance.

Phase five: 2019-21

The fifth iteration of the survey work took place intensively across Northern England and (with a slightly shorter questionnaire) across the rest of England and Wales, garnering a sample of over 4,000 respondents. Data were collected prior to the Covid-19 pandemic, but a shorter interim study was undertaken in 2020 to do an initial assessment of impact.

Chapman, T. (2020) THIRD SECTOR TRENDS IN NORTH EAST ENGLAND 2020, Newcastle, Community Foundation serving Tyne and Wear and Northumberland.

Chapman, T. (2020) THIRD SECTOR TRENDS IN NORTH WEST ENGLAND 2020, Newcastle, Community Foundation serving Tyne and Wear and Northumberland.

Chapman, T. (2020) *Third Sector Trends in Yorkshire and Humber 2020: a digest of findings*, Newcastle, Community Foundation serving Tyne and Wear and Northumberland.

Chapman, T. (2020) *The structure and dynamics of the Third Sector in England and Wales: technical paper on working definitions and baseline data analysis*. Durham, https://www.stchads.ac.uk/wp-content/uploads/2020/12/THIRDS2.pdf

Special areas of focus in this stage of the study included: relationships with the private sector and charitable foundations, perceptions of social impact, diversity and inclusion in Third Sector organisational leadership, and trading interactions amongst community businesses/socially enterprising organisations.

Chapman, T. (2021) *Going the extra mile: how business work with the Third Sector*, London: Pro-Bono Economics / Law Family Commission for Civil Society (July 2021).

Chapman, T. (2020) *The Strength of Weak Ties: How charitable trusts and foundations collectively contribute to civil society in North East England* , Newcastle upon Tyne, Community Foundation Tyne & Wear and Northumberland.

Chapman, T. (2020) *Diversity and Inclusion in organisational leadership: evidence from Third Sector Trends 2020*, Newcastle upon Tyne: Community Foundation Tyne & Wear and Northumberland.

Chapman, T., Longlands, S. and Hunter, J. (2020) *Third Sector Trends Survey: Covid-19 and its potential impact on the Third Sector in the North*, London, IPPR.

Chapman, T. (2020) *Third Sector Trends Covid Impact Study*, Newcastle, Community Foundation Tyne & Wear and Newcastle.

Chapman, T. (2020) *Community businesses in the North of England 2020: new comparative analysis from the Third Sector Trends Study*, London: Power to Change.

Phase 4, 2015-18

This phase of the research concentrated solely on the North of England and achieved a response rate of over 3,500 cases. Analytical reports for each region were produced and in addition, thematic reports were written with colleagues at IPPR North.

Chapman, T. and Hunter, J. (2017) *Third Sector Trends in the North of England: a summary of key findings*, Manchester: IPPR North. third-sector-trends-in-the-north-of-England_Mar2017

Chapman, T. and Hunter, J. *(2018) The value of volunteering in the North,* Manchester: IPPR North. The Value of Volunteering in the North IPPR North October 31 2018

Chapman, T. and Hunter, J. (2018) *The value of business to the Third Sector in the north*, Manchester: IPPR North. value-of-business-to-the-third-sector-march18

Chapman, T. (2017) *A digest of findings from the Third Sector Trends Study in North East England*, Durham: St Chad's College, Durham University.

Chapman, T. (2017) *A digest of findings from the Third Sector Trends Study in Yorkshire and the Humber*, Durham, Policy&Practice, St Chad's College, Durham University.

Chapman, T. (2017) *A digest of findings from the Third Sector Trends Study in North West England*, Durham, Policy&Practice, St Chad's College, Durham University.

Chapman, T., Mawson, J., Robinson, F. and Wistow, J. (2018) *How to work effectively with the Third Sector: a discussion paper for public sector organisations*, Durham: Institute for Local Governance.

Chapman, T. (2017) 'Journeys and destinations: how Third Sector organisations navigate their future in turbulent times', *Voluntary Sector Review*, 8:1, 3-24.

Chapman, T. (2017) 'The propensity of Third Sector organisations to borrow money in the UK', *Policy Studies*, 38:2, 185-294.

A number of local area studies were also commissioned in this phase of the research.

Chapman, T. (2017) TSTS 2016 Third Sector Trends in Bradford, Durham, Policy&Practice, St Chad's College, Durham University.

Chapman, T. (2017) THIRD-SECTOR-TRENDS-EAST-YORKSHIRE-AND-HULL, Durham, Policy&Practice, St Chad's College, Durham University.

Chapman, T. (2016) *Third Sector Trends in Tees Valley*, Durham, Policy&Practice, St Chad's College, Durham University.

A new line of analysis on community businesses, funded by Power to Change led to two new reports, one involving qualitative research in Tees Valley and Bradford, and a statistical study using data from Third Sector Trends.

Chapman, T. and Gray, T. (2019) Striking a balance trading interactions amongst community businesses, Bristol, Power to Change.

Chapman, T. and Gray, T. *(2018) Community Business in the North of England (2018) Policy&Practice: evidence from Third Sector Trends.* Durham, Policy&Practice.

In response to current initiatives by a primary funder, Joseph Rowntree Foundation, there was a special focus on the extent to which the sector addressed the issues of alleviation of poverty in the North.

Chapman, T. (2017*) Tackling Poverty in the North – Third Sector Trends,* Briefing Paper, Durham, Policy&Practice, St Chad's College, Durham University.

Further work on strengthening capability of smaller organisations was also undertaken, including additional qualitative work, for Lloyds Bank Foundation.

Chapman, T. (2019) *The Social Process of Supporting Small Charities (*March 2019)*, London: Lloyds Bank Foundation.*

Phase 1-3, 2008-2015

Third Sector Trends was initiated by Northern Rock Foundation in 2008 involving a research partnership between the universities of Durham, Southampton and Teesside together with NCVO and Guidestar.

Durham and Teesside universities engaged in three elements of work between 2008-15. First, the establishment of the Third Sector Trends survey, which began in 2010 and was repeated in 2012 and 2014 in North East England and Cumbria.

