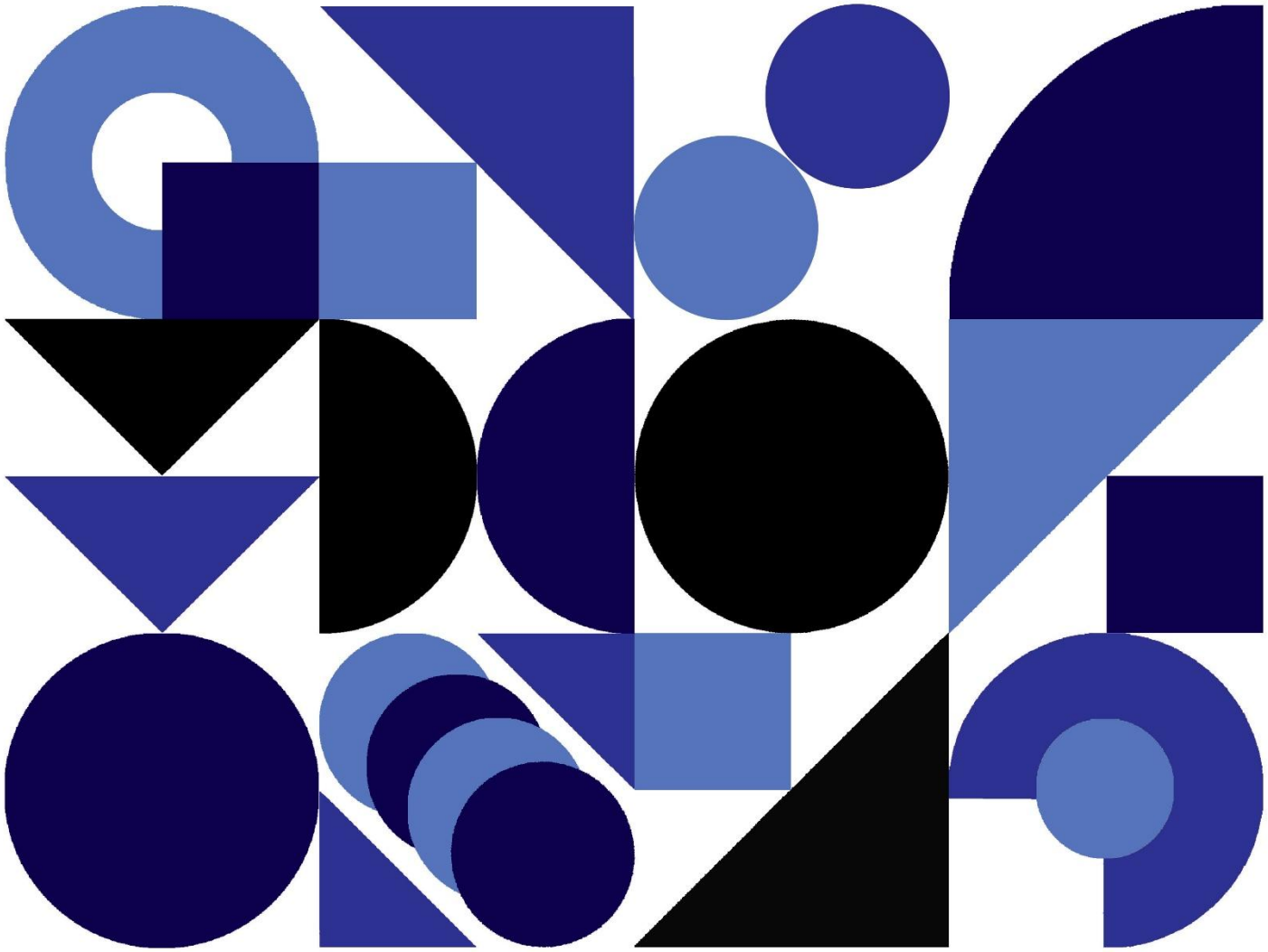


Third Sector Trends in England and Wales 2025

The contribution of voluntary organisations to place: A study of Devon and Cornwall in comparative context

NHS Devon

November 2026

About the authors

Tony Chapman is Director of Policy&Practice, St Chad's College, and Honorary Professor of Social Policy in the Department of Sociology, Durham University.

Jonathan Wistow is Associate Professor in Social Policy, Department of Sociology, Durham University and Co-Director of the Wolfson Research Institute for Health and Wellbeing.

