



Third Sector Trends in England and Wales 2025

**The contribution of the voluntary sector to place:
A study of Wales in comparative context**



June 2026

About the author

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The contents of the report express the views of the author and do not necessarily reflect the views or policies of the commissioning partners.

Third Sector Trends Study

Data in this report are drawn from the Third Sector Trends study which 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 and St Chad's College are currently collaborating with partners including: Wales Council for Voluntary Action, Lloyds Bank Foundation England and Wales and Millfield House Foundation to undertake the Third Sector Trends Study survey and analysis in 2025-26.

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

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



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I am enormously grateful to the organisations which have contributed to the cost of undertaking the study in 2025: *Community Foundation North East, Lloyds Bank Foundation England and Wales, Wales Council for Voluntary Action and Millfield House Foundation.*

This is a long running study and it continues to benefit from the support of my colleagues Rob Williamson, Hannah Mackay-Christie, Adam Lopardo and Alastair Walker at Community Foundation North East. Their enthusiasm, advice and assistance are invaluable and much appreciated.

Summary of key findings

This report was commissioned by Wales Council for Voluntary Action as part of a wider research project to build a clear statistical picture on the structure, energy, dynamics, purpose and impact of the voluntary sector in Wales. The study, which draws on data and techniques developed in the long-running Third Sector Trends study shows that the voluntary sector in Wales is large, energetic, productive and impactful.

- There are over 10,500 registered voluntary organisations in Wales.¹
- The voluntary sector has an annual income of around £2.23billion and its expenditure is about £2.16billion.
- The total financial value of the sector to the economy is estimated at £2.56billion and produces £3.98billion of tangible social value through economic, fiscal and use value.
- Intangible 'added value' is judged to be at least equal to the energy invested in the voluntary sector's work and this adds up to £9.12billion as the total estimated economic value of the voluntary sector in Wales
- The work of voluntary organisations in Wales is supported by 212,200 regular volunteers.²
- Collectively, volunteers who regularly give their time to voluntary organisations in Wales deliver 15.3 million hours of work annually which is valued at between £186million (at National Living Wage) or £255million (at 80% of median wage).
- Voluntary organisations in Wales work effectively together: 76% of voluntary organisations work in complementary ways with others in the voluntary sector; 69% work quite closely but in less formal ways and 34% work in formal partnerships arrangements.
- There are some good relationships with the private sector: 31% of voluntary organisations receive money from business to help them work; 27% get free use of facilities or free goods and services; 16% benefit from time given by employee volunteers; and 18% get *pro bono* professional or technical support.
- The vast majority (86%) of voluntary organisations in Wales (of those which have a relationship with the public sector) feel that their work is valued by public agencies; 65% feel well informed about issues of importance to them; 44% are involved in the development and implementation of policy and 49% feel that public bodies act on their opinions when participating in consultations.
- Relatively few (8%) of voluntary organisations work 'for' the public sector by delivering public services under contracts - although the percentage bidding for or delivering contracts rises dramatically to 51% of the biggest voluntary organisations (with income from £1-25m).

¹ This includes the Charity Commission Register, Register of Societies/Mutuals Register, Register of Community Interest Companies and Register of Community Amateur Sport Clubs. There are thousands of unregistered voluntary organisations in Wales, which have not been assessed as part of this report.

² The term 'regular volunteers' refers to people who offer support to voluntary organisations that can be relied upon and scheduled into planned activities – not occasional or ephemeral volunteering. Many types of volunteering are excluded from this definition, see Section 4.2 of this report for further explanation.

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Section 1

Introduction

1.1 Purpose and context

This report was commissioned by **Wales Council for Voluntary Action** to build a statistical picture on the structure, dynamics, energy, purpose and impact of the voluntary sector in Wales. The study draws on data and techniques developed in the long-running Third Sector Trends study which covers England and Wales.

A longitudinal study was initially commissioned so as to produce comparable data to assess the responsiveness of the voluntary sector and its constituent parts to change within the North East and Cumbria. Since then, its reach has widened to the North of England in 2016 and from 2019 at national levels in England and Wales so as to examine how the voluntary sector in this region compares with others.

Three national reports on survey findings have already been published from the 2025 survey. The analysis in those reports underpins interpretation of statistics for Wales in this publication. This report takes another step forward by exploring the situation in Wales alongside a parallel report based on the situation in North East England (further localised reports will follow using similar techniques).

The analysis involves comparisons with regions in England and by looking at area variations in Wales. Consequently, the report shows how 'different' Wales is in many respects from other regions but similar in others. To an extent, variations are shaped by local social and economic circumstances which, in turn, affect how the voluntary sector is structured, how its purpose is framed and where its impact is achieved.

A note on terminology

In this report, the term '**voluntary organisations**' will generally be used throughout and the sector as a whole will be described as the '**voluntary sector**'. For stylistic reasons, the term 'third sector organisation' abbreviated to '**TSO**' will be used periodically in charts and tables as 'VSO' has different and potentially misleading connotations.

It is recognised that there is a proliferation of alternative terms in common usage in other reports and policy documents such as '*third sector*', '*civil society sector*', '*social sector*', '*non-profit sector*', '*charitable sector*', '*VCSE*' (voluntary, community and social enterprise sector) and '*VCFSE sector*' (voluntary, community, faith and social enterprise sector).

Terminology on the legal form of voluntary organisations (such as Charities, Charitable Incorporated Organisations, Registered Societies, Community Interest Companies and Community Amateur Sport Clubs) will not be used unless specifically required.

1.2 Structure of the report

In **Section 2** of this report, a foundation for subsequent analysis is presented by providing an overview of national statistics on the social and economic situation in Wales. This will aid interpretation of findings about voluntary sector activity in Wales in subsequent sections.

Section 3 presents a detailed area-based assessment of the structure of the voluntary sector in Wales, drawing upon evidence from the Third Sector Trends Combined Register dataset that covers all legal forms of voluntary organisations.

Section 4 looks at the ‘people energy’ of the voluntary sector in Wales by assessing levels of employment and volunteering. The analysis will also address the challenges the sector is facing with recruitment and retention and how it is preparing its people for their roles through training and development.

The purpose, energy and impact of the voluntary sector in Wales is explored in **Section 5**. The aim is to build a picture of key sector priorities in beneficiary terms and where impact is achieved. Indications of the financial value of sector impact are also presented.

Sector finances are complex and challenging. **Section 6** looks at sources of income, with a special focus on grants, public sector contracts and earned income from trading. Data will also be presented on sector property assets and use of reserves together with an appraisal of sector mood about the financial future.

The final analytical section of the report (**Section 7**) will look at the strength of relationships within the voluntary sector together with an exploration of relationships with business and the public sector. Crucially, this section will also explore how the voluntary sector is oriented towards influencing local social and public policy.

The closing section of the report will summarise key findings and consider their implications in comparative context.

1.3 Geographies

Political geographies

Where possible, data will be presented at the lowest practicable geographical level (i.e. the *local authority*) using national statistics and Third Sector Trends Combined Register data. In many cases, that depth of analysis will not be possible due to the limitations of available data.

When local authority data are used, sub-regional summaries will also be generated. These follow the conventions adopted by **Stats Wales**:

- **North Wales**: Isle of Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire, Wrexham.
- **Mid Wales**: Powys, Ceredigion.
- **South West Wales**: Pembrokeshire, Carmarthenshire, Swansea, Neath Port Talbot.
- **South East Wales**: Bridgend, Cardiff, Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Monmouthshire, Newport, Vale of Glamorgan.

Only two categories are available for some criteria of national statistics (these distinctions are not used in Third Sector Trends analysis):

- **West Wales and the Valleys**: Isle of Anglesey, Gwynedd, Conwy, Denbighshire, Ceredigion, Pembrokeshire, Carmarthenshire, Swansea, Neath Port Talbot, Bridgend, Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen.
- **East Wales**: Flintshire, Wrexham, Powys, Vale of Glamorgan, Cardiff, Monmouthshire, Newport.

Thematic geographies

Using ONS Lookups it is possible to re-configure both Third Sector Trends Combined Register and Third Sector Trends survey data according to other criteria. These can then be used for comparative purposes with ‘statistical neighbour’ or ‘statistical stranger’ areas England.

The following distinctions will be adopted:

- **Areas of relative affluence and deprivation:** using Welsh Index of Multiple Deprivation (WIMD) in five categories. For comparative purposes, the English Indices of Deprivation (IMD) will be used. These two sets of statistics are not entirely compatible – but they share similar characteristics.
- **Urban / rural distinctions:** Third Sector Trends draws statistical distinctions between urban and rural areas based on DEFRA’s categorisations. There are eight categories but these are too many to put to useful purpose. Consequently, Third Sector Trends uses just three reconfigured categories (metropolitan, urban, town and country). These can be used for comparative purposes within Wales and between Wales and England (and/or English regions) where appropriate.

Data from the Third Sector Trends Combined Register provides a comprehensive listing of formally registered voluntary organisations in Wales. There are insufficient survey data to use the above sub-national categories reliably for comparative analysis with 159 responses in North Wales, 83 in Mid Wales, 164 in South West Wales and 303 in South East Wales. Consequently, two categories are used ‘Major urban areas’ (n=353) and ‘Town and Country Areas’ (n=356). Consequently, analysis will use the broader area type definitions of ‘major urban area’ and ‘town and country area’ based on DEFRA distinctions in ONS lookups.

Table 1.1 Configuration of Third Sector Trends register and survey data into collapsed DEFRA urban and rural categories						
	Major urban areas		Town and country areas		Wales	
	Register	Survey	Register	Survey	Register	Survey
North Wales	0	0	2,644	159	2,644	159
Mid Wales	0	0	1,392	83	1,392	83
South West Wales	1,024	87	1,383	77	2,387	164
South East Wales	3,627	266	438	37	4,110	303
Wales	4,651	353	5,837	356	10,533³	709

1.4 Data sources

National statistics

Support was provided by *Stats Wales, Welsh Government* and the *Department for Business and Trade* when preparing the evidence for Section 2 of this report on core national, sub-regional and local authority data on demographics, employment, health,

³Some Combined Register cases could not be categorised into DEFRA categories due to insufficient data so the sum of register cases is slightly higher (10,533) than the sum of urban and town and country areas (10,508). All survey cases are accounted for and totals tally.

deprivation, diversity and comparative business density data. Extensive use is also made of NOMIS and ONS 2021 Census Data in the report.

Third Sector Trends Combined Register data

The Third Sector Trends study collated a database of all registered voluntary, organisations in November 2024 (updated for this and other reports in May 2025). This provides a basis for analysis in this report and for the analysis of 2025 survey data.

Using ONS lookups, evidence from the combined register was aligned, via postcodes, to recategorize data on several dimensions including: local authorities, sub-regional areas, together with DEFRA urban/rural categorisations and WIMD/IMD distinctions – other potential categorical distinctions have also been retained to include national parks, NHS ICS areas, combined authorities and so on.

Third Sector Trends Combined Register data includes:

- ***Charity Commission Register***: including: *general charities, trusts, charitable companies and Charitable Incorporated Organisations (CIOs)*. The register provides a wide range of data on finances and organisational purpose which is employed extensively in this analysis and used as a benchmark for other legal forms.
- ***Register of Societies***: very limited data are available on organisational purpose within the register, but it is possible to distinguish legal forms including: Registered Societies, Cooperative and Community Benefit Societies (formerly Industrial and Provident Societies), Credit Unions, Working Men’s Clubs. (Friendly Societies, Benevolent Societies and Building Societies are not included in the analysis but data have been retained for future use). Post codes were extracted to map registered societies against ONS lookups. No financial data are available on the register but it is possible to determine Standard Industrial Classifications of Economic Activities (SIC codes) via Companies House for some legal forms.
- ***Community Amateur Sport Clubs***: this register only provides the name and address of organisations. Post codes are available which means that all CASCs can be mapped against geographical criteria using ONS look ups. SIC codes were applied to CASCs manually.
- ***Community Interest Companies***: the register provides limited detail, including name, address and post code. However, it was possible to determine SIC codes via Companies House and Orbis.

Third Sector Trends 2019, 2022 and 2025 Survey data

As a stand alone data set, Third Sector Trends in England and Wales 2025 survey is insufficiently large to make accurate statements about sector structure. However, through the use of combined register data (described above) it is possible to scale up survey data to make good estimations on sector finance, employment, volunteers and so on. This requires great care and relies to a large extent on comparative analysis in statistical neighbour areas in England to help confirm the accuracy and credibility of the analysis.

- ***Third Sector Trends in England and Wales 2019*** survey data: this was an experimental pilot study of Third Sector Trends across the whole of England and Wales while most effort was concentrated in the three regions of the North of England. Nearly 1,000 additional responses were received from a blind call to take part in the study including 108 in Wales. This provided sufficient impetus to undertake the study fully at national level in 2022. As the

number of responses in Wales are very small, however, minimal usage is made of these data in this report.

- **Third Sector Trends in England and Wales 2022** survey data: which includes 6,070 cases is used extensively to build a picture of sector dynamics, purpose and impact. The data analysis is limited by the size of the sample in Wales (443 responses) but this provides a good general set of indicators on sector dynamics, purpose and impact at a national level. The 2022 survey was conducted entirely in English.
- **Third Sector Trends in England and Wales 2025** survey data: was collected between June and September 2025 and produced 709 responses in Wales. From direct mailing via Online Surveys, 501 valid responses were collected. In addition 206 were collected with the help of WCVA and CVCs in local authority areas and Wales Community Foundation. The survey was available in English and Welsh; 41 survey responses (5.7%) were submitted in Welsh.⁴

360Giving

Data on the distribution of grant finance have been drawn from 360Giving. The evidence has been recategorised using ONS lookups to all relevant geographical distinctions. The data were compiled in December 2024 and January 2025 for the period 2019-2023 for England and Wales to provide comparative evidence for analytical purposes.

Other data sources

Other reports from WCVA, NHS Wales, NCVO UK Civil Society Almanac 2024⁵, UK and Welsh Government departments, academics, think tanks and local area studies are referred to and referenced within the report where appropriate.

1.5 Research methods and survey sample

Third Sector Trends was initiated in 2008 by *Northern Rock Foundation* in North East England and Cumbria as a longitudinal study to explore the structure and dynamics of the sector in the context of change. Surveys began in North East England and Cumbria in 2010.⁶ The field of study has widened to include Yorkshire & Humber in 2013, the remainder of North West England in 2016 and across England and Wales from 2019. There have been six iterations of the triennial survey.

In 2025, the survey was administered using *Online Surveys*⁷ between June and September. A total of 8,680 valid responses were received. Responses were obtained using direct email invitations from listings collated from the Charity Commission register (there were 7,163 returns representing a 5.4% response rate from a sample frame of 133,161 charities). These data were supplemented by 1,517

⁴ Full details are available in *Third Sector Trends in England and Wales: technical paper on research methodology and sample structure [third edition]*: <https://www.stchads.ac.uk/wp-content/uploads/2025/10/Technical-paper-on-research-methodology-and-sample-structure-third-edition-Third-Sector-Trends-in-England-and-Wales-025-.pdf>

⁵ Unfortunately NCVO postponed the publication of its UK Civil Society Almanac in 2025, so the report is reliant on data from the 2024 edition.

⁶ A separate report is available which details the research methodology employed in the Third Sector Trends surveys. This can be accessed here: [Technical paper on research methodologies, October 2022](#).

⁷ Online Surveys is a powerful platform specifically designed for use by academics by JISC. Details on the platform's specifications can be found here: <https://www.onlinesurveys.ac.uk/>

responses to appeals to participate by local infrastructure organisations and community foundations across England and Wales.⁸

The national sample is fully representative of sector organisations by size (as defined by income levels) and is distributed appropriately across areas of relative deprivation and affluence when compared with Third Sector Trends Combined Register data. The survey dataset has good coverage in Wales and all English regions each with at least 600 responses and apart from London, an average 5.6% response rate measured against the Charity Commission Register sample frame. A much lower response rate in London, as in 2022, stood at 2.8% but due to high organisational density, a credible sample of 713 was obtained.

The wide-ranging questionnaire asks respondents about beneficiaries served and what voluntary organisations feel that they have achieved. The survey also examines voluntary organisations' energy by focusing questions on its people resources, property assets and financial situation. Leadership is a core element of the study too; asking participants how voluntary organisations invest in their *own* wellbeing so that they can serve their beneficiaries more effectively. And finally, it asks about inter-organisational relationships which is the topic of this report.

The current series of Third Sector Trends reports relies almost exclusively upon quantitative data drawn from this and previous rounds of the survey. But the study does invite survey participants to tell us anything else they'd like us to know. Well over 2,000 respondents took that opportunity in 2025. Occasionally, quotations from these open-text statements are used to 'illustrate' points of interpretation but must not be confused with qualitative evidence.

Interpretative observations originate from quantitative analysis and previous in-depth qualitative studies from Third Sector Trends (and directly related projects) which are referenced accordingly. The most important of these studies ran from 2008 to 2022 with 50 voluntary organisations from the North East of England and Cumbria. The final report from that study, *[Going the distance, how third sector organisations work through turbulent times](#)*, has recently been revised and republished to accompany this series of quantitative reports.⁹

⁸ This is a fully representative national sample, as evidenced by comparison with combined register data (including the registers of the Charity Commission, Community Interest Companies, Register of Mutuals/Societies Register and Community Amateur Sport Clubs Register). A separate report which details research methodology, sample structure and characteristics is available here: [Archive of publications from Third Sector Trends - St Chad's College Durham](#).

⁹ The report is available here: [Archive of publications from Third Sector Trends - St Chad's College Durham](#).

Section 2

Demographic, economic and social profile of Wales

To make sense of how the voluntary sector contributes to the economy, environment and society in Wales, this section of the report provides a contextualising review of national data on demography, economy and society. Its purpose is to provide a basis for the interpretation of voluntary sector data in subsequent analytical sections.

2.1 Demographic profile

It is not possible to make sense of how effective the voluntary sector is in meeting the needs and desires of localities without understanding the context within which organisations are working. The first step in understanding context is to look at area demography.

Table 2.1 presents national data on the age structure of the population at national, local authority and sub-national regional levels. There are significant variations in population levels across regions in Wales. Mid Wales, for example, covers almost a third of the area of the country but its population of 207,500 people is relatively sparse.

Over two thirds of the population is located in the largely urban south of Wales, especially so in South East Wales with a population over 1.5 million people. The population of North Wales is about 690,000 but it is distributed unevenly due to the geography of the region. The population is more dense in the east of the region (in Flintshire and Wrexham) and along the northern coastline. Population density in Isle of Anglesey and Gwynedd is more sparsely distributed and focused mainly in small towns.

The age structure of regions varies considerably. Mid Wales has a much larger proportion of older people (27%) than all other regions. South West Wales has the smallest population of older people (19%). Within regions, there are substantial variations across local authorities. In North Wales, for example, over a quarter of the population is aged over 65 in Anglesey, Conwy and Denbighshire compared with just a fifth of the population in Wrexham and Flintshire.

Age structures can affect the way that the voluntary sector operates (often with higher proportions of volunteers in areas with older populations) and how its priorities are shaped (for example in areas such as youth work, health and social care, and so on). These factors will be explored later in the report.

Table 2.1 Population and age distribution in Wales

(Source: ONS Census 2021, Stats Wales, mid-year estimates 2023)

Local authority		Aged under 15 years (percent)	Aged 15 to 64 years (percent)	Aged 65 years and over (percent)	All persons (number)	Most recent population estimate May 2023
North Wales	Isle of Anglesey	16.1	57.5	26.4	68,900	69,291
	Gwynedd	15.3	61.2	23.3	117,200	119,173
	Conwy	15.0	57.8	27.4	114,900	114,410
	Denbighshire	16.5	58.9	24.8	96,000	97,156
	Flintshire	16.5	61.9	21.4	154,800	155,812
	Wrexham	17.2	62.5	20.2	135,000	136,149
Mid Wales	Powys	14.4	57.7	27.8	133,000	134,439
	Ceredigion	13.1	61.1	25.7	71,500	73,050
South West Wales	Pembrokeshire	15.7	57.9	26.1	123,100	125,006
	Carmarthenshire	16.2	59.7	24.2	187,900	190,083
	Swansea	16.0	63.5	20.5	238,500	246,742
	Neath Port Talbot	16.5	62.3	21.2	142,300	142,898
South East Wales	Bridgend	16.7	62.6	20.8	145,600	146,743
	Vale of Glamorgan	17.5	60.6	21.9	131,800	134,733
	Cardiff	17.1	68.4	14.5	362,400	383,536
	Rhondda Cynon Taf	17.2	63.1	19.6	237,500	241,178
	Merthyr Tydfil	18.0	63.1	18.9	58,800	58,593
	Caerphilly	17.3	62.6	20.2	176,100	176,437
	Blaenau Gwent	16.4	63.2	20.3	66,900	67,356
	Torfaen	17.3	62.0	20.7	92,300	93,419
	Monmouthshire	14.8	59.4	25.8	93,000	94,572
Newport	19.0	64.2	17.0	159,900	163,628	
Sub-regions of Wales	North Wales	16.2	60.4	23.5	686,800	691,991
	Mid Wales	14.0	58.9	27.1	204,500	207,489
	South West Wales	16.1	61.3	22.6	691,800	704,729
	South East Wales	17.2	63.8	18.9	1,524,300	1,560,195
Wales		16.5	62.2	21.3	3,107,400	3,164,404

The ethnic minority population in Wales is comparatively small compared with most English regions. London is the most diverse region with a white British population of just 37%, but there are large ethnic minority populations in several other regions, especially the West Midlands (28%). Wales and North East England have the smallest ethnic minority populations at just 9%.¹⁰

As Table 2.2 shows, South East Wales is the most ethnically diverse region of Wales. Within this area there is considerable variation. Cardiff (21%) and Newport (16%) are the most ethnically diverse local authority areas and Blaenau Gwent is the least. In South West Wales, the largest concentration of ethnic minority population is in Swansea (8%) and the lowest in Pembrokeshire (2%).

¹⁰ HM Government (2022) *Regional Ethnic Diversity*. <https://www.ethnicity-facts-figures.service.gov.uk/uk-population-by-ethnicity/national-and-regional-populations/regional-ethnic-diversity/latest/#:~:text=2021%20Census%20data%20for%20England%20and%20Wales%20shows,further%202.4%25%20with%20white%20ethnic%20minorities%20More%20items> (downloaded May 2025)

Similarly, in North Wales there is considerable variation, with the biggest ethnic minority population in Wrexham (4%) and the smallest in Isle of Anglesey (2%). In Mid Wales, the distribution varies from 2% in Powys to 4% in Ceredigion.

Table 2.2 Population diversity in Wales (Source: ONS Census Data 2021)						
	All Asian	All Black	All mixed	All white	Other	N=
Isle of Anglesey	0.6	0.2	0.9	98.1	0.2	68,879
Gwynedd	1.7	0.4	1.1	96.2	0.5	117,392
Conwy	1.4	0.2	1.1	96.9	0.3	114,743
Denbighshire	1.7	0.3	1.1	96.5	0.4	95,820
Flintshire	0.9	0.2	0.9	97.6	0.3	154,960
Wrexham	1.7	0.6	1.2	96.0	0.6	135,122
Powys	0.9	0.2	0.9	97.7	0.3	133,169
Ceredigion	1.5	0.5	1.2	96.2	0.5	71,473
Pembrokeshire	0.9	0.2	0.9	97.6	0.3	123,359
Carmarthenshire	1.2	0.2	0.9	97.2	0.4	187,898
Swansea	4.4	1.2	1.6	91.4	1.4	238,491
Neath Port Talbot	1.6	0.4	1.1	96.6	0.3	142,290
Bridgend	1.5	0.3	1.2	96.8	0.3	145,490
Vale of Glamorgan	2.1	0.5	2.3	94.6	0.5	131,939
Cardiff	9.7	3.8	4.0	79.2	3.3	362,310
Rhondda Cynon Taf	1.5	0.4	1.0	96.7	0.3	237,653
Merthyr Tydfil	1.5	0.2	0.9	97.1	0.4	58,839
Caerphilly	0.9	0.2	1.0	97.7	0.2	175,955
Blaenau Gwent	0.9	0.2	0.9	97.8	0.2	66,903
Torfaen	1.3	0.2	1.1	97.1	0.3	92,276
Monmouthshire	1.3	0.2	1.2	96.9	0.3	92,960
Newport	7.6	2.3	2.8	85.5	1.7	159,592
North Wales	1.4	0.3	1.1	96.8	0.4	686,916
Mid Wales	1.1	0.3	1.0	97.2	0.4	204,642
South West Wales	2.3	0.6	1.2	95.2	0.7	692,038
South East Wales	4.0	1.4	2.0	91.4	1.2	1,523,917
Wales	2.9	0.9	1.6	93.8	0.9	3,107,513

2.2 Social profile

To make sense of how the voluntary sector is oriented towards local preferences and needs, it is useful to look at variations across a range of social indicators. Table 2.3 focuses on aspects of personal wellbeing. These variations will not be discussed in detail here as they are provided for interpretative purpose later in the analysis when looking at the structure and purpose of the local voluntary sector in Wales. It is worth noting, however, that simplistic assertions about linkages between area demographics and personal wellbeing should be avoided. For example, experiences of loneliness are not concentrated in areas where there is an older population. The highest levels of loneliness are recorded in Torfaen.

Crucially, these data provide useful indications of social need such as inaccessibility to services and material deprivation which seem to be associated with local area satisfaction. Access to sporting activities has also been included in this personal

wellbeing table as it provides clues on the extent to which there is a physically active population. It is notable that there are higher levels of activity in North Wales and South West Wales.

Table 2.3 Social wellbeing indicators in Wales (Source: Stats Wales 2025)					
	Percentage of people living in households in material deprivation by local authority	Percentage of people satisfied with their ability to get to/ access the facilities and services they need	Well-being - Percentage of people who are lonely	Percentage of people satisfied with local area as a place to live	Sport - Percentage of people participating in sporting activities three or more times a week
Isle of Anglesey	13.7	77.4	8.2	92.3	34.4
Gwynedd	14.9	90.8	9.8	92.8	46.0
Conwy	10.1	87.5	9.2	93.3	34.6
Denbighshire	14.8	87.2	10.6	96.4	38.5
Flintshire	12.6	84.1	9.8	85.0	44.4
Wrexham	15.8	81.4	14.2	86.1	42.4
Powys	14.1	82.3	11.1	94.9	29.7
Ceredigion	18.4	86.2	14.1	92.7	39.0
Pembrokeshire	13.4	87.7	13.7	92.3	31.1
Carmarthenshire	16.7	85.2	17.0	90.3	41.6
Swansea	13.3	90.6	11.3	90.1	39.8
Neath Port Talbot	21.5	76.0	17.0	80.2	38.1
Bridgend	15.6	83.2	10.7	87.3	41.1
Vale of Glamorgan	15.7	86.7	11.0	91.2	44.0
Cardiff	14.9	92.0	12.2	90.4	50.2
Rhondda Cynon Taf	20.5	83.3	15.4	84.9	36.1
Merthyr Tydfil	18.2	85.7	14.6	87.4	34.0
Caerphilly	14.9	84.8	9.5	87.7	38.4
Blaenau Gwent	16.1	72.5	9.0	68.5	26.6
Torfaen	19.0	92.1	17.2	91.3	20.4
Monmouthshire	8.4	85.7	11.6	95.0	43.3
Newport	17.6	88.0	16.3	79.3	31.3
North Wales	13.7	84.7	10.3	91.0	40.0
Mid Wales	16.3	84.2	12.6	93.8	34.3
South West Wales	16.2	84.9	14.7	88.2	37.6
South East Wales	14.6	77.6	11.6	78.4	33.2
Wales	15.5	85.8	12.6	88.6	39.1

Table 2.4 presents data on 'civic wellbeing' and is concerned with issues such as levels of volunteering, political participation, social cohesion, cultural engagement and Welsh language speaking. Again, these data are presented for contextual interpretative purposes later in the report. It is clear, however, that the situation is complex as there are many 'inconsistencies' across Wales regions and local authority areas when looking at specific indicators.

The impression gleaned from the data presented in Tables 2.3 and 2.4 is one of great complexity. This means that generalised assertions about, for example, area deprivation and aspects of civic engagement and personal wellbeing need to be made with great care.

As illustrated in Table 2.5, when indicators are ranked by local authority level. Six local authority areas are colour-highlighted for each indicator – three with the lowest proportion of households suffering from material deprivation (Monmouthshire, Conwy and Flintshire) and three with the highest (Torfaen, Rhondda Cynon Taf and Neath Port Talbot). It is evident that clear patterns of clustering around issues such a deprivation are hard to discern. At best, it can be stated that areas with the highest levels of deprivation are more likely to position other indicators in the lower half of the grid, while the reverse is the case of the least deprived areas. But there are substantive variations which cannot be ignored.

Table 2.4 Civic wellbeing indicators in Wales (Source: Stats Wales 2025)					
	Percentage who feel able to influence decisions affecting their local areas	Percentage agreeing they belong to the area, people from different backgrounds get on well & treat each other with respect	Percentage of people who Volunteer	Percentage of people attending or participating in arts	Percentage of people who can speak Welsh
Isle of Anglesey	27.8	69.0	28.7	57.1	48.0
Gwynedd	37.0	73.2	33.3	68.0	64.0
Conwy	31.6	73.1	26.7	61.9	27.6
Denbighshire	36.7	68.6	26.3	63.0	20.9
Flintshire	22.2	63.0	30.1	76.0	12.4
Wrexham	28.3	59.3	29.3	66.8	16.7
Powys	23.1	70.6	42.1	74.9	13.8
Ceredigion	28.0	69.2	35.6	77.4	36.2
Pembrokeshire	28.4	77.6	36.4	76.7	13.8
Carmarthenshire	31.6	68.0	31.4	75.9	43.1
Swansea	33.4	59.3	29.5	74.3	11.2
Neath Port Talbot	27.5	64.2	30.0	70.4	12.8
Bridgend	30.9	67.3	24.4	68.4	12.9
Vale of Glamorgan	33.8	68.3	27.7	77.8	-
Cardiff	33.2	62.7	31.9	83.3	11.8
Rhondda Cynon Taf	25.8	63.0	24.7	64.2	14.3
Merthyr Tydfil	32.0	62.1	26.0	64.3	15.3
Caerphilly	26.3	62.2	22.5	71.3	10.2
Blaenau Gwent	19.4	38.9	22.3	60.5	-
Torfaen	31.8	54.5	28.0	74.1	-
Monmouthshire	32.6	67.7	39.2	78.8	9.6
Newport	28.0	57.8	27.8	69.5	-
North Wales	30.6	67.7	29.0	65.5	-
Mid Wales	25.5	69.9	38.8	76.1	-
South West Wales	30.2	67.3	31.8	74.3	-
South East Wales	26.7	54.9	24.9	64.7	-
Wales	29.7	64.5	29.7	72.1	18.0

Table 2.5 Personal wellbeing and civic engagement indicators ranked by local authority area

Percentage who feel able to influence decisions affecting their local areas (largest to smallest %)	Percentage of people agreeing that they belong to the area; that people from different backgrounds get on well together; and that people treat each other with respect (largest to smallest %)	Percentage of people attending or participating in arts (largest to smallest %)	Percentage of people living in households in material deprivation by local authority (least deprived to most deprived)	Percentage of people satisfied with their ability to get to/ access the facilities and services they need (highest to lowest %)	Percentage of people who are lonely (lowest to highest %)	Percentage of people participating in sporting activities three or more times a week (highest to lowest %)	Recreation - Percentage of people who Volunteer (largest to smallest %)
Gwynedd	Pembrokeshire	Cardiff	Monmouthshire	Torfaen	Isle of Anglesey	Cardiff	Powys
Denbighshire	Gwynedd	Monmouthshire	Conwy	Cardiff	Blaenau Gwent	Gwynedd	Monmouthshire
Vale of Glamorgan	Conwy	Vale of Glamorgan	Flintshire	Gwynedd	Conwy	Flintshire	Pembrokeshire
Swansea	Powys	Ceredigion	Swansea	Swansea	Caerphilly	Vale of Glamorgan	Ceredigion
Cardiff	Ceredigion	Pembrokeshire	Pembrokeshire	Newport	Gwynedd	Monmouthshire	Gwynedd
Monmouthshire	Isle of Anglesey	Flintshire	Isle of Anglesey	Pembrokeshire	Flintshire	Wrexham	Cardiff
Merthyr Tydfil	Denbighshire	Carmarthenshire	Powys	Conwy	Denbighshire	Carmarthenshire	Carmarthenshire
Torfaen	Vale of Glamorgan	Powys	Denbighshire	Denbighshire	Bridgend	Bridgend	Flintshire
Carmarthenshire	Carmarthenshire	Swansea	Gwynedd	Vale of Glamorgan	Vale of Glamorgan	Swansea	Neath Port Talbot
Conwy	Monmouthshire	Torfaen	Caerphilly	Ceredigion	Powys	Ceredigion	Swansea
Bridgend	Bridgend	Caerphilly	Cardiff	Merthyr Tydfil	Swansea	Denbighshire	Wrexham
Pembrokeshire	Neath Port Talbot	Neath Port Talbot	Bridgend	Monmouthshire	Monmouthshire	Caerphilly	Isle of Anglesey
Wrexham	Rhondda Cynon Taf	Newport	Vale of Glamorgan	Carmarthenshire	Cardiff	Neath Port Talbot	Torfaen
Ceredigion	Flintshire	Bridgend	Wrexham	Caerphilly	Pembrokeshire	Rhondda Cynon Taf	Newport
Newport	Cardiff	Gwynedd	Blaenau Gwent	Flintshire	Ceredigion	Conwy	Vale of Glamorgan
Isle of Anglesey	Caerphilly	Wrexham	Carmarthenshire	Rhondda Cynon Taf	Wrexham	Isle of Anglesey	Conwy
Neath Port Talbot	Merthyr Tydfil	Merthyr Tydfil	Newport	Bridgend	Merthyr Tydfil	Merthyr Tydfil	Denbighshire
Caerphilly	Swansea	Rhondda Cynon Taf	Merthyr Tydfil	Powys	Rhondda Cynon Taf	Newport	Merthyr Tydfil
Rhondda Cynon Taf	Wrexham	Denbighshire	Ceredigion	Wrexham	Newport	Pembrokeshire	Rhondda Cynon Taf
Powys	Newport	Conwy	Torfaen	Isle of Anglesey	Carmarthenshire	Powys	Bridgend
Flintshire	Torfaen	Blaenau Gwent	Rhondda Cynon Taf	Neath Port Talbot	Neath Port Talbot	Blaenau Gwent	Caerphilly
Blaenau Gwent	Blaenau Gwent	Isle of Anglesey	Neath Port Talbot	Blaenau Gwent	Torfaen	Torfaen	Blaenau Gwent

2.3 Health profile

Aspects of personal wellbeing and civic engagement are often associated with issues surrounding public health inequalities. Using public health data it is useful therefore to examine variations across regions and local authorities in Wales to assist with subsequent interpretation of voluntary sector purpose and impact. It is evident from the data presented in Table 2.6 that there are substantial variations in life expectancy and healthy life expectancy (HLE) across Wales. Amongst men, the highest HLE is in Monmouthshire (69.8 years) and the lowest in Merthyr Tydfil (61.1 years). For women, highest HLE is in Gwynedd (71.1 years), Isle of Anglesey (70.9) and Monmouthshire (70.7 years), but lowest in Neath Port Talbot (62.4 years) and Rhondda Cynon Taf (62.9 years).