The field of study was widened for the survey in 2013 to Yorkshire and Humber, supported by Involve Yorkshire and Humber and Joseph Rowntree Foundation. Baseline data for Yorkshire and Humber were assembled by Southampton University and NCVO in 2010.

Chapman, T. and Robinson, F. (2011) *Taking Stock, Moving On: a summary report on the results of the Northern Rock Foundation Third Sector Trends Study*, Newcastle: Northern Rock Foundation. Third Sector Trends 2011 Taking-Stock-Moving-On A summary report and position statement at the end of the first phase of study

Chapman, T., van der Graaf, P. Bell, V., Robinson, F. and Crow, R. (2010) Third Sector Trends 2011 Keeping-the-show-on-the-road-Report, Newcastle, Northern Rock Foundation.

Chapman, T. (2014) *Third Sector Trends in Yorkshire and Humber*, Leeds: Involve Yorkshire and Humber.

Chapman, T. (2015) Research briefing on the Third Sector in Kirklees (January 2015), Huddersfield, Kirklees Council.

Secondly, a qualitative study of 50 organisations in the study region. The first two phases of this work were funded by Northern Rock Foundation, subsequent phases were funded by ESRC (in 2016-17) and the final phase by the Community Foundation (in 2019-21),

Chapman, T., Robinson, F., Brown, J., Crow, R., Bell, V. and Bailey, E. (2010) *What makes Third Sector organisations tick? Interactions of foresight, enterprise, capability and impact*", Newcastle: Northern Rock Foundation. NRF-TST- What makes third sector organisations tick 2019

Thirdly, a consultation process was begun to examine the strengths and weaknesses of the sector in the study region. This was undertaken between 2008-2011 and involved a region wide set of events culminating in the Forearmed with foresight report and an initial study of local infrastructure organisations in the study region which set the scene for subsequent qualitative and quantitative field work.

Chapman, T. Robinson, F., Brown, J. Ford, C., Shaw, S. Crow, R. and Bailey, E. (2009) *Third Sector Trends 2009 Mosaic, jigsaw or an abstract Getting a big picture perspective on the Third Sector*, Newcastle: Northern Rock Foundation.

Bell, V., Robinson, F., Chapman, T., van der Graaf, P., Shaw, S., Brown, J. and Chinaka, G. (2010) *Forearmed with Foresight: speculations on the future development of the Third Sector in North East England and Cumbria*, Newcastle: Northern Rock Foundation.

Southampton University, NCVO and Guidestar undertook work to set a baseline for future surveys undertaken by Durham and Teesside universities in North East England, Cumbria and Yorkshire and Humber. The following reports were produced between 2009-12. They are all available here

Kane, D. and Mohan, J. (2010a) *Mapping registered Third Sector organisations in the North East*, Newcastle: Northern Rock Foundation Third Sector Trends Study Working Paper.

Kane, D. and Mohan, J. (2010b) *Mapping registered Third Sector organisations in Cumbria*, Newcastle: Northern Rock Foundation Third Sector Trends Study Working Paper.

Kane, D. and Mohan, J. (2010c) *Mapping registered Third Sector organisations in Yorkshire and the Humber*, Newcastle: Northern Rock Foundation Third Sector Trends Study Working Paper.

Mohan, J., Kane, D., Wilding, K. Branson, J. and Owles, F. (2010) *Beyond 'flat earth' maps of the Third Sector*, Newcastle: Northern Rock Foundation Third Sector Trends Study Working Paper.

Mohan, J., Rajme, F.G. and Kane, D. (2011a) *Paid work and volunteering in the Third Sector in North East England*, Newcastle: Northern Rock Foundation Third Sector Trends Study Working Paper.

Mohan, J., Rajme, F.G. and Kane, D. (2011b) *Paid work and volunteering in the Third Sector in Cumbria*, Newcastle: Northern Rock Foundation Third Sector Trends Study Working Paper.

Two discussion papers were also produced which outlined methodological complexities underlying the study.

Chapman, T., Bell, V. and Robinson, F. (2011) *Measuring Impact: easy to say, hard to do: a think-piece to stimulate debate from the Third Sector Trends Study*, Newcastle: Northern Rock Foundation Third Sector Trends Study Working Paper. Third Sector Trends 2014 Measuring-Impact-easy-to-say-hard-to-do

Robinson, F., Bell, V. and Chapman, T. (2011) *Building Better Boards: What's the problem?* Newcastle: Northern Rock Foundation. Third Sector Trends 2011 Building-better-boards

Prior to the launch of Third Sector Trends, development work for the programme resulted in a number of publications and reports.

Chapman, T. and Crow, R. (2008) *A Thriving Third Sector: a study of North Yorkshire and City of York*, Middlesbrough: Social Futures Institute.

Chapman, T., Crow, R. and Brown, J. (2008) 'Entering a Brave New World? An assessment of Third Sector readiness to tender for the delivery of public services', *Policy Studies*, Vol. 28, No 1, pp. 1-17.

Chapman, T., Forbes, D. and Brown, J. (2007) 'They think they have God on their side': the impact of public sector attitudes on the development of social enterprise', *Social Enterprise Journal,* Vol. 2, No. 1, pp. 78-89.

Chapman, T., Crow, R. Brown, J. and Ward, J. (2006) *Facing the Future: A Study of the Impact of a Changing Funding Environment on the Voluntary and Community Sector in the North East of England*, Middlesbrough: Social Futures Institute.

Appendix 2
Online Surveys questionnaire 2025

The appendix includes all aspects of the questionnaire as written and administered in 2025. For each question, number of responses are provided together with percentage response rates. Frequencies for sub categories are not included so as not to prefigure findings in national reports.

PAGE 1: Welcome page

Welcome to Third Sector Trends in England and Wales 2025

This study of voluntary and community organisations, social enterprises, cooperatives, societies and amateur sport clubs (sometimes called the 'third sector', 'voluntary sector' or 'civil society sector') started in 2010 and it takes place every three years.