The contents of the report express the views of the authors 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. The 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 have worked with partners: Lloyds Bank Foundation England and Wales, Wales Council for Voluntary Action (WCVA) and Millfield House Foundation to undertake the Third Sector Trends study survey in 2025-26

More information about Third Sector Trends can be found here:

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

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

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

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











Front and rear cover design

Tower Design Workshop

Published by

Policy&Practice
St Chad's College
Durham University
18 North Bailey
DH1 4RU

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

November 2026

Contents

Acknowledgements 4

Section 1: Introduction 5

1.1 Context and purpose
1.2 Structure of the report
1.3 Research methods and survey sample
1.4 Area context
1.5 Spatial analysis
1.6 Health analysis

Section 2: Sector structure, income and people energy 14

2.1 Sector structure
2.2 Sector employment
2.3 Support from volunteers
2.4 Labour market dynamics
2.5 Training and development

Section 3: Sector purpose, energy and impact 31

3.1 Sector purpose and beneficiaries
3.2 Perceptions of social impact
3.3 Financial estimates of sector impact

Section 4: Income, assets and financial wellbeing 40

4.1 Income sources
4.2 Assets and reserves
4.3 Expectations about finance

Section 5: Relationships and influencing 51

5.1 Relationships within the voluntary sector
5.2 Relationships with business
5.3 Relationships with the public sector
5.4 Sector influence on local social and public policy

Section 6: Summary, discussion and implications 62

6.1 Summary of key findings
6.2 Discussion in comparative context
6.3 Sector readiness to collaborate

Acknowledgements

Third Sector Trends is a joint effort involving thousands of people and organisations. The study could not continue without the enormous amount of support it receives.

I would like to thank all the participants who took the time to do the survey and to write about their experiences. Many of the people who responded will have been involved in the study for years and years now. So my thanks go to them for sticking with it this far and hopefully continuing to take part in 2028.

Help to get people to respond to the survey has come from many local voluntary sector infrastructure organisations and community foundations across the country by sending invitations to their lists of members or grantees, putting stories in their newsletters or promoting the study via social media. My thanks go to them for helping build the sample.

In the development of new themes and questions for the survey in 2025, I would particularly like to thank Mark Pierce (formerly Community Foundation North East), Suzanne Perry (formerly Lloyds Bank Foundation England and Wales), Mark Freeman (Cambridge CVS), Cullagh Warnock (Millfield House Foundation), Natalie Zhivkova (WCVA), Jo Curry (Sir James Knott Trust) and Matt Roche (The Mercers' Company).

Thankyou to NHS Devon Integrated Care Board for supporting the study so strongly in 2025 and for commissioning this report. I'd like to thank Darin Halifax for his encouragement and advice in the development of this report and to Nora Corkery and Diana Crump for helping to promote the study across Devon.

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*.

Section 1
Introduction

1.1 Context and purpose

This report produces statistical analysis of the situation of the local voluntary, community and social enterprise sector (VCSE) in Devon and Cornwall. This research is set in the context of the clustering of ICB Integrated Care Board areas of Devon and Cornwall & Scilly Isles in September 2025. This forms part of a longer-term national initiative to reduce the number of ICBs from 42 to 26 clusters across England.

As this report draws upon comparative data for the whole of South West England, evidence from two other ICBs will also be included: *Bristol, North Somerset and South Gloucestershire* (formerly two ICBS) and *Somerset, Dorset and North East Somerset, Swindon and Wiltshire* (previously three ICBs).[1]

Devon is going through the process of local government reorganisation. This has involved a period of consultations about a series of five proposals from existing unitary councils, Devon County Council and county council Districts.[2] As no Ministerial decision has yet been made about local government reorganisation in Devon, this report will retain the current administrative geography of Devon for analytical purposes.

In this report, data are drawn from a combined register of all currently active voluntary organisations England and Wales. The report also uses survey data from Third Sector Trends in 2025 and provides comparative evidence to highlight those activities and achievements of the VCSE sector in Devon and Cornwall & Isles of Scilly that are distinctive, effective or particularly challenging. The analysis builds upon findings from a series of national reports from the 2025 Third Sector Trends study.[3]

1.2 Structure of the report

The analysis in this report is divided into five sections

- ***Section 2*** provides a detailed description of sector structure to include analysis of sector income, employment, volunteering, labour market dynamics and investment in training and development.
- ***Section 3*** focuses upon sector beneficiaries and VCSE organisations' perceptions of social impact. Financial estimates of sector energy are