	Males			Females		
	Life expectancy	Healthy life expectancy	Percentage of life expectancy in good health	Life expectancy	Healthy life expectancy	Percentage of life expectancy in good health
Isle of Anglesey	78.6	67.7	86.2	82.9	70.9	85.6
Gwynedd	79.3	68.2	85.9	83.5	71.1	85.2
Conwy	78.9	67.3	85.3	82.6	69.1	83.6
Denbighshire	78.1	67.5	86.5	81.4	67.7	83.2
Flintshire	79.0	67.7	85.8	82.4	68.9	83.5
Wrexham	78.3	66.8	85.3	81.8	67.8	82.9
Powys	80.2	68.2	85.0	83.6	68.7	82.2
Ceredigion	80.1	67.9	84.7	83.9	69.7	83.1
Pembrokeshire	79.5	66.9	84.1	82.9	69.0	83.3
Carmarthenshire	78.6	65.0	82.7	82.6	66.0	79.9
Swansea	77.8	65.5	84.2	82.4	66.8	81.1
Neath Port Talbot	77.0	61.9	80.4	81.2	62.4	76.9
Bridgend	77.0	63.4	82.4	81.2	64.3	79.2
Vale of Glamorgan	79.6	66.6	83.8	83.4	68.7	82.4
Cardiff	78.2	65.3	83.6	82.7	67.1	81.1
Rhondda Cynon Taf	76.5	61.2	80.0	80.9	62.9	77.8
Merthyr Tydfil	77.1	61.1	79.2	80.9	61.5	76.0
Caerphilly	77.7	61.5	79.2	81.4	63.7	78.2
Blaenau Gwent	76.0	59.6	78.5	80.2	59.3	74.0
Torfaen	77.9	63.1	81.0	82.0	64.4	78.5
Monmouthshire	80.5	69.8	86.7	84.1	70.7	84.1
Newport	78.0	65.4	83.9	82.3	67.2	81.6
North Wales	78.8	67.7	85.9	82.5	69.5	84.2
Mid Wales	79.2	67.3	85.0	82.8	68.8	83.0
South West Wales	78.2	64.8	82.8	82.2	66.1	80.3
South East Wales	78.1	64.1	82.1	82.1	65.3	79.6
Wales	78.3	65.3	83.3	82.3	66.7	81.1

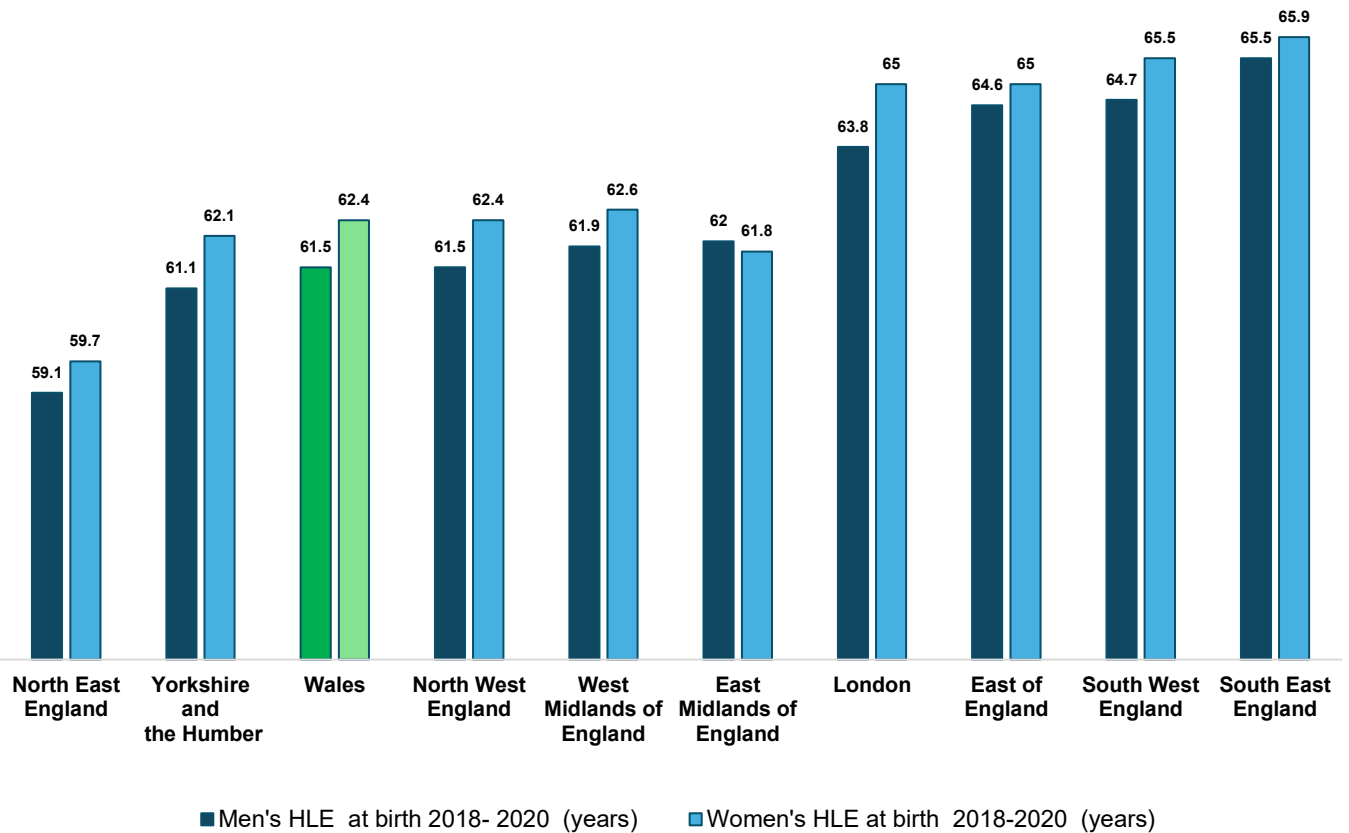
When HLE data is configured with levels of material deprivation in rank order, it is evident that there is an imperfect but nevertheless close association between these two factors (see Table 2.7).

There are exceptions. In Caerphilly, for example, levels of HLE are particularly low for women and men while there is only a middling score for material deprivation in the area. This is indicative of variations within local authority areas where there can be substantive differences in localised areas of wealth and deprivation.

	Percentage of people living in households in material deprivation by local authority (in rank order from most deprived to least deprived)	Men's healthy life expectancy	Women's healthy life expectancy
Neath Port Talbot	21.5	61.9	62.4
Rhondda Cynon Taf	20.5	61.2	62.9
Torfaen	19.0	63.1	64.4
Ceredigion	18.4	67.9	69.7
Merthyr Tydfil	18.2	61.1	61.5
Newport	17.6	65.4	67.2
Carmarthenshire	16.7	65.0	66.0
Blaenau Gwent	16.1	59.6	59.3
Wrexham	15.8	66.8	67.8
Vale of Glamorgan	15.7	66.6	68.7
Bridgend	15.6	63.4	64.3
Gwynedd	14.9	68.2	71.1
Cardiff	14.9	65.3	67.1
Caerphilly	14.9	61.5	63.7
Denbighshire	14.8	67.5	67.7
Powys	14.1	68.2	68.7
Isle of Anglesey	13.7	67.7	70.9
Pembrokeshire	13.4	66.9	69.0
Swansea	13.3	65.5	66.8
Flintshire	12.6	67.7	68.9
Conwy	10.1	67.3	69.1
Monmouthshire	8.4	69.8	70.7

From a comparative perspective with English regions it is shown that North West England and Yorkshire and Humber are Wales' closest statistical neighbours in this domain (see Figure 2.1).

Figure 2.1 **Healthy life expectancy in Wales and English regions**
(Source: Census 2021)



2.4 Labour market, skills and occupational profile

When exploring the structure, size and people energy the voluntary sector has at its disposal in Wales, it is useful to look at local labour market conditions to reach a more finely tuned contextual understanding of local conditions. This sub-section briefly addresses the issue by looking at qualifications, employment rates, size of the working population, average levels of local pay and occupational status distribution.

Table 2.8 shows educational performance levels across Wales as indicated by levels of qualifications achieved. Variations in educational performance often reflect a wide range of contextual factors, such as local employment opportunity structures, cultural or social-class based associations with educational achievement. While these factors are too complex to analysis in depth here, it is clear that anomalies abound. To clarify the situation, Table 2.9 compares area levels of deprivation with highest and lowest levels of achievement in rank order.

Table 2.8 Levels of educational performance in regions and local authority areas of Wales
(Source: Nomis, May 2025)

	No qualific- ations	Qualified to level 1	Qualified to level 2	Qualified to level 3	Qualified to levels 4-6	Qualified to levels 7-8
Isle of Anglesey	3.2	6.4	24.1	24.1	31.4	10.8
Gwynedd	3.3	4.0	19.9	25.4	33.6	13.9
Conwy	13.3	2.6	19.6	20.4	33.0	11.1
Denbighshire	13.2	6.3	19.7	22.5	32.5	5.7
Flintshire	8.4	7.6	19.4	23.5	30.9	10.3
Wrexham	6.3	7.1	25.1	14.3	35.8	11.5
Powys	3.4	4.0	20.7	27.7	30.4	13.9
Ceredigion	6.1	2.2	21.2	22.6	30.1	17.8
Pembrokeshire	10.5	3.3	19.7	25.5	30.3	10.6
Carmarthenshire	5.3	5.3	16.6	26.5	33.6	12.7
Swansea	7.6	3.2	17.2	21.7	37.0	13.4
Neath Port Talbot	9.9	5.0	22.1	25.4	25.8	11.7
Bridgend	7.3	5.7	22.8	22.5	29.5	12.2
The Vale of Glamorgan	2.5	3.8	16.1	22.9	39.4	15.3
Cardiff	9.7	2.7	13.9	20.1	36.6	17.0
Rhondda Cynon Taf	7.7	6.6	27.7	23.2	26.4	8.4
Merthyr Tydfil	14.1	8.5	26.1	19.9	22.7	8.8
Caerphilly	7.0	5.2	21.2	20.8	35.1	10.8
Blaenau Gwent	16.6	5.3	23.4	21.2	24.5	9.0
Torfaen	8.6	4.7	24.7	27.2	28.8	6.0
Monmouthshire	3.0	2.4	14.3	19.7	40.6	20.0
Newport	9.2	5.9	19.8	19.1	29.9	16.1
North Wales	8.0	5.7	21.2	21.3	33.0	10.8
Mid Wales	4.5	3.2	20.9	25.7	30.2	15.4
South West Wales	8.0	4.1	18.5	24.4	32.6	12.4
South East Wales	8.3	4.7	20.1	21.4	32.4	13.1
Wales	7.9	4.7	20.0	22.3	32.4	12.6

Table 2.9 Relationship between material deprivation (in rank order) and educational qualifications (Source: Stats Wales, Nomis, May 2025)				
	Percentage of people living in households in material deprivation (from least to most affluent)	No qualifications or level 1 only	Qualified to level 2	Qualifications of Level 3 or above
Neath Port Talbot	21.5	14.9	22.1	62.9
Rhondda Cynon Taf	20.5	14.3	27.7	58.0
Torfaen	19.0	13.3	24.7	62.0
Ceredigion	18.4	8.3	21.2	70.5
Merthyr Tydfil	18.2	22.6	26.1	51.4
Newport	17.6	15.1	19.8	65.1
Carmarthenshire	16.7	10.6	16.6	72.8
Mid Wales	16.3	7.7	20.9	71.3
South West Wales	16.2	12.1	18.5	69.4
Blaenau Gwent	16.1	21.9	23.4	54.7
Wrexham	15.8	13.4	25.1	61.6
Vale of Glamorgan	15.7	6.3	16.1	77.6
Bridgend	15.6	13.0	22.8	64.2
Wales	15.5	12.6	20.0	67.3
Gwynedd	14.9	7.3	19.9	72.9
Cardiff	14.9	12.4	13.9	73.7
Caerphilly	14.9	12.2	21.2	66.7
Denbighshire	14.8	19.5	19.7	60.7
South East Wales	14.6	13.0	20.1	66.9
Powys	14.1	7.4	20.7	72.0
Isle of Anglesey	13.7	9.6	24.1	66.3
North Wales	13.7	13.7	21.2	65.1
Pembrokeshire	13.4	13.8	19.7	66.4
Swansea	13.3	10.8	17.2	72.1
Flintshire	12.6	16.0	19.4	64.7
Conwy	10.1	15.9	19.6	64.5
Monmouthshire	8.4	5.4	14.3	80.3

Table 2.10 shows variations in employment rate. These levels vary due to a range of localised factors which cannot be explored here, but it is clear that there are broad similarities across areas. There are exceptions: employment rates in Bridgend (65%) and Rhondda Cynon Taf (66%) are significantly lower than in other areas and are at their highest in Flintshire (80%) and Wrexham (79%).

The working population and business population will be referred to later in the analysis when comparing with the size of the voluntary sector in Wales. Gross weekly earnings vary substantially across sub-regions. Mid Wales has the lowest average weekly wage levels (£587) and South East Wales the highest (£646).

There is considerable variation within regions. In North Wales, for instance, the lowest wage area is Gwynedd (£587) whilst the highest is Isle of Anglesey (£668). Newport has the highest weekly wage levels (£713) while Caerphilly has the lowest (£542).

	Employment Rate	Working population 2024 (excluding students)	Business population 2023	Gross weekly earnings
Isle of Anglesey	73.6	35,600	7,045	668.3
Gwynedd	71.9	64,300	12,885	586.5
Conwy	75.2	62,300	11,490	594.0
Denbighshire	71.5	50,300	7,865	597.6
Flintshire	79.7	89,100	11,240	649.7
Wrexham	79.3	81,700	11,485	630.7
Powys	73.2	64,300	9,455	594.3
Ceredigion	71.5	40,600	18,210	574.3
Pembrokeshire	71.5	64,500	15,230	640.7
Carmarthenshire	72.1	99,700	15,215	655.5
Swansea	71.0	134,400	18,210	619.8
Neath Port Talbot	73.1	82,200	7,585	671.1
Bridgend	65.3	83,700	9,430	611.3
Vale of Glamorgan	76.6	68,700	9,410	553.7
Cardiff	75.5	222,400	33,575	676.4
Rhondda Cynon Taf	65.6	135,200	13,210	653.2
Merthyr Tydfil	73.3	35,600	3,385	613.8
Caerphilly	76.8	105,400	10,135	541.6
Blaenau Gwent	70.3	40,600	3,125	648.2
Torfaen	75.6	54,000	6,815	600.9
Monmouthshire	76.2	50,300	7,835	659.1
Newport	72.5	87,100	10,975	713.7
North Wales	75.8	383,300	62,010	622.0
Mid Wales	72.5	104,900	27,665	586.6
South West Wales	71.8	380,800	56,240	641.0
South East Wales	72.7	883,000	107,895	646.0
Wales	73.2	1,752,000	253,810	633.7

Sufficiently detailed occupational status data are not readily available for regions and local authority areas in Wales. However, it is useful to look at Wales' occupational structure in comparison with English regions for contextual purposes. As Table 2.11 shows, Wales' closest statistical neighbour is North East England where the occupational structure is strikingly similar. In Wales, the proportion of the working population in professional and managerial jobs is much lower than in the most affluent regions of England (East of England, South East England and London).

¹¹ Survey data are available from the Wales Employer Skills Survey but response rates are too low to reliably report at local authority or regional level. See: <https://www.gov.wales/employer-skills-survey-2022-wales-report> Sources of data on employment include: <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/employmentinlocalauthoritiesenglandandwales/census2021>; [Employment in local authorities, England and Wales - Office for National Statistics](https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/employmentinlocalauthoritiesenglandandwales/census2021). Data on business population are taken from the following sources: [Size Analysis of Active Businesses in Wales, 2022](https://www.gov.wales/sites/default/files/statistics-and-research/2023-06/size-analysis-businesses-2022-655.pdf) <https://www.gov.wales/sites/default/files/statistics-and-research/2023-06/size-analysis-businesses-2022-655.pdf>

Table 2.11 Occupational profiles in Wales and English Regions (Source: Nomis, October 2024)									
	Managers, directors and senior officials	Professional occupations	Associate professional occupations	Administrative & secretarial	Skilled trades occupations	Caring, leisure and other service occupations	Sales and customer service occupations	Process plant & machine operatives	Elementary occupations
Wales	9.1	23.4	14.9	9.8	9.2	9.8	7.2	6.6	9.9
North East England	8.2	23.7	14.6	9.9	8.8	10.4	8.0	6.4	10.0
North West England	9.5	25.2	15.5	10.1	8.2	8.8	7.2	5.6	9.8
Yorkshire and Humber	9.8	24.5	13.6	9.2	10.5	8.6	6.8	7.1	9.9
East Midlands of England	10.4	22.7	14.0	9.8	9.8	9.1	6.6	8.1	9.6
West Midlands of England	9.8	24.7	14.3	9.7	9.3	8.3	5.8	6.5	11.6
East of England	12.3	25.8	15.9	10.8	8.9	7.5	6.6	5.4	6.9
London	13.3	33.0	16.9	8.7	5.8	7.3	5.3	2.9	7.0
South East England	13.5	28.3	15.8	8.9	8.8	7.8	5.2	4.3	7.4
South West England	10.6	26.1	14.8	8.3	10.5	8.4	6.2	5.4	9.5
United Kingdom	10.9	26.6	15.2	9.5	8.8	8.4	6.3	5.4	8.9

2.5 Industrial sector classifications

Finally, to determine the make up of the labour market in Wales, it is useful to look at the industrial composition of Wales. There is no Standard Industrial Classification (SIC) code for voluntary sector activity – instead, voluntary organisations are distributed through other categories.

Reflecting variations in the occupational structure as shown above, there is a concentration in some industrial sectors (such as primary industries and production/manufacturing, tourism and public administration) but lower levels of employment in higher skills/paid areas of work such as finance, professional services, information and communication industries).

Voluntary sector employment tends to fall primarily within education, social service, health and other service activities.

Table 2.12 Industrial composition of Wales by region and the UK (Source NOMIS, October 2024)

	West Wales and the Valleys	East Wales	Wales	UK	Difference between Wales and UK
Agriculture, forestry and fishing	3.6	2.5	3.1	1.2	1.9
Production	11.5	11.4	11.5	8.6	2.9
Mining and quarrying	0.2	0.1	0.2	0.2	-0.0
Manufacturing	10.1	9.6	9.8	7.4	2.4
Electricity, gas, steam and air conditioning supply	0.3	1.0	0.6	0.4	0.2
Water supply; sewerage, waste, remediation	0.9	0.8	0.9	0.6	0.3
Construction	7.3	6.0	6.7	7.0	-0.2
Wholesale, retail, transport, hotels and food	27.1	24.2	25.8	25.9	-0.1
Wholesale and retail trade; vehicle repair	14.3	13.4	13.9	13.8	0.1
Transportation and storage	3.1	3.4	3.3	5.1	-1.8
Accommodation and food service activities	9.6	7.3	8.6	7.0	1.7
Information and communication	2.0	2.8	2.4	4.3	-2.0
Finance and insurance activities	1.6	3.7	2.5	3.2	-0.7
Real estate activities	1.3	1.4	1.4	1.7	-0.4
Professional, scientific, technical & admin.	10.1	14.8	12.1	18.0	-5.9
Professional, scientific and technical activities	4.3	7.5	5.7	9.4	-3.7
Administrative and support service activities	5.8	7.3	6.5	8.7	-2.2
Public admin., defence, education and health	30.5	28.1	29.5	24.2	5.2
Public admin, defence, statutory social security	6.8	6.3	6.6	3.8	2.7
Education	8.9	8.2	8.6	8.3	0.3
Human health and social work activities	14.8	13.6	14.3	12.1	2.2
Other service activities	5.0	5.1	5.0	5.9	-0.8
Arts, entertainment and recreation	2.6	2.7	2.6	3.0	-0.3
Other industries	2.4	2.3	2.4	2.9	-0.5
All industries employment	814,300	629,800	1,444,100	33,515,600	

2.6 Summary of key findings

This brief statistical overview of economy and society in Wales shows that this is a nation of contrasts. These variations needed to be understood to aid interpretation of data on the structure, dynamics, energy, purpose and impact of voluntary organisations in Wales. The key findings can be summed up as follows.

- **Demography:** Wales has a complex social structure in demographic terms. For example, some rural areas have an ageing resident population, while major urban areas are more likely to have a more youthful and ethnically diverse populace (Table 2.1 on age, Table 2.2 on diversity).
- **Personal health and wellbeing:** in Wales there are significant variations in public health by area. In Blaenau Gwent, for example, males have a healthy life expectancy of just 60 years compared with 70 years in Monmouthshire (Table 2.6). There are dramatic variations in *life expectancy* across Wales. In Blaenau Gwent, male life expectancy is 76 years compared with 81 years in Monmouthshire, for women it is 80 years and 84 years (Table 2.6).
- **Access to services:** it is crucial that people can access essential services, but in Wales there are wide variations. Poor levels of access to services can be due to local deprivation. In other cases it is associated with spatial inaccessibility – especially so in remote rural areas. But it is a mixed picture – in some deprived or rural areas levels of access to services are strong, while in others they are weak (Table 2.3).
- **Social and civic engagement:** local social and economic conditions can have an impact on civic participation. In Powys, 42% of the population regularly volunteer compare with just 23% in Caerphilly (Table 2.4). *Trust and belonging*, similarly, can be undermined when there are low levels of personal wellbeing. In Blaenau Gwent, one of the poorest areas in Wales, 39% of the population feel a strong sense of trust and belonging compared with 78% in Pembrokeshire which is one of the richest (Table 2.4).
- **Financial insecurity:** many areas of Wales are wealthy but many others are quite poor. In Neath Port Talbot, for example, 22% of households are living in poverty compared with just 10% in Conwy (Table 2.7).

High levels of social deprivation which blight some areas in Wales has a substantive impact on people's opportunities in a variety of ways.

- **Life chances:** people's economic wellbeing through adult life is shaped by opportunity structures and those with few qualifications can struggle to achieve their potential. In Blaenau Gwent, 17% of the working age population have no qualifications compared with just 3% in Gwynedd (Table 2.8).
- **Social mobility:** higher levels of qualifications open doors to better paid, interesting and secure work. In Monmouthshire, 61% of the working age population have Level 4+ qualifications compared with 32% in Merthyr Tydfil (Table 2.8).
- **Employment rates:** there are dramatic differences in the percentages of the local population economically engaged ranging from 65% in Bridgend to 80% in Flintshire (Table 2.10).
- **Higher status employment opportunities:** in Wales, the percentage of professional and higher managerial jobs is 33% compared with 46% in London (Figure 2.2). In Wales there are lower concentrations of those industrial sectors which provide higher levels of pay and prospects such as professional and scientific occupations (Table 2.11). Given these variations, it

is not surprising that many people from Wales migrate to other areas to work.¹²

As this section has shown, to prepare the ground for the analysis in the next section on the structure of the voluntary sector, Wales is characterised by its social complexity – not its uniformity – and the likelihood is that the structure and purpose of the voluntary sector will reflect that complexity.

¹² See, for example, Swinney, P. and Williams, M. (2016) *The Great British Brain Drain*, London: Centre for Cities: <https://www.centreforcities.org/reader/great-british-brain-drain/nature-migration-within-england-wales/> For more recent raw data, see: Office for National Statistics: (2024) Migration within the UK: Movement of people within the UK, between local authorities and regions in England and Wales and to or from Scotland and Northern Ireland. <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/migrationwithintheuk>

Section 3

Voluntary sector structural profile

This section presents data on sector structure by size of organisations, legal form, organisational longevity, spatial range of operation and distribution by areas of affluence and deprivation. These findings underpin subsequent analysis of sector dynamic and impact.

The analysis only covers formally registered organisations as data from other sources on unregistered societies, organisations or groups is generally incomplete (an explanatory note can be found below – see end of Section 3.1)¹³

3.1 Size of organisations

Statistics on how the registered voluntary sector is structured according to organisations size are drawn from Charity Commission Register (CCR) data. These data are collated into discrete bands. As shown in Table 3.1, the distribution of organisations in Wales differs from England in significant ways.

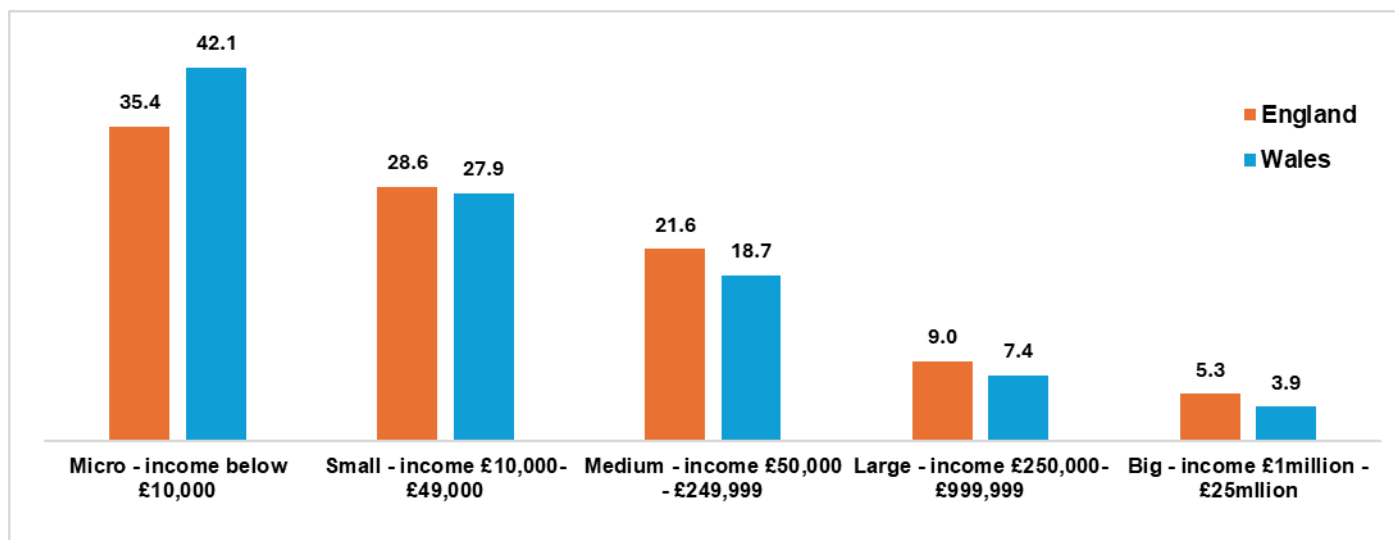
There are proportionally more micro organisations in Wales than in England, but fewer larger organisations and big organisations. On the surface, these differences appear to be quite small – but their significance is considerable when making estimates on sector income, volunteering and employment.

Table 3.1 Comparison of voluntary sector structure in England and Wales (Source, Charity Commission Register May 2025)					
Organisation types	Income bands	Wales	England	England and Wales	Difference:
Micro informal organisations	Under £2,000	17.4	14.1	14.2	3.4
	£2,001-£5,000	12.0	9.9	10.0	2.1
	£5,001-£10,000	12.5	11.4	11.4	1.1
Small semi-formal organisations	£10,001-£25,000	17.2	17.9	17.9	-0.6
	£25,001-£50,000	10.6	10.6	10.6	-0.1
Medium semi-formal organisations	£50,001-£100,000	10.0	10.0	10.0	0.0
	£100,001-£250,000	8.6	11.5	11.4	-2.9
Large formal organisations	£250,001-£500,000	4.6	5.5	5.5	-0.9
	£500,001-£1,000,000	2.8	3.4	3.4	-0.7
Big hierarchical formal organisations	£1,000,001-£5,000,000	3.0	3.9	3.8	-0.9
	£5,000,001-£25,000,000	0.9	1.4	1.4	-0.6
Major complex orgs.	£25,000,001 plus	0.3	0.4	0.4	-0.1
	Total	6,918	131,734	138,644	

¹³ *Third Sector Support Wales* (TSSW) [<https://thirdsectorsupport.wales/>] is a network of organisations working across Wales which collates data on both registered and unincorporated, informal or 'grass roots' voluntary organisations and groups. Information is made available and is fully searchable on the TSSW Knowledge Hub and is accessible using *infoengine*. As inclusion in the database is largely voluntary, it is currently incomplete and not suitable for the statistical analysis implemented in this report. For further detail see: <https://en.infoengine.cymru/how-to-searching-registering>.

Using a 12 category scale is unwieldy for general analysis so Third Sector Trends adopts a five category scale (which excludes very large organisations with income of £25million or more as these are unlikely to constitute 'local' organisations). Figure 3.1 presents comparative data for England and Wales on sector structure to visually illustrate substantive variations which will affect subsequent analysis on sector employment and volunteering.

Figure 3.1 **Variations in voluntary sector structure in England and Wales**
(Source: Charity Commission Register May 2025, England=131,255, Wales=6,890)



The Third Sector Trends study does not use the same size categories as the Charity Commission or NCVO in its analysis. This is because the study has a strong focus on the local voluntary sector where a majority of organisations are small. If these smaller organisations are not disaggregated into meaningful discrete categories, it is not possible fully to understand how the sector is structured, how it works and how it achieves its objectives.

The use of these categories does not imply that they are completely separate and distinctive, but they are useful when making comparisons about organisational structure, functions, policy and practice preferences which inform analysis, interpretation, conclusions and recommendations.¹⁴

- **Micro voluntary organisations** (with income below £10,000) and **small voluntary organisations** (with income between £10,000 and £50,000) rarely employ staff and therefore operate quite informally in terms of their policies and practices – they mainly operate at a local level, but not exclusively so. They are usually heavily or completely reliant on voluntarily given time to sustain their activity. Being small does not mean that these organisations lack complexity in terms of interpersonal relationships – this is due to the voluntaristic nature of participation in activity which requires the development of a negotiated order to define and tackle priorities.
- **Medium-sized voluntary organisations** (with income between £50,000 and £250,000) adopt semi-formal practices. They tend to employ people but there is little scope for a complex division of labour or occupational specialisation. Often, they are the 'embodiment' of their leaders' interest in cultural and value terms – but not always – some adopt more inclusive cooperative approaches. This can make personal interrelationships complex.

¹⁴ While Third Sector Trends analysis uses five categories of organisations, voluntary organisations are also distributed into 12 income categories in the registered charities dataset and in the survey datasets. Only rarely, however, are these more finely tuned categories employed when finer tuned analysis is required.