We've been building a picture of how organisations and groups work, what they achieve and how they feel about their future. This helps policy makers, funding bodies and CVSs to make good decisions on how to support the voluntary sector.

Whether your organisation is large or small, thriving, struggling or just going along as normal - we need to hear from you. It's interesting and only takes 15 to 20 minutes to complete.

All data are securely stored completely anonymously. We don't collect or retain any personal data (to see our ethics and data privacy policy click here. If you're worried about anything, feel free to contact me: tony.chapman@durham.ac.uk.

To start the survey, just press the NEXT button at the bottom of this page. When you've finished the survey, you'll receive a message to show the survey has been logged successfully to Online Surveys.

The study is being financially supported by the following organisations: Community Foundation North East, Lloyds Bank Foundation England and Wales, Wales Council for Voluntary Action and Millfield House Foundation. Third Sector Trends in Wales 2025

Welcome to Third Sector Trends in England and Wales 2025 [Wales version]

This study of voluntary and community organisations, social enterprises, cooperatives, societies and amateur sport clubs (sometimes called the 'third sector'. 'voluntary sector', or 'civil society sector') started in 2010 and it takes place every three years.

We've been building a picture of how organisations and groups work, what they achieve and how they feel about their future. This helps policy makers, funding bodies and CVCs to make good decisions on how to support the voluntary sector.

Whether your organisation is large or small, thriving, struggling or just going along as normal - we need to hear from you. It's interesting and only takes 15 to 20 minutes to complete.

Os byddai’n well gennych wneud yr arolwg yn Gymraeg – cliciwch YMA | If you'd prefer to do the survey in Welsh - click HERE.

All data are securely stored completely anonymously. We don't collect or retain any personal data (to see our ethics and data privacy policy click here) If you're worried about anything, feel free to contact me: tony.chapman@durham.ac.uk.

To start the survey, just press the NEXT button at the bottom of this page. When you've finished the survey, you'll receive a message to show the survey has been logged successfully to Online Surveys.

The study runs right across England and Wales and is being financially supported by the following organisations: Wales Council for Voluntary Action, Lloyds Bank Foundation England and Wales, Community Foundation North East and Millfield House Foundation.

PAGE 2: About your organisation or group

First, we need some basic details about your organisation or group...

1. **Approximately, when was your organisation or group established?** (Please tick one box)

	Responses	Percent of sample
Since 2020	757	8.7
2000 - 2009	1,716	19.8
1980 - 1989	1,134	13.1
1900 - 1945	1,046	12.1
2010 - 2019	891	10.3
1990 - 1999	1,540	17.7
1946 - 1979	785	9.0
Before 1900	709	8.2
Don't know	94	1.1
Total / Percentage (Missing n=8)	**8,672**	**99.9**

2. **Where does your organisation or group do most of its work?** (Please tick one box)

	Responses	Percent of sample
Just in our neighbourhood or village	3,176	36.6
Within our local authority	2,560	29.5
Across at least two local authorities in Wales	1,161	13.4
At a regional level (e.g. South East Wales or Mid Wales)	566	6.5
At a national level	771	8.9
Internationally	429	4.9
Total / Percentage (Missing n=17)	**8,663**	**99.8**

3. **What is the post code of your main office or base?** (this is vital for geographical mapping, we promise to delete the postcode from the final data set)

Respondents only included in sample if at least a partial post code is given to locate by region and local authority, see note on Question 34.

4. **What is the legal identity of your organisation or group?** (Tick all that apply)

	Responses	Percent of sample
Informal / unregistered society, club or group	271	3.1
Registered charity or trust	6,161	71.0
Charitable Incorporated Organisation (CIO)	1,961	22.6
Community Interest Company (CIC)	247	2.8
Registered Society (e.g. Credit Union, Community Benefit Society)	33	0.4
Community Amateur Sports Club (CASC)	39	0.4
Company Limited by Guarantee / Shares (CLG / CLS)	797	9.2
Housing Association / Registered Social Landlord	27	0.3
Faith Organisation	461	5.3
Other	119	0.4
Total / Percentage (all respondents answered at least one response)	**8,680**	**100.0**

PAGE 3: Mission, practice and impact

We'd now like to ask you about the people you serve and the impact you have...

5. Who are the main beneficiaries of your organisation's or group's activities? (Tick all that apply)

	Responses
People in general	4,837
Children and young people	3,409
Older people	2,820
People with physical disabilities	1,785
People with physical health conditions	1,783
People with mental health conditions	2,036
People with learning disabilities	1,530
Carers	1,058
People of a particular ethnic or racial origin	573
People with homelessness and housing issues	919
Unemployed/workless people	1,033
People or households living in poverty	1,611
People with concerns about gender and sexuality	344
People in rural areas	1,383
Overseas aid (e.g. famine relief, education, development work)	397
Animals	236
Other Third Sector Organisations (e.g. a grant making trust or a CVC)	321
Other	847
Total / Percentage (all respondents answered at least one response)	**8,680**

We know that these questions don't cover all the things that organisations and groups do, but there's space at the end of the survey to tell us more if you'd like to.

6. At a community level, what kind of impact do you think you have? (Tick one box on each row)

	We have a very strong impact	**We make a good contribution**	**We make some difference**	**We don't try to do this**	**N=**	**Percent response**	**Missing data**
We develop knowledge and skills through education and training					8,396	**96.7**	284
We improve health and wellbeing					8,451	**97.4**	229
We reduce social isolation					8,451	**97.4**	229
We encourage physical activity and improve people's fitness					8,404	**96.8**	276
We increase employability					8,254	**95.1**	426
We tackle the consequences of poverty					8,178	**94.2**	502
We improve people’s access to basic services					8,179	**94.2**	501
We enhance the cultural and artistic life of the community					8,155	**94.0**	284

Continued from previous page	We have a very strong impact	We make a good contribution	We make some difference	We don't try to do this	N=	Percent response	Missing data
We improve the local environment					8,293	**95.5**	387
We promote community cohesion					8,184	**94.3**	496
We empower people in the community					8,303	**95.7**	377
We increase people's pride in their community					8,212	**94.6**	468
We give people confidence to manage their lives					8,204	**94.5**	476

Response rates are on the margins of acceptability in this question. It could be assumed that those not responding 'did not try to do this', but as this cannot be certain, the analysis will stick with those who did respond.