[1] NHS England (2025) *How the NHS structure in the South West is changing* (website accessed 3rd April 2026), https://www.england.nhs.uk/south/team/organisations/how-the-nhs-structure-in-the-south-west-is-changing/

[2] Ministry of Housing, Communities and Local Government (2026) *Consultation on proposals for local government reorganisation in Devon, Plymouth and Torbay* (26th March) https://consult.communities.gov.uk/local-government-reorganisation/devon-plymouth-and-torbay/

[3] All reports from Third Sector Trends, including detailed technical papers on analytical techniques and research methodology can be located here: https://www.stchads.ac.uk/research/third-sector-trends-in-england-and-wales/publications-from-third-sector-trends/

provided together with estimates of tangible economic, fiscal, use value and intangible aspects of added value.

- ***Section 4*** examines sector income sources (including more detailed analysis of grants, contracts and earned income) together with an evaluation of current sector property assets and financial reserves. An appraisal of financial wellbeing and resilience is provided alongside current expectations about finance.
- ***Section 5*** looks at relationships within the voluntary sector together with private sector and local public sector interactions. This section also explores views on local devolution agendas and the willingness of VCSE organisations to engage in influencing local public and social policy.

The concluding section provides a summary of key findings together with a brief discussion of their implications.

A note on terminology

For stylistic reasons, terminology to describe the VCSE sector and VCSE organisations varies – to include the terms 'voluntary sector' and 'voluntary organisations'. The more concise terms 'third sector' and 'third sector organisations' (abbreviated as 'TSOs') are also used extensively in tabular data and figures. Specific usage of legal forms of VCSE organisations (such as *Community Interest Company* or *Community Amateur Sport Clubs*) are avoided except when referring to specific configurations of legal forms using register or survey data.

1.3 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.[4] 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*[5] 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 responses to appeals to participate by local infrastructure organisations and community foundations across England and Wales.[6]

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.

[4] 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.

[5] 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/

[6] 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.

For this report, some use is made of 2022 Third Sector Trends survey data for comparative purposes. The scope for this is limited because there were many fewer responses in 2022 (total sample 6,070) than in the more recent 2025 survey (8,680). In South West England there were 789 responses in 2022.

Table 1.1 **Third Sector Trends survey response and combined register data 2025**

Ceremonial county areas	Survey	Distribution	Combined register	Distribution
West of England Combined Authority	121	11.0	3,776	15.5
Gloucestershire	150	13.7	3,013	12.3
Somerset	189	17.2	3,449	14.1
Wiltshire	138	12.6	2,871	11.8
Dorset	132	12.0	2,942	12.0
Devon	**259**	**23.6**	**5,577**	**22.8**
Cornwall & Scilly	**108**	**9.8**	**2,798**	**11.5**
South West of England	**1,097**	**100.0**	**24,426**	**100.0**

The wide-ranging questionnaire asks respondents about beneficiaries served and what voluntary organisations feel that they have achieved. The survey also examines TSOs' 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.[7] However, some 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.[8]

1.4 Area context

This sub-section provides a basis for the interpretation of VCSE sector data in subsequent analysis by presenting a brief socio-economic statistical profile of Devon and Cornwall.

Population data are presented in Table 1.2 for Devon and Cornwall and its constituent unitary local authorities and county council districts. There is considerable ethnic heterogeneity across the area – only in Exeter and Plymouth do ethnicity minority groups collectively exceed 5% of the resident population.

When exploring the structure, dynamics and energy of the VCSE sector in localities, it is essential to get a good understanding of local socio-economic profiles in order to

[7] The report draws upon a wide range of analytical techniques, the complexity of which cannot be fully explained in this report for reasons of brevity. A full set of explanations on the usage or these techniques can be found here: 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

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

find out how well VCSE sector capacity matches local need. The English Indices of Deprivation (generally referred to as the Indices of Multiple Deprivation or IMD) provide useful comparative data on the social and economic situation of local authority areas. As Table 1.3 shows, area deprivation on all criteria is substantially higher against all criteria in Cornwall when compared with Devon; but the areas with deepest concentrations of deprivation are Torbay and Plymouth. Income deprivation is especially high in Torbay as is education and skills. Barriers to housing is relatively high across Devon but is substantially higher in Cornwall.