While they are ambitious to achieve a great deal, they rely mainly on grants to keep going and most have limited or no interest in delivering public sector contracts.

- **Larger voluntary organisations** (which have income between £250,000 and £1million) are more formal in their structures and culture because their scale allows for specialisation and a more complex division of labour. There are formally embedded hierarchical aspects to organisational structure and some procedural practices are necessarily adopted. But they are not impersonal bodies in practice because of their small scale and limited number of employees and volunteers. These voluntary organisations rely on a mixed finance diet where grants and self-generated trading tend to be amongst the most important income sources.
- **Big voluntary organisations** (which have income between £1million - £25million). Due to scale they adopt more formalistic inter-personal relationships between strata of employees and social distance becomes more pronounced and separates domains of decision making and practice delivery – whilst not losing elements of organic change from across the formal hierarchy. Financially, these organisations rely on mixed sources: particularly grants, self-generated income and public contracts. They devote significant time to strategic planning and position themselves beneficially through effective public relations and networking.
- **Major or super-major voluntary organisations** (which have income above £25million) are not included in the study because they are more likely to work nationally or internationally and resemble large businesses or smaller public sector bodies in organisational terms. Many rely heavily on public sector contracts, grants and trading. Very large organisations often depend upon self-generated fundraising. Consequently, they seek to develop a recognisable presence or ‘brand’ in the public domain. Such organisations tend to be effective at influencing policy stakeholders and/or formal engagement in visible campaigning.

The above analysis draws exclusively on CCR data. Other registers of voluntary organisations do not provide detail on income and expenditure. However, the CCR categories are likely broadly to reflect distribution of other legal forms and it is possible to scale up these legal forms to build up a picture for the whole of Wales based on individual local authority areas. The approach is, however, imperfect and can produce statistical oddities about levels of employment if simplistic assumptions are made about the density of larger organisations (i.e. inflate numbers of employees to unrealistic levels).¹⁵

When considering the voluntary sector spatially at the local level, local authorities are used as the lowest level of analysis. It is clear from Table 3.2 that there are substantive variations in sector structure from place to place. The bulk of voluntary sector employment is provided by larger organisations and the biggest organisations. As can be seen from the table, the heaviest numerical concentrations of large and big organisations are in major urban areas centred on Cardiff and Swansea. In predominantly rural areas such as Powys, there tend to be very few large or big organisations. While the biggest voluntary organisations are based in major urban areas, this does not mean that they do not work across wider areas.

¹⁵ Using ONS postcode lookups, all organisations (irrespective of legal form) can be mapped by local authority area. The likelihood is that most CASCs and CICs are relatively small and there are few larger voluntary organisations of this legal form. This needs, therefore, to be built into the statistical model used to calculate the number of volunteers, employing organisations and employers for the whole sector. Registered societies are more likely to reflect Charity Commission Register statistics as some of the legal forms (such as CCBSs – or former Industrial and Provident Societies, Credit Unions and Friendly Societies) tend to have larger organisations, while Societies are usually (but by no means always) quite small. Adjustment of the multipliers to produce credible estimates is necessary but relies on an element of intuition which is informed, as far as possible, with other available evidence.

Table 3.2 Structure of the local voluntary sector (Source: Charity Commission Register, May 2025, excludes registered societies, CASCs and CICs)

	Micro - income below £10,000	Small - income £10,000- £49,999	Medium - income £50,000 - £249,999	Large - income £250,000- £999,999	Big - income £1million - £25million	Total voluntary organisations
Isle of Anglesey	44.3	33.8	16.4	3.5	2.0	201
Gwynedd	50.4	24.7	16.1	5.2	3.6	502
Conwy	37.5	31.1	23.0	6.0	2.5	283
Denbighshire	45.4	25.3	19.3	7.4	2.6	269
Flintshire	37.3	32.2	20.3	6.2	4.0	276
Wrexham	42.8	22.3	25.5	7.6	1.8	278
Powys	50.7	25.6	15.6	6.1	1.9	718
Ceredigion	49.6	21.6	17.2	7.1	4.5	268
Pembrokeshire	42.1	32.8	16.5	6.9	1.6	375
Carmarthenshire	52.2	23.7	15.3	5.3	3.5	548
Swansea	34.4	29.0	23.7	7.3	5.6	372
Neath Port Talbot	44.5	25.7	18.3	8.3	3.2	218
Bridgend	38.0	33.3	18.8	7.0	2.8	213
Vale of Glamorgan	42.6	31.9	15.9	8.1	1.5	270
Cardiff	26.5	26.8	23.4	13.5	9.8	721
Rhondda Cynon Taf	37.2	29.4	17.7	10.5	5.2	344
Merthyr Tydfill	34.9	24.1	19.3	10.8	10.8	83
Caerphilly	41.6	31.4	21.7	4.4	0.9	226
Blaenau Gwent	52.0	29.3	12.0	4.0	2.7	75
Torfaen	38.0	23.3	23.3	11.6	3.9	129
Monmouthshire	46.5	36.5	11.3	4.8	1.0	310
Newport	35.5	28.0	22.3	7.1	7.1	211
North Wales	43.8	27.6	19.8	6.0	2.9	1,809
Mid Wales	50.4	24.5	16.0	6.4	2.6	986
South West Wales	44.2	27.6	18.1	6.6	3.5	1,513
South East Wales	36.6	29.7	19.3	9.2	5.2	2,582
Wales	42.1	27.9	18.7	7.4	3.9	6,890
England and Wales	35.5	28.6	21.5	9.0	5.3	139,592

Unregistered organisations

It is not known for certain how many organisations and groups sit 'below the radar' of registers in England and Wales. Many local infrastructure organisations (such as County Voluntary Councils) hold listings of local members or associates which enumerate many more groups than can be identified on registers. Academic study on the characteristics, purpose and social value produced by such societies, organisations or groups has been undertaken,¹⁶ but firm empirical evidence to affirm how many informal organisations exist and where they tend to be concentrated remains patchy.

Third Sector Trends commissioned the most detailed study to date to estimate the proportion of voluntary organisations which operated below the radar in 46 local authorities in Cumbria, Yorkshire and Humber and North East England. From this work it was determined that there was an average of 3.66 below the radar groups per 1,000 population.¹⁷ This equates to 1.29 below the radar groups for every registered organisation.¹⁸

More recent research for Local Trust by NCVO and 360Giving has drawn a distinction between more structured unregistered organisations (which are in a position, for example, to apply for grants) and less formal groups. The evidence suggests that a proportion of unregistered groups could be considered as sufficiently similar to many small charities and CIOs that they could be included in 'formal' sector estimates. Local Trust estimate that there are between 200,000 - 300,000 below the radar groups. Around 13,000 of which received grants between 2016-19.¹⁹

Such estimates are plausible, but their use remains contentious as it is not known whether their activities are comparable with those of registered organisations. During the Covid-19 pandemic, however, there were indications that mutual aid groups had been effective in tackling a wide range of issues such as social isolation and homelessness. Mutual aid groups have been defined as:

A mutual aid group is a volunteer led initiative where groups of people in a particular area join together to support one another, meeting vital community needs without relying on official bodies. They do so in a way that prioritises those who are most vulnerable or otherwise unable to access help through regular channels.²⁰

It has been estimated that there are around 4,300 mutual aid groups in the UK which marshal the efforts of up to 3 million volunteers who provide support for local

¹⁶ See, for example, McCabe, A. and Phillimore, J. (2009) Exploring below the radar: issues of theme and focus, Birmingham, *Third Sector Research Centre Working Paper no. 8*: <https://www.birmingham.ac.uk/Documents/college-social-sciences/social-policy/tsrc/working-papers/working-paper-8.pdf>. A second collection of observations related to this study was published with critical commentary on what defined such informal groups. Qualitative analysis had much to say about the experience, purpose and potential social benefit produced by such groups but avoided speculation on their number. See: McCabe, A. (2018) Ten years below the radar: reflections on voluntary and community action 2008-2018, Birmingham, *Third Sector Research Centre Working Paper no. 143*. <https://www.birmingham.ac.uk/Documents/college-social-sciences/social-policy/tsrc/working-papers/10-years-below-the-radar-final.pdf>

¹⁷ Mohan, J., Kane, D., Wilding, K., Branson, J. and Owles, F. (2010) *Beyond 'flat earth' maps of the Third Sector*, Newcastle-upon-Tyne: Northern Rock Foundation: <https://www.communityfoundation.org.uk/wordpress/wp-content/uploads/2017/09/NRF-TST-Report-Beyond-Flat-Earth.pdf>. The summation of area statistics was undertaken using all three Third Sector Trends Mapping reports for Cumbria, Yorkshire and Humber and North East England which listed 23,526 registered organisations in an area with a population of 8.3m people.

¹⁸ In Third Sector Trends surveys, all organisations and groups are welcome to join the study by invitation from the researchers (using registered listings), funding bodies (such as trusts and foundations), public bodies (such as local authorities and NHS Trusts) and local infrastructure organisations (at regional or local authority/district level) which hold listings.

¹⁹ See: 360Giving and NCVO (2020) *Below the Radar: exploring grants data for grassroots organisations*, London: Local Trust: <https://localtrust.org.uk/wp-content/uploads/2020/08/Below-the-Radar-Report-HR.pdf>.

²⁰ See, for example, Power, A. and Benton, E. (2021) *Where next for Britain's 4,300 mutual aid groups?*, London: London School of Economics: <https://blogs.lse.ac.uk/covid19/2021/05/06/where-next-for-britains-4300-mutual-aid-groups/>. The full academic article by the same authors 'Community responses to the Coronavirus pandemic: how mutual aid can help', is available here: <https://ppr.lse.ac.uk/articles/10.31389/lseppr.21/>. <https://covidmutualaid.org/> is the coordinating body, although not all mutual aid groups are registered here.

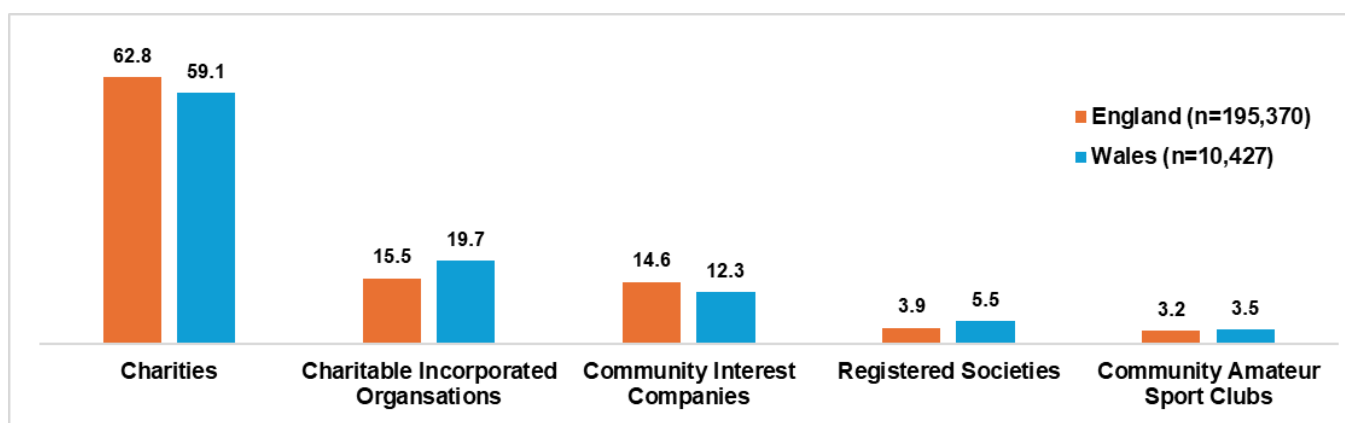
communities. Early indications from research suggested that many of these groups and volunteers would continue to inject energy into their communities once the pandemic subsided – though not necessarily on the same issues. There is keen interest amongst sector representative bodies, think tanks and policy analysts to include unregistered societies and groups in sector estimates, Third Sector Trends invites informal organisations to take part in the study, but due to the current limitations of data it is not possible to report analytical findings with confidence.²¹

In Wales, specifically, there has been substantial investment in collating more reliable and accessible information on registered and unregistered organisations, societies and groups by *Third Sector Support Wales* (TSSW). This is a network of 20 local and national infrastructure organisations working across Wales. Information is made available and is fully searchable on the TSSW Knowledge Hub and is accessible using *infoengine* – a directory of voluntary sector services. As inclusion in the database is voluntary, it is currently incomplete and not yet suitable for statistical analysis implemented in this report.²²

3.2 Legal form of organisations

Using Third Sector Trends Combined Register data, it is possible to show how sector structure varies between England and Wales. As shown in Figure 3.2, sector composition is broadly similar although there are notably more Registered Societies in Wales than in England. This reflects the industrial heritage of Wales where charity status was often eschewed in favour of this legal form as is the case in the industrial North of England and the English West Midlands (and especially so in the case of Cooperatives, Mutuels, Working Men’s Clubs and former Industrial and Provident Societies [now defined as Cooperatives and Community Benefit Societies]). It is likely that the larger proportion of Charitable Incorporated Organisations in Wales reflects the comparatively large number of smaller organisations as shown in the above analysis on local sector structure by size of voluntary organisations.

Figure 3.2 **Legal form of voluntary organisations in England and Wales**
(Source, Third Sector Trends Combined Register, May 2025)



At the local level there are substantive variations in sector structure which can have a bearing on the interpretation of how voluntary organisations work in different kinds of localities. Table 3.3 shows these variations:

²¹ Unregistered organisations are encouraged to take part in Third Sector Trends surveys by local infrastructure organisations such as CVSs which include them in their listings. But only 143 unregistered organisations chose to complete the Third Sector Trends survey from a sample of 6,070 in 2022, which is insufficient to undertake analysis in any depth.

²² TSSW website can be located here: <https://thirdsectorsupport.wales/>. The Knowledge hub can be located here: <https://knowledgehub.cymru/>. Access to infoengine is free but requires registration and once complete can be accessed here: <https://en.infoengine.cymru/how-to-searching-registering>.

- **Community Interest Companies** are more prevalent in major urban and industrial areas as suggested above – especially so in Cardiff (19%), Swansea (19%) and Blaenau Gwent (17%).
- As expected, there are larger proportions of **Registered Societies** in former industrial areas such as Rhondda Cynon Taf (12%), Merthyr Tydfill (11%) Caerphilly (10%) and Blaenau Gwent (11%).
- Conventional **Registered Charities** are most dominant in rural areas such as Powys (67%), Gwynedd (68%), Carmarthenshire (66%) and Monmouthshire (69%).
- The newer charitable form of **Charitable Incorporated Organisations** has become common in almost all areas – constituting around 15-25% of organisations.
- **Community Amateur Sport Clubs** are relatively evenly distributed – Isle of Anglesey and Flintshire have the lowest (~1%) and the highest is in Neath Port Talbot (9%).

Table 3.3 Voluntary sector structure in Wales by legal form (sources: registers from Charity Commission, CICs, CASCs and Registered Societies May 2025)

	Charities	Charitable Incorporated Organisations	Community Interest Companies	Registered Societies	Community Amateur Sport Clubs	Total voluntary organisations
Isle of Anglesey	67.4	22.7	7.7	1.5	0.7	275
Gwynedd	68.2	15.9	7.7	5.0	3.2	703
Conwy	57.5	21.9	12.6	2.5	5.5	438
Denbighshire	60.7	19.3	12.0	5.0	3.0	400
Flintshire	53.6	26.0	15.9	3.1	1.4	417
Wrexham	56.3	25.8	12.2	3.2	2.5	410
Powys	67.0	15.2	9.0	4.8	4.0	994
Ceredigion	64.1	18.2	8.8	6.6	2.3	398
Pembrokeshire	57.0	19.0	14.8	5.9	3.3	576
Carmarthenshire	66.1	15.4	9.4	5.2	3.9	787
Swansea	51.9	18.5	19.1	6.5	4.0	666
Neath Port Talbot	48.8	25.5	10.5	6.4	8.9	358
Bridgend	52.6	23.8	11.9	6.7	4.9	346
Vale of Glamorgan	58.7	23.1	12.1	4.1	1.9	418
Cardiff	53.4	22.4	18.5	3.8	2.0	1,202
Rhondda Cynon Taf	54.8	18.4	11.7	11.9	3.2	567
Merthyr Tydfill	56.9	18.2	9.5	10.9	4.4	140
Caerphilly	54.1	18.9	13.5	9.6	3.9	356
Blaenau Gwent	50.8	18.3	16.7	10.8	3.3	119
Torfaen	57.9	20.8	9.1	6.6	5.6	199
Monmouthshire	69.4	15.7	7.0	3.0	4.9	438
Newport	56.4	20.4	12.2	7.2	3.8	326
North Wales	61.1	21.2	11.2	3.7	2.9	2,643
Mid Wales	66.2	16.0	9.0	5.3	3.5	1,392
South West Wales	57.3	18.6	13.5	5.9	4.6	2,387
South East Wales	56.3	20.5	13.4	6.5	3.3	4,111
Wales	59.1	19.7	12.3	5.5	3.5	100.0
N= Wales	6,158	2,051	1,279	572	367	10,533
England and Wales	62.6	15.8	14.4	4.0	3.3	205,000

Density by resident population and business population

Table 3.4. shows the number of voluntary organisations and businesses by area together with data on the size of the resident population. The number of charities per 10,000 resident population varies substantially. Predominantly rural areas tend to have higher densities of voluntary organisations, especially Powys, but also Ceredigion, Gwynedd, Pembrokeshire and Monmouthshire. By contrast, density is much lower in Blaenau Gwent, Caerphilly, Torfaen and Newport.

Later in the report, analysis is undertaken on the relationships between voluntary organisations and businesses – consequently, business density and voluntary organisation density is compared in Table 3.4. Powys has the lowest number of businesses per voluntary organisations (due to the proliferation of voluntary organisations in this area) while Ceredigion has the highest. In major urban areas the proportions are generally quite similar (Cardiff = 29, Swansea = 28, Newport = 34, Wrexham = 29, Bridgend = 27).

Table 3.4 Density of voluntary organisations in Wales by local population and business population in local authorities and sub-regions (Source: Third Sector Trends Combined Register)

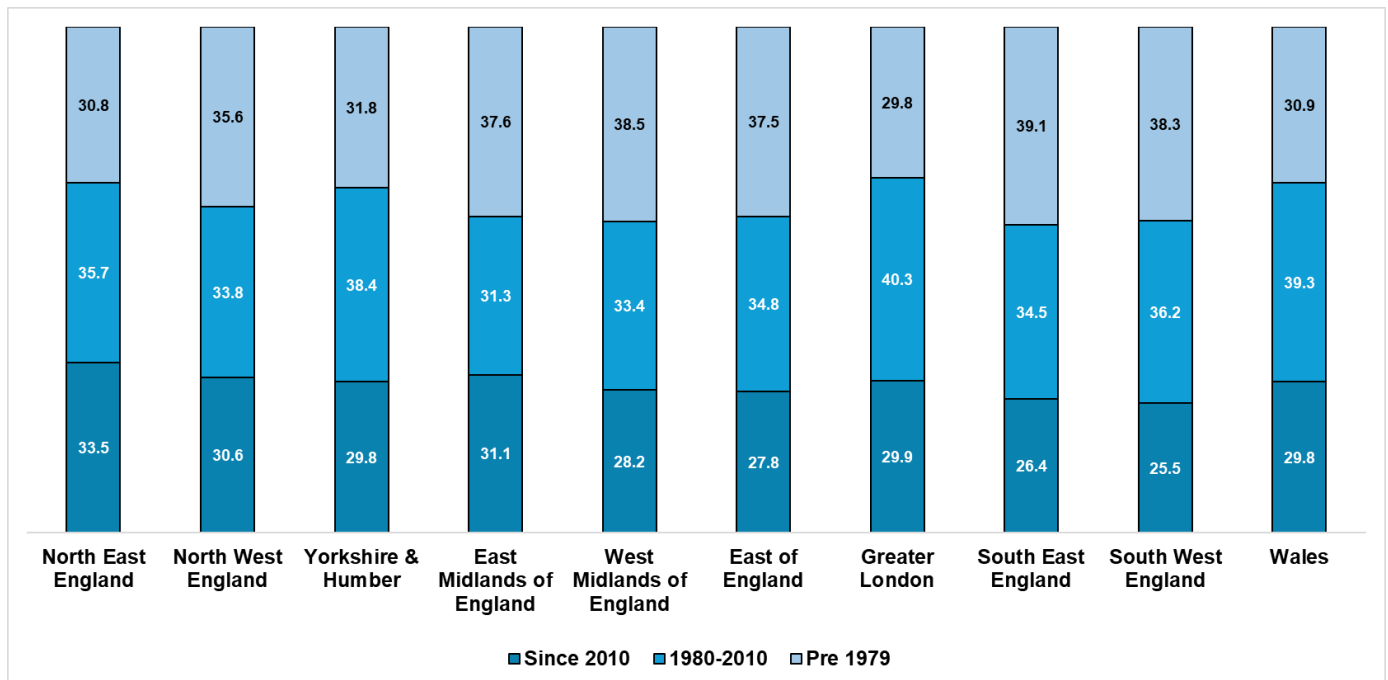
	Local resident population (May 2023, see Table 2.1)	Business population (see Table 2.10)	Voluntary organisations (see Table 3.3)	Businesses per voluntary organisation	Voluntary organisations per 10,000 resident population
Isle of Anglesey	69,291	7,045	275	25.6	39.7
Gwynedd	119,173	12,885	703	18.3	59.0
Conwy	114,410	11,490	438	26.2	38.3
Denbighshire	97,156	7,865	400	19.7	41.2
Flintshire	155,812	11,240	417	27.0	26.8
Wrexham	136,149	11,485	410	28.0	30.1
Powys	134,439	9,455	994	9.5	73.9
Ceredigion	73,050	18,210	398	45.8	54.5
Pembrokeshire	125,006	15,230	576	26.4	46.1
Carmarthenshire	190,083	15,215	787	19.3	41.4
Swansea	246,742	18,210	666	27.3	27.0
Neath Port Talbot	142,898	7,585	358	21.2	25.1
Bridgend	146,743	9,430	346	27.3	23.6
Vale of Glamorgan	134,733	9,410	418	22.5	31.0
Cardiff	383,536	33,575	1,202	27.9	31.3
Rhondda Cynon Taf	241,178	13,210	567	23.3	23.5
Merthyr Tydfil	58,593	3,385	140	24.2	23.9
Caerphilly	176,437	10,135	356	28.5	20.2
Blaenau Gwent	67,356	3,125	119	26.3	17.7
Torfaen	93,419	6,815	199	34.2	21.3
Monmouthshire	94,572	7,835	438	17.9	46.3
Newport	163,628	10,975	326	33.7	19.9
North Wales	691,991	62,010	2,643	23.5	38.2
Mid Wales	207,489	27,665	1,392	19.9	67.1
South West Wales	704,729	56,240	2,387	23.6	33.9
South East Wales	1,560,195	107,895	4,111	26.2	26.3
Wales	3,164,404	253,810	10,533	24.1	33.3

3.3 Longevity of voluntary organisations

The extent to which the voluntary sector is an ‘established’ aspect of local community life can be assessed by looking at the longevity of organisations. There are too few data to do this analysis at local level. However, looking at data from English regions gives a good impression of how Wales compares.

Figure 3.3 draws on 2025 survey data and shows that the voluntary sector in Wales has fewer organisations established before 1979 than in many English regions. The regions with the largest proportion of older organisations are the relatively affluent areas of South East, South West and East of England. The proportion of voluntary organisations established since 2000 in Wales (30%) is close to the England and Wales average (29%).

Figure 3.3 **Age distribution of voluntary organisation in Wales and English regions**
(Third Sector Trends 2025, n=8,578)



3.4 Spatial range of operation

The spatial range at which voluntary organisations work is shown in Table 3.5 where Wales is compared with English regions. It is clear from this chart that London is at odds with all other areas in this respect – where only 12% of voluntary organisations work entirely at neighbourhood level. Wales sits in the middle of the range with 30% of organisations working at the very local level.

Table 3.5 Spatial range of voluntary organisations' operation in Wales and English regions
(Third Sector Trends 2025 survey data)

	Neighbourhood or village	Within one local authority	Across two or more local authorities	Regional level	Wales or UK-wide	Internationally	N=
Wales	30.2	28.5	13.7	7.3	15.8	4.5	709
North East England	33.7	26.7	13.7	20.8	2.9	2.3	659
North West England	34.3	33.2	16.4	6.6	6.1	3.3	798
Yorkshire and Humber	39.6	33.0	13.3	5.5	5.6	3.0	952
East Midlands of England	40.7	30.2	13.6	5.4	6.5	3.6	612
West Midlands of England	38.9	29.3	11.7	5.7	9.1	5.3	736
East of England	44.1	29.4	13.9	3.6	5.5	3.5	1,120
London	12.1	27.3	15.6	10.2	22.4	12.4	774
South East England	37.5	30.8	13.5	3.2	8.7	6.4	1,209
South West England	46.9	26.5	9.8	3.6	8.3	4.9	1,094
England and Wales	36.7	29.6	13.4	6.5	8.9	5.0	8,663

3.5 Distribution by areas of relative deprivation

When analysing sector purpose at area level, it is vital to understand how much capacity voluntary organisations have to deal with local issues. One way of doing this is to look at the distribution of organisations by areas' relative affluence or deprivation.

Table 3.6 uses Third Sector Trends Combined Register data to compare the distribution of voluntary organisations in Wales (using Welsh Index of Multiple [WIMD] Deprivation) with each English region (using The English indices of deprivation [IMD]).²³ Variations in distribution directly reflect comparative levels of affluence and deprivation across regions.

The distribution of voluntary organisations in Wales is very similar to that of England and Wales. East Midlands of England is Wales' closest 'statistical neighbour' while South East England is its furthest 'statistical stranger.'

It is clear from this analysis that in some English regions, larger proportions of the voluntary sector are based in relatively poor areas – especially so in the northern and west midlands areas of England where there are swathes of deep urban deprivation. As shown in Table 2.7, Wales also has deep areas of deprivation but these do not show up when data are aggregated as in Table 3.6. Consequently, Table 3.6(b) disaggregates data by local authorities in Wales.

²³ Indices of Deprivation are constructed differently in Wales and England and are not directly comparable. However their use provides useful indicative evidence for comparative purposes. See: [Welsh Index of Multiple Deprivation](#); [English indices of deprivation 2019 - GOV.UK](#).

Table 3.6 Regional and national distribution of voluntary organisations by area affluence²⁴ (Third Sector Trends Combined Register, 2025)						
	Least affluent IMD 1-2	IMD 3-4	Intermediate IMD 5-6	IMD 7-8	Most affluent IMD 9-10	N=
Wales	13.8	18.6	23.8	25.5	18.3	10,533
North East England	27.9	23.1	18.9	15.1	15.0	7,134
North West England	30.4	17.8	17.3	18.8	15.7	20,755
Yorkshire and Humber	25.0	15.0	19.9	21.4	18.6	15,057
East Midlands of England	14.1	18.6	18.9	24.7	23.6	14,646
West Midlands of England	24.4	19.2	22.4	19.8	14.2	17,501
East of England	7.5	15.4	25.8	24.5	26.8	22,108
London	15.2	29.4	24.7	20.0	10.7	38,861
South East England	6.2	11.7	19.7	27.4	35.0	33,979
South West England	9.3	19.9	29.3	22.9	18.6	24,426
England and Wales	15.5	19.2	22.6	22.5	20.3	205,000

Table 3.7 shows that in major urban areas (and other less-urban former industrial areas), the voluntary sector is more concentrated in areas of deep social deprivation. For example, in Blaenau Gwent, 46% of voluntary organisations are based in the most deprived quintile, followed by Newport (38%), Neath Port Talbot (36%) and Merthyr Tydfil (35%). At the other end of the spectrum, fewer than 3% of voluntary organisations are situated in the poorest quintile of the WIMD in Monmouthshire and Gwynedd.

Data such as these can be misleading. Voluntary organisations work across spatial boundaries – just because they are based in poor areas does not mean that they do all their work there. Similarly, many organisations based in more affluent areas devote their time to people facing critical needs. Nonetheless, the data provide some broad indications of how sector structure is distributed by area affluence and these findings may be useful for interpretation, especially in subsequent sub-sections on sector purpose and impact.

²⁴ Indices of deprivation in England and the Index of Multiple Deprivation in Wales are constructed in slightly different ways and are not strictly comparable. However, both sets of indices are similarly purposed so comparative data has been presented in a single set of quintiles. See: [Welsh Index of Multiple Deprivation](#); [English indices of deprivation 2019 - GOV.UK](#).

Table 3.7 Local authority distribution of voluntary organisations by level of area deprivation in Wales (Source: Third Sector Trends Combined Register, row percentages, May 2025)

	(In rank order) Poorest WIMD 1-2	WIMD 3-4	Intermediate WIMD 5-6	WIMD 7-8	Richest WIMD 9-10	Total voluntary organisations
Blaenau Gwent	45.8	37.5	7.5	9.2	0.0	120
Newport	37.9	9.4	17.2	13.5	21.9	319
Neath Port Talbot	36.3	26.6	12.5	14.1	10.5	358
Merthyr Tydfill	35.0	32.8	23.4	3.6	5.1	140
Torfaen	23.4	24.4	12.2	18.8	21.3	199
Cardiff	22.9	13.2	20.6	17.6	25.8	1,202
Swansea	22.1	11.1	18.5	10.6	37.7	666
Rhondda Cynon Taf	17.9	40.1	21.6	10.5	9.9	567
Bridgend	15.7	33.4	6.7	29.9	14.2	344
Caerphilly	11.8	25.4	29.0	19.4	14.4	346
Conwy	11.0	20.5	21.0	27.9	19.6	438
Denbighshire	10.0	24.1	20.6	30.6	14.8	400
Isle of Anglesey	9.1	7.3	46.0	27.4	10.2	275
Flintshire	8.9	17.1	13.7	24.0	36.3	417
Wrexham	8.7	32.3	15.6	26.1	17.4	410
Powys	8.5	4.1	29.6	44.5	13.3	994
Ceredigion	7.6	13.1	42.4	24.0	12.9	398
Vale of Glamorgan ²⁵	7.5	4.9	11.7	11.7	64.3	418
Pembrokeshire	5.2	18.6	27.7	46.3	2.1	576
Carmarthenshire	4.7	33.4	30.4	28.5	3.0	787
Gwynedd	2.6	16.5	40.8	29.4	10.7	703
Monmouthshire	2.6	5.6	22.2	49.8	19.9	438
North Wales	7.7	19.9	26.8	27.7	17.8	2,643
Mid Wales	8.3	6.7	33.3	38.6	13.1	1,392
South West Wales	14.4	22.7	23.8	25.7	13.4	2,387
South East Wales	19.2	19.7	18.6	19.6	22.9	4,111
Wales	13.8	18.7	23.8	25.6	18.2	10,533
England and Wales	15.6	19.3	22.7	22.4	20.0	205,939

²⁵ Due to concerns that the data for Vale of Glamorgan were so far out of line, a detailed check by LSOA was undertaken against the WIMD Postcode Lookups spreadsheet for Wales (available from <https://wimd.gov.wales/>). All Vale of Glamorgan postcodes (6,613) in the combined registers datafile were aligned against 79 LSOAs in Vale of Glamorgan and then recategorised by WIMD quintile. A total of 41 (52%) LSOAs were in WIMD quintile 5 (most affluent areas) compared with 11% in WIMD 4, 14% WIMD 3, 10% WIMD2 AND 13% WIMD 1. Given that wealthier areas generally have a much higher proportion of smaller voluntary organisations than in poorer areas, it seems safe to assume that the allocation to Vale of Glamorgan is correct – even if this is an outlier when compared with other relatively affluent areas such as Monmouthshire. Assuming an average population of 1,705 per LSOA, that would suggest a population of 69,925 in WIMD5 (41 LSOAs) compared with 17,055 in WIMD1 (10 LSOAs).

Section 4

Voluntary sector workforce

This section presents data on the voluntary sector workforce, focusing on employees and volunteers in separate sub-sections. Following this, comparative analysis on diversity in sector leadership will be provided.

4.1 Sector employment

The voluntary sector in England and Wales employs about 1.15 million people, constituting an average of 3% of employment in English regions and Wales (see Table 4.1). It is estimated that this represents a small increase of around 25,000 employees nationally since 2022. In Wales, the voluntary sector employs 42,600 employees, which is about 2.9% of regional employment. The cost of employing staff is estimated at £2.3billion and accounts for about 67% of sector income.