7(a) How much impact does decision making at each level of government have on the work of your organisation or group? (Tick one box on each row) **[Wales only]**

N.B. 681 respondents from Wales filled in the specific Wales questionnaire, a further 31 completed the England and Wales version (to which they were directed by local infrastructure bodies). The response rate has been calculated for the actual completions, not the total sample when the 31 additional cases were added to the dataset.

	A big impact	Some impact	No impact	Don' t know	N=	Response rate	Missing
Local Council(s)					667	**97.9**	42
Regional bodies (e.g. Regional Partnership Board)					659	**96.8**	50
Welsh Government					669	**98.2**	40
UK Government					661	**97.1**	48

7(b) How involved do you feel in policy-making processes that affect your organisation or group at each level of government? (Tick one box on each row) **[Wales only]**

	Heavily involved	Occasionally involved	Rarely involved	Never involved	N=	Response rate	Missing
Local Council(s)					671	**98.5**	38
Regional bodies (e.g. Regional Partnership Board)					666	**97.8**	43
Welsh Government					670	**98.4**	39
UK Government					667	**97.9**	42

7. There's a lot of talk in policy circles about including voluntary organisations in 'devolved' (i.e. local) decision making. Over the last 2 years, what do you think has changed? (Tick one box on each row) **[England only]**

	Strongly agree	Agree	Disagree	Strongly disagree	This doesn' t really affect us	N=	Percent response	England sample
Opportunities for effective collaborative working have increased (e.g. with local council / NHS)						7,927	**99.5**	7,970
Policy makers give us much more notice now about new initiatives						7,892	**99.0**	7,970
Policy makers are more receptive to our arguments even if they don't always agree						7,880	**98.9**	7,970
Public sector agencies seem to be working together more effectively						7,876	**98.8**	7,970
We're asked more often to help improve engagement with local people						7,897	**99.1**	7,970

PAGE 4: Organisations and groups need people to get things done, please tell us about that...

8. Over the last two years, has the number of paid staff, trustees and volunteers in your organisation increased, stayed the same or reduced? (Tick one box on each row)

	Increased	Stayed the same	Reduced	Not applicable	All	Percent response	Missing+
Paid full-time staff					8,464	**97.5**	216
Paid part-time staff					8,407	**96.9**	273
Volunteers (excluding trustees)					8,573	**98.8**	107
Trustees / committee members					8,619	**99.3**	61

+ Missing values accentuated because TSOs are not employers

9. Has your experience of recruiting and retaining employees, volunteers and trustees changed in the last two years? (Tick one box on each row)

	It has become quite a lot harder	Stayed about the same	It has become quite a lot easier	We don't have employees / volunteers	Total	Percent response	Missing+
Holding on to our existing staff					8,566	**98.7**	114
Recruiting new staff					8,450	**97.4**	230
Holding on to existing volunteers					8,579	**98.8**	101
Recruiting new volunteers					8,574	**98.8**	106
Holding on to our existing trustees					8,604	**99.1**	76
Recruiting new trustees					8,569	**98.7**	111

+ Missing values accentuated because some TSOs, which are not employers did not respond

10. What is your experience of working with volunteers (excluding your trustees / committee)? (Tick one box on each row)

	Strongly agree	Agree	Disagree	Strongly disagree	Not applicable to us	N=	Percent response	Missing+
We rely mainly on volunteers who commit time on a very regular basis						8,639	**99.5**	41
We rely mainly on volunteers who can work unsupervised						8,587	**98.9**	93
Many of our volunteers are our service users/beneficiaries						8,583	**98.9**	97
We could not keep going as an organisation or group without volunteers						8,633	**99.5**	47
We have never fully recovered our volunteer numbers since the pandemic						8,608	**99.2**	72

11. Does your organisation or group need to invest time and resource in any of the following areas? (Tick one box on each row)

	High priority	Low priority	Not needed	N=	Percent response	Missing
Managing employees / volunteers				8,622	**99.3**	58
Trustee development and training				8,627	**99.4**	53
Business planning				8,620	**99.3**	60
Income generation				8,603	**99.1**	77
Practical digital skills (e.g. financial accounting software)				8,624	**99.4**	56
Artificial intelligence (AI)				8,597	**99.0**	83

12. What support does your organisation provide for employees and volunteers? (Tick one box on each row)

	Just for employees	Just for volunteers	For employees and volunteers	We don't do this	Total	Percent response	Missing
We have a general training budget					8,624	**99.4**	56
We offer flexible working arrangements					8,614	**99.2**	66
We make provisions for personal development					8,603	**99.1**	77

13. If you need support or training, where would you usually go to get this? (Tick one box on each row) **[England only, a separate Wales version was constructed)**

	From a local infrastructure body (such as a Council for Voluntary Services)	From a local charitable grant-making trust or community foundation	From the local authority, NHS or other public sector body	From a local private sector business or specialist professional (e.g. a law firm)	We'd do it ourselves	Not applicable to us	N=	Percent response	Missing
Employment issues							7,859	**98.6**	111
Volunteering issues							7,880	**98.9**	90
Governance/ leadership issues							7,865	**98.7**	105
Income generation issues							7,876	**98.8**	94
Financial management issues							7,865	**98.7**	105
Local social and public policy issues							7,821	**98.1**	149

14. Leadership in voluntary organisations can involve a mix of 'excitement' and 'worry'. How do you feel 'this week' about these statements? (Tick one box on each row if you have a leadership role)