Table 1.2 **Demographic profiles in Devon and Cornwall local authorities** (Source: ONS 2021)

	Asian or Asian British	Black, African, Caribbean or Black British	Mixed or multiple ethnic groups	White	Other ethnic group	Total population
Cornwall	0.7	0.2	1.2	96.8	1.1	570,305
Isles of Scilly	0.3	0.2	1.1	97.5	0.9	2,055
Plymouth	2.2	1.1	1.8	94.0	1.0	264,695
Torbay	1.6	0.3	1.5	96.1	0.4	139,324
East Devon	1.0	0.2	1.1	97.4	0.3	150,823
Exeter	4.9	0.9	2.5	90.3	1.4	130,707
Mid Devon	0.7	0.1	1.1	97.8	0.3	82,853
North Devon	1.2	0.3	1.2	97.0	0.3	98,612
South Hams	0.7	0.2	1.2	97.5	0.4	88,628
Teignbridge	0.7	0.2	1.2	97.7	0.3	134,802
Torridge	0.5	0.1	0.9	98.2	0.2	68,114
West Devon	0.6	0.2	1.1	97.8	0.3	57,094
Cornwall & Scilly Isles	*0.7*	*0.2*	*1.2*	*96.8*	*1.1*	*572,360*
Devon	*1.6*	*0.5*	*1.5*	*95.8*	*0.6*	*1,215,652*
Devon and Cornwall	**1.3**	**0.4**	**1.4**	**96.2**	**0.7**	**1,788,012**

Table 1.3 **Indices of Multiple Deprivation** (Source: ONS 2021)

	IMD - Rank of average rank	IMD - Rank of proportion of LSOAs in most deprived 10% nationally	Income - Rank of average rank	Education, Skills and Training - Rank of average rank	Health Deprivation and Disability - Rank of average rank	Barriers to Housing and Services - Rank of average rank
Cornwall	60	82	64	78	78	42
Isles of Scilly	134	130	151	134	151	83
Plymouth	52	38	61	46	29	101
Torbay	38	44	24	35	42	84
Devon	110	124	108	102	107	67

Public health profile

In recent years there has been a shift in policy emphasis in many societies away from life expectancy towards the assessment of 'healthy life expectancy'.[9] In England, data are collected by the ONS on self-perceptions of health.[10] Healthy life expectancy is defined as follows:

> ***"The healthy life expectancy measure adds a 'quality of life' dimension to estimates of life expectancy by dividing it into time spent in different states of health. Health status estimates are based on the following survey question; 'How is your health in general; would you say it was… very good, good, fair, bad, or very bad'. If a respondent answered 'very good' or 'good' they were classified as having 'good' health. Those who answered 'fair', 'bad', or 'very bad' were classified as having 'not good' health and equate to those in 'poor' health."***

Healthy life expectancy statistics provide a useful benchmark for the analysis of spatial variations in public health. Unfortunately, data are only published at upper-tier local authority levels. It is clear that data from indices of multiple deprivations as shown above, tend to mirror data on healthy life expectancy.

Table 1.4 **Healthy life expectancy in Devon and Cornwall** (Source: ONS 2021)

	Men's life expectancy at birth	Men's healthy life expectancy at birth	*Years of ill health*	Women's life expectancy at birth	Women's healthy life expectancy at birth	*Years of ill health*
Cornwall	79.5	63.2	*16.3*	83.5	65.7	*17.8*
Devon	80.5	65.6	*14.8*	84.4	66.4	*18.0*
Torbay	79.0	62.8	*16.2*	83.0	63.2	*19.8*
Plymouth	78.5	59.0	*19.5*	82.5	59.5	*23.0*

1.5 Spatial analysis

Currently the political geography of Devon and Cornwall is in transition as local government reorganisation takes place here, as in many other parts of England. Within Devon, there remains considerable uncertainty as to how local government reorganisation will play out in practical terms after a consultation process involving five separate proposals which were made November 2025.

The proposal consultation period closed after seven weeks on 26th March 2026. A ministerial decision was reached subsequently, but that has since been paused[11] and subsequently withdrawn[12]. No matter which of the five proposals (or alternative proposals) are ultimately accepted by the Minister, there will be substantial disruption

[9] Welsh, C., Matthews, F. and Jagger, C. (2021) 'Trends in life expectancy and healthy life years at birth and age 65 in the UK, 2008–2016, and other countries of the EU28: An observational cross-sectional study', The Lancet Regional Health, https://www.thelancet.com/journals/lanepe/article/PIIS2666-7762(20)30023-5/fulltext

[10] Source: Public Health England, 2017. https://www.gov.uk/government/publications/health-profile-for-england/chapter-1-life-expectancy-and-healthy-life-expectancy