Table 4.1 The contribution of the voluntary sector to employment in England and Wales (Third Sector Trends Statistical Model 2025)					
	Estimated number of voluntary sector employees	Regional/National employment ²⁶	Estimated percentage of regional employment	Estimated sector income (£millions)	Approximate percentage of sector income spent on wages
Wales	42,600	1,457,000	2.9	2,258.1	67.3
North East England	37,500	1,211,000	3.1	1,983.0	65.1
North West England	107,900	3,675,000	2.9	5,711.5	68.6
Yorkshire and Humber	72,300	2,693,000	2.7	3,868.7	66.4
East Midlands of England	55,700	2,476,000	2.3	2,944.0	67.5
West Midlands of England	86,500	2,945,000	2.9	4,609.0	67.5
East of England	93,100	3,301,000	2.8	4,946.1	75.0
London	173,700 (372,000)	4,964,000	3.5 (7.5)	19,987.1 ²⁷	82.9
South East England	178,700	4,934,000	3.6	9,548.3	76.1
South West England	101,600	3,027,000	3.4	5,404.3	68.7
England and Wales	1,148,500²⁸	30,683,000	3.1²⁹	61,260.2	69.1³⁰

²⁶ Source: Nomis (downloaded September 27th, 2025)
<https://www.nomisweb.co.uk/reports/lmp/gor/2013265921/report.aspx#tabnrhi>

²⁷ Estimated cost for total London-based organisational employment. Costs will be exaggerated as expense incurred elsewhere in the UK or abroad are likely to be lower.

²⁸ Includes London-based organisational employees which are distributed elsewhere in England and Wales.

²⁹ Average regional percentage excludes London-based organisations' employees as it is not known how they are distributed across the UK and abroad.

³⁰ Average percentage cost excluding London.

Table 4.2 provides estimates on the distribution of the workforce and its associated costs by local authorities sub regions of Wales.³¹

Table 4.2 Estimated employee numbers in Wales (Third Sector Trends Statistical Model 2025)				
	Total number of registered voluntary organisations	Estimated sector income (£millions)	Estimated number of employees	Estimated salary cost of employees (£millions)
Isle of Anglesey	275	£58.9	1,100	£40.0
Gwynedd	703	£150.7	2,800	£97.0
Conwy	438	£93.9	1,800	£60.5
Denbighshire	400	£85.8	1,600	£55.2
Flintshire	417	£89.4	1,700	£57.6
Wrexham	410	£87.9	1,700	£56.6
Powys	994	£213.1	4,000	£137.2
Ceredigion	398	£85.3	1,600	£54.9
Pembrokeshire	576	£123.5	2,300	£79.5
Carmarthenshire	787	£168.7	3,200	£108.6
Swansea	666	£142.8	2,700	£91.9
Neath Port Talbot	358	£76.8	1,450	£49.4
Bridgend	346	£74.2	1,400	£47.8
Vale of Glamorgan	418	£89.6	1,700	£57.7
Cardiff	1,202	£257.5	4,850	£165.8
Rhondda Cynon Taf	567	£121.6	2,300	£78.3
Merthyr Tydfil	140	£30.0	550	£19.3
Caerphilly	356	£76.3	1,450	£49.1
Blaenau Gwent	119	£25.5	500	£16.4
Torfaen	199	£42.7	800	£27.5
Monmouthshire	438	£93.9	1,800	£60.5
Newport	326	£69.9	1,300	£45.0
North Wales	2,643	£566.6	10,700	£366.9
Mid Wales	1,392	£298.4	5,600	£192.1
South West Wales	2,387	£511.8	9,650	£329.4
South East Wales	4,111	£881.2	16,650	£567.4
Wales	10,533	£2,258.0	42,600	£1,455.8

³¹ The accuracy of the estimates produced by the statistical model is reduced at lower level geographies and should be considered as 'indicative'.

4.2 Support from volunteers

National estimates for the number of volunteers in the UK are published annually in NCVO's Civil Society Almanac.³² It is reported that 16% of people volunteered at least once in the previous year with a group, club or organisation in the UK – this represents a decline from a recent peak of 23% in 2019-20. These are still impressive statistics which show that a culture of volunteering, in one capacity or another, is well established in the UK.

Third Sector Trends estimates the number of 'regular' volunteers organisations rely upon to provide practical hands-on support to achieve their objectives.³³ This means that several other kinds of volunteers are not included in the analysis:

- Volunteers giving time to public bodies such as local public libraries (unless they are community-run entities) or the NHS (unless they are working directly for a voluntary organisation such as RVS).
- Volunteering in schools as governors, as members of informal/unregistered parent teacher associations, supporting teachers in the classroom, school trips and sports days, or general school fundraising activities.
- Volunteering for other public bodies such as the police as special constables, the criminal justice system as magistrates and so on.
- Employee supported volunteers or the provision of pro-bono support by employees or professionals (unless it is facilitated via a voluntary organisation such as Pro-Bono Economics).
- Volunteers participating in local or national fundraising appeals (for example, *BBC Children in Need*, *Comic Relief*, *Sport Relief*, or for large national charities such as *Save the Children* and *Oxfam*³⁴ etc.)

It is not being asserted that these forms of volunteering lack value or are of a lesser value than those working directly and regularly for local voluntary organisations. It is simply a question of calculating the practical contributions regular volunteers make, via local voluntary organisations to society.

With these caveats in mind, it is possible to calculate the amount of energy which is produced through voluntarism (see Table 4.3(a)). In Wales, the number of regular volunteers is 212,300, producing 15.3million hours of work which is valued between £186.6million and £255.1million.

³² NCVO UK Civil Society Almanac 2024 <https://www.ncvo.org.uk/news-and-insights/news-index/uk-civil-society-almanac-2024/>. The publication of the 2025 Almanac has been postponed: <https://www.civilsociety.co.uk/news/ncvo-delays-civil-society-almanac-publication-until-2026.html>.

³³ Regular volunteers are defined as people who provide on average 72 hours of support to a TSO in one year (or an average of six hours per month). Calculations exclude occasional or ephemeral (i.e. 'one-off') volunteering. Ephemeral or occasional volunteering may include people who help with a fundraising appeal, people who are allocated to volunteer through, for example, employee supported volunteer initiatives or by university student volunteer programmes.

³⁴ Supporting large nationals as volunteers in local charity shops would be included providing that federated branches responded to the survey at a local level.

Table 4.3(a) Estimated number and proxy replacement value of regular volunteers in voluntary organisations (Third Sector Trends Statistical Model 2025)						
	Number of regular volunteers	Estimated total hours worked (£millions)	Value at National Living Wage (£millions)	Number of full-time equivalent regular volunteers	80% average median regional wage	Value produced at 80% average regional (£millions)
Wales	212,300	15.3	186.6	8,900	28,471	255.1
North East England	148,900	10.7	130.9	6,300	27,506	172.9
North West England	431,500	31.1	379.3	18,200	28,954	527.2
Yorkshire and Humber	310,300	22.3	272.8	13,000	28,072	367.7
East Midlands of England	289,700	20.9	254.7	12,200	28,459	347.9
West Midlands of England	342,400	24.7	301.0	14,500	28,700	414.7
East of England	437,700	31.5	384.8	18,500	31,762	586.8
London ³⁵	903,500	65.1	794.2	38,100	35,501	1,353.7
South East England	708,300	51.0	622.6	29,900	32,415	968.9
South West England	492,800	35.5	433.2	20,800	29,153	606.3
England and Wales	4,277,400	308.0	3,760.2	180,400	29,899	5,601.1

Table 4.3(b) Estimated number and proxy replacement value of regular volunteers in voluntary organisations in Wales (Third Sector Trends Statistical Model 2025)				
	Estimated number of regular volunteers	Estimated hours worked (1,000s)	Equivalent cost at National Minimum Wage (£millions)	Equivalent cost at 80% median regional wage (£millions)
Isle of Anglesey	5,400	391.1	4.8	6.5
Gwynedd	13,900	1,001.8	12.2	16.7
Conwy	8,700	625.4	7.6	10.4
Denbighshire	7,900	572.3	7.0	9.6
Flintshire	8,300	597.7	7.3	10.0
Wrexham	8,200	588.9	7.2	9.8
Powys	20,400	1,469.5	17.9	24.5
Ceredigion	8,000	572.7	7.0	9.6
Pembrokeshire	11,500	830.5	10.1	13.9
Carmarthenshire	15,800	1,137.0	13.9	19.0
Swansea	13,400	964.0	11.8	16.1
Neath Port Talbot	7,200	519.2	6.3	8.7
Bridgend	7,000	502.8	6.1	8.4
Vale of Glamorgan	8,500	608.6	7.4	10.2
Cardiff	24,300	1,751.9	21.4	29.2
Rhondda Cynon Taf	11,500	828.7	10.1	13.8
Caerphilly	7,200	521.3	6.4	8.7
Blaenau Gwent	2,400	174.6	2.1	2.9
Torfaen	4,000	292.5	3.6	4.9
Monmouthshire	9,000	645.1	7.9	10.8
Newport	6,700	481.0	5.9	8.0
Merthyr Tydfil	2,900	207.4	2.5	3.5
Wales³⁶	212,300	15,283.9	186.6	255.1

³⁵ Estimates of the number of volunteers may be over or underestimated in London because many larger organisations, such as charitable foundations, tend not to have volunteers. Large international organisations by contrast may have very large numbers of volunteers but they may not provide support in England and Wales.

³⁶ Totals in first two columns do not add to sum due to rounding errors.

Reliance on regular volunteers is high in Wales (Table 4.4). Expectations that voluntary organisations can rely on volunteers on a very regular basis (84%) or for them to work unsupervised (79%) is similar to the average for England and Wales. Similarly, 85% of voluntary organisations in Wales state that they could not keep going without volunteers.

In Wales, higher percentage of voluntary organisations report that many of their service users are volunteers (70%) compared with the average of 67% for England and Wales. In all English regions, a substantial proportion of voluntary organisations state that they have yet to recover to pre-pandemic levels of volunteering (~39%). In Wales, voluntary organisations are struggling more in this respect (42%).

Table 4.4 Reliance on volunteers by region (Third Sector Trends in England and Wales 2025, percentage 'agree' or 'strongly agree' n=8,583)					
	We rely mainly on volunteers who commit time on a very regular basis	We rely mainly on volunteers who can work unsupervised	Many of our volunteers are our service users/beneficiaries	We could not keep going as an organisation or group without volunteers	We have never fully recovered our volunteer numbers since the pandemic
Wales	83.6	79.0	69.8	84.9	41.5
North East England	80.7	71.2	73.8	81.8	38.9
North West England	84.5	76.7	70.4	87.9	44.2
Yorkshire & Humber	87.8	78.4	70.6	90.5	39.4
East Midlands of England	86.3	80.3	62.3	86.5	36.6
West Midlands of England	87.0	82.7	69.3	90.0	39.6
East of England	84.3	77.1	64.2	86.7	38.6
Greater London	81.4	72.5	64.6	84.2	36.1
South East England	86.8	80.3	62.9	90.7	36.0
South West England	86.3	83.2	63.0	89.1	38.0
England and Wales	85.1	78.4	66.8	87.6	38.8

4.3 Labour market dynamics

There has been a good deal of turbulence in the structure of the voluntary sector labour force in recent years but patterns of change vary by region. As Table 4.5 shows, the situation in Wales is close to England and Wales averages, although there are some indications that part-time employment has decreased more in Wales than elsewhere.

Voluntary organisations also report significant changes in the numbers of regular volunteers and trustees over the last two years (Table 4.6). In Wales, the percentage of organisations stating the volunteer numbers have increased (35%) is a little above regional averages (33%).

On balance, trustee numbers seem to have remained fairly level in Wales, but that conceals some movement within the sector where 20% of voluntary organisations reported an increase while 19% recorded a decrease. This pattern is similar in all regions.

Table 4.5 Changing levels of full and part-time employment over the last two years (Third Sector Trends in England and Wales 2025)						
	<i>Full-time employees</i>			<i>Part-time employees</i>		
	Increased	Stayed the same	Reduced	Increased	Stayed the same	Reduced
Wales	27.4	53.9	18.7	35.7	45.4	18.9
North East England	31.8	49.0	19.2	36.5	46.0	17.5
North West England	22.3	57.3	20.4	36.7	48.5	14.7
Yorkshire and Humber	26.5	51.8	21.7	38.3	45.2	16.5
East Midlands of England	21.5	55.4	23.1	35.2	46.6	18.2
West Midlands of England	24.4	60.4	15.2	33.9	52.7	13.4
East of England	27.9	57.4	14.7	36.9	52.4	10.8
London	24.9	58.4	16.7	38.0	49.1	13.0
South East England	24.5	58.5	17.0	34.0	51.3	14.7
South West England	21.7	59.8	18.5	32.1	53.7	14.2
England and Wales	25.5	56.1	18.4	35.8	49.3	14.9

Table 4.6 Changing levels of regular volunteers and trustees over the last two years (Third Sector Trends in England and Wales 2025)						
	<i>Regular volunteers</i>			<i>Trustees</i>		
	Increased	Stayed the same	Reduced	Increased	Stayed the same	Reduced
Wales	35.0	44.0	20.9	19.5	61.9	18.6
North East England	37.5	42.1	20.4	20.3	61.6	18.1
North West England	34.7	45.2	20.0	18.3	63.2	18.5
Yorkshire and Humber	33.9	46.8	19.3	19.4	64.0	16.6
East Midlands of England	32.4	46.4	21.2	21.5	61.1	17.4
West Midlands of England	35.0	45.6	19.4	18.6	64.7	16.6
East of England	32.7	46.9	20.4	19.4	62.0	18.6
London	32.6	50.9	16.5	22.5	64.3	13.3
South East England	30.2	51.8	18.0	17.6	66.4	16.0
South West England	27.9	49.7	22.4	19.1	62.0	18.8
England and Wales	32.8	47.3	19.8	19.4	63.3	17.3

As Table 4.7 shows, more voluntary organisations in Wales report difficulties in retaining staff (22%) than those stating that difficulties had eased (3%). That pattern is reflected in all regions. Recruitment problems vary across regions. In Wales, 36% of voluntary organisations report recruitment problems. The retention of regular volunteers has been challenging for about a quarter of voluntary organisations across all regions but is highest in Wales (27%) as shown in Table 4.8. Few voluntary organisations report that the situation has eased.

Volunteer recruitment problems are widespread (44% in Wales) and at a similar level in all regions (~42-44%) apart from London where lower levels of difficulty are reported (34%). Only 6-9% of voluntary organisations state that the situation has eased in the last two years. The situation in Wales seems to be better than most English regions in this respect (9%). Many regions have struggled to return to pre-pandemic levels of volunteering (Figure 4.1). These problems are second most severe in Wales (42%) after North West England (44%).

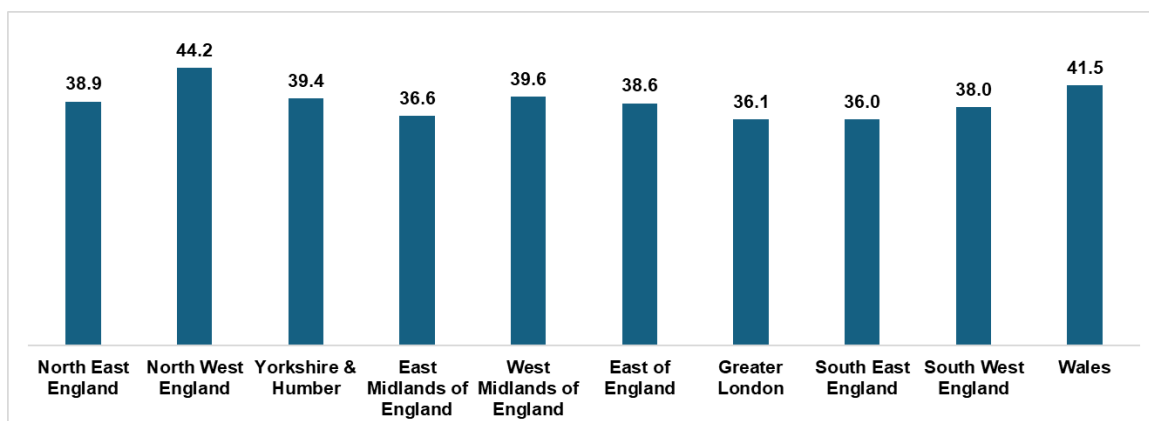
Table 4.7 Recruitment and retention of employees over the last two years
(Third Sector Trends in England and Wales 2025)

	Retaining employees			Recruiting employees		
	Become quite a lot harder	Stayed about the same	Become quite a lot easier	Become quite a lot harder	Stayed about the same	Become quite a lot easier
Wales	21.6	75.3	3.1	36.4	58.4	5.3
North East England	22.3	73.7	4.0	41.0	51.2	7.8
North West England	19.9	76.9	3.2	33.0	60.8	6.3
Yorkshire and Humber	20.5	76.1	3.4	33.2	61.0	5.9
East Midlands of England	19.9	76.3	3.8	34.4	60.6	5.1
West Midlands of England	18.6	79.0	2.5	32.1	62.1	5.8
East of England	17.4	79.7	2.9	31.5	63.5	5.0
London	18.4	77.7	3.9	27.6	65.3	7.1
South East England	17.7	79.5	2.8	32.3	64.0	3.7
South West England	16.9	80.7	2.4	32.1	64.5	3.5
England and Wales	19.1	77.8	3.1	33.1	61.5	5.4

Table 4.8 Recruitment and retention of regular volunteers over the last two years
(Third Sector Trends in England and Wales 2025)

	Retaining regular volunteers			Recruiting regular volunteers		
	Become quite a lot harder	Stayed about the same	Become quite a lot easier	Become quite a lot harder	Stayed about the same	Become quite a lot easier
Wales	27.2	69.1	3.7	44.4	46.4	9.2
North East England	25.4	69.8	4.8	42.5	49.7	7.7
North West England	25.3	71.4	3.3	42.2	49.9	8.0
Yorkshire and Humber	26.9	69.2	3.9	45.3	48.6	6.1
East Midlands of England	23.0	73.9	3.1	43.0	49.7	7.3
West Midlands of England	25.7	69.7	4.6	45.1	46.8	8.0
East of England	25.0	72.0	2.9	46.9	46.8	6.4
London	22.8	74.0	3.1	34.0	56.5	9.5
South East England	22.8	73.7	3.5	44.3	49.8	5.9
South West England	24.4	72.9	2.6	44.3	49.9	5.8
England and Wales	24.8	71.7	3.5	43.5	49.3	7.2

Figure 4.1 Percentage of voluntary organisations yet to bring volunteer numbers to pre-pandemic level (Third Sector Trends in England and Wales 2025)



As Table 4.9 demonstrates, a clear majority of voluntary organisations report that retaining trustees has not been a serious problem in all regions (~80-85%). Amongst those voluntary organisations which have been struggling with retention of trustees, the issue is most severe in East of England, the South West and in Wales. London and the South East are least affected. Trustee recruitment problems are widespread in all regions (~35-39%) apart from London where the percentage of voluntary organisations is lower (27%).

Table 4.9 Recruitment and retention of trustees over the last two years (Third Sector Trends England and Wales 2025)						
	<i>Retaining trustees</i>			<i>Recruiting trustees</i>		
	It has become quite a lot harder	Stayed about the same	It has become quite a lot easier	It has become quite a lot harder	Stayed about the same	It has become quite a lot easier
Wales	16.6	81.1	2.2	38.0	56.3	5.7
North East England	16.6	81.6	1.8	37.3	58.3	4.4
North West England	15.5	81.1	3.4	33.9	60.2	5.9
Yorkshire and Humber	16.8	80.0	3.1	35.4	58.4	6.1
East Midlands of England	15.6	82.0	2.4	35.3	59.8	4.9
West Midlands of England	15.8	81.2	3.0	35.7	59.3	5.0
East of England	17.9	79.7	2.4	37.2	57.2	5.6
London	13.3	84.3	2.5	26.7	68.2	5.1
South East England	13.5	84.9	1.7	35.3	60.5	4.2
South West England	18.2	79.9	1.9	38.9	56.6	4.5
England and Wales	16.0	81.6	2.4	35.5	59.3	5.1

Recruitment and retention problems affect organisations differently, depending upon their size (Table 4.10). Staff recruitment and retention problems are felt most severely in larger organisations (with income between £250,000-£1m) – 45% of these organisations are struggling in with recruitment and 26% with retention. Volunteer recruitment and retention problems are widespread, irrespective of size, but may be felt more keenly by smaller voluntary organisations which rely more heavily on their support. Trustee recruitment, again, is widespread across all size categories but no clear pattern is observed.

Table 4.10 Recruitment and retention by size of voluntary organisations in Wales 2025 (Third Sector Trends in England and Wales 2025, percent struggling with each issue)					
	Micro - income below £10,000	Small - income £10,000 - £49,999	Medium - income £50,000 - £249,999	Large - income £250,000 - £999,999	Big - income £1million - £25million
Recruiting staff	Too few cases for reliable analysis	26.2	35.2	44.6	Too few cases for reliable analysis
Retaining staff		18.9	19.1	25.8	
Recruiting volunteers	46.4	45.4	46.2	34.1	
Retaining volunteers	27.2	24.0	32.1	26.5	
Recruiting trustees	42.0	35.1	41.9	40.7	
Retaining trustees	18.1	15.7	18.4	16.3	
N=	186	179	173	94	

4.4 Organisational leadership

Third Sector Trends has been tracking the characteristics of chairs and chief officers nationally since 2022. The biographical and personal characteristics of voluntary organisation board chairs varies across regions (Table 4.11). This is partly due to demographic conditions (for example, by density of older people or minority ethnic groups) so it is unwise to interpret variations at face value. For example, the percentage of minority ethnic chairs in the Wales is comparatively low (4%) when compared with highly diverse London (24%).

Similarly, the characteristics of chief officers is shaped to some extent by local demographic circumstance. Caution should be taken in making detailed regional comparisons as lower sample sizes may affect accuracy of data (Table 4.12).

	Graduate chair		Female chair		Registered disabled chair		Black, Asian or other ethnic minority chair		Retired chair	
	2022	2025	2022	2025	2022	2025	2022	2025	2022	2025
Wales	71.0	68.0	49.4	43.1	11.4	11.6	5.5	4.4	64.1	53.8
North East England	71.0	69.8	51.1	49.0	11.6	12.7	5.9	4.6	57.4	55.3
North West England	67.1	64.1	46.6	42.7	12.7	8.8	7.8	7.4	56.6	56.3
Yorkshire and Humber	70.9	66.7	40.9	45.8	12.2	7.3	9.1	5.8	58.8	55.9
East Midlands of England	62.4	62.5	41.5	37.2	9.1	6.1	8.3	7.3	56.9	59.3
West Midlands of England	69.1	66.0	43.4	39.9	9.5	6.7	9.9	6.4	61.1	61.7
East of England	66.0	62.8	39.2	44.3	6.4	5.0	3.1	5.8	60.8	57.2
London	83.5	82.2	47.3	43.5	12.2	7.7	28.2	23.6	50.7	46.0
South East England	70.6	72.7	41.8	37.9	6.0	6.3	4.6	4.6	60.5	59.6
South West England	68.5	66.9	44.3	39.1	5.7	5.1	3.0	2.4	62.5	62.5
England and Wales	70.1	68.2	44.5	42.1	9.5	7.4	8.1	6.9	59.1	57.1

	Graduate CEO		Female CEO		Registered disabled CEO		Black, Asian or other ethnic minority CEO	
	2022	2025	2022	2025	2022	2025	2022	2025
Wales	60.2	66.3	64.9	67.7	8.0	10.8	4.1	5.4
North East England	66.0	66.9	59.8	67.6	8.5	12.1	5.8	5.3
North West England	61.7	66.4	66.0	67.7	10.6	9.5	9.6	9.2
Yorkshire and Humber	69.6	68.8	59.9	68.4	10.2	10.1	12.3	9.4
East Midlands of England	56.8	55.3	55.8	60.2	6.9	4.1	10.5	9.6
West Midlands of England	62.8	64.4	62.4	66.3	9.5	10.2	10.0	10.1
East of England	51.0	60.5	57.9	66.5	4.1	6.8	6.2	9.8
London	70.9	81.3	53.6	63.9	6.4	10.9	25.8	27.0
South East England	60.1	71.4	65.5	65.5	4.9	8.6	6.3	5.6
South West England	61.8	63.5	64.5	68.8	8.1	7.0	5.5	6.7
England and Wales	62.7	67.1	61.5	66.5	7.9	9.1	9.6	10.0

4.5 Training and development

Ensuring that people are highly motivated and properly equipped with the skills needed to do their work is generally thought to be an important aspect of organisational effectiveness. And yet, the most important priority set by voluntary organisations is ‘income generation’ (Table 4.13).

Clearly, voluntary organisations need money to rent or buy property within which to work, to buy kit and consumables to deliver services and to pay employees’ wages. But it is a moot point as to whether developing fundraising skills should be the top priority. Income generation is most clearly prioritised in North East England over all other issues by 77% of voluntary organisations compared with 73% in Wales.

There could be stronger arguments, from an outsider’s perspective, to invest in business planning so as to work out what the money is needed for; and investing in the capability of managers and trustees to help ensure that they are making the right decisions. That stated, emphasis on most aspects of training tend to be higher in Wales than in most English regions (Wales’ closest statistical neighbour is North East England in this respect).

Table 4.13 Percentage of voluntary organisations stating that training needs are a high priority
(Third Sector Trends in England and Wales 2025)

	Managing employees / volunteers	Trustee development and training	Business planning	Income generation	Practical digital skills	Artificial intelligence (AI)
Wales	47.2	33.3	46.8	72.7	25.8	11.3
North East England	48.1	31.5	47.6	76.7	27.7	15.9
North West England	44.2	28.5	42.4	67.4	23.6	11.4
Yorkshire & Humber	40.1	28.0	41.0	71.0	22.6	12.3
East Midlands of England	37.6	26.7	35.6	62.9	21.9	7.2
West Midlands of England	36.6	27.4	38.2	66.1	22.0	8.7
East of England	40.4	26.6	36.9	64.3	18.9	9.9
Greater London	48.8	29.1	48.1	71.8	28.9	17.0
South East England	40.8	28.1	39.9	63.6	23.6	10.1
South West England	36.4	24.1	35.8	63.2	20.0	7.2
England and Wales	41.6	28.0	40.8	67.5	23.1	10.9

Investing in people is generally considered to be beneficial to organisational health and a major contributor to success in achieving objectives.³⁷ Table 4.14 presents headline data for employees and volunteers in Wales and each English on the extent of voluntary organisations’ investment in training, wellbeing (using flexible working arrangements as an indicator) and personal development. Only the first of these factors, holding a training budget, implies direct financial commitment from voluntary

³⁷ Academic studies of the public and private sectors generally show that investment in people through training, supporting their wellbeing and personal development enhances organisational effectiveness. For a critical view of the literature, see: Burgess, S., and Williams, I. (2009) ‘Investing in your people works—can 40,000 organisations be wrong?’, *Library Management*, 30(8-9), 608-618. The literature on voluntary sector organisational training and development is patchy. See: Egan, T. (2017) ‘Training and development in nonprofit organizations’, in Ward, J. and Sowa, J. (eds.) *The Nonprofit Human Resource Management Handbook*, New York, Routledge (223-249). Routledge. Most literature in this field is generally focused on the wider objective of fundraising or social impact rather than improving organisations capability and wellbeing; see, for example: Green, E., Ritchie, F., Bradley, P. and Parry, G. (2021) ‘Financial resilience, income dependence and organisational survival in UK charities’, *Voluntas: international journal of voluntary and nonprofit organizations*, 32(5), 992-1008.

organisations, but other factors will also involve direct or indirect costs. Levels of investment in employees is a good deal higher in Wales, North East England and Greater London than in most other regions. This applies to the holding of training budgets, flexible working and personal development. It is notable that investment in volunteers appears to be higher in North East England than many other regions and the national average.

Table 4.14 Percent of voluntary organisations which invest in training, flexible working and personal development for employees and volunteers (Third Sector Trends in England and Wales 2025)				
Hold a training budget	Employees	Volunteers	Do not do this	N=
Wales	36.6	34.6	54.8	705
North East England	39.4	42.4	48.9	655
North West England	31.6	35.5	57.1	795
Yorkshire & Humber	33.8	35.6	57.2	943
East Midlands of England	27.7	29.8	63.0	610
West Midlands of England	26.9	29.2	63.7	732
East of England	31.1	32.9	60.4	1,115
Greater London	39.0	33.5	54.1	767
South East England	28.9	32.8	60.9	1,209
South West England	24.2	27.9	66.7	1,093
England and Wales	31.4	33.2	59.2	8,624
Allow flexible working	Employees	Volunteers	Do not do this	N=
Wales	46.8	48.5	41.1	705
North East England	48.0	56.6	33.8	656
North West England	42.4	49.7	42.0	793
Yorkshire & Humber	39.7	50.6	41.9	945
East Midlands of England	34.3	46.6	46.7	612
West Midlands of England	35.9	49.0	44.4	728
East of England	40.5	48.1	43.9	1,111
Greater London	50.8	50.5	37.2	769
South East England	37.6	48.2	44.3	1,204
South West England	33.8	45.0	48.4	1,091
England and Wales	40.5	49.0	42.8	8,614
Personal development	Employees	Volunteers	Do not do this	N=
Wales	42.7	42.8	45.8	705
North East England	47.8	55.9	35.4	655
North West England	40.2	45.6	45.0	794
Yorkshire & Humber	39.0	44.6	47.3	941
East Midlands of England	32.4	40.1	53.1	608
West Midlands of England	32.5	39.6	52.5	729
East of England	36.4	39.7	51.3	1,112
Greater London	45.3	43.5	43.5	768
South East England	33.1	37.3	53.6	1,204
South West England	29.4	33.5	59.0	1,087
England and Wales	37.3	41.5	49.4	8,603

Voluntary organisations often seek support to meet training and development needs in Wales.³⁸ In some cases this is not necessary, for example employment issues are not relevant to 34% of voluntary organisations in Wales because they are not employers. By contrast, over 90% of voluntary organisations state that income generation issues are relevant to them (Table 4.15).

- **Employment issues:** about 39% of organisations deal with this issue in-house. About a quarter of voluntary organisations go to a local private sector business for support, 15% to local CVCs and 17% to a national voluntary sector body. Very few (5%) seek support from local authorities.
- **Volunteering issues:** over half of voluntary organisations deal with this issue in house while a quarter seek support from CVCs and 20% from a national voluntary sector body. Very few seek support from the public sector or businesses.
- **Governance issues:** national infrastructure bodies help 23% of voluntary organisations while 21% of CVCs do so but many voluntary organisations deal with these issues in house (45%). Comparatively few voluntary organisation seek help from the public sector (5%) or businesses (7%).
- **Income generation issues:** are generally dealt with in house (61%); 20% of voluntary organisations go to national infrastructure organisations for help, while 10% opt for local CVCs to offer support. About 5% use private sector firms and 4% local public authorities.
- **Financial management issues:** are primarily handled in-house (61%) though many voluntary organisations go to private businesses for help (19%); 20% go to voluntary sector infrastructure bodies – evenly split between national and local organisations. Public bodies are very rarely called upon for help in this respect (1%).

Table 4.15 Sources of support for training and development in Wales
(Third Sector Trends in Wales 2025)

	Employment issues	Volunteering issues	Governance/ leadership issues	Income generation issues	Financial management issues
From a local infrastructure body (e.g. County Voluntary Council)	14.8	24.1	20.8	10.4	9.3
From a national voluntary sector body (e.g. WCVA, ACEVO, National Lottery, Community Foundation Wales)	17.1	20.0	22.5	19.8	9.8
From the local authority, NHS or other public sector body	4.7	2.6	4.7	4.2	1.1
From a local private sector business or specialist professional (e.g. a law firm)	24.6	2.6	7.4	4.7	19.4
We'd do it ourselves	38.8	50.7	44.6	60.9	60.5
Not applicable to us	33.5	13.0	8.8	9.5	6.8
N=	702	706	701	704	704

³⁸ Comparable data for England are not available as different questions were used in England and Wales.

Section 5

Sector purpose, energy and impact

5.1 Sector purpose and beneficiaries

Third Sector Trends collects data on a limited range of broad categories of beneficiary groups. Most voluntary organisations tend to tackle a range of beneficiary issues rather than focusing upon just one. While it is not possible to undertake highly nuanced regional analysis using these data, it is clear that sector emphasis in beneficiary terms reflects local regional conditions. For example, emphasis on physical disability or illnesses as beneficiary areas tends to be stronger in areas where concentrations of deprivation are higher.

In Wales it is notable that the focus on all aspects of health is higher than the national average and the most affluent English regions such as East of England and South East England (Table 5.1). Clearly this also affects sector focus on supporting carers, which is above average in Wales (14%). The same pattern applies for related beneficiary issues such as unemployment, urban deprivation and poverty.

The emphasis on working in rural areas is amongst the highest in Wales (20%) and at a similar level to East of England and South West England. As would be expected, very few attend to such issues in metropolitan London (2%).

In some aspects of beneficiary support, other regions stand out. For example, homelessness is featured as a bigger priority in Greater London than any other region, while emphasis on rural issues is higher in the less urban regions of East Midlands, South West, East of England and Wales. The focus on overseas aid and development is highest in Greater London (8%) and the South East (6%), but is quite low in Wales (4%).