	Excited: "get's me up in the morning"	Quite excited	Neither excited nor worried	Quite worried	Worried: "keeps me awake at night"	We don't do this	N=	Percent response	Missing
Working collaboratively with other voluntary organisations							8,594	**99.0**	86
Managing with the financial resources we have to hand							8,582	**98.9**	98
Putting ourselves forward for awards to show how well we're doing							8,571	**98.7**	109
Managing difficult interpersonal relationships (i.e. with volunteers, trustees, staff)							8,578	**98.8**	102
Bidding for funding to do something brand new							8,569	**98.7**	111
Campaigning to get the general public to see things our way							8,543	**98.4**	137

15. Can you tell us a little about the person who is the Chair of your board of trustees / directors or management committee? (Tick one box on each row)

	Yes	No	N=	Percent response	Missing
University graduate			8,457	**97.4**	223
Female			8,434	**97.2**	246
Has a registered disability			8,282	**95.4**	398
Black, Asian or other ethnic minority			8,303	**95.7**	377
Retired			8,466	**97.5**	214

16. Can you tell us a little about your most senior member of paid staff? (Tick one box on each row)

	Yes	No	Not applicable	N=	Percent response	Missing
University graduate				8,571	**98.7**	109
Female				8,416	**97.0**	264
Has a registered disability				8,301	**95.6**	379
Black, Asian or other ethnic minority				8,309	**95.7**	371

PAGE 5 Your organisation's financial and property resources

We're already more than half way through the survey. We'll ask you very quickly about your financial situation... don't worry, no need to check any fine detail.

17. What was your organisation's or group's total income in the last financial year? (Tick one box)

No income	128	1.5
£1 - £2,000	591	6.8
£2,001 - £5,000	841	9.7
£5,001 - £10,000	945	10.9
£10,001 - £25,000	1,536	17.7
£25,001 - £50,000	1,141	13.1
£50,001 - £100,000	992	11.4
£100,001 - £250,000	1,093	12.6
£250,001 - £500,000	599	6.9
£500,001 - £1,000,000	357	4.1
£1,000,001 - £5,000,000	323	3.7
£5,000,001 - £25,000,000	104	1.2
Over £25 million	30	0.3
Number / Percent	8,680	1.5
Percent responded (all cases removed without data on income)	0	0.0

18. Over the last two years, has your organisation's or group's income: (Tick one box)

Risen significantly	
Remained about the same	
Fallen significantly	
Number	
Percent responded	**99.4**
Missing	50

19. How important are the following sources of funding for your work? (Tick one box on each row)

	Important	Of some importance	Least important	Not important	N=	Percent response	Missing
Grants					1,916	**98.8**	104
Contracts					5,560	**96.6**	297
Earned income (e.g. retail, selling goods/ services – but not contracts)					3,898	**98.0**	173
Investment income (e.g. stocks, shares, interest, dividends, etc.)					5,265	**98.1**	165
Contribution in kind (e.g. use of facilities and free professional help)					3,004	**98.2**	157
Gifts (e.g. sponsorship, donations, legacies)					1,588	**98.9**	92
Subscriptions					4,643	**98.3**	148
Borrowed money (e.g. loans from banks)					7,783	**97.6**	207

20. In the last financial year, has your organisation or group drawn on its reserves? (Tick one box)

No, we don't have any reserves	
No, we have not drawn on our reserves	
Yes, we have used our reserves to invest in new activities (such as buying property, developing a new service, employing a development worker)	
Yes, we have used our reserves for essential costs (such as salaries, bills, rent, etc.)	
We have used our reserves for both investment and essential costs	
Number / Percent	
Percentage response	**99.2**
Missing	68

21. Do you have access to a property (such as a village hall or community building) that can be used for offices, to hold events or deliver services? (Tick one box on each row)

	Yes	No - but we're looking into this	No - and we have no plans to do this	N=	Percent response	Missing
We own a property that we use				8,253	**95.1**	427
We rent a property to use				8,170	**94.1**	510
We have a property that we got via community asset transfer of a public building				7,931	**91.4**	749
We are allowed to use space in a property without charge				8,018	**92.4**	662

The lower response rate may have resulted from participants having no stake in property usage, although that cannot be confirmed. The key findings about property ownership falls within the 95% threshold suggesting that these data can be relied upon. Other data will be used but with a stated caveat that estimates my be lower because of non completion.

22. Approximately how much of your money is earned? - e.g. from selling products and services and / or contracts to deliver services. (Tick one box)

None	
1-20%	
21- 40%	
41 - 60%	
61 - 80%	
81 - 100%	
Number / Percent	
Percent response	**99.4**
Missing	52

23. In the last two years, how well 'overall' did charitable trusts and foundations support your organisation or group? (Tick one box on each row)

	Strongly agree	Agree	Disagree	Strongly disagree	Not applicable to us	N=	Percent response	Missing
They gave us unrestricted funding (e.g. 'core' funding)						8,620	**99.3**	60
They took the time to get to know us						8,556	**98.6**	124
They wanted us to be 'innovative'						8,544	**98.4**	136
They've made a long-term investment in our work						8,533	**98.3**	147
They helped develop our skills (e.g. consultants / training)						8,530	**98.3**	150

PAGE 6: Interactions

Now we'll ask your opinions about working with other organisations...

24 What kinds of relationships do you have with other voluntary organisations and groups? (Tick one box on each row)

	Yes, this is how we work now	Not at the moment, but we'd like to work this way	No, this doesn't apply to us	N=	Percent response	Missing
We have useful informal relationships with other voluntary organisations and groups				8,604	**99.1**	76
We often work quite closely, but informally, with other voluntary organisations and groups				8,573	**98.8**	107
We often work in formal partnership arrangements with voluntary organisations and groups				8,552	**98.5**	128

25 How important are your organisation's or group's relationships with private sector businesses? (Tick one box on each row)

	Of great importance	Of some importance	Of little importance	Of no importance	N=	Percent response	Missing
They give us money to help us do our work					8,573	**98.8**	107
They provide free facilities, or goods and services to help us do our work					8,545	**98.4**	135
They provide volunteers to help us do our work					8,517	**98.1**	163
They provide free expert advice to help do our work					8,491	**97.8**	189