Table 5.1 Percent of voluntary organisations serving specific beneficiary areas by region 2025
(Third Sector Trends in England and Wales 2025)

	People with physical disabilities	People with physical health conditions	People with mental health conditions	People with learning disabilities	Carers
Wales	22.4	22.1	24.8	20.5	14.1
North East England	23.1	25.4	31.9	22.8	16.8
North West England	22.3	21.8	26.8	19.1	12.8
Yorkshire & Humber	21.5	22.5	25.6	18.3	13.3
East Midlands of England	18.6	18.3	20.2	15.2	11.4
West Midlands of England	21.4	20.7	24.2	18.5	11.4
East of England	20.1	19.3	22.9	15.4	12.5
Greater London	19.9	20.2	22.1	18.1	10.7
South East England	19.8	20.4	21.4	15.6	11.6
South West England	18.1	16.9	18.3	16.0	9.1
England and Wales	20.6	20.5	23.5	17.6	12.2

Table 5.1 / continued...	People of a particular ethnic or racial origin	People with homelessness and housing issues	Unemployed/workless people	People or households living in poverty	People with concerns about gender and sexuality
Wales	7.1	11.1	13.0	19.5	5.4
North East England	7.6	11.6	18.5	27.4	5.4
North West England	8.5	10.6	12.8	19.1	4.0
Yorkshire & Humber	7.7	10.7	13.7	18.5	4.9
East Midlands of England	5.2	10.3	10.0	15.7	3.4
West Midlands of England	6.1	11.2	11.5	16.8	3.9
East of England	5.7	9.5	11.7	20.1	3.7
Greater London	11.6	14.0	13.4	21.7	4.1
South East England	4.6	9.9	9.2	15.7	2.9
South West England	4.1	8.7	8.6	14.5	3.0
England and Wales	6.6	10.6	11.9	18.6	4.0
	People in rural areas	People in disadvantaged urban areas	Overseas aid (e.g. famine relief, education, development work)	Animals	Other Third Sector Organisations (e.g. a grant making trust or a CVS)
Wales	20.3	12.6	3.8	4.2	3.9
North East England	17.7	21.5	1.8	2.9	2.3
North West England	13.6	17.8	2.5	3.1	2.9
Yorkshire & Humber	14.8	15.8	3.9	3.5	4.9
East Midlands of England	18.9	11.4	5.4	2.1	3.8
West Midlands of England	15.6	14.2	6.0	2.0	2.6
East of England	20.8	12.0	3.7	2.0	2.9
Greater London	2.6	18.5	7.8	1.7	6.1
South East England	12.0	9.8	6.2	2.6	4.0
South West England	22.1	9.8	4.4	3.1	3.6
England and Wales	15.9	13.9	4.6	2.7	3.7
	People in general	Children and young people	Older people	Other	N=
Wales	57.5	39.8	35.7	8.9	709
North East England	54.9	45.5	35.2	10.0	661
North West England	55.3	40.1	35.1	10.0	800
Yorkshire & Humber	57.5	39.1	33.9	9.8	953
East Midlands of England	59.1	38.5	32.1	8.0	613
West Midlands of England	58.6	39.8	34.4	8.0	739
East of England	55.1	38.0	33.0	10.6	1,122
Greater London	47.5	41.5	25.8	14.0	774
South East England	52.7	36.3	29.8	10.4	1,212
South West England	59.8	37.8	31.7	7.7	1,097
England and Wales	55.7	39.3	32.5	9.8	8,680

5.2 Perceptions of social impact

Currently, Third Sector Trends is the only large-scale study which collects substantive data on perceptions of sector impact. New questions were introduced in 2019 on the impact of the sector’s work which were developed in collaboration with *Power to Change*. Respondents were asked “*at a community level, what kind of impact do you think you have?*” across several domains.

For each aspect, respondents were invited to tick one of the following responses: ‘we have a very strong impact,’ ‘we make an important contribution,’ ‘we make some difference’ and ‘no we don’t try to do this’. Response rates to each question were high (never falling below 94% for each statement) which bolsters the reliability of the findings. It was a matter of concern, when this question was first launched in 2019, that people who took part in the survey might be tempted to ‘over emphasise’ the value of their work. But this did not turn out to be the case. Respondents were measured in their assessments of the areas of impact to which they contribute.

Table 5.2 shows the strength of impact that voluntary organisations have on several aspects of personal, social and community wellbeing. Interestingly, in Wales there tends to be a much stronger focus on issues surrounding deprivation than in many other regions that reflects the contextual analysis of national statistics presented in Section 2 of this report.

Table 5.2 Percent of voluntary organisations stating that they ‘have a very strong impact’ by region 2025 (Third Sector Trends in England and Wales 2025)

	We develop knowledge and skills through education and training	We improve health and wellbeing	We reduce social isolation	We encourage physical activity and improve people’s fitness	We increase employability	We tackle the consequences of poverty	We improve people’s access to basic services
Wales	18.6	27.5	30.8	13.8	5.5	11.3	13.0
North East England	20.8	32.0	37.7	17.3	9.7	13.4	14.4
North West England	18.1	29.2	30.2	14.9	5.2	12.5	13.0
Yorkshire & Humber	16.4	28.3	28.1	13.9	6.6	8.9	12.1
East Midlands	15.0	19.9	22.1	11.0	5.7	7.6	7.5
West Midlands	14.8	23.1	26.5	12.2	5.8	8.9	10.7
East of England	16.1	25.5	28.5	10.6	5.7	9.4	11.3
Greater London	22.6	23.9	27.0	12.8	9.0	12.6	9.6
South East England	14.4	20.5	21.7	10.6	4.8	7.8	8.7
South West England	13.0	19.3	20.3	10.7	3.6	7.1	6.4
England and Wales	16.7	24.6	26.8	12.5	6.0	9.7	10.5

Table 5.2 /continued...						
	We give people confidence to manage their lives	We enhance the cultural and artistic life of the community	We improve the local environment	We promote community cohesion	We empower people in the community	We increase people's pride in their community
Wales	23.8	18.9	10.0	22.9	21.2	16.8
North East England	26.9	14.7	9.4	22.3	25.3	18.8
North West England	23.5	15.8	8.8	21.0	20.8	15.7
Yorkshire & Humber	22.1	14.3	7.3	19.3	19.3	16.7
East Midlands	15.6	14.9	7.8	15.7	11.7	11.3
West Midlands	20.3	15.3	8.7	19.5	16.6	13.9
East of England	20.5	15.2	9.0	19.8	18.9	13.9
Greater London	22.6	16.8	6.3	18.2	21.9	12.9
South East England	17.0	13.8	8.3	14.8	14.1	10.2
South West England	12.8	14.1	8.7	14.0	11.5	10.6
England and Wales	20.1	15.2	8.4	18.4	17.8	13.8

Table 5.3 compares the percentages of voluntary organisations which stated they have a 'very strong' impact on a series of social indicators between 2022 and 2025. Data are presented for Wales in Rank order for 2025. The strongest area of impact is in tackling social isolation (31%) while increasing employability is the weakest (6%). There is little evidence to suggest that sector perceptions of impact have changed markedly over the last three years. There is one notable exception; strong impact on the local environment has decreased from 14% in 2022 to 10% in 2025. It is also, perhaps, surprising that given the strong current emphasis on the 'cost of living crisis' that sector activity has not shifted further in this direction in Wales (as is the case in England).

When comparing major urban with town and country areas, there are substantive variations in perceptions of strong impact in some domains of practice. Emphasis on community empowerment, tackling poverty and reducing social isolation is much stronger in major urban areas while environmental impact is stronger in town and country areas. In some domains of social or community impact, there are scant differences between major urban and town and country areas such as improving people's physical activity and fitness, employability, and enhancing the cultural and artistic life of the community.

Table 5.3 Perceptions of strong impact in Wales 2022-2025 (Third Sector Trends in England and Wales 2025)			
	Major urban areas	Town and country areas	Wales 2025 (2022 in parentheses)
We reduce social isolation	33.7	28.0	30.7 (29.2)
We improve health and wellbeing	31.7	22.0	27.4 (30.1)
We give people confidence to manage their lives	30.0	16.5	23.9 (24.8)
We promote community cohesion	24.2	21.6	23.0 (23.8)
We empower people in the community	24.1	17.0	21.2 (21.9)
We enhance the cultural and artistic life of the community	18.0	18.8	18.5 (20.4)
We develop knowledge and skills through education and training	20.4	15.7	18.3 (no data)

Table 5.3 / Continued...	Major urban areas	Town and country areas	Wales 2025 (2022 in parentheses)
We increase people's pride in their community	16.0	16.9	16.9 (17.8)
We encourage physical activity and improve people's fitness	13.5	13.8	13.7 (14.9)
We improve people's access to basic services	15.8	9.6	13.2 (14.1)
We tackle the consequences of poverty	13.8	8.4	11.3 (11.9)
We improve the local environment	8.7	11.3	10.0 (14.1)
We increase employability	5.9	4.8	5.5 (7.2)

5.3 Financial estimates of sector impact

The approach to defining sector value by Third Sector Trends involves four steps.³⁹ The first step is to estimate the 'added value' the voluntary sector contributes involves the identification of the amount of 'energy' which the sector has at its disposal to achieve its objectives. Rather than over-labouring the process of defining sector energy, a relatively simple approach is taken to include financial or proxy financial values under four headings:

- **The value of financial expenditure:** it is possible to make good estimates of sector expenditure. This sum captures the economic value of employee wages, spending on rent and consumables and the disbursement of grants to individuals or other voluntary organisations together with contributions to local and national taxation.
- **The proxy-replacement value of volunteer time available:** in Section 2, calculations on the number of regular volunteers and the work time they invest were presented. Replacement values were attributed to this energy at National Living Wage and at 80% of median regional wages. A mid-point estimate is used to define the value of volunteering.
- **The proxy value of additional in-kind support:** in-kind support from the private sector and public sector is estimated. This support includes the free or low-cost use of facilities and services, pro bono advice and technical expertise, employee volunteer support and the provision of free goods such as surplus consumables.⁴⁰
- **The proxy value of self-generated income:** this estimate is based on the regional share of the national value of income gained from retailing of pre-used goods. This represents the production of financial value from redundant articles and is not covered in the expenditure category (which would include income from other types of voluntary sector trading).⁴¹

³⁹ See Section 5, *Technical paper on sector structure and analytical techniques*: <https://www.stchads.ac.uk/wp-content/uploads/2025/12/Third-Sector-Trends-in-England-and-Wales-2025-Technical-paper-on-sector-structure-and-analytical-techniques-December-2025.pdf>

⁴⁰ A report on the substantive contribution of business to the voluntary sector has been produced as part of the Law Family Commission on Civil Society. See Chapman, T. (2021) *Going the extra mile: how business works with the local third sector*, London: Pro Bono Economics. Currently there are no equivalent studies of local public sector investment in the voluntary sector using in-kind resources. However, it is likely that the non-financial contributions of public bodies such as NHS trusts, health authorities, police, fire and rescue and other agencies is likely to be at least equal to private sector investment. In-kind support would include the contribution of officers with responsibility for voluntary sector liaison, research and intelligence and advice and guidance – but exclude contracts to the voluntary sector to provide infrastructure support as this will be counted under voluntary sector expenditure. Other forms of in-kind support would include free access to venues and equipment for voluntary sector usage and beneficial arrangements such as peppercorn rents.

⁴¹ The evidence from the Charity Retail Association suggests that charity shop retail produces about £331m in profits in 2018/19. On this basis, estimates were generated for Yorkshire and the three study areas. For further discussion of the value produced through charity shop recycling and retail see also, Osterley, R. and Williams, D. (2019) 'The social, environmental and economic benefits of reuse by charity shops', *Detritus* 7(1) 29-35. <https://digital.detritusjournal.com/articles/the-social-environmental-and-economic-benefits-of-reuse-by-charity-shops/244>. For further analysis on the value of charity shop retail, see Harrison-Evans, P.

As shown in Table 5.4, these combined financial values reach substantial sums. But these statistics do not fully reflect the whole value of the economic and social impact the voluntary sector produces. Instead, they simply signal the resource 'energy' that the sector has at its disposal.

	Estimated sector expenditure (£millions)	Proxy-replacement value of volunteer time mid point estimate (£millions)	Proxy value of additional in-kind support in each area (£millions)	Proxy value of additional sources of self-generated income in each area (£millions)	Total financial value of sector energy expended by the Third Sector in each area (£millions)
Isle of Anglesey	56.4	5.7	4.4	0.4	66.9
Gwynedd	144.2	14.5	11.4	1.1	171.2
Conwy	89.9	9.0	7.1	0.7	106.7
Denbighshire	82.1	8.3	6.5	0.6	97.5
Flintshire	85.6	8.6	6.7	0.7	101.6
Wrexham	84.1	8.5	6.6	0.6	99.9
Powys	204.0	21.2	16.1	1.6	242.9
Ceredigion	81.7	8.3	6.4	0.6	97.0
Pembrokeshire	118.2	12.0	9.3	0.9	140.4
Carmarthenshire	161.5	16.4	12.7	1.2	191.8
Swansea	136.7	13.9	10.8	1.0	162.4
Neath Port Talbot	73.5	7.5	5.8	0.6	87.4
Bridgend	71.0	7.3	5.6	0.5	84.4
Vale of Glamorgan	85.8	8.8	6.8	0.7	102.1
Cardiff	246.4	25.3	19.4	1.9	293.0
Rhondda Cynon Taf	116.3	12.0	9.2	0.9	138.4
Merthyr Tydfil	28.7	3.0	2.3	0.2	34.2
Caerphilly	73.0	7.5	5.7	0.6	86.8
Blaenau Gwent	24.4	2.5	1.9	0.2	29.0
Torfaen	40.8	4.2	3.2	0.3	48.5
Monmouthshire	89.9	9.3	7.1	0.7	107.0
Newport	66.9	7.0	5.3	0.5	79.7
Wales	2,161.1	220.8	170.3	16.5	2,568.7

The second step in the process is to define types of 'added value' that the voluntary sector contributes to local economy and society. No claim is made that these distinctions are entirely original – instead, the approach draws upon the large policy and academic literature on the appraisal or measurement of impact which implicitly or explicitly embrace one or more of these notions of impact value.⁴²

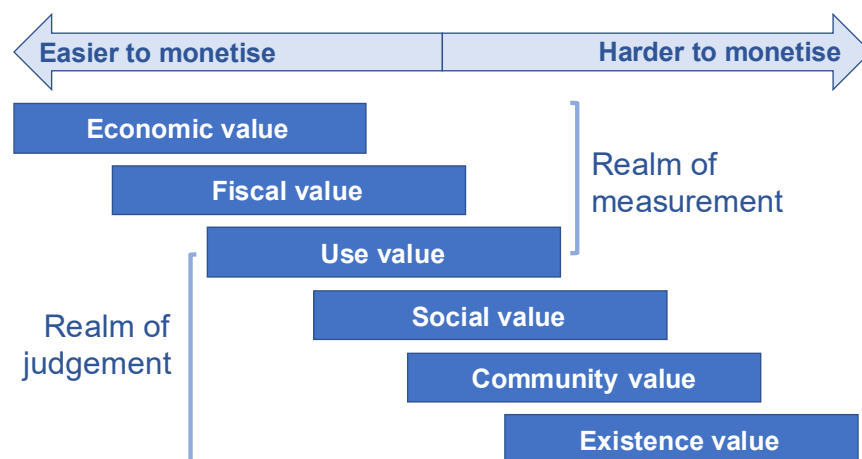
(2016) *Shopping for good: the social benefits of charity retail*, London: Demos <https://www.demos.co.uk/wp-content/uploads/2017/09/Shopping-for-Good-the-social-benefits-of-charity-retail-.pdf>. While charity retail declined during the pandemic due to lockdowns and closures, there are indications that business has bounced back in 2022: [Charity shops reveal surge in interest with sales 22% higher than pre-pandemic due to cost of living crisis \(inews.co.uk\)](https://www.inews.co.uk/news/charity-shops-reveal-surge-in-interest-with-sales-22-percent-higher-than-pre-pandemic-due-to-cost-of-living-crisis/).

⁴² There is a large academic and policy literature on the definition and measurement of value. A useful contribution has been offered by Mulgan, G., Breckon, J., Tarrega, M., Bakhshi, H., Davies, J., Khan, H. and Finnis, A. (2019) *Public value: how can it be measured, managed and grown?* London: Nesta. There are many methodologies on offer to measure value, such as descriptive models of causation adopted in 'theories of change' which may result in impact; complex manipulation of evidence and predictive modelling in social return on investment strategies, and so on. Whichever approach is adopted, results can be contested depending on the value position of the observer. For further discussion, see Third Sector Trends discussion paper: *Measuring Impact: easy to*

- **Economic value:** is defined as the economic contribution that the local voluntary sector makes to the area through ‘multiplier effects’ driven by: organisational expenditure on local businesses; the spending of employees in the local economy and productivity from self-generated trading activities.
- **Fiscal value:** is defined as the savings gained by local public sector agencies and government departments because of voluntary sector activity (either by delivering services under contract more efficiently or cheaply, or by reducing service need via voluntary sector generated activity).
- **Use value:** is defined as the direct and immediate personal or social benefits gained by voluntary sector service users which in turn incentivises, empowers and facilitates greater socially, economically or environmentally beneficial activity by the resident population in employment, self-employment, unpaid caring, running private businesses/social enterprises and volunteering.
- **Social value:** the alleviation of the impact of specific social problems and investment in personal wellbeing to generate or embrace new opportunities to strengthen economy and society locally.
- **Community value:** strengthening the quality of life, enriching culture, and encouraging cohesion, tolerance, trust and belief in civil society through the collective contribution of the voluntary sector working in neighbourly, complementary or collaborative ways.
- **Existence value:** when the voluntary sector invests in social and community wellbeing which is valued by the general population though not necessarily ‘used’ personally. Existence value also includes extant voluntary sector capacity and latent potential to produce energy and momentum to tackle unforeseen local challenges or crises.

As Figure 5.1 illustrates, some of these types of value are easier to ‘measure’ and ‘monetise’ than others. Economic, fiscal and use values are *more* amenable to measurement and monetisation. Social, cultural and existence values cannot easily be monetised or measured – but this does not mean that shared judgements cannot be reached about their value.

Figure 5.1 **Realms of measurement and informed judgement**



The third step in the analysis is to apply standardised multipliers to each aspect of value. The multiplier estimates are more ‘conservative’ than those often adopted in evaluation work. This is because specific assessments of voluntary sector practices attribute success within defined practice boundaries – but without necessarily

considering how other interventions may have contributed to overall impact. It is accepted that the estimates may be 'too low' or 'too high'.

And similarly, the possibility is not dismissed that there could be considerable levels of variation when looking at different aspects of sub-sector activity.⁴³ It would be expected that the estimates, as given, may be subject to challenge as the quality of evidence on sector impact improves – but this would be welcomed if it helps to produce informed debate about voluntary sector economic impact. The resulting economic values, once multipliers have been applied to sector energy estimates are presented in Table 5.5.

Table 5.5 Estimates of tangible added value produced by the voluntary sector in Wales					
	Total financial value of sector energy expended by the voluntary sector in each area (£millions)	Economic multiplier value (mid-point estimate 65%) (£millions)	Fiscal multiplier value (mid-point estimate 55%) (£millions)	Use value multiplier (mid-point estimate 35%) (£millions)	Total contribution of multiplier excluding direct financial value (£millions)
Isle of Anglesey	66.9	43.5	36.8	23.4	103.7
Gwynedd	171.2	111.3	94.1	59.9	265.3
Conwy	106.7	69.3	58.7	37.3	165.3
Denbighshire	97.5	63.3	53.6	34.1	151
Flintshire	101.6	66	55.9	35.6	157.5
Wrexham	99.8	64.9	54.9	35	154.8
Powys	242.9	157.8	133.5	85	376.3
Ceredigion	97.0	63	53.3	33.9	150.2
Pembrokeshire	140.4	91.3	77.2	49.1	217.6
Carmarthenshire	191.8	124.7	105.5	67.1	297.3
Swansea	162.4	105.5	89.3	56.8	251.6
Neath Port Talbot	87.4	56.7	48	30.6	135.3
Bridgend	84.4	54.9	46.4	29.5	130.8
Vale of Glamorgan	102.1	66.3	56.1	35.7	158.1
Cardiff	293.0	190.5	161.2	102.6	454.3
Rhondda Cynon Taf	138.4	89.9	76.1	48.4	214.4
Merthyr Tydfil	34.2	22.2	18.8	12	53
Caerphilly	86.8	56.5	47.8	30.4	134.7
Blaenau Gwent	29.0	18.9	16	10.2	45.1
Torfaen	48.5	31.6	26.7	17	75.3
Monmouthshire	107.0	69.5	58.8	37.4	165.7
Newport	79.7	51.8	43.8	27.9	123.5
Wales	2,568.7	1,669.4	1,412.5	898.9	3,980.8

The fourth step involves making observations on how to value aspects of voluntary sector activities that cannot easily be defined, let alone measured. It may not be possible accurately and consistently to measure value which is created through the individual and accumulated action of the voluntary sector, but it does not mean that

⁴³ For a brief overview of the limitations of approaches to economic impact analysis, see Westall, A. (2009) *Economic analysis and the third sector: overview of economic analysis in relation to the third sector*, Birmingham: third sector Research Centre Working Paper No. 14. http://epapers.bham.ac.uk/801/1/WP14_Economic_analysis_and_the_third_sector_-_Westall_Dec_09.pdf. See also, Harlock, J. (2013) *Impact measurement practice in the UK third sector: a review of emerging evidence*, Birmingham: third sector Research Centre Working Paper No. 14, http://epapers.bham.ac.uk/1800/1/WP106_Impact_measurement_practice_in_the_UK_third_sector_-_Harlock%2C_July_2013.pdf

such value does not exist. Dredging for ‘data’ to collate, categorise and count and then shoehorn into statistical models rarely looks convincing. It is better to recognise that making shared judgements about the value of sector activity that is already happening. There are two simple ways of recognising this.

Firstly, by taking into account the fact that a majority of voluntary organisations are awarded grants and gifts from time to time, by trusts and foundations, local public bodies which operate small community grants, local parish councils, faith organisations, businesses or philanthropists, public giving and so forth. This shows that through the use of judgement, much of the work of the sector has already been assessed and invested in by people.

Secondly, and as importantly, the low levels of closures among voluntary organisations indicate that continuity and sustainability is the norm, not the exception. What this shows is that that voluntary organisations are relevant, purposeful and produce social and community activity that people value, contribute towards and use. It is a simple point to make: if the community did not value the work and sustain the resolve to keep it alive and active - the voluntary sector would not exist.

If accepted, in principle, that the added social, community and environmental value that the voluntary sector accumulates is at least of equal value to the energy the sector expends - that is as far as financial evaluation exercises on intangible sector-wide impact need to go – the results of which are presented in Table 5.6.

Table 5.6 Estimates of total value produced by the voluntary sector in Wales 2025				
	Actual financial value of the voluntary sector (£millions)	Added economic, fiscal and use value (£millions)	Added intangible social, community and existence value (£millions)	Total value (£millions)
Isle of Anglesey	66.9	103.7	66.9	237.5
Gwynedd	171.2	265.3	171.2	607.7
Conwy	106.7	165.3	106.7	378.7
Denbighshire	97.5	151	97.5	346.0
Flintshire	101.6	157.5	101.6	360.7
Wrexham	99.8	154.8	99.8	354.4
Powys	242.9	376.3	242.9	862.1
Ceredigion	97.0	150.2	97.0	344.2
Pembrokeshire	140.4	217.6	140.4	498.4
Carmarthenshire	191.8	297.3	191.8	680.9
Swansea	162.4	251.6	162.4	576.4
Neath Port Talbot	87.4	135.3	87.4	310.1
Bridgend	84.4	130.8	84.4	299.6
Vale of Glamorgan	102.1	158.1	102.1	362.3
Cardiff	293.0	454.3	293.0	1040.3
Rhondda Cynon Taf	138.4	214.4	138.4	491.2
Merthyr Tydfil	34.2	53	34.2	121.4
Caerphilly	86.8	134.7	86.8	308.3
Blaenau Gwent	29.0	45.1	29.0	103.1
Torfaen	48.5	75.3	48.5	172.3
Monmouthshire	107.0	165.7	107.0	379.7
Newport	79.7	123.5	79.7	282.9
Wales	2,568.7	3,980.8	2,568.7	9118.2

Section 6

Income, assets and financial wellbeing

Third Sector Trends research includes all types of registered organisations with income below £25million. As Table 6.1 shows, there are about 205,000 organisations in England and Wales and total sector income amounts to about £61billion. Organisational density varies by region. There are proportionately more voluntary organisations per 1,000 population in the affluent south of England than in the Midlands and the North. In Wales there are 3.2 voluntary organisations per 1,000 members of the resident population which is just below the national average for England and Wales.

Table 6.1 Third Sector income in Wales and English regions 2025				
	Number of Third Sector organisations	Population in each region (1,000s)	Third Sector organisations per 1,000 population	Estimated Third Sector income (£millions)
Wales	10,530	3,164	3.2	2,260
North East England	7,140	2,711	2.6	1,980
North West England	20,760	7,600	2.7	5,710
Yorkshire and Humber	15,060	5,594	2.7	3,870
East Midlands of England	14,650	4,991	3.0	2,940
West Midlands of England	17,500	6,086	2.9	4,610
East of England	22,110	6,469	3.4	4,950
London	38,860	8,945	4.4	19,990
South East England	33,980	9,483	3.6	9,550
South West England	24,430	5,811	4.2	5,400
England and Wales	205,000	60,854	3.4	61,260

6.1 Income sources

Dependence upon a single income source can be risky. Consequently, most voluntary organisations prefer to rely upon a mix of income sources such as grants, earned income, gifts and legacies, subscriptions and so on. Table 6.2 shows how sources of income are valued relative to each other in Wales and English regions.

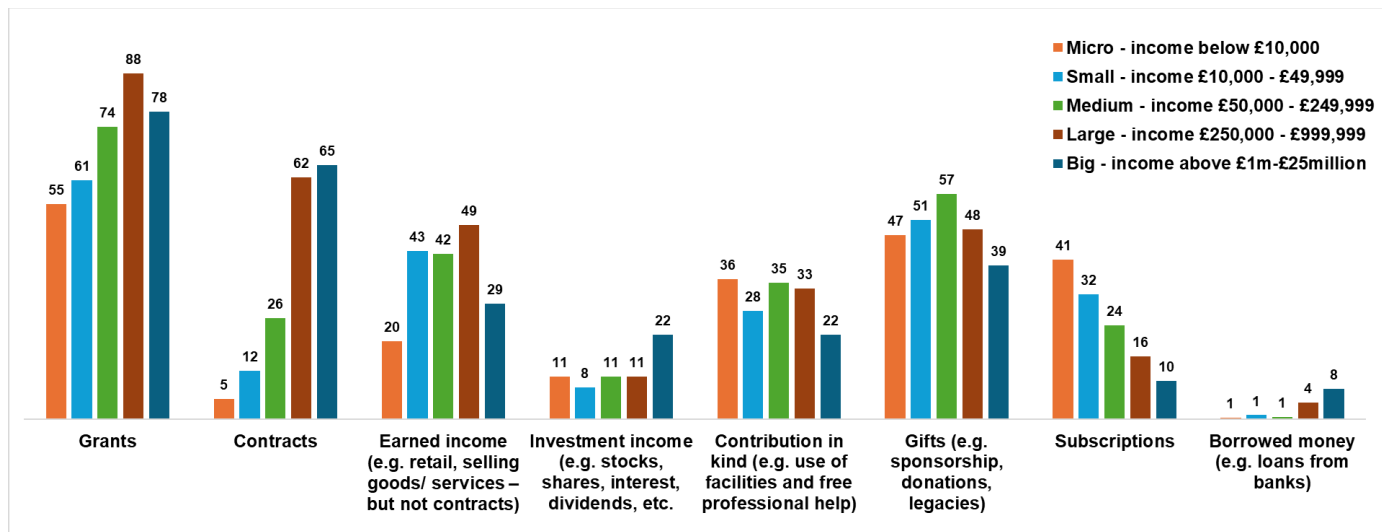
Table 6.2 Percent of voluntary organisations valuing a range of income sources (% 'most important' or 'important', Third Sector Trends in England and Wales 2025)								
	Grants	Contracts	Earned income (e.g. retail, selling goods/ services – but not contracts)	Investment income (e.g. stocks, shares, interest, dividends, etc.)	Contribution in kind (e.g. use of facilities and free professional help)	Gifts (e.g. sponsorship, donations, legacies)	Subscriptions	Borrowed money (e.g. loans from banks)
Wales	68.1	24.4	36.1	10.9	32.2	49.9	28.4	1.6
North East England	73.3	28.5	36.4	9.4	34.8	49.8	26.6	2.9
North West England	60.2	22.8	35.4	10.3	33.0	53.8	30.1	1.8
Yorkshire and Humber	59.0	22.5	38.1	10.6	32.5	52.8	29.8	1.8
East Midlands of England	51.2	15.6	31.2	12.8	29.1	46.7	31.8	3.2
West Midlands of England	54.3	14.7	32.0	12.4	32.3	53.8	31.8	1.8
East of England	56.3	18.0	33.0	13.7	32.1	52.7	31.0	2.2
London	53.9	21.4	31.4	16.5	35.8	61.5	33.1	2.9
South East England	50.5	15.5	31.0	15.7	30.2	55.6	33.2	2.6
South West England	49.8	12.1	34.8	15.4	27.8	50.2	30.4	1.2
England and Wales	56.9	19.1	33.9	13.1	31.8	52.9	30.8	2.2

Headline data on income sources can conceal underlying variations. Figure 6.1 compares perceptions of the value of income sources by size of organisations in Wales.

- Grant funding is generally regarded as a 'most important' or 'important' source of income, but this varies by size of voluntary organisations. Only 55% of micro organisations feel that grants are of importance to them compared with 88% of larger organisations.
- In Wales, income from contracts to deliver services is valued by 65% of the biggest organisations, but only by 5% of the smallest.
- The size of voluntary organisations affects how earned income is valued - rising from 20% of micro voluntary organisations to 42-43% of small and medium sized and 49% of larger organisations. Earned income is regarded as less important (29%) by the biggest voluntary organisations in Wales.
- Few organisations highly value income from investments - ranging from around 11% of small to large-sized voluntary organisations to 22% of the biggest organisations.
- Contributions in kind are valued quite highly by all organisations in Wales although there is no clear size-related pattern. The biggest voluntary organisations are least likely to value in-kind support (22%) .
- Gifts and donations are most highly valued by medium-sized organisations in Wales (57%) and least valued by the biggest (38%),
- Micro organisations are most likely to value subscription income (41%); percentages fall steadily to 10% of the biggest voluntary organisations in Wales.

- Borrowed money is not considered to be an important source of income by most voluntary organisations: only 8% of the biggest organisations emphasise its importance.

Figure 6.1 **How sources of income are valued by organisational size in Wales** (Percent stating that income is 'most important' or 'important'. Third Sector Trends in England and Wales 2025, n=709)



Comparative data on the 'relative' value attached to income sources is presented for Wales and English regions in Figure 6.2. Unlike Figure 6.1, the percentages add up to 100% for each region. It is clear from these data that Wales's closest statistical neighbour is North East England where grants are valued much more highly than in all other regions while subscriptions and gifts are valued the least.

Figure 6.2 **Relative value of income sources in Wales and English regions** (Third Sector Trends in England and Wales 2025, average n=8,512)



Relationships with grant funders

Grant funding, as shown above, is the mainstay of income for many voluntary organisations. Table 6.3 provides headline data on how much voluntary organisations valued their relationships with grant makers in Wales in 2025. Percentages in Wales are very close to England and Wales averages.

It is, perhaps, surprising that around half of voluntary organisations do not currently have a relationship with trusts and foundations suggesting that reliance on and competition for grant funding may be lower than is often imagined. That does not, of course, mean that these voluntary organisations never have or never will need grants.

Table 6.3 Quality of relationships with grant-making trusts and foundations in Wales (national comparisons in parentheses; Third Sector Trends, England and Wales n= 8,350, Wales n=709)					
	They gave us unrestricted funding (e.g. 'core' funding)	They took the time to get to know us	They wanted us to be 'innovative'	They've made a long-term investment in our work	They helped develop our skills (e.g. consultants / training)
Strongly agree	9.3 (9.1)	6.1 (5.2)	8.9 (6.3)	5.4 (4.9)	2.6 (2.4)
Agree	19.1 (18.5)	22.0 (22.0)	23.0 (20.4)	13.3 (12.7)	14.9 (11.8)
Disagree	12.9 (10.8)	13.8 (13.0)	9.2 (10.7)	15.3 (15.5)	15.8 (15.7)
Strongly disagree	13.9 (11.2)	10.4 (7.8)	6.6 (5.6)	13.8 (11.0)	13.2 (10.5)
Not applicable	44.8 (50.4)	47.6 (52.0)	52.4 (57.0)	52.2 (55.0)	53.3 (59.7)

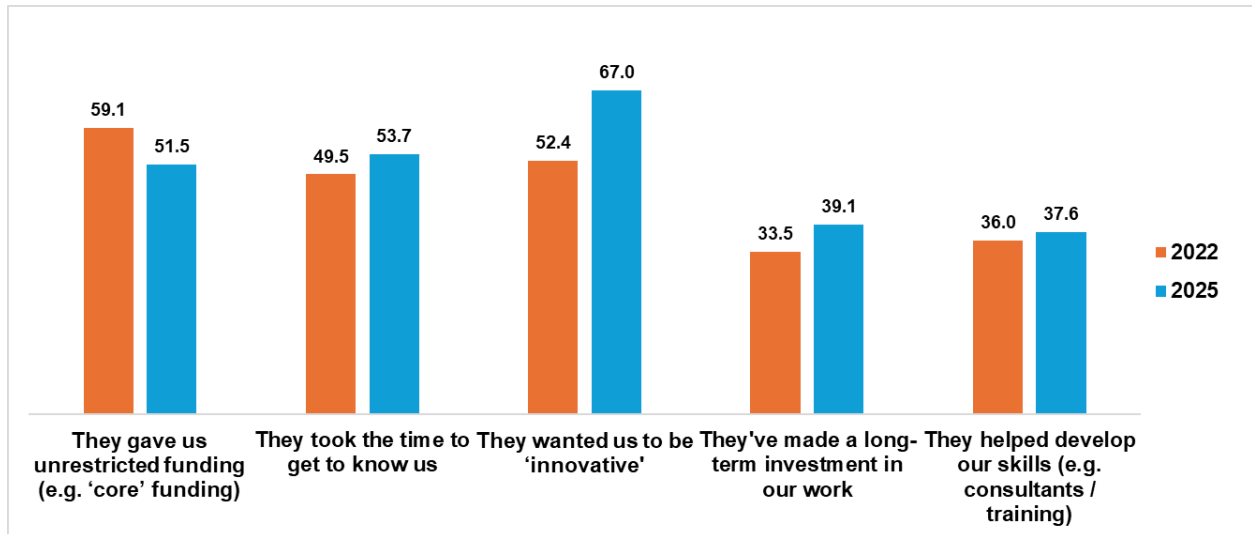
Figure 6.3 deepens the analysis by presenting the percentages of voluntary organisations which 'agreed' or 'strongly agreed' with a series of statements on relationships with grant makers from 2022-2025. Those voluntary organisations which have no relationship with grant-making trusts and foundations are excluded.

This analysis produces some interesting findings (regional comparisons are provided in Figure 6.4, over page).

- In 2022, 59% of voluntary organisations stated that they received unrestricted or 'core funding' in the extraordinary circumstances surrounding the Coronavirus pandemic, but the percentage has now fallen to 52% (compared with 60% in South West England).
- Many grant-making foundations are committed to getting to know their grantees. During the pandemic, 50% of voluntary organisations in Wales reported that this was so, but has now risen only slightly to 54% after restrictions were lifted (compared with 62% in North East England).
- During the pandemic, grant makers adopted a 'lighter touch' approach when working with voluntary organisations and pressurised them less about being 'innovative' (52% in Wales in 2022). Some grant funders have since gone back to demanding that innovation is a requirement and in 2025, 67% of voluntary organisations state that innovation is a condition of grant funding. Expectations about innovation are higher in Wales than in every English region except London (69%).
- For many years, voluntary sector organisations have complained about the short-term investment they receive from grant-making foundations. During the pandemic, about 34% of voluntary organisations in Wales reported that they received long-term investment in 2022. That has now risen slightly to 39% (which is much lower than in North East England (48%).
- Many grant-makers commit to help voluntary organisations to develop their skills by appointing, for example, consultants or providing training sessions. Provision was received by 36% of voluntary organisations during the

pandemic in Wales, but has risen slightly to 38% in 2025. Provision of skills support varies little by region.

Figure 6.3 Voluntary organisations’ working relationship with grant-making trusts and foundations in Wales: 2022-2025 (Third Sector Trends in Wales, percentage ‘agree’ or ‘strongly agree’ 2022, n=443, 2025 n=706)



Grant awards in regional context

To put the above analysis in context, data from 360Giving have been reconfigured for England and Wales over a five year period from 2018-2023 to examine where grants are distributed spatially by trusts and foundations.⁴⁴ Data are presented on the distribution of TSOs by area affluence within each region (Table 6.4). These data suggest that the odds of organisations holding grants are higher in poor rather than rich areas. In North East England, for instance, 41% of grants are distributed to the poorest areas within which only 28% of TSOs are based.⁴⁵

Background analysis shows that 13% of voluntary organisations in Wales stated that grants were of ‘no importance’ to them; that percentage rose steadily from fewer than 4% of organisations based in the least advantaged deciles of the Welsh Index of Multiple Deprivation to 35% in the most advantaged areas. These data accurately reflect the position of voluntary organisations in Wales during 2025, but that does not mean such views are set in stone. Demand for grants may be ‘occasional’ (perhaps to buy a minibus, stage an event or renovate a venue) rather than ‘continuous’ (to sustain a regularised service).

When expressed as ratios (Table 6.5), it is clear that the odds of voluntary organisations being awarded grants is higher in poorer areas (although that may not be a fully accurate reflection of *demand* because, as noted above, requirements for grants can be ‘continuous’ or ‘ephemeral’). In North East England, grant makers seem to be working particularly hard to focus their grant making in poor areas in their region: 3.7:1 grants per TSO were awarded in the poorest areas over a five year period compared with 1.6:1 in the richest. In Wales, by contrast, grant funding seems to be more balanced, irrespective of local levels of affluence or deprivation.

⁴⁴ Further statistical detail on the distribution of grant funding is available in an appendix, see Tables A1 to A4.

⁴⁵ There are, of course, exceptions. For example 25% of grants in South West England are allocated in the richest areas which are occupied by only 19% of the voluntary sector.

Figure 6.4 **Regional variations in voluntary organisations' working relationship with grant-making trusts and foundations**
 (Third Sector Trends in England and Wales 2025, n=8,620)

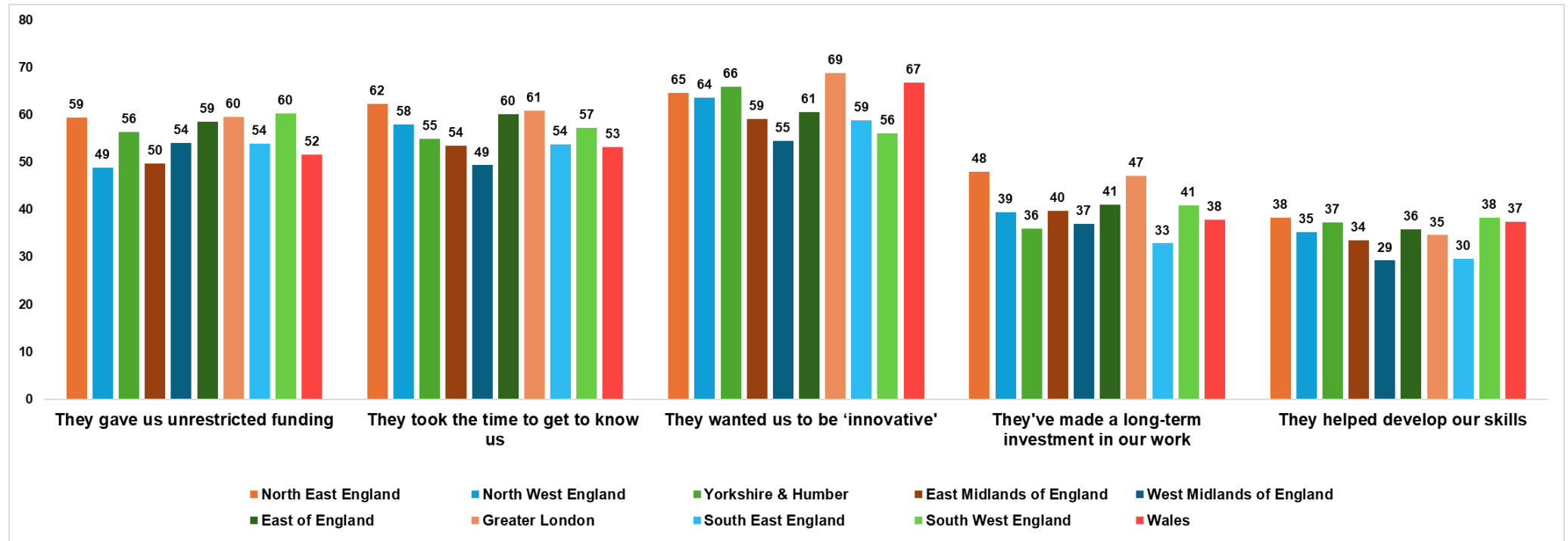


Table 6.4 Distribution of grants and voluntary organisations by region and areas of deprivation in Wales and English regions
(source: 360Giving / Third Sector Trends Combined Register 2025)

	<i>Poorest IMD 1-2</i>		<i>IMD 3-4</i>		<i>Intermediate IMD 5-6</i>		<i>IMD 7-8</i>		<i>Richest IMD 9-10</i>		Number of grants	Number of TSOs
	Percent grants	Percent TSOs	Percent grants	Percent TSOs	Percent grants	Percent TSOs	Percent grants	Percent TSOs	Percent grants	Percent TSOs		
Wales	16.1	13.8	20.7	18.6	23.8	23.8	20.4	25.5	18.9	18.3	17,235	10,533
North East England	40.9	27.9	17.3	23.1	18.0	18.9	14.3	15.1	9.5	15.0	18,185	7,134
North West England	39.5	30.4	25.3	17.8	18.4	17.3	8.9	18.8	7.8	15.7	17,405	20,755
Yorkshire and The Humber	46.4	25.0	21.1	15.0	12.6	19.9	12.2	21.4	7.8	18.6	23,436	15,057
East Midlands of England	35.2	14.1	22.5	18.6	18.8	18.9	14.8	24.7	8.7	23.6	13,510	14,646
West Midlands of England	26.8	24.4	24.3	19.2	16.4	22.4	16.3	19.8	16.2	14.2	10,778	17,501
East of England	22.5	7.5	22.3	15.4	26.9	25.8	16.7	24.5	11.5	26.8	22,271	22,108
London	22.2	15.2	36.4	29.4	22.0	24.7	13.6	20.0	5.7	10.7	41,512	38,861
South East England	25.6	6.2	21.5	11.7	20.9	19.7	20.2	27.4	11.8	35.0	8,424	33,979
South West England	13.5	9.3	17.3	19.9	19.7	29.3	25.0	22.9	24.6	18.6	22,417	24,426
England and Wales	28.2	15.5	24.3	19.2	20.1	22.6	15.9	22.5	11.6	20.3	195,173	205,000

Table 6.5 Ratios of grants received to number of organisations (Calculated from data in Table 3.3)							
	Poorest IMD 1-2	IMD 3-4	IMD 5-6	IMD 7-8	Richest IMD 9-10	Number of grants	Number of TSOs
Wales	1.9	1.8	1.6	1.3	1.7	17,235	10,533
North East England	3.7	1.9	2.4	2.4	1.6	18,185	7,134
North West England	1.1	1.2	0.9	0.4	0.4	17,405	20,755
Yorkshire and Humber	2.9	2.2	1.0	0.9	0.7	23,436	15,057
East Midlands of England	2.3	1.1	0.9	0.6	0.3	13,510	14,646
West Midlands of England	0.7	0.8	0.5	0.5	0.7	10,778	17,501
East of England	3.0	1.5	1.1	0.7	0.4	22,271	22,108
London	1.6	1.3	1.0	0.7	0.6	41,512	38,861
South East England	1.0	0.5	0.3	0.2	0.1	8,424	33,979
South West England	1.3	0.8	0.6	1.0	1.2	22,417	24,426
England and Wales	1.7	1.2	0.8	0.7	0.5	195,173	205,000

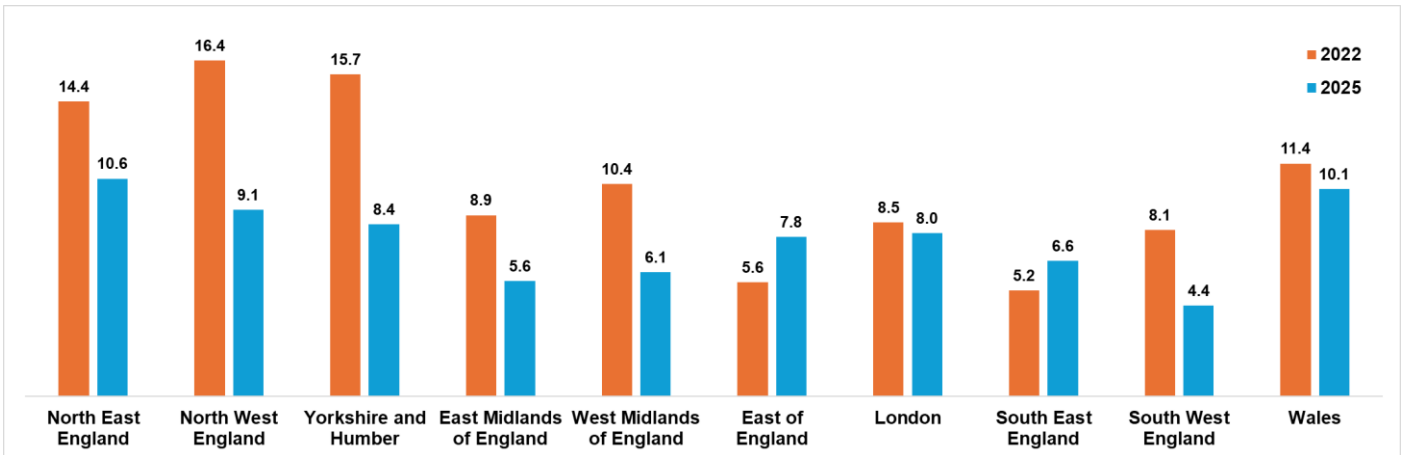
Public service delivery contracts

Historically, UK government policy on the procurement of service delivery from voluntary organisations has lacked critical awareness of market demand for such work and mistakenly believed that sector capacity can easily be built. Current Westminster procurement policies differ little, in essentials, from previous incarnations of two decades ago.

In Wales, the proportion of voluntary organisations which have no knowledge about or interest in delivering service under public sector contracts has remained about the same (~72%). In 2022 the number of voluntary organisations bidding for contracts was higher (5%) than 2025 (3%). This may be because bids have translated into a slight increase in voluntary organisations delivering contracts in 2025 (rising from 6-8%). These findings run contrary to trends in most of England where voluntary organisations are losing interest in the delivery of contracts (see Figure 6.6).

Table 6.6 Delivery of public sector services under contract in Wales: 2022-2025		
	2022	2025
Not aware of these opportunities	29.6	34.3
Aware of these opportunities but they are not relevant to our organisation's objectives	42.6	36.5
Aware if these opportunities but need more information	3.2	4.6
Interested in this option but would need extra support to do this	6.6	7.0
Interested in this option but feel there are barriers in the tendering process	6.6	7.2
Bidding for contracts	5.2	2.4
Delivering contracts	6.2	8.0
N=	443	669

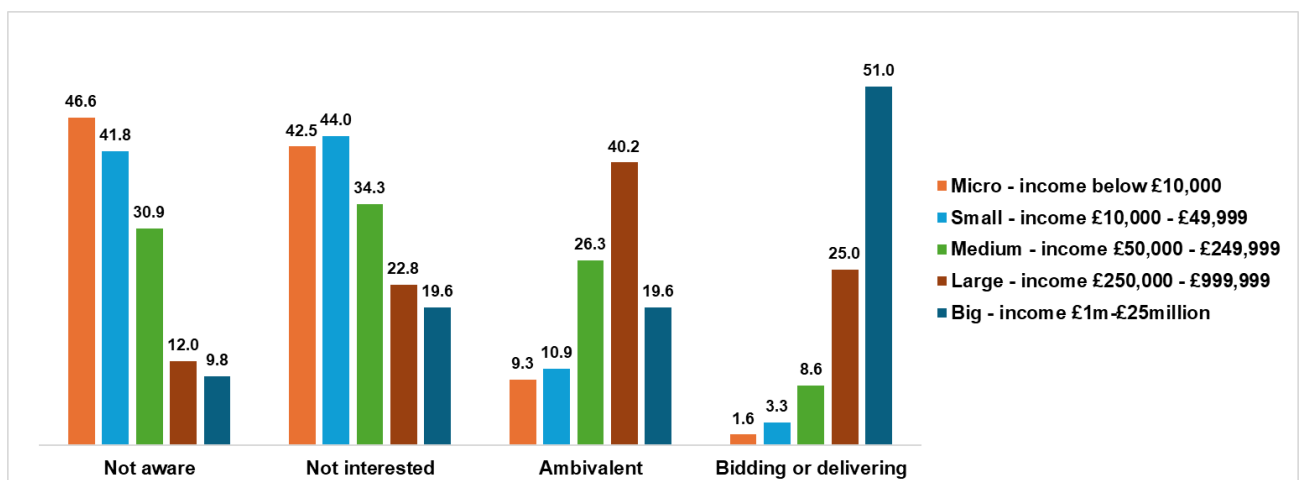
Figure 6.5 **Percent of voluntary organisations bidding for or delivering public sector contracts 2022-2025** (Third Sector Trends in England and Wales, 2022 n=5,967, 2025 n=8,547)



The size of voluntary organisations has a clear impact on levels of interest and participation in the delivery of public service contracts.

- Given their size and interests it is not surprising that very few micro voluntary organisations are aware of or interested in delivering public services under contract (89%).
- Small voluntary organisations are slightly more aware of such opportunities but are, nevertheless, disinterested (44%) or ambivalent about this option (11%).
- Medium-sized voluntary organisations in Wales are more likely to be ambivalent about bidding for contracts (26%) and few are bidding or delivering contracts (9%).
- Larger voluntary organisations in Wales are considering the possibility but remain ambivalent (40%) and the proportion of voluntary organisations bidding or delivering is quite small (25%).
- Amongst the biggest voluntary organisations, 51% are or delivering contracts; 20% remain ambivalent while 35% refuse or are unaware of these opportunities.

Figure 6.6 **Orientation towards delivering public service contracts by size of voluntary organisations in Wales** (Third Sector Trends in England and Wales 2025, n=695)



As Figure 6.7 shows, interest in public service delivery is very low in the most affluent areas of Wales (over 84% are unaware or disinterested). Involvement is strongest in the second poorest quintile of the Wales indices of deprivation where 22% of voluntary organisations remain ambivalent about the idea and 18% are bidding or delivering services.

Public sector service delivery contracts tend to be offered more often in urban areas where the depth and intensity of many social problems is greater. This helps to explain why interest in town and country areas is lower: only 8% of voluntary organisations are bidding or delivering public services compared with 12% in major urban areas (Figure 6.8)

Figure 6.7 **Orientation towards delivering public service contracts by area affluence in Wales** (Third Sector Trends in England and Wales 2025, n=680)

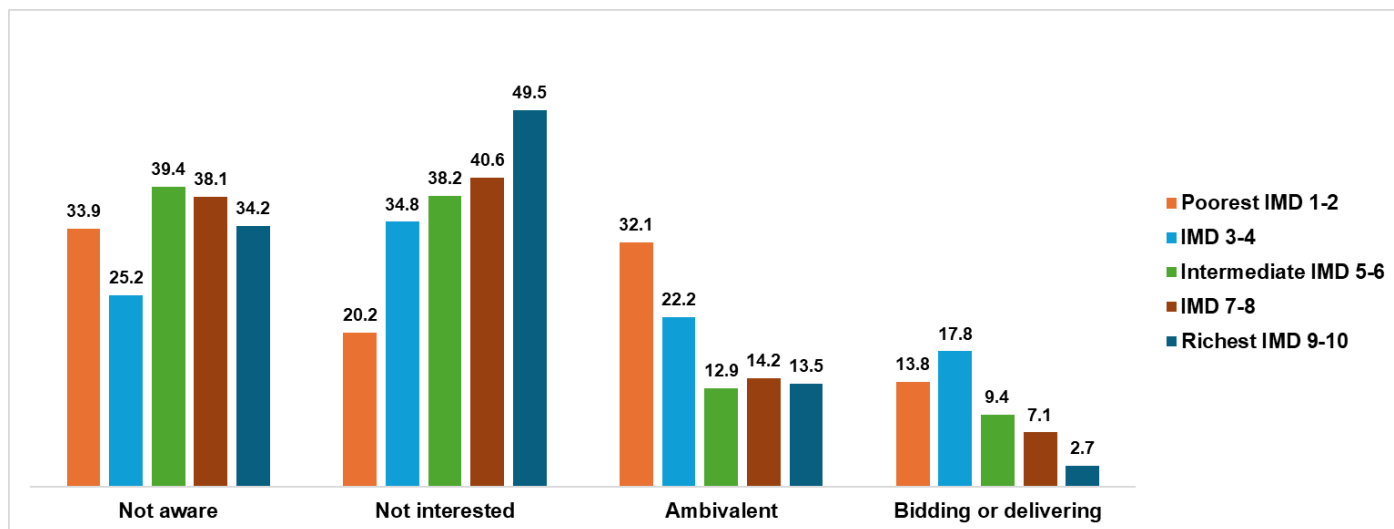
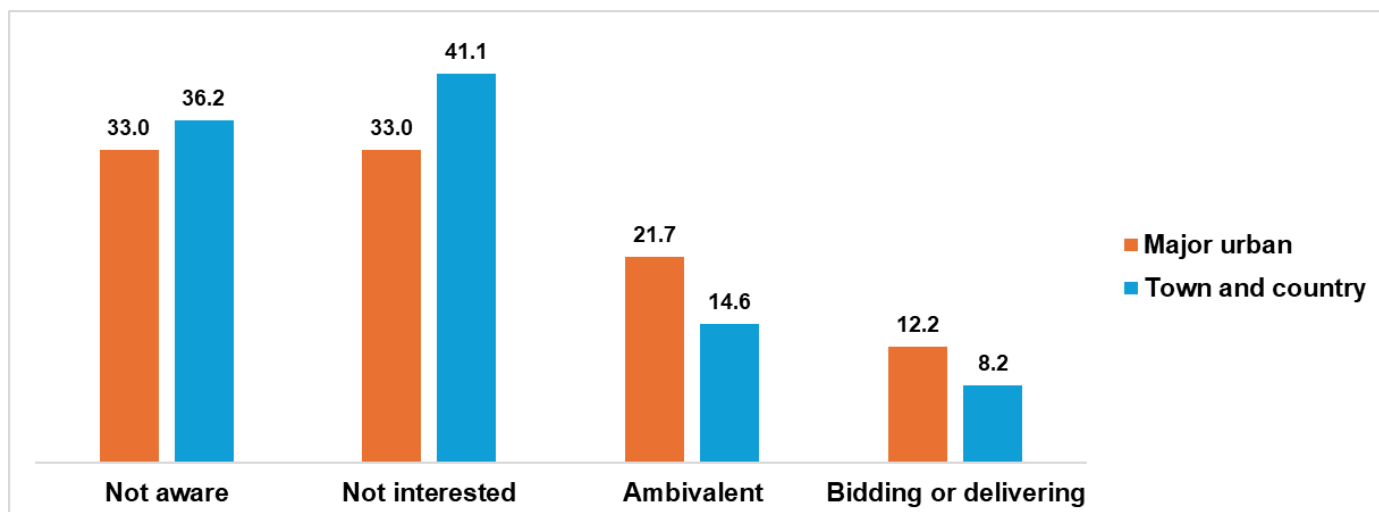


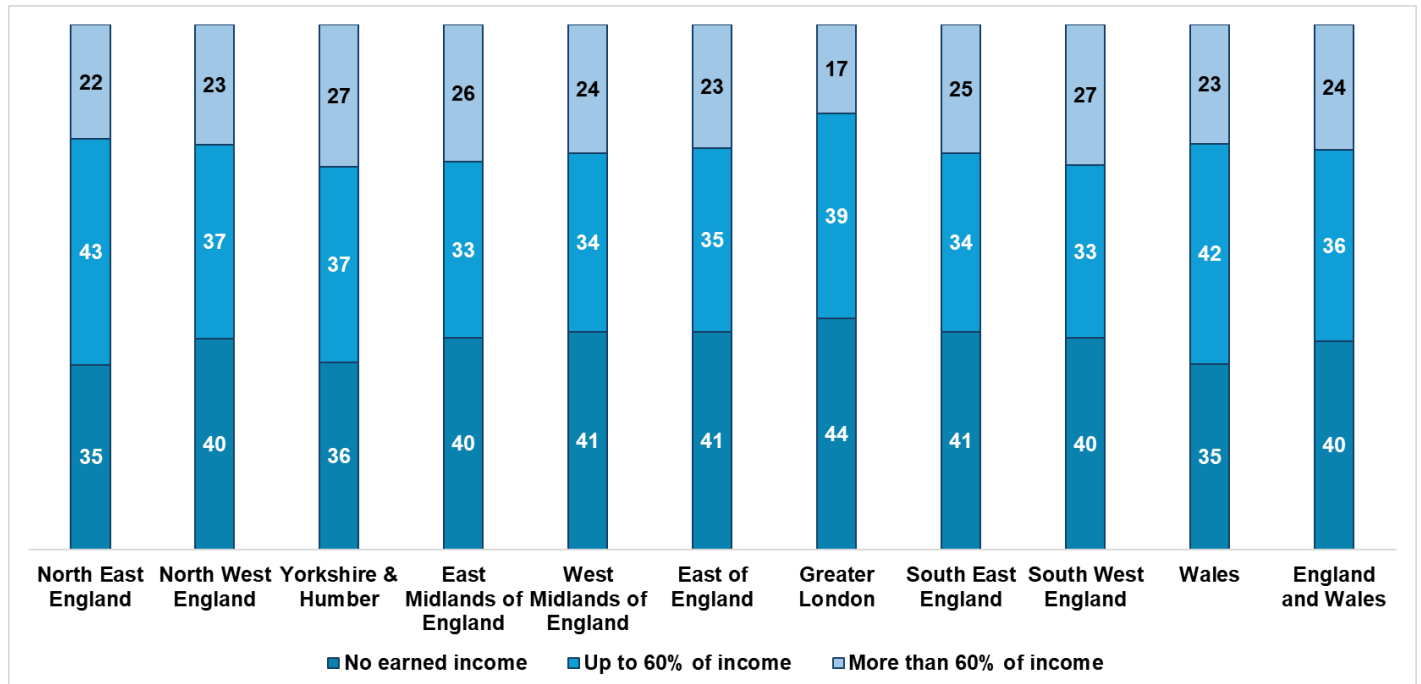
Figure 6.8 **Orientation towards delivering public service contracts in major urban and town and country areas of Wales** (Third Sector Trends in England and Wales 2025, n=699)



Earned income

In 2025 about 65% of voluntary organisations in Wales earned a proportion of their income by trading (by delivering contracts or engaging in self-generated trading of goods and services). Fewer than a quarter of voluntary organisations in Wales are heavily reliant upon trading (only 24% earn more than 60% of their income, see Figure 6.9). When compared with English regions, it can be seen that variations are quite small – with the exception of London where trading is less common.

Figure 6.9 **Percent of voluntary organisations' income from trading by region**
(Third Sector Trends in England and Wales 2025)



As shown in Table 6.7, earning income is equally common in both major urban and town and country areas of Wales. But the proportion of income earned in town and country areas is higher. The evidence suggests that, post-pandemic, earned income has picked up (especially in town and country areas of Wales) now that restrictions on trading have been lifted.

Table 6.7 **Earned income by voluntary organisations in Wales 2022-2025**
(Third Sector Trends in England and Wales surveys 2022, 2025)

	Major urban areas		Town and country areas	
	2022	2025	2022	2025
No earned income	39.3	36.0	38.9	35.2
1-20% earned	29.0	28.0	20.4	21.0
21- 40% earned	7.1	9.7	12.0	7.5
41 - 60% earned	8.0	6.2	7.4	10.1
61 - 80% earned	4.9	6.2	8.3	8.4
81 - 100% earned	11.6	13.9	13.0	17.9
N=	224	339	216	347

6.2 Assets and reserves

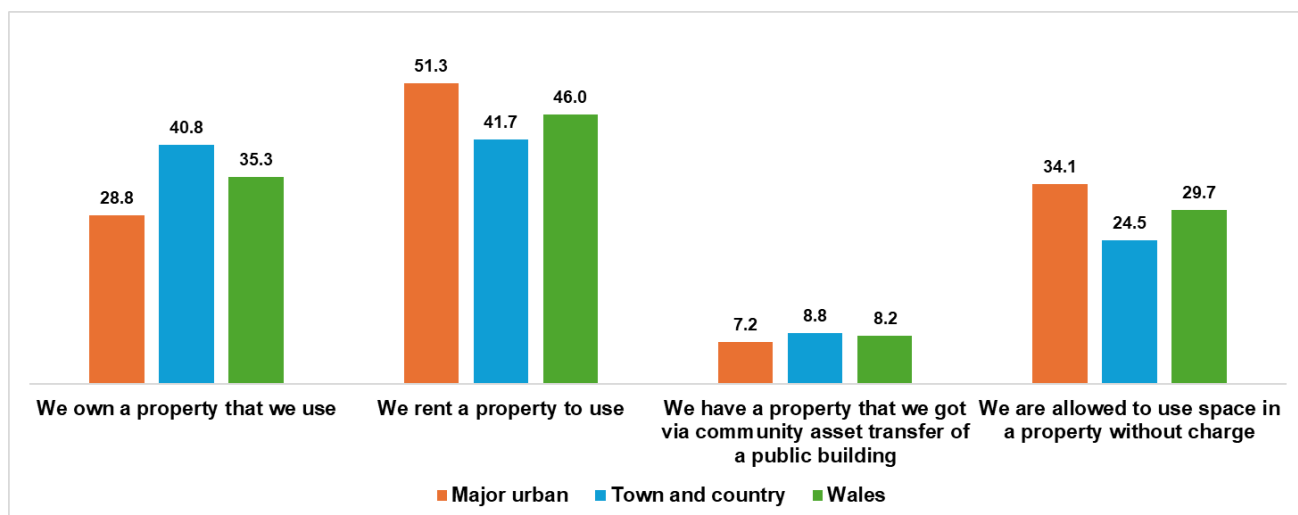
Property assets

As Table 6.8 shows, the most common forms of property tenure or usage across England and Wales in 2025 are renting (41%), followed by ownership (29%) and free use of space in a building (30%). Tenure patterns are quite similar across regions, with the exception of London where only 19% of organisations own property. Community asset transfer is still relatively rare; although nearly 10% of voluntary organisations have acquired property in this way in North East England, as have 8% in Wales which is substantially higher than all other regions.

Table 6.8 Voluntary organisations' property tenure by region 2025 (Third Sector Trends in England and Wales 2025)					
	Own a property	Rent a property	Asset transfer	Free use of space	N=
Wales	35.0	46.7	8.2	29.6	672
North East England	31.9	48.2	9.5	30.9	624
North West England	28.9	45.9	4.6	28.0	755
Yorkshire and Humber	27.9	39.1	6.4	28.6	899
East Midlands of England	30.0	40.1	4.9	29.1	594
West Midlands of England	30.7	37.3	5.6	30.0	701
East of England	30.1	42.3	4.8	30.1	1,068
London	18.9	40.2	3.7	32.9	736
South East England	25.2	40.3	3.5	29.4	1,156
South West England	30.6	36.3	5.1	27.6	1,048
England and Wales	28.7	41.3	5.4	29.5	8,253

Property tenure within Wales varies to some extent by the characteristics of the locality within which voluntary organisations are based. In major urban areas, property ownership is more rare (29%) than town and country areas (41%). Renting is far more usual in major urban areas (see Figure 6.10). Access to property via community asset transfer occurs at a similar level in urban and town and country areas. The offer of free use of space is much more prevalent in major urban areas in Wales.

Figure 6.10 Property tenure in major urban and town and country areas of Wales 2025
(Third Sector Trends in England and Wales 2025)



Financial reserves

Holding reserves is regarded as a good indication of voluntary organisations' financial wellbeing. In Wales, as shown in Table 6.9, most voluntary organisations in 2025 hold reserves (82%), more than half of which did not draw upon these reserves in the previous year.