26. How do you think your organisation is regarded by local statutory bodies in your area? (Tick one box on each row)

	Strongly agree	Agree	Disagree	Strongly disagree	Not applicable to us	N=	Percent response	Missing
They value the work of our organisation						8,618	**99.3**	62
They inform our organisation on issues which affect us or are of interest to us						8,582	**98.9**	98
They involve our organisation appropriately in developing and implementing policy on issues which affect us						8,582	**98.9**	98
They act upon our organisation's opinions and / or responses to consultation						8,539	**98.4**	141

27. Which of the following best describes your organisation's current position about tendering for public sector services? (Tick one box)

We are not aware of these opportunities	2,965
We are aware of these opportunities but they are not relevant to our organisation's objectives	3,709
We are aware of these opportunities but need more information	285
We are interested in this option but would need extra support to do this	468
We are interested in this option but feel there are barriers in the tendering process	477
We are already bidding to deliver public sector services	156
We are already delivering public sector services for which we have tendered	487
Number	8547
Missing	133
Percentage response	**98.5**

28. Does your organisation or group try to influence local public and social policy? (Tick one box on each row)

	Strongly agree	**Agree**	**Disagree**	**Strongly disagree**	**N=**	**Percent response**	**Missing**
We tend to steer well clear of political issues					8,548	**98.5**	132
We try to go to relevant meetings/events which relate to our kind of work					8,518	**98.1**	162
We campaign to further the interests of our beneficiaries					8,461	**97.5**	219
We trust a local third sector support agency to do this on our behalf (e.g. a CVC)					8,397	**96.7**	283
We tend to work behind the scenes to influence policy					8,456	**97.4**	224

PAGE 7: The future

Ok, we're nearly done - two questions to go. A NEW question on local 'liveability' and 'environmental impact' and then it's time to tell us how you feel about the future...

29. What is your organisation's position on these environmental issues in the localities where you work? (Tick one box on each row)

	This is a top priority for us	We've made some progress in the last two years	We try, but it's not really a priority	This doesn't apply to us	N=	Percent response	Missing
We've been making a big effort to reduce energy use (but not just for financial reasons)					8,617	**99.3**	63
We work hard to influence local people's environmental awareness and behaviour					8,586	**98.9**	94
We're determined to improve 'liveability' (e.g. ensuring that public spaces are safe, attractive and well used)					8,568	**98.7**	112
We routinely re-use and recycle everything we can					8,600	**99.1**	80
We're doing everything we can to protect bio-diversity in areas where we work					8,585	**98.9**	95

30. Over the next two years, what do you expect will happen to your organisation or group? (Tick one box on each row)

	Increase significantly	Increase	Remain similar	Decrease	Decrease significantly	Not applicable	N=	Percent response	Missing
Income will…							8,603	**99.1**	77
Support from private businesses will…							8,546	**98.5**	134
Grants from charitable foundations will…							8,580	**98.8**	100
Funding from statutory agencies will…							8,534	**98.3**	146
Support from volunteers will …							8,586	**98.9**	94
Working in partnership will …							8,550	**98.5**	130
The need for our services will …							8,573	**98.8**	107

31. If you'd like us to send you the results of the survey, please tell us your email address (this will be removed from the dataset to assure confidentiality and will not be used for any other purpose).

4,223 respondents have requested that they are notified when results are published.

32. **In case you didn't tell us before, please do let us know the postcode of your main location?** (This is absolutely vital for geographical mapping before we delete it from our database).

8,597 respondents provided a full or partial postcode on first request. 4,473 provided a postcode on the second request – some of which provided a full postcode here to compensate for a partial postcode at the start of the survey. In the few cases where post codes were not given, we reverted to the pre-population parameter postcode. If there was no postcode, an attempt was made to recover it by using the email address left and locating the organisation by Google or the Third Sector Trends combined register. When a postcode could not be identified, the case was removed from the sample. Of 8,692 returns, 8,680 were retained and 12 discarded. 23 other incomplete responses were removed prior to final dataset processing.

33. **You don't need to, but we'd love to hear from you if there is anything else you would like to tell us - just use this space.**

2,387 respondents made comments in this space, 27.5% of all submissions

That's it! Thank you so much for completing the survey.

Every contribution is incredibly valuable to us - so please encourage your friends and colleagues in the voluntary sector to do the survey too!

Appendix 3

Research ethics, personal privacy and data usage statement

This document, dated May 2025, was linked to all survey invitations. The privacy statement was available in Welsh.

Purpose of the study

Third Sector Trends was initiated in 2008 and now covers the whole of England and Wales. The study was conceived and originally commissioned by Northern Rock Foundation with research conducted by the universities of Durham, Southampton and Teesside. The Community Foundation North East was a co-founder of the research and is now responsible for its legacy.

Since 2012, the research programme has been run by Policy&Practice, St Chad's College, Durham University. Its geographical coverage has expanded, first to the whole of the North of England in 2016 and then to England and Wales in 2019. All data held from the study are owned by Community Foundation North East and St Chad's College Durham University.

The study was established to look at structure, resource, purpose, practice and impact of 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 government, local public sector and health organisations, the private sector, grant making foundations, Third Sector infrastructure organisations at national and local levels and, of course, individual TSOs.

To widen the scope of the study, Third Sector Trends has worked with many funding partners over the years. In 2025 the study is being supported by The Community Foundation North East, Lloyds Bank Foundation England and Wales, Wales Council for Voluntary Action and Millfield House Foundation.

If you would like more information on study purpose and its publications – there is more information here: https://www.stchads.ac.uk/research/third-sector-trends-in-england-and-wales/

If you want to know more about research methods, you can read this report (this is for 2022 and will be updated in 2025 once the fieldwork is complete): https://www.stchads.ac.uk/wp-content/uploads/2022/10/Third-Sector-Trends-Research-Methods-2022.pdf

A report is also available on analytical techniques (also to be updated in 2025): https://www.stchads.ac.uk/wp-content/uploads/2022/07/Third-Sector-Trends-Structure-and-Dynamics-of-the-Third-Sector-in-England-and-Wales-December-2020-Revised-June-2022-2.pdf

Research ethics and compliance to data protection legislation

St Chad's College, Durham University is responsible for collecting data for Third Sector Trends which is used in accordance with UK GDPR/ Data Protection Act 2018. Our interpretation of these regulations has been obtained via https://ukdataservice.ac.uk/.

The ethical principles underlying the study are aligned with the British Sociological Association, Social Policy Association and Social Research Association.

The project is led by Professor Tony Chapman. If you would like to seek clarification or discuss any aspect of the project, data collection or usage, please contact him by email: tony.chapman@durham.ac.uk

Who participates in the study?

Participation in the study is entirely voluntary. That said, we undertake the fieldwork over an extended period from June to October and this may result in potential participants receiving several requests to take part.

Requests via Online Surveys can be stopped by writing to the lead researcher (as is indicated in the letter of invitation). Requests from other organisations such as community foundations and voluntary sector local infrastructure organisations is beyond the control of St Chad's College, Durham University and cannot be stopped.

Since its inception, over 18,500 responses have been given by voluntary, community and social enterprises (VCSEs) and unincorporated organisations and groups. We invite people who are closely involved in such organisations (as, for example, trustees or senior employees) to take part in a triennial survey.

We do this by sending invitations to people identified on the Charity Commission Register and via other organisations who send invitations from their listings of VCSEs (such as local and national voluntary sector infrastructure organisations and community foundations).

To keep tabs on response rates by area, sample data are tracked by local authority area and region but respondents cannot see that on Online Surveys.

Taking part involves the completion of a survey questionnaire which takes about 15-20 minutes to do using Online Surveys. The survey attracts a large number of respondents (over 6,000 in 2022) and collates data to undertake detailed statistical analysis by organisational types, area types and so on.

This is the only large-scale representative study of its kind in the UK. It takes a lot of effort on the part of many organisations to build up a large enough sample for analysis. We apologise that this can be annoying to some people, but we ask them to recognise the benefits when considering the value and impact of the findings of the study.

Does the survey collect personal data?

No, Third Sector Trends is about organisations, not individuals. Complete anonymity of respondents is further ensured because we do not ask for the organisation's name nor do we ask for or retain any 'personal information' about the respondent (i.e. their name, home address, email, phone number or any biographical details).

We do ask for an email address at the end of the survey, should respondents wish to be informed about its publications – but this information is removed from the database and kept separately and used only for the stated purpose. The list of emails will not be shared with any other organisations (including Community Foundation North East).

We ask that respondents tell us the postcode of the main office of their organisation. These data (as the survey questionnaire makes clear) are used for geographical mapping using ONS Lookups - and once that is done the post code is permanently removed from the database.

Can I ask you to withdraw the responses I have given once submitted?

Unfortunately not. We cannot withdraw your data because it would be impossible for us to identify it from other responses as we collect and retain no information about organisational or respondents identity.

Can anyone else see the data that are collected?

We work closely at a local level with voluntary sector infrastructure organisations and community foundations. If they provide substantive and sustained support through the fieldwork period, we will consider releasing data to them for their local area providing that there are enough cases (i.e. lines of data for individual organisations) to do effective analysis and to ensure that anonymity is completely protected.

Any such agreements to share data will be made on the proviso that postcodes are removed to ensure that individual organisations cannot be identified. To date, such data has only been shared in spreadsheet format on one occasion (in 2019). Generally we prefer to share data only in tabular form.

Register data from our 2025 combined register dataset can be shared as these data are available in the public domain. The combined register includes data from Charity Commission Register, Community Interest Company register, Community Amateur Sports Club register and Registered Societies Register.

When and how can I find the results of the study once it is complete?

The results will be published over a period of six months starting in November/December 2025. If you have given us your email to receive these results, we will contact you and provide a link to the first report and tell you when other reports will be available and where to find them.

The findings from the study are also widely reported upon in the voluntary sector press (*Civil Society Media, Third Sector, UK Fundraising* and *Charity Times*).

All reports from the study will be available on the websites of Community Foundation North East and St Chad's College Durham University.

Appendix 4

Review of survey questions by year of study

Each stage of the project has included a core set of questions to track changes in sector structure and dynamics. Core elements cannot be changed to ensure comparability and take up about half of the questionnaire and include the following issues *(applies to all phases of study unless otherwise stated)*:

- ***Organisational characteristics***: date established, legal form, spatial range of operation, organisational location.
- ***Organisational purpose and impact***: beneficiaries served, areas of social impact, practice preferences *(introduced in 2019)*.
- ***Organisational resources***: number of employees and volunteers, capabilities of volunteers, types of income, percentage earned income, income change in last two years, contractual working, property, investment and cash assets, use of reserves *(assets questions introduced in 2014)*,
- ***Inter-organisational relationships***: with other TSOs, the public sector and private sector.
- ***Future expectations***: about income, financial support from foundations, private and public sector organisations, volunteers, need for services.

Thematic exploration

At each stage of the survey, space has been made available to explore specific themes.

- Evidence on ***organisational foresight and capability***: including possession of a training budget, training provision, training priorities, strategic priorities and action planning – was undertaken in 2010 and 2012, reintroduced in 2022 on training, staff development and flexible working. New questions on employee retention and recruitment added in lieu of potential changes brought about by the pandemic – all repeated in 2025.,
- ***Assets, reserves and propensity to borrow money*** was introduced in 2014. Assets questions have been retained since 2014, in 2022 a new question on the use of property (owned, rented, asset transfer and peppercorn/free use) was introduced – repeated in 2025.
- ***The role of volunteers*** in the Third Sector, identify routes to volunteering and explore how TSOs benefit from taking on volunteers was introduced in 2014. This was extended further in 2016 on the composition of the volunteer workforce and then developed in 2022 on the impact of the pandemic on the composition of the volunteer workforce – repeated in 2025.
- ***The role of private sector business*** in supporting the work of the Third Sector by investing resources of money, skills, people and facility was introduced in 2014 and explored in more depth in 2019. In 2022 extended to find out whether relationships are primarily with local or national businesses – this aspect was not repeated in 2025..
- ***Routes to grant funding and relationships with foundations***: routes to grant funding was explored in 2016 and developed further in 2019 on the quality of relationships with foundations. New sub-questions on relationships with funders during the pandemic – modified for post-pandemic environment in 2025.