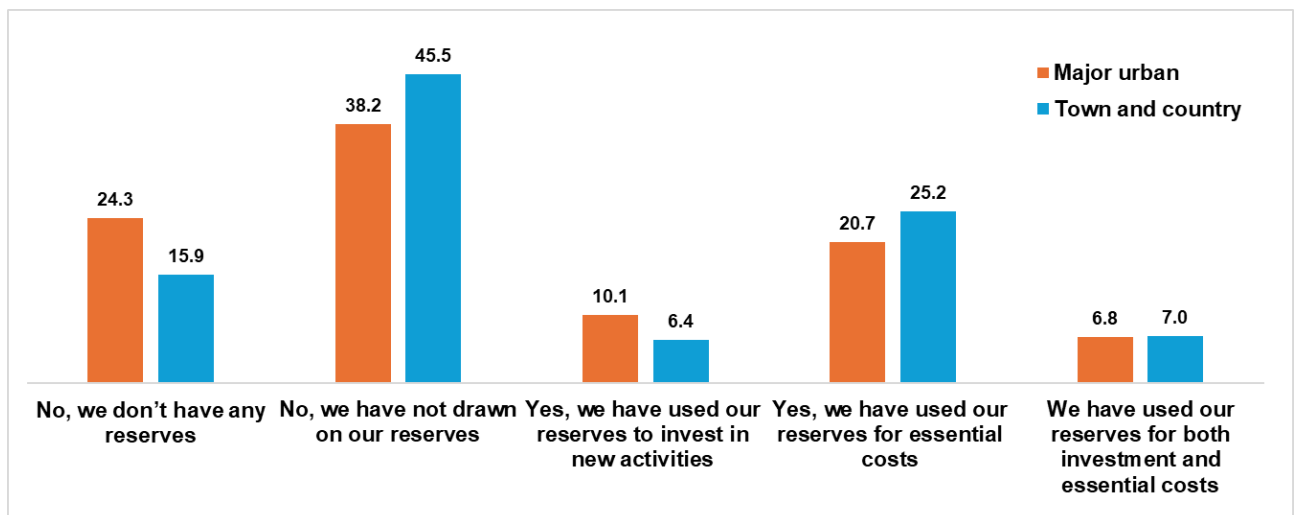
About 16% of organisations (adding together percentages in the 3rd and 5th row of the table) used reserves to invest in new activities, while about 30% used reserves (adding the 4th and 5th row of the table) for essential purposes such as rent, bills and

wages.⁴⁶ As would be expected, the biggest organisations are most likely to hold reserves (94%) compared with 69% of micro organisations. Investment in new activity becomes more common as voluntary organisations grow in size, rising from 10% of micro to 41% of the biggest. Use of reserves for essential costs is most common in larger voluntary organisations: 42% used reserves solely for these costs, while another 9% used them for a mix of investment and essential costs.

Table 6.9 Ownership and use of reserves by size of voluntary organisations in Wales 2025 (Third Sector Trends in England and Wales 2025)						
	Micro - income below £10,000	Small - income £10,000 - £49,999	Medium - income £50,000 - £249,999	Large - income £250,000 - £999,999	Big - income £1m- £25million	Wales
Do not have any reserves	31.1	19.6	16.6	11.7	3.9	19.9
Have not drawn on reserves	41.3	49.5	42.9	29.8	37.3	42.0
Have used reserves to invest in new activities	4.6	8.2	6.3	8.5	27.5	8.1
Have used our reserves for essential costs	17.9	15.8	28.6	41.5	17.6	23.1
Reserves used for investment & essential costs	5.1	7.1	5.7	8.5	13.7	6.9
N=	196	184	175	94	51	700

At one level, the situation of voluntary organisations in major urban areas is more difficult financially, as 24% of voluntary organisations do not have reserves compared with 16% in town and country areas (Figure 6.11). However, voluntary organisations in town and county areas are more likely to be using reserves for essential costs (25%).

Figure 6.11 Ownership and use of reserves in major urban and town and country areas of Wales 2025 (Third Sector Trends in England and Wales 2025, n=705)



Variations in the use of reserves are compared for Wales and English regions in Table 6.10. It is shown that voluntary organisations in Wales are the least likely to hold reserves and fewer than in most English regions have been able to leave reserves untouched. With the exception of London, voluntary organisations in Wales were the most likely in 2025 to be using reserves for essential costs.

⁴⁶ To calculate the percentages of TSOs using reserves for investment the third and fifth row of the table are added, for the use of reserves for essential costs, the fourth and fifth row are added,

Table 6.10 Reliance on reserves by region, comparing 2022 and 2025 (Third Sector Trends in England and Wales 2022 and 2025)												
	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		N=	
	2022	2025	2022	2025	2022	2025	2022	2025	2022	2025	2022	2025
Wales	20.5	20.5	40.3	41.5	9.8	8.1	22.3	23.0	7.1	7.0	439	704
North East England	19.1	19.4	42.7	42.0	9.1	10.6	20.6	20.6	8.4	7.3	606	659
North West England	18.3	19.7	44.5	44.6	8.7	6.9	22.0	21.0	6.6	7.8	728	796
Yorkshire and Humber	14.1	18.6	46.6	46.1	9.5	10.2	23.3	19.4	6.5	5.7	644	943
East Midlands of England	15.3	18.6	40.4	46.5	8.0	9.7	28.8	17.1	7.5	8.1	399	607
West Midlands of England	16.9	19.3	43.8	44.1	8.7	10.1	21.8	20.6	8.7	5.9	504	732
East of England	15.0	17.4	48.4	48.2	7.8	9.8	22.1	18.0	6.7	6.6	566	1,113
London	16.6	19.5	43.7	41.0	7.0	9.2	25.2	23.8	7.5	6.5	531	770
South East England	13.6	16.3	48.8	44.7	9.6	10.7	22.2	21.3	5.8	6.9	811	1,195
South West England	15.4	17.4	47.9	46.4	9.0	9.4	22.1	18.8	5.6	8.0	779	1,093
England and Wales	16.3	18.4	45.2	44.8	8.8	9.5	22.8	20.3	6.9	7.0	6,007	8,612

6.3 Expectations about finance

Organisational leaders in the voluntary sector can sometimes make reasonable estimations about their finances in the medium term if they are confident about recurrent income streams. But as ever, nobody can be quite sure what is around the corner – so the data presented here should be considered in that light.

Third Sector Trends surveys ask respondents to make an assessment of their prospects over the next two years. It has been shown in previous rounds of the study that leaders of voluntary organisations of all sizes tend to be ‘over optimistic’ in their projections about future finances. This should not be seen as a ‘bad thing’, optimism both reflects and drives sector enthusiasm and commitment. But when hopes are dashed, it can make people in the sector feel disappointed.

- In general terms, the voluntary sector in Wales is cautiously optimistic with around 78% of voluntary organisations believing that income will remain either the same or increase – although fewer are expecting income to rise in 2025 (25%) than was the case in 2022 (32%).
- There is some evidence to suggest that voluntary organisations have become more optimistic about support from business in 2025 (24%) than was so in 2022 (19%).
- Future grant funding is considered in a slightly less positive light. Fewer voluntary organisations expected that income from grants would rise in 2025 (24%) than was the case in 2022 (29%). Nonetheless, over a quarter of voluntary organisations in 2025 expected that income from grants would fall.
- Only funding from statutory agencies is regarded more negatively, with 37% of voluntary organisations in 2025 expecting support to decrease over the next two years compared with 26% in 2022 (Table 6.11).

	<i>Income will...</i>		<i>Support from private businesses will...</i>		<i>Grants from charitable foundations will...</i>		<i>Funding from statutory agencies will...</i>	
	2022	2025	2022	2025	2022	2025	2022	2025
Increase	32.0	25.3	19.0	23.9	28.9	24.4	20.1	15.7
Remain similar	47.1	52.8	56.7	59.0	46.3	48.9	53.5	47.2
Decrease	20.9	22.0	24.2	17.1	24.9	26.7	26.4	37.0
N=	437	798	434	794	439	798	438	793

Income projections vary by size of voluntary organisations as shown in Figure 6.12. Medium-sized organisations are the most optimistic that income will rise (32%). While micro organisations are the least optimistic (18%), they are the most likely to believe that their financial situation will remain stable (67%). Larger voluntary organisations (37%) and the biggest voluntary organisations (31%) are the most pessimistic about their financial future - believing that income will fall.

Pessimism about future income levels is higher in major urban areas (25%) and, due to concentrations of deprivation in those areas, their concerns may be associated with an anticipated decline in statutory funding (as shown in Table 6.12). Levels of optimism, however, are about the same in urban and town and country areas.

Figure 6.12 **Income projections over the next two years in Wales by organisational size**
(Third Sector Trends in England and Wales 2025)

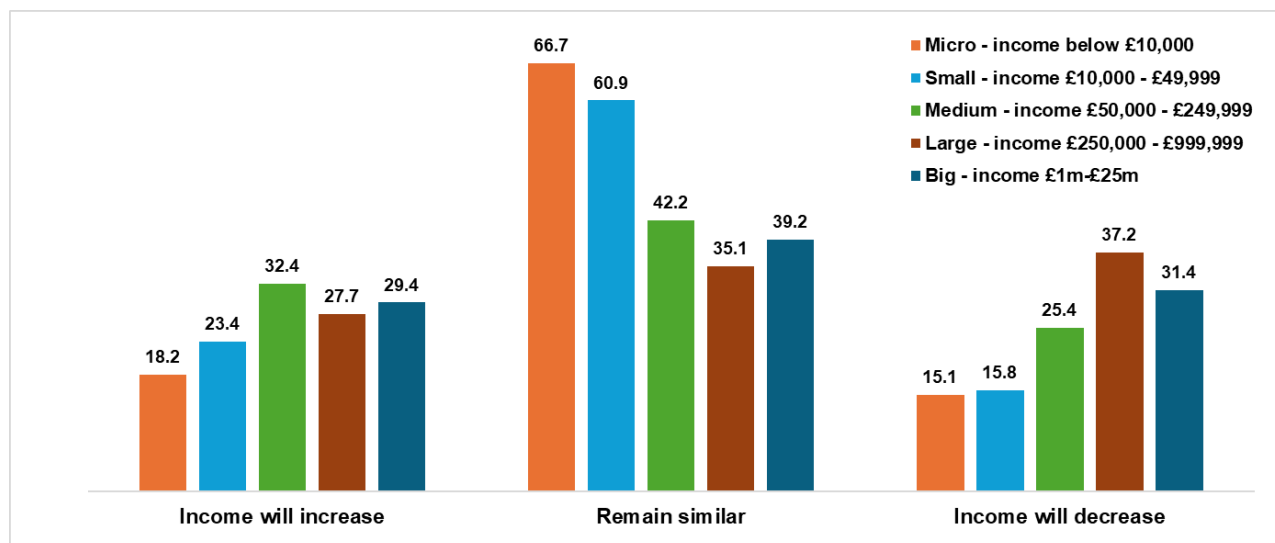
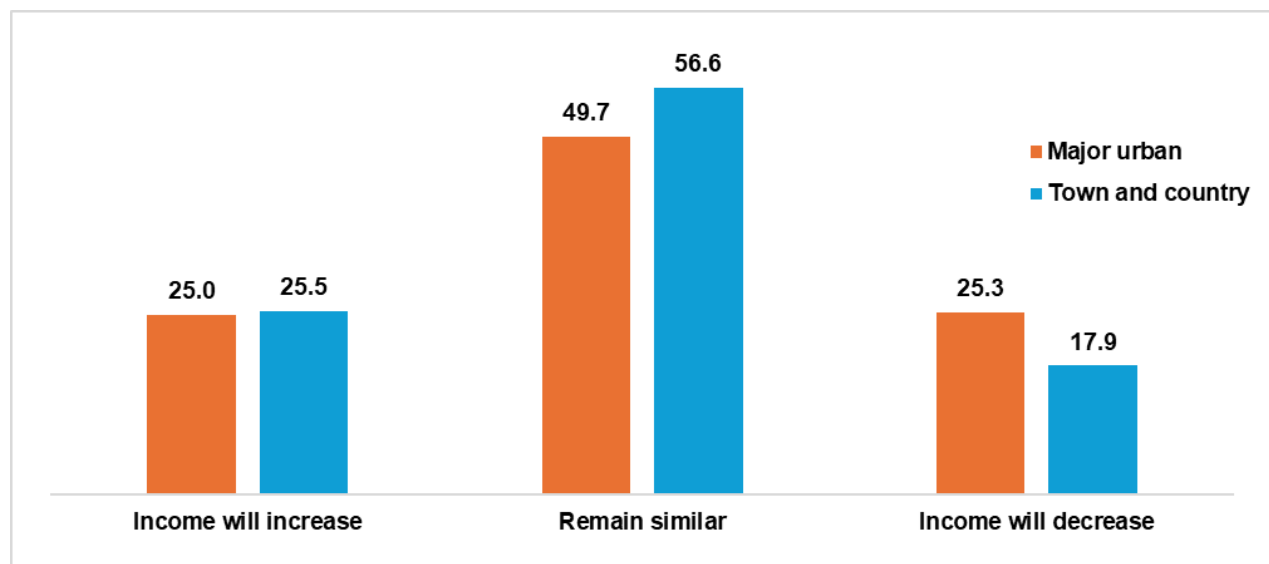


Figure 6.13 **Income projections by voluntary organisations over the next two years in Wales: by area characteristics** (Third Sector Trends in England and Wales 2025)



Finally, Table 6.15 compares perceptions of the financial outlook in Wales with English regions in 2022 and 2025. In Wales, leaders of voluntary organisations were less optimistic in 2025 than they were in 2022. This pattern is mirrored in all regions except London and East of England where leaders were similarly optimistic in 2022 and 2025.

In Wales, organisational leaders were slightly more pessimistic about income levels in 2025 (22%) than in 2022 (21%); a position shared by leaders in North East and North West England. Some regions are considerably less pessimistic than they were in 2022, especially in Yorkshire & Humber, the East and West Midlands, South East and South West England.

Table 6.12 Voluntary organisations' perceptions of financial outlook by region 2022 and 2025 (Third Sector Trends in England and Wales 2022 & 2025)				
	<i>Income will increase over next two years</i>		<i>Income will decrease over next two year</i>	
	<i>2022</i>	<i>2025</i>	<i>2022</i>	<i>2025</i>
Wales	32.0	25.5	20.9	21.8
North East England	36.1	31.8	18.0	17.4
North West England	35.9	30.6	20.2	18.9
Yorkshire and Humber	33.8	26.3	19.1	14.5
East Midlands of England	30.6	27.9	19.8	14.5
West Midlands of England	28.4	25.8	21.9	13.3
East of England	30.6	29.2	17.0	16.2
London	37.8	38.0	18.3	16.8
South East England	32.5	28.2	17.3	14.5
South West England	31.5	23.8	19.6	15.7
England and Wales	33.0	28.5	19.1	16.2

Section 7

Relationships and influencing

7.1 Relationships within the voluntary sector

The voluntary sector is often lauded by policy makers about its willingness to work collaboratively. And certainly, taking the voluntary sector as a whole across England and Wales, there is strong evidence to demonstrate commitment to informal and formal interaction (see Table 7.1).

- Nationally, 72% of voluntary organisations have useful informal relationships with other voluntary organisations and groups, Wales has a higher level of informal working (76%) than most English regions.
- 62% of voluntary organisations nationally work quite closely, but informally, with other voluntary organisations; organisations in Wales and North East England and Wales are the most likely to do so (69%).
- 28% of voluntary organisations work in formal partnership arrangements with other voluntary organisations nationally; voluntary organisations in North East England are by far the most likely to do so (39%) but Wales remains well above the regional average (34%).

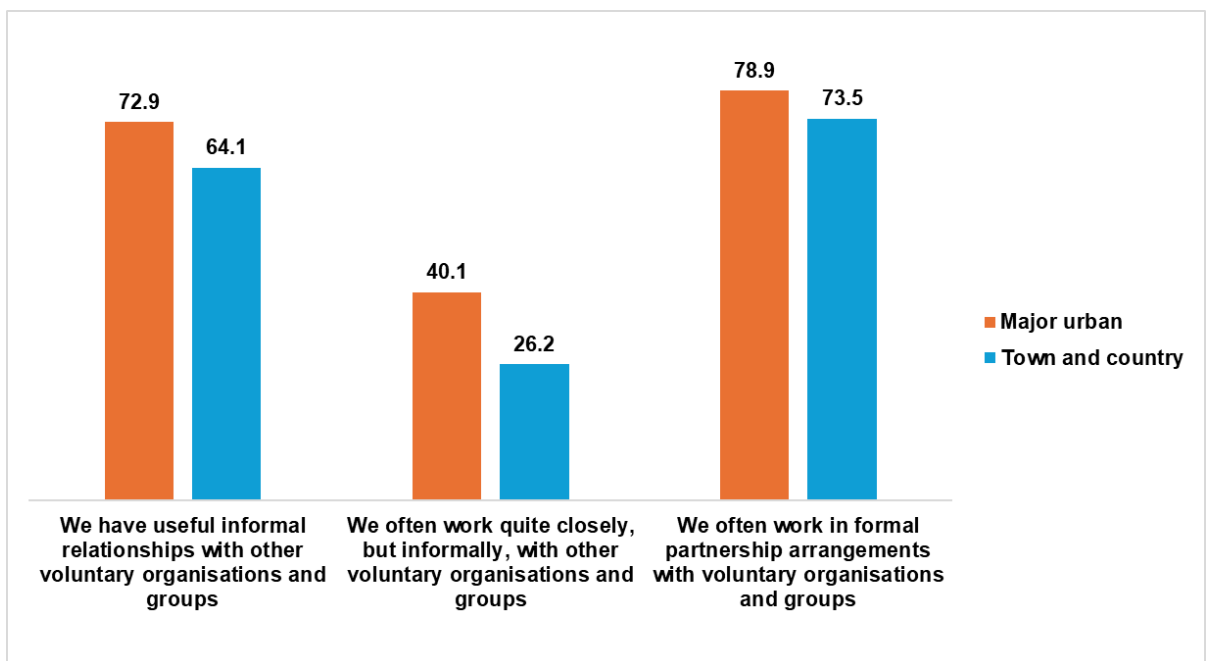
Table 7.1 Relationships within the voluntary sector in Wales and English regions (Third Sector Trends in England and Wales 2025)				
	We have useful informal relationships with other voluntary organisations and groups	We often work quite closely, but informally, with other voluntary organisations and groups	We often work in formal partnership arrangements with voluntary organisations and groups	N=
Wales	76.0	68.9	33.5	705
North East England	79.6	69.3	39.0	656
North West England	69.7	62.8	30.4	792
Yorkshire and Humber	73.1	64.8	28.3	940
East Midlands of England	68.8	58.1	24.2	605
West Midlands of England	70.5	59.9	24.5	733
East of England	71.6	60.4	25.1	1,111
London	76.2	63.1	32.6	768
South East England	71.7	58.7	24.4	1,203
South West England	66.9	58.3	20.6	1,091
England and Wales	72.1	62.0	27.6	8,604

Table 7.2 shows that formal collaboration in the poorest areas is stronger in Wales (53%) than in any English region. Collaboration in Wales' most affluent areas (19%) is below that of some English regions and especially London (28%).

Table 7.2 Percent of voluntary organisations working in formal collaborative relationships by area affluence (Third Sector Trends in England and Wales 2025)						
	Poorest IMD 1-2	IMD 3-4	Intermediate IMD 5-6	IMD 7-8	Richest IMD 9-10	N=
Wales	52.6	42.8	29.1	26.9	18.6	702
North East England	47.9	40.3	40.0	33.0	23.6	648
North West England	43.6	31.7	22.3	23.8	22.7	789
Yorkshire & Humber	43.0	35.3	22.1	18.5	23.9	936
East Midlands of England	34.2	30.3	22.5	21.1	20.1	604
West Midlands of England	39.8	29.3	21.3	19.1	19.6	727
East of England	45.8	33.5	23.7	19.0	20.7	1,109
Greater London	39.2	38.2	34.2	23.1	27.5	767
South East England	43.8	38.5	26.2	21.1	18.2	1,193
South West England	37.5	26.7	18.4	18.0	15.0	1,079
England and Wales	43.5	34.5	25.2	21.4	20.2	8,554

Informal and formal collaboration tends to be stronger in the major urban areas of Wales than in town and country areas, as shown in Figure 7.1. That is likely to be at least partly related to the higher level of density of deprived districts in major urban areas because grant funding in such areas often welcomes or requires collaborative working.

Figure 7.1 Percent of voluntary organisations in Wales working collaboratively by area characteristics (Third Sector Trends in England and Wales 2025. major urban n=337, town and country n=347)



7.2 Relationships with the private sector

Private sector businesses can support voluntary organisations in several ways.⁴⁷ Third Sector Trends surveys distinguish empirically between four types of assistance (see Table 7.3).

- **Financial support:** money given to voluntary organisations in various ways such as sponsorship of events, one-off financial contributions to support projects and initiatives, more regularised payments to sustain activities, and so on. Financial support is offered to half of voluntary organisations, an average of 33% of voluntary organisations across England and Wales state that this income is of some or great importance to them. Wales has a relatively low score of 31%.
- **In-kind support:** use of facilities (such as meeting rooms, minibuses, plant or studios), gifts of new, used or surplus goods (such as DIY products, food and drink, stationary, computing equipment) and free services (such as printing leaflets, catering services). In-kind support is received by 43% of voluntary organisations across England and Wales – 27% of voluntary organisations in Wales state that this is of some or great importance to them which is equal to the England and Wales average.
- **Employee supported volunteers:** where companies allocate paid time for their employees to undertake tasks for voluntary organisations on an occasional or regularised basis – but not necessarily using their work-related skills. Volunteering activities may include, for example, decorating a community centre, fundraising, environmental work, marshalling at events and so on. Employee supported volunteering is of some or great importance to 17% of voluntary organisations across England and Wales and is highest in London and the North East (=21%) but relatively low in Wales (16%).
- **Pro bono expert advice:** where business owners, partners or qualified employees provide unpaid professional or technical support to voluntary organisations with, for example, book-keeping and accountancy, architectural and design services, mentoring, business and management consultancy, public relations and media support, amongst other things. Pro bono expert advice: is of some or great importance to 20% of voluntary organisations across England and Wales, but 25% in London and North East England. In Wales, 18% of voluntary organisations receive pro bono advice from business.

Background analysis reveals that there are significant variations in the level of financial support from business in Wales. For example, 36% of voluntary organisations in major urban areas state that financial support from business is of 'some' or 'great' importance to them compared with 26% in town and country areas.

Financial support from business tends to be higher in less affluent areas of Wales. 40% of voluntary organisations in the poorest quintile of the Wales Indices of Multiple Deprivation state that support is of some or great value to them compared with 30% in the most affluent areas.

It is organisational size that makes the most difference, however. Fewer micro voluntary organisations receive valuable financial support from business (22%) than

⁴⁷ A critical literature review on sources of support from business is provided in Chapman T. (2019) *Going the Extra Mile*, how businesses support the third sector in England and Wales, London: Power to Change (Chapter 1), available here: https://www.researchgate.net/publication/353379534_Going_the_extra_mile_how_businesses_support_the_third_sector_in_England_and_Wales. A more textured understanding of the kinds of support given and how it is valued was gained from qualitative interviews in the TSO50 study and other directly related projects, see: <https://www.stchads.ac.uk/uncategorised/going-the-distance-how-third-sector-organisations-work-through-turbulent-times/> and <https://www.stchads.ac.uk/research/research-news/trading-interactions-amongst-community-businesses-bradford-hartlepool-middlesbrough/>.

the biggest voluntary organisations (31%). But it is medium to large sized voluntary organisations that are supported the most by business in Wales (36% and 38% respectively).

Table 7.3 Voluntary sector relationships with business in Wales and English regions 2025
(Third Sector Trends in England and Wales 2025, percentage reporting 'some' or 'great' importance)

	They give us money to help us do our work	They provide free facilities, or goods and services to help us do our work	They provide volunteers to help us do our work	They provide free expert advice to help do our work	N=
Wales	30.9	27.4	15.5	18.0	702
North East England	37.7	32.4	20.6	24.9	650
North West England	37.7	30.1	19.5	21.4	788
Yorkshire and Humber	36.9	30.1	19.9	22.8	935
East Midlands of England	32.3	27.2	16.8	18.3	603
West Midlands of England	33.1	26.8	16.2	17.9	728
East of England	31.1	26.5	15.5	19.5	1,114
London	36.8	31.2	20.9	24.9	767
South East England	29.7	24.7	14.0	16.5	1,197
South West England	27.7	21.9	12.0	16.3	1,089
England and Wales	33.0	27.4	16.7	19.8	8,573

7.3 Relationships within the public sector

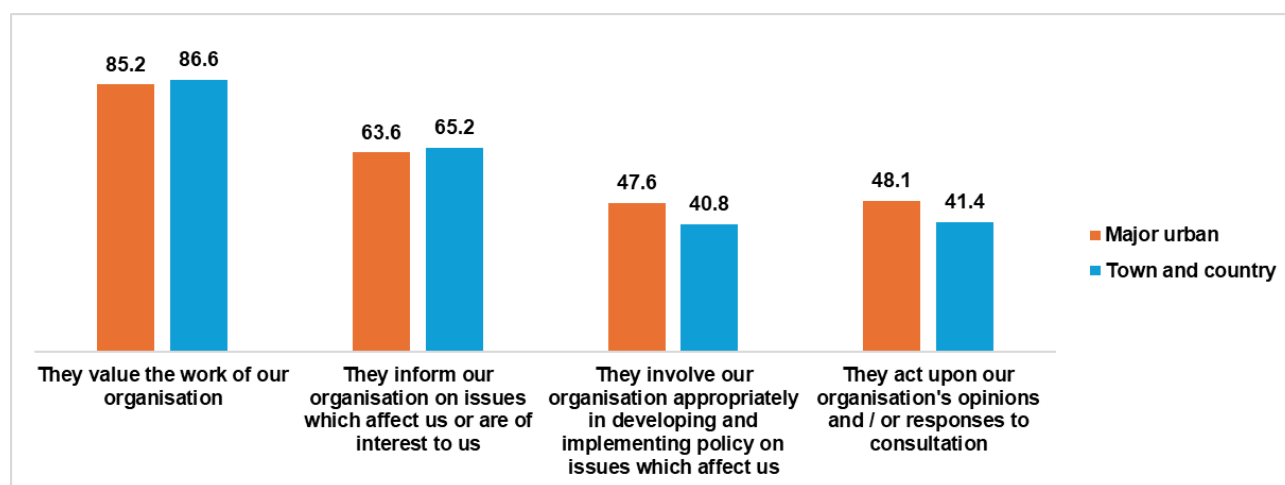
This sub-section looks at aspects of interaction between the voluntary sector and the local public sector. Table 7.4 compares levels of positive interaction regionally in Wales with English regions in 2025. Voluntary organisations in Wales are more or less equally likely to feel valued (86%) and informed (65%). Voluntary organisations in Yorkshire and Humber are most likely to agree that local agencies inform them about issues of interest (68%).

In Wales, voluntary organisations are slightly more likely to feel involved in policy processes (44%) and feel that local agencies act on their opinions (25%) than on average across England and Wales. Comparably few voluntary organisations in North East England feel involved appropriately in developing or implementing policy (38%). Voluntary organisations in North West England (46%) and Yorkshire & Humber (48%) are the most positive in this respect. In some regions, voluntary organisations report that local public agencies are more likely to act upon their opinions, especially Yorkshire & Humber (47%).

As for feeling valued or being informed by the public sector in major urban areas and town and country areas of Wales as shown in Figure 7.2, variations in opinion are slight. There is, however, some evidence to suggest that in major urban areas, voluntary organisations feel that public authorities are more responsive to their opinions and involve them to a greater degree.

Table 7.4 Relationships with the public sector in Wales and English regions (Third Sector Trends in England and Wales 2025 percent 'agree' or 'strongly agree')					
	They value the work of our organisation	They inform our organisation on issues which affect us or are of interest to us	They involve our organisation appropriately in developing and implementing policy on issues which affect us	They act upon our organisation's opinions and / or responses to consultation	N=
Wales	85.9	64.7	44.2	45.0	703
North East England	84.8	62.9	37.7	41.2	654
North West England	88.0	65.4	46.0	45.0	793
Yorkshire and Humber	88.0	68.2	47.8	46.6	946
East Midlands of England	87.9	60.9	39.0	40.4	609
West Midlands of England	87.6	62.1	39.3	44.1	734
East of England	88.5	65.5	41.9	41.5	1,113
London	85.6	64.3	40.4	45.4	770
South East England	88.6	61.5	40.1	40.9	1,205
South West England	87.5	60.9	37.5	40.7	1,091
England and Wales	87.4	63.7	41.5	43.0	8,618

Figure 7.2 Relationships with the public sector by area characteristics in Wales
(Third Sector Trends in England and Wales 2025)



7.4 Sector influence on social and public policy

Perceptions of the quality of relationships with the public sector in Wales are clearly not affected by an unwillingness of voluntary organisations to get involved and have their say. As Table 7.5 shows, the voluntary sector in Wales is the least likely to avoid political issues. Voluntary organisations' level of engagement with local meetings and events is comparably high in Wales (72%) though much lower than in North East England (79%). The sector's willingness to campaign to further their interests in Wales (52%) is also higher than the England and Wales average, but lower than in North East England (57%). Over half of voluntary organisations in Wales campaign to influence policy and 48% work behind the scenes to influence policy. Voluntary organisations in Wales are most likely to trust their local CVC to represent their interests in policy circles (39%).

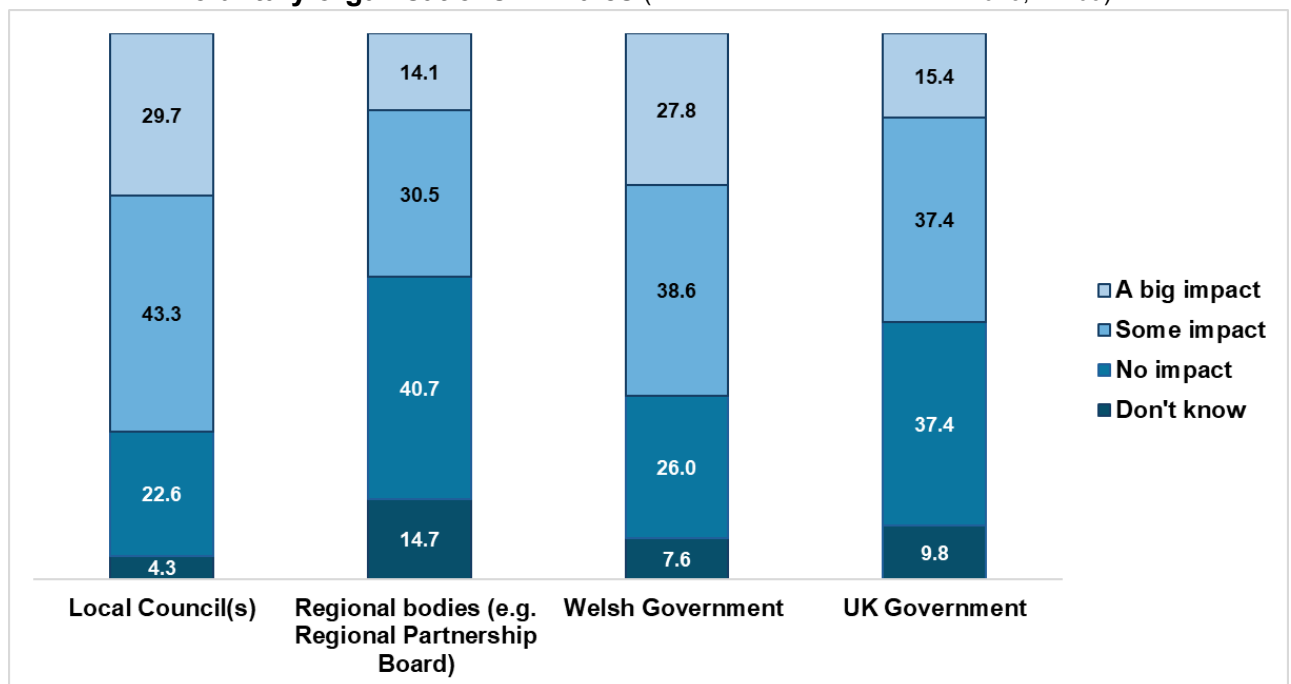
Table 7.5 Influencing social and public policy in Wales and English regions
 (Third Sector Trends in England and Wales 2025, percentage 'agree' or 'strongly agree', n=8,612)

	We tend to steer well clear of political issues	We try to go to relevant meetings/events which relate to our kind of work	We campaign to further the interests of our beneficiaries	We trust a local voluntary sector support agency to do this on our behalf (e.g. a CVS)	We tend to work behind the scenes to influence policy
Wales	66.0	72.2	51.6	39.1	47.5
North East England	69.8	79.3	56.7	38.5	48.9
North West England	69.7	71.6	50.9	38.1	45.8
Yorkshire & Humber	72.4	70.6	47.4	35.8	42.7
East Midlands of England	80.7	62.6	40.5	28.2	34.1
West Midlands of England	74.4	69.5	51.3	26.8	39.6
East of England	73.5	71.2	46.0	31.6	42.4
Greater London	66.7	68.2	50.8	29.6	45.0
South East England	76.9	66.9	44.7	24.6	40.2
South West England	77.7	65.8	42.2	24.9	37.2
England and Wales	73.1	69.6	47.7	31.2	42.1

Relationships with layers of government in Wales

In Wales, separate survey questions were used to discern how well voluntary organisations work at levels of local and national government. Public sector decision making affects voluntary organisations to a greater degree at the local level and Welsh government levels (see Figure 7.3). Regional bodies clearly have a lower level of impact.