- ***Sector impact at the local level*** includes exploration of TSO's perceptions of their principal areas of impact to individuals and communities introduced in 2019 and has been tracked in 2022 and 2025.
- ***Enterprising activity*** exploration of types of business activity organisations engage with was developed further in 2019 which was not repeated in 2022 or 2025.
- ***Extent of usage of digital applications*** including six new questions to explore which TSOs were making the most use of digital was introduced in 2019 but has not yet been published. This was developed and repeated in 2022 to assess the impact of Covid-19, but discontinued thereafter.
- ***Leadership and diversity***: biographical profiles of chairs and chief officers of organisations was introduced in 2019 and has been maintained to track change.
- ***Campaigning and influencing***: introduced in 2022 to enhance understanding of active engagement with local stakeholders, behind the scenes influencing and direct campaigning. The question was repeated in 2025.
- ***Impact of local devolution***: new question for 2025 to strengthen understanding on campaigning and influencing and explore area variations. A separate question was used in Wales – see Appendix 2.
- ***Personal challenges associated with leadership***: new question in 2025 to critically examine how leaders feel about tackling core areas of organisational management, development and impact.
- ***Attitudes and practices about the environment***: new question for 2025 focus on reuse/recycling, energy use, liveability, bio-diversity and campaigning/influencing the general public.

Core questions 2010 - 2022	2010	2012	2012	2013/14	2016	2019	2022	2025
Postcode for geo-mapping	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Age of organisation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Legal form of organisation	Yes	Yes	Yes	Yes	Yes	Additional categories	Yes	Yes
Spatial range of activity	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Local authority where TSO is based	Yes	Yes	Yes	Yes	Yes	Yes	Geo mapping	Geo mapping
Primary, secondary or tertiary service orientation of TSOs	Yes	No	Yes	Yes	No	No	No	No
Income in previous year (11 bands)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Income change in last two years	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Number of full-time, part-time staff, trustees and volunteers (bands)	Yes	Yes	Yes	Yes	Yes	Yes	Statistical model	Statistical model
Change in numbers of full and part-time employees, volunteers and trustees (bands)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Does the TSO have a training budget	Yes	Yes	Yes	Yes	Yes	Yes	New format	New format
Priorities for staff training	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
Perceptions about the importance of / reliance upon funding sources	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Percentage of income earned from trading or contracts	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Attitudes toward partnership bidding	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Attitudes about and orientation toward public sector contract delivery	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Quality of relationships with the local public sector	Yes	Yes	Yes	Fewer categories	Yes	Yes	Additional category	Yes

New questions 2012 (North East and Cumbria)	2010	2012	2013/14	2016	2019	2022	2025
Approaches to the collection of evidence on impact	**Failed Question**	No	**New Question**	No	No	No	No
Anticipation of change in the next two years (several categories)	**New**	Yes	Yes	Yes	Additional category	Additional category	Yes
Organisational ethos in practice, policy and cultural terms	**New**	Yes	Yes	Fewer categories	Fewer categories	No	No

New questions 2013 (Yorkshire and Humber)	2013	2014	2016	2019	2022	2025
Beneficiaries served	**New**	Yes	Additional category	Additional category	Yes	2 Additional cats.
Operation in urban and rural areas	**New**	Yes	Yes	Geo mapping	Geo mapping	Geo mapping
Extent of assets (property, investment and free reserves)	**New**	Yes	Yes	Yes	Revised	Yes
Use of assets and reserves (for investment or emergency use)	**New**	Yes	Yes	Yes	Yes	Yes
Purposes for borrowing	**New**	Yes	No	No	No	No

New questions 2014 (North East and Cumbria)	2014	2016	2019	2022	2025
Quality of relationships with private sector	**New**	Yes	Yes	Yes	Yes
Quality of relationships with other TSOs	**New**	Yes	Yes	Yes	Yes
Planning for the future (multiple statements)	**New**	Yes	No	No	No

New questions 2016 (North of England)	2016	2019	2022	2025
Approaches to practice	**New**	Yes	No	No
Grant applications in the last two years	**New**	No	No	No
Where TSOs seek advice and support to improve capability	**New**	Yes	No	Yes
Attitudes about grant funders	**New**	Yes	Additional category	Yes
Characteristics of volunteers (age, gender, BAME, education)	**New**	Condensed into one question	Reduce existing and introduce new statements	Yes
Experience of working with volunteers and extent of reliance upon them	**New**			

New questions 2019 (England and Wales)	2019	2022	2025
Equality and diversity in relation to chairs and CEOs	**New**	Yes	Yes (minor amendment to question format)
Quality and productivity of relationships with business	**New**	No	No
Quality of relationships with charitable foundations	**New**	Yes	Yes
Uses of online digital technologies	**New**	Additional category	No
Perceptions of impact for beneficiaries and the wider community	**New**	Additional category	Yes
Nature of trading activities	**New**	No	No

New questions 2022 (England and Wales)	2022	2025
Attitudes on retaining and recruiting volunteers.	**New**	Yes
Experiences of recruiting and retaining employees.	**New**	Yes (also including volunteers and trustees)
Extent to which organisations work with local or national businesses.	**New**	No
Practices surrounding influencing local public and social policy.	**New**	Yes

New questions 2025 (England and Wales)	2025
Impact of local devolution on local policy and practice in England	**New** (different questions in Wales)
The experience of leadership (extent of 'excitement' and 'worry' about key issues)	**New**
Attitudes and behaviours associated with the environment	**New**

NOTES

Published by

Policy&Practice
St Chad's College
Durham University
18 North Bailey
Durham DH1 3RH

https://www.stchads.ac.uk/category/research/

October 2025