Figure 7.3 The impact of decision making at each level of government on the work of voluntary organisations in Wales (Third Sector Trends in Wales 2025, n=709)



The impact of public sector decision making tends to fall more heavily in major urban areas than in town and country areas (see Table 7.6). For example, a third of voluntary organisations in major urban areas feel that local authority decision making has a big impact compared with 27% in town and country areas. The gap is considerably wider at Welsh government level (35% and 21% respectively).

Table 7.6 The impact of decision making at each level of government on the work of voluntary organisations in Wales by area type (Third Sector Trends in Wales 2025)								
	Local Council(s)		Regional bodies (e.g. Regional Partnership Board)		Welsh Government		UK Government	
	Major urban	Town and country	Major urban	Town and country	Major urban	Town and country	Major urban	Town and country
A big impact	33.2	26.6	14.6	12.6	35.4	20.7	18.0	12.4
Some impact	41.0	45.6	34.2	26.8	35.4	42.0	40.0	35.5
No impact	21.5	23.7	38.9	43.5	23.1	29.2	33.1	41.1
Don't know	4.2	4.1	12.3	17.1	6.2	8.2	8.9	10.9
N=	307	342	301	340	308	343	305	338

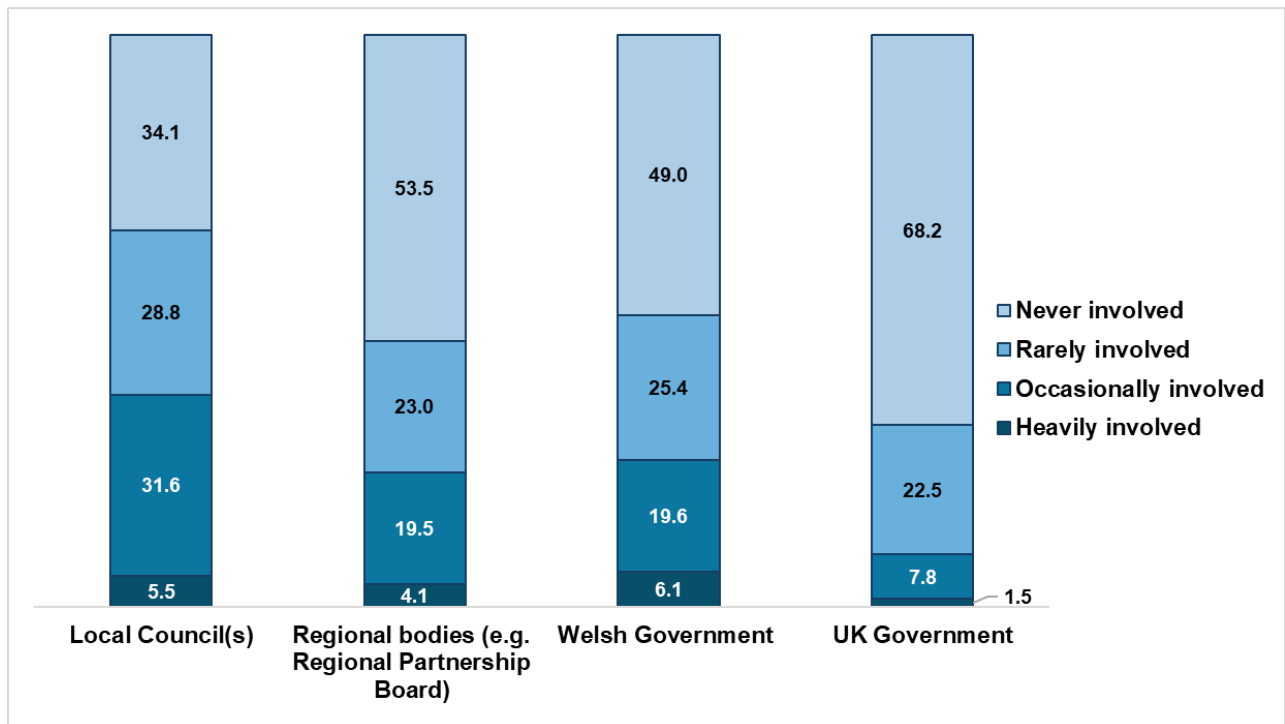
As Table 7.7 also clearly illustrates, larger voluntary organisations are much more likely to feel the impact of government decision making than their smaller counterparts – though less so at the local level than at national. Similarly, the affluence of area within which voluntary organisations are based affects the level of impact felt by local or national government decision making (Table 7.8). At all levels of government, voluntary organisations feel more impact if they are based in poorer areas.

Table 7.7 The impact of decision making at each level of government on the work of voluntary organisations in Wales by size of organisation (Third Sector Trends in Wales 2025, percentage reporting a 'big impact')					
	Micro - income below £10,000	Small - income £10,000 - £49,999	Medium - income £50,000 - £249,999	Large - income £250,000 - £999,999	Big - income £1m-£25million
Local Council(s)	22.6	21.2	31.5	46.6	50.0
Regional bodies	8.3	8.8	16.0	20.7	37.2
Welsh Government	12.5	13.3	33.7	53.9	75.0
UK Government	8.7	8.4	17.8	27.6	36.4
N=	186	179	165	88	44

Table 7.8 The impact of decision making at each level of government on the work of voluntary organisations in Wales by area affluence (Third Sector Trends in Wales 2025, percentage reporting a 'big impact')					
	Poorest IMD 1-2	IMD 3-4	Intermediate IMD 5-6	IMD 7-8	Richest IMD 9-10
Local Council(s)	45.5	32.8	31.1	23.8	17.9
Regional bodies	23.5	20.2	10.3	10.7	6.6
Welsh Government	50.5	33.6	23.2	22.0	13.9
UK Government	23.8	16.3	12.7	16.1	7.6
N=	101	125	167	151	106

Voluntary organisations are most likely to get involved in public sector policy-making processes at the local level, but very few are heavily involved (6%). About a half of voluntary organisations are never involved in policy making at regional and Welsh government levels – more than two thirds are never involved in UK government policy processes.

Figure 7.4 **Involvement in policy-making processes by voluntary organisations at each level of government in Wales** (Third Sector Trends in Wales 2025)



The characteristics of the local area where voluntary organisations are based has an impact on levels of involvement in policy-making processes (Table 7.9). Only a very few organisations based in either major urban areas or town and country areas get involved at local level (6%) although occasional involvement is more prevalent – especially in major urban areas.

Table 7.9 **Involvement in policy-making processes by voluntary organisations at each level of government in Wales by area type** (Third Sector Trends in Wales 2025)

Area types	Local Council(s)		Regional bodies (e.g. Regional Partnership Board)		Welsh Government		UK Government	
	Major urban	Town and country	Major urban	Town and country	Major urban	Town and country	Major urban	Town and country
	Heavily involved	5.5	5.8	4.9	2.6	9.4	2.6	2.0
Occasionally involved	34.3	27.8	22.4	15.3	25.5	14.0	11.1	4.4
Rarely involved	28.2	29.9	26.9	20.6	27.1	24.5	26.5	19.0
Never involved	32.0	36.5	45.8	61.5	38.1	58.9	60.5	76.4
N=	309	345	308	340	310	343	306	343

When organisational size is taken into account (Table 7.10), it is clear that there are wide variations in ‘heavy’ and ‘occasional’ involvement in policy-making processes. For example, at local level only 30% of micro voluntary organisations have some level of involvement compared with 64% of the biggest voluntary organisations. Similarly, as shown in Table 7.11, area affluence has an impact on levels of engagement with local authority policy making; almost twice as many voluntary organisations have some local involvement in the poorest areas of Wales than in the richest.

Table 7.10 Involvement in policy-making processes by voluntary organisations at each level of government in Wales by size of organisation (Third Sector Trends in Wales 2025, percentage ‘heavily’ or ‘occasionally’ involved’)					
	Micro - income below £10,000	Small - income £10,000 - £49,999	Medium - income £50,000 - £249,999	Large - income £250,000 - £999,999	Big - income £1m-£25m
Local Council(s)	30.3	33.9	33.3	53.9	63.6
Regional bodies	11.0	13.3	25.1	47.2	65.9
Welsh Government	13.6	17.2	24.0	52.2	65.9
UK Government	5.4	6.7	9.0	14.8	27.3
N=	185	180	168	89	44

Table 7.11 Involvement in policy-making processes by voluntary organisations at each level of government in Wales by area affluence (Third Sector Trends in Wales 2025, percentage ‘heavily’ or ‘occasionally’ involved’)					
	Poorest IMD 1-2	IMD 3-4	Intermediate IMD 5-6	IMD 7-8	Richest IMD 9-10
Local Council(s)	50.5	34.4	35.7	36.6	27.8
Regional bodies	37.6	25.4	21.0	18.7	12.4
Welsh Government	36.6	30.2	23.8	19.9	18.5
UK Government	18.8	5.6	9.0	5.3	6.5
N=	101	125	168	153	108

8. Summary and implications

This section draws together key findings from this report on the current position of the voluntary sector in Wales. It opens with an appraisal of the national situation in comparative context. The second sub-section looks at the situation across Wales and considers how variations in economy and society affect the structure and dynamics of the local voluntary sector.

8.1 The national picture for the voluntary sector in Wales

This report shows that the voluntary sector in Wales is a force to be reckoned with. Certainly, it is large, energetic, productive and impactful. There are over 10,500 registered voluntary organisations in Wales,⁴⁸ with an annual income of around £2.23billion and expenditure is about £2.16billion.

As such, the voluntary sector is a major resource in Wales as its direct contribution to the economy is estimated at £2.56billion and produces additional £3.98billion of indirect value through tangible economic, fiscal and use value. Intangible added value is judged to be at least equal to the energy invested in the voluntary sector's work and this adds up to a total estimated economic value the voluntary sector in Wales of £9.12billion.

The voluntary sector operates within the domain of civil society which sits at the intersection of private-sector business, the state and private households.⁴⁹ The sector is formed by thousands of autonomous voluntary organisations which are driven by their determination to support issues that they feel are important and deliver their work according to their own practice preferences to beneficiaries of their choice.

As such, voluntary organisations are 'particularistic' in their orientation to social issues, not 'universalistic' as is the state. This means that the voluntary sector as a whole in Wales should not be regarded as an integrated 'system' that can be shaped nor a resource that can be 'harnessed'.

That does not mean that voluntary organisations cannot work together effectively. As this report shows, 76% of voluntary organisations work in complementary ways with others; 69% work quite closely but in informal ways and 34% work together in formally constituted partnership arrangements.

The voluntary sector in Wales also benefits from working well with the private sector: 31% of voluntary organisations receive money from business to help them work; 27% get free use of facilities or free goods and services; 16% benefit from time given by employee volunteers; and 18% get *pro bono* professional or technical support.

And with local government, Welsh and UK government departments and the NHS: 89% of voluntary organisations (which have a relationship with these organisations) feel that their work is valued by public agencies; 65% feel well informed about issues of importance to them; 44% are involved in the development and implementation of

⁴⁸ This includes the Charity Commission Register, Register of Societies, Register of Community Interest Companies and Register of Community Amateur Sport Clubs.

⁴⁹ See the conceptual model on sector location as defined in Evers A, Laville J. Defining the third sector in Europe. In Evers A, Laville J. (eds) *The third sector in Europe*. 2005. Cheltenham: Edward Elgar.

policy and 45% feel that public bodies act on their opinions when participating in consultations.

That stated, relatively few voluntary organisations (8%) work 'for' the public sector by delivering public services under contract (although the percentage rises dramatically to 51% of the biggest voluntary organisations with income from £1m-25m).

8.2 Financial wellbeing and outlook

All of this sounds like good news – but sustaining income and the people energy to get things done is not easy for voluntary organisations. Some of this financial pressure derives from the way the voluntary sector itself works. Because leaders are ambitious and determined, voluntary organisations often find themselves in competition over scarce resources of people to work for them, money to get things done and even beneficiaries. Arguably, there would never be enough resource to satisfy every voluntary organisation's needs – so this can lead to frustration and disappointment when expectations do not live up to reality.

In 2025, almost a quarter of voluntary organisations in Wales (23%) were struggling to some extent financially and were drawing upon their reserves solely to meet essential costs such as salaries, rent/mortgages and utility bills. Another 7% of organisations were using reserves for essential costs but were also using them to invest – suggesting that their financial situation was not quite so severe and confidence in the future remained robust.

Nonetheless, the voluntary sector is broadly optimistic about its future prospects (see Table 8.1). In 2022, for example, 79% of voluntary organisations in Wales expected that their income could be sustained at the same or a higher level over the next two years (in 2019 it was 84%⁵⁰). In 2025, 78% also expected that income would rise or remain the same (though fewer expected that income would rise in 2025 (25%) than in 2022 (32%)).

The voluntary sector in Wales has become a little less positive in its expectations about grant funding: 29% of voluntary organisations expected this would rise in 2022, but in 2025 it was 24%. In 2022, of course, there was something of a glut of free-flowing unrestricted grant funding due to the pandemic which may have influenced levels of optimism. Expectations about increasing statutory funding, have fallen from 20% in 2022 to 16% in 2025. Conversely, voluntary organisations were more optimistic about financial support from business, rising from 19% in 2022 to 24% in 2025.

In 2025, voluntary organisations expectations about partnership arrangements increasing over the next two years (41%) was slightly lower than 2022 (44%). The comparison is not, perhaps, a fair one because pandemic conditions suppressed partnership working to some extent in 2022.

Optimism about increasing the number of regular volunteer numbers is slightly muted in 2025 (28%) compared with in 2022 (33%), but again that may be related to pandemic conditions. Similarly, the higher level of expected demand for services voiced in 2022 (67%) may reflect the peculiar circumstances surrounding the pandemic as only 62% of organisations expected demand to rise in 2025.

⁵⁰ Third Sector Trends undertook a pilot study in 2019 to work at national level across England and Wales, drawing a sample of over 4,000 respondents). In Wales there were relatively few responses (n=108), however, so these statistics should be regarded with caution).

Table 8.1 Voluntary organisations' expectations about the next two years in Wales (Third Sector Trends in England and Wales 2019 & 2022)			
	2019	2022	2025
Income will...			
Increase	30.5	32.0	25.3
Remain similar	53.3	47.1	52.8
Decrease	16.2	20.9	22.0
Grant funding from foundations will...			
Increase	33.3	28.9	24.4
Remain similar	51.9	46.3	48.9
Decrease	14.8	24.9	26.7
Funding from business will...			
Increase	19.7	19.0	23.9
Remain similar	67.2	56.7	59.0
Decrease	13.1	24.2	17.1
Funding from statutory sources will...			
Increase	10.9	20.1	15.7
Remain similar	48.4	53.5	47.2
Decrease	40.6	26.4	37.0
Working in partnership will...			
Increase	38.1	44.2	41.2
Remain similar	42.9	52.2	53.5
Decrease	19.0	3.6	5.4
Support from volunteers will...			
Increase	27.6	33.0	27.9
Remain similar	57.1	53.3	58.3
Decrease	15.2	13.7	13.8
The need for our services will...			
Increase	58.7	67.1	61.6
Remain similar	34.6	31.0	36.2
Decrease	6.7	1.9	2.2
N=	108	443	709

It is a good thing that the voluntary sector generally has an optimistic outlook as this can energise leaders and strengthen organisational vitality – and when the survey is repeated in the summer of 2028 across Wales, it will be possible to assess whether the above expectations are realised.

8.3 Labour market dynamics

The wellbeing of the voluntary sector in Wales is heavily dependent upon sustaining its people resources. An urgent research priority in the 2025 survey was to assess whether labour market conditions had deteriorated. That concern derived from a general acceptance that the voluntary sector is a relatively 'low pay' sector. There are some plausible reasons for this – the general public would be suspicious if people working for voluntary organisations (especially when in leadership roles) were paid as highly as in the public and private sectors. The problem, however, is that 'low pay' is also common for employees on the front line delivering services such as social care.

The consequences of endemic low pay began to emerge even before the pandemic as organisations started to find it harder to fill posts when wages were higher in the public and private sectors. By the time Third Sector Trends examined this in 2022, 46% of voluntary organisations in Wales were struggling to recruit employees. That pressure eased to some extent in 2025 to 36%.

Staff retention problems affected 21% of voluntary organisations in 2022 when pressures on labour costs were rising. The situation worsened when the UK government raised levels of employer National Insurance Contributions and the National Minimum Wage. Nonetheless, the signs are that problems surrounding employee retention have not worsened. As in 2022, 22% of voluntary organisations were struggling in this respect in 2025.

A similar situation continues to affect volunteer recruitment and retention. Growing concern is regularly voiced in the voluntary sector press that those volunteers who left the sector during the pandemic have not returned. Furthermore, in 2025, 42% of voluntary organisations in Wales reported that they had yet to recover regular volunteer numbers to pre-pandemic levels. Over a quarter of voluntary organisations reported that retaining regular volunteers had become harder (27%) and 44% stated that recruitment became harder too. Volunteer retention problems were marginally worse in Wales than in any English region in 2025.

8.4 Variations across Wales

The situation of the voluntary sector in Wales is strikingly similar, statistically, to that of the whole of England and Wales according to many criteria presented in this report. In fact, Wales is more similar to the average England and Wales statistics than any English region.

But national statistics tell only one part of the story. Taken as a whole, the voluntary sector in Wales operates in a relatively 'typical way' (using England and Wales statistical averages as a benchmark), but most of the voluntary sector does not work at national level. On the contrary, most voluntary organisations in Wales are locally oriented: in 2025, 60% work just in one local authority area - and indeed – 30% of voluntary organisations limit their activities just to their local neighbourhood or village.

In Section 2 of this report, a statistical profile of economy and society in Wales was provided. This demonstrated that as a nation, Wales is enormously varied when looking beneath the surface of national level statistics. Certainly, at a spatial level, population is distributed unevenly – with most of the urban population concentrated in South East and South West Wales.

Mid Wales and much of North Wales is sparsely populated – and some areas are relatively inaccessible to and remote from urban centres where core services such as health and higher education are located. There are also wide disparities in affluence in Wales which can compound problems in remote areas. Many former industrial villages and townships are struggling economically which has produced high levels of social deprivation and few opportunities.

In rural areas, many residents are relatively poor - relying as they do on insecure, poorly paid seasonal work associated with the visitor economy. And yet, some sparsely populated areas are highly affluent, where many residents are well qualified and are well served by the local labour market – often commuting to jobs in industrial and public sector management and in the professions. Similarly, in the big cities of South Wales there are also wide disparities in affluence which puts different demands on voluntary organisations in richer or poorer neighbourhoods.

8.5 Projecting the voluntary sector in a positive light

What is abundantly clear from this report is that the structure of the voluntary sector tends to reflect local conditions. Certainly, voluntary organisations in major urban areas seem to feel the effect of local and national government decision making more keenly than in town and country areas. That is likely to be related to the concentration of work in areas of critical and pernicious social need in more densely populated deprived urban areas. Furthermore, location in major urban areas also affects the way they engage with local, regional and national public authorities – and especially so at Welsh government levels.

It would be a mistake, however, to claim that the problems the voluntary sector in Wales face in tackling social, economic, cultural and environmental issues are either universal or insurmountable. Talking down the sector's situation by making false claims about the sector's immanent demise is a dangerous route to take – because why, after all, would people want to invest their money or time in a sector that is on its last legs?

The voluntary sector in Wales is not in a crisis, but rather (as in most English regions), it is more of a question of swings and roundabouts – where many voluntary organisations have stable finances or are flourishing financially – while a minority of others are struggling. That is bound to happen in a complex and competitive social marketplace where highly committed, irrepressibly optimistic and ambitious leaders are hungry to achieve more. And such pressures can be heightened when the searchlights of funding organisations move in other directions, leaving voluntary organisations working in some areas of social benefit adrift financially, while others suddenly come back into favour.

There will always be winners and losers in the race to win the resources of people, money and ideas that bolster voluntary organisations' energy and potential. That is why projecting a positive and productive image of the sector to trusts and foundations, public authorities and a sympathetically-minded business community is vital to ensure that support continues to flow in the voluntary sector's direction. The findings from this report on the sector's enormous energy, productivity and achievement will hopefully help to underpin these positive messages whilst also alerting onlookers to disparities within the voluntary sector that may require urgent attention.

Appendix

Grants from trusts and foundations

Grants have been shown to be of particular importance to voluntary organisations in Wales. It is possible to explore this aspect of voluntary sector funding in more detail by drawing upon data on trusts and foundations' distribution of grant income from 360Giving on (grants from government departments are excluded from this analysis). The aim of this exercise is to look at 'distribution' of grant income rather than its value. Estimating total grant value is difficult because not all major grant funders in Wales submit evidence to 360Giving. In order to take this 'broad view' analytically, data cover a five year period from 2019-2023. As Table A.1 indicates, there are wide variations in grant income across local authority areas in Wales. Major urban areas tend to be the recipients of higher levels of grant income (but this is not to say that the work they do is limited to those areas).

Table A.1 Estimated value of grants by local authority area and sub-regions of Wales 2019-2023
(Source: 360Giving, January 2025)

	Number of grants (last 5 years)	Sum of Amount Awarded £millions (last 5 years)	Most recent population estimates (ONS May 2023)	Value of grants per 10,000 resident population (last 5 years, £millions)	Number of voluntary organisations (all legal forms)	Average grant award per organisation (last 5 years)
Isle of Anglesey	484	14.5	69,291	2.1	273	£53,082
Gwynedd	918	56.8	119,173	4.8	698	£81,275
Conwy	647	34.8	114,410	3.0	438	£79,415
Denbighshire	1,136	21.2	97,156	2.2	399	£53,065
Flintshire	651	20.2	155,812	1.3	416	£48,539
Wrexham	731	25.0	136,149	1.8	403	£62,115
Powys	986	37.9	134,439	2.8	996	£38,042
Ceredigion	471	29.9	73,050	4.1	396	£75,419
Pembrokeshire	649	26.3	125,006	2.1	574	£45,839
Carmarthenshire	1,109	62.9	190,083	3.2	787	£79,899
Swansea	1,439	154.2	246,742	6.3	648	£237,981
Neath Port Talbot	628	26.0	142,898	1.8	361	£71,855
Bridgend	520	59.5	146,743	4.1	344	£172,930
Vale of Glamorgan	687	15.6	134,733	1.2	412	£37,908
Cardiff	2,690	320.2	383,536	8.4	1,162	£275,554
Rhondda Cynon Taf	1,376	57.8	241,178	2.4	564	£102,411
Merthyr Tydfil	412	11.1	58,593	1.9	137	£81,267
Caerphilly	493	12.9	176,437	0.7	355	£36,150
Blaenau Gwent	270	13.3	67,356	1.9	120	£110,919
Torfaen	339	34.0	93,419	3.6	197	£172,395
Monmouthshire	376	19.9	94,572	2.1	428	£46,493
Newport	1,075	61.9	163,628	3.8	319	£194,067
North Wales	4,567	172.4	691,991	2.6	2,627	£65,627
Mid Wales	1,457	67.8	207,489	3.3	1,392	£48,675
South West Wales	3,825	269.3	704,729	3.8	2,370	£113,647
South East Wales	8,238	606.1	1,560,195	3.9	4,038	£150,100
Wales	18,087	1,115.6	3,164,404	3.5	10,427	£106,992

The distribution of grants by value varies considerably from area to area as shown in Table A.2.⁵¹ The areas with the highest proportion of larger grants tend to be focused in major urban areas or in areas with significant levels social deprivation – in these areas, there tend to be higher percentages of larger voluntary organisations which are more able to access bigger grants.

Table A.2 Distribution of grants by size by local authority areas and subregions of Wales 2019-2023 (source: 360Giving, January 2025, row percentages)								
	Below £1,000	£1,000 - £4,999	£5,000 - £9,999	£10,000 - £49,999	£50,000 - £249,999	£250,000 - £999,999	£1million - £5million	n=
Isle of Anglesey	6.4	46.8	7.6	17.5	17.0	4.7	0.0	171
Gwynedd	2.0	30.7	15.5	30.9	17.4	2.8	0.7	459
Conwy	3.9	37.0	14.8	28.8	13.6	1.8	0.0	330
Denbighshire	5.3	32.9	21.1	27.3	12.8	0.7	0.0	304
Flintshire	4.5	23.1	22.1	31.1	15.1	4.2	0.0	312
Wrexham	5.1	32.8	17.7	27.6	15.4	1.4	0.0	351
Powys	3.8	26.9	25.2	28.2	15.0	0.9	0.0	282
Ceredigion	5.7	19.5	18.1	34.4	15.6	6.7	0.0	358
Pembrokeshire	3.9	24.3	22.1	32.4	14.5	2.5	0.3	550
Carmarthenshire	4.2	29.3	21.1	28.0	15.8	1.6	0.0	664
Swansea	3.0	14.5	20.3	38.6	20.3	3.0	0.3	278
Neath Port Talbot	1.1	21.2	24.5	35.3	16.5	1.4	0.0	268
Bridgend	4.5	25.0	25.0	28.7	14.9	1.9	0.0	280
Vale of Glamorgan	6.1	27.9	23.9	27.5	12.5	2.1	0.0	1,438
Cardiff	4.2	17.0	17.7	35.1	21.6	3.8	0.7	594
Rhondda Cynon Taf	2.9	28.5	18.7	31.1	15.2	3.7	0.0	198
Merthyr Tydfill	2.7	18.3	14.0	33.3	27.4	4.3	0.0	140
Caerphilly	3.5	24.7	16.2	38.4	14.6	2.5	0.0	175
Blaenau Gwent	2.1	17.9	20.7	40.7	15.0	2.9	0.7	171
Torfaen	2.9	18.9	23.4	30.9	20.0	4.0	0.0	284
Monmouthshire	3.5	32.2	17.0	34.5	11.7	0.6	0.6	632
Newport	4.9	18.3	21.5	35.2	18.0	2.1	0.0	186
North Wales	4.2	32.7	17.0	28.2	15.3	2.4	0.2	1,927
Mid Wales	4.4	24.6	23.0	30.1	15.2	2.7	0.0	914
South West Wales	3.2	21.8	21.5	33.7	17.3	2.3	0.2	1,850
South East Wales	3.9	21.6	19.2	33.5	18.3	3.2	0.3	3,734
Wales	3.9	24.5	19.6	32.0	17.0	2.8	0.2	8,424

⁵¹ The reason why grant numbers are lower is because these data are drawn from a matched data set with ONS post code lookups. Only about half of 360Giving data held these postcodes.

Grant distribution is also affected by the way the voluntary sector itself is structured across areas of affluence and deprivation within local authority and sub-regional boundaries (as shown in Table A.3). Consequently, in relatively affluent local authority areas such as Monmouthshire, it is not surprising that most grants are concentrated in more affluent areas - while in relatively poor areas such as Blaenau Gwent more than half the grants are received in the poorest quintile of the WIMD.

Table A.3 Distribution of grants awarded by Welsh Index of Multiple Deprivation 2019-2023 (source: 360Giving, January 2025, row percentages)						
	Most deprived		Intermediate		Least deprived	
	WIMD 1-2	WIMD 3-4	WIMD 5-6	WIMD 7-8	WIMD 9-10	N=
Isle of Anglesey	18.1	14.6	26.9	31.6	8.8	171
Gwynedd	6.5	21.6	38.1	26.1	7.6	459
Conwy	23.9	19.4	15.8	18.8	22.1	330
Denbighshire	23.7	23.0	14.5	25.0	13.8	304
Flintshire	18.6	26.3	7.1	25.3	22.8	312
Wrexham	14.0	49.6	5.7	21.7	9.1	351
Powys	9.2	14.5	28.4	29.8	18.1	282
Ceredigion	18.5	7.0	23.1	38.8	12.7	632
Pembrokeshire	5.6	32.1	33.0	29.1	0.3	358
Carmarthenshire	15.1	39.1	25.6	19.5	0.7	550
Swansea	40.1	15.2	17.0	4.4	23.3	664
Neath Port Talbot	45.0	27.0	8.3	17.3	2.5	278
Bridgend	11.9	41.8	7.5	28.4	10.4	268
Vale of Glamorgan	26.1	9.3	11.1	10.4	43.2	280
Cardiff	34.7	9.6	28.6	16.8	10.3	1437
Rhondda Cynon Taf	24.4	35.9	22.7	10.9	6.1	594
Merthyr Tydfil	64.0	22.6	10.8	0.5	2.2	186
Caerphilly	14.1	25.3	27.8	21.7	11.1	198
Blaenau Gwent	55.7	29.3	3.6	11.4	0.0	140
Torfaen	31.4	33.1	12.6	8.0	14.9	175
Monmouthshire	0.6	1.2	15.8	70.8	11.7	171
Newport	59.9	7.7	18.3	4.9	9.2	284
North Wales	16.6	26.7	18.6	24.2	13.9	1,927
Mid Wales	15.6	9.3	24.7	36.0	14.3	914
South West Wales	26.7	27.4	21.4	15.6	9.0	1,850
South East Wales	32.1	18.9	20.8	16.6	11.5	3,733
Wales	25.6	21.5	20.9	20.2	11.8	8,424

It would be a mistake to assume that patterns of grant making are shaped entirely by spatial factors. On the contrary patterns of grant distribution are highly complex. In Table A.4, data are ranked by total estimated grant income by local authority area. This shows that Cardiff is the recipient of the highest levels of grant funding per 10,000 resident population – but much of this funding will be distributed more widely by larger organisations which work in neighbouring areas or across Wales.

There is some evidence to suggest that grant funding levels by resident population are higher where there are significant levels of social deprivation. There are some inconsistencies. For example, Neath Port Talbot has relatively high levels of deprivation but grant income is relatively low by population.

Table A.4 Distribution of grant funding by resident population and incidence of household material deprivation (Source: 360Giving, January 2025)

	Total estimated grant income 2019-2023	Local resident population	Estimated grant income per 10,000 resident population 2019-2023 (in rank order)	Percentage of people living in households in material deprivation by local authority	Average grant income per voluntary organisation
Cardiff	£78,555,000	383,536	£2,048,178	14.9	£67,603
Gwynedd	£21,264,500	119,173	£1,784,339	14.9	£30,465
Ceredigion	£11,254,500	73,050	£1,540,657	18.4	£28,420
Merthyr Tydfil	£7,597,500	58,593	£1,296,657	18.2	£55,456
Powys	£15,488,000	134,439	£1,152,047	14.1	£15,550
Swansea	£27,187,500	246,742	£1,101,859	13.3	£41,956
Blaenau Gwent	£7,021,500	67,356	£1,042,446	16.1	£58,513
Pembrokeshire	£12,622,000	125,006	£1,009,712	13.4	£21,990
Isle of Anglesey	£6,488,000	69,291	£936,341	13.7	£23,766
Rhondda	£20,988,500	241,178	£870,249	20.5	£37,214
Flintshire	£11,959,500	155,812	£767,560	12.6	£28,749
Torfaen	£6,642,500	93,419	£711,044	19.0	£33,718
Conwy	£7,479,000	114,410	£653,702	10.1	£17,075
Carmarthenshire	£12,064,000	190,083	£634,670	16.7	£15,329
Monmouthshire	£5,258,000	94,572	£555,979	8.4	£12,285
Wrexham	£7,121,500	136,149	£523,067	15.8	£17,671
Vale of Glamorgan	£6,906,000	134,733	£512,569	15.7	£16,762
Denbighshire	£4,648,000	97,156	£478,406	14.8	£11,649
Newport	£7,609,500	163,628	£465,049	17.6	£23,854
Neath Port Talbot	£6,299,000	142,898	£440,804	21.5	£17,449
Bridgend	£6,326,000	146,743	£431,094	15.6	£18,390
Caerphilly	£5,826,000	176,437	£330,203	14.9	£16,411
North Wales	£58,960,500	691,991	£852,041		£22,444
Mid Wales	£26,742,500	207,489	£1,288,864		£19,212
South West Wales	£64,498,500	704,729	£915,224		£27,215
South East Wales	£146,404,500	1,560,195	£938,373		£36,257
Wales	£296,606,000	3,164,404	£937,320		£28,446

NOTES

More information on Third Sector Trends in England and Wales

Previous reports from Third Sector Trends are all available here:
<https://www.stchads.ac.uk/research/third-sector-trends-in-england-and-wales/publications-from-third-sector-trends/>

Full details on the research methodology underpinning Third Sector Trends Study research can be found here: <https://www.stchads.ac.uk/wp-content/uploads/2022/10/Third-Sector-Trends-Research-Methods-2022.pdf>

A discussion on analytical techniques can be found here:
<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>



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