[11] In July 2026, the Minister confirmed that a four unitary authority model would be adopted in Devon. However, in September 2026 the local government restructuring programme was paused https://www.bbc.co.uk/news/articles/cy5zw02rgpqo and in October the plan was withdrawn https://www.bbc.co.uk/news/articles/cmwydjql2l1wo. At the time of publication of this report, further indication of how devolution may play out were outlined in the Chancellor's autumn Budget which can has been reviewed by the Local Government Association and can be accessed here: https://www.local.gov.uk/autumn-budget-2026. For further detail on the original proposals, see: https://www.gov.uk/government/consultations/local-government-reorganisation-in-devon-plymouth-and-torbay/proposals-for-local-government-reorganisation-in-devon-plymouth-and-torbay.

[12] Oates, M. (2026) Controversial plans for Devon councils withdrawn, BBC News: https://www.bbc.co.uk/news/articles/cmwydjql2l1wo

to political relationships across the ceremonial county area and it will take time for new procedural arrangements to be put in place when areas are given the authority to do so.

That being the case, data are presented in a variety of ways.

- The project's principal geographical focus will be the ceremonial counties of Devon and Cornwall together with current local authority boundaries to include:
  - ***Cornwall, Plymouth*** and ***Torbay*** unitary authorities.
  - ***Devon County Council*** (including the following districts: East Devon, Exeter, Mid Devon, North Devon, South Hams, Teignbridge, Torridge and West Devon)
- It will be possible to present findings for the above council areas using combined register and statistical model data. But due to the constraints of the size of survey dataset for Devon and Cornwall it is not possible to disaggregate survey data with confidence below Devon and Cornwall levels (there were no responses from Iles of Scilly).
- The report will make extensive use of comparisons with other English regions and Wales to contextualise the overall position in South West England. These data will then be divided, where possible, into each of the ceremonial county areas:
  - ***Cornwall & Scilly***
  - ***Devon***
  - ***Dorset***
  - ***Wiltshire***
  - ***Somerset***
  - ***Gloucestershire***
  - ***West of England Combined Authority***

1.6 Health analysis

Third Sector Trends surveys collate data on beneficiaries served by VCSE organisations. There are five questions which directly concern health, including, 'physical health', 'disability', 'mental health', 'learning disabilities' and 'carers'. As there are insufficient data to undertake analysis reliably on health-oriented organisations at local level in Devon and Cornwall – national data will be used to inform analysis and interpretation. Many organisations serve more than one beneficiary group associated with health conditions so it is necessary to combine the five questions into a single variable on health – this includes – 3,556 respondents from a sample of 8.680 (41% of the sample).

Table 1.5 **Health orientation of VCSE organisations** (Third Sector Trends in England and Wales 2025, n=8,680)

Beneficiary groups TSOs serve	Number of respondents	Percentage of total sample
People with physical disabilities	1,785	20.6
People with physical health conditions	1,783	20.5
People with mental health conditions	2,036	23.5
People with learning disabilities	1,530	17.6
Carers	1,058	12.2
Combined data for TSOs serving health related beneficiaries	**3,556**	**41.0**

While 3,556 VCSE organisations have some commitment to health related issues, that is not to say that this is their central concern. Consequently, it is necessary to isolate those organisations which regard health and wellbeing as a 'primary' focus in their work and achievement in impact terms.

To do this, data from a second set of questions were collated on voluntary organisations' perceptions of impact in core areas of social benefit. These questions include 13 sub-categories ranging from 'employability support' to 'empowerment in the community'. One of these questions on impact determines if '*we improve health and wellbeing*'. Answers are reported on the following scale: 'we have a very strong impact', 'we make a good contribution',' we make some difference' and 'we do not try to do this'.

As shown in Table 1.6, many TSOs which work with health beneficiaries claim to achieve a tangible impact on health and wellbeing, but also in related areas of impact including: 'physical activity', 'social isolation' and 'improving people's access to basic services'. It is apparent that many organisations with health beneficiaries believe that they make a strong impact. Amongst the 3,499 TSOs with health and social care beneficiaries, 72% feel that they make a strong or good contribution to tackling 'health and wellbeing'. A similar percentage of 3,415 VCSE organisations with health beneficiaries feel that they make a strong or good contribution to 'social isolation'. Fewer voluntary organisations with health beneficiaries feel that they make a strong or good contribution to 'physical activity' (42%) as is the case with those addressing 'access to services' (34%).

Table 1.6 **Contribution of health-oriented VCSE organisations to aspects of impact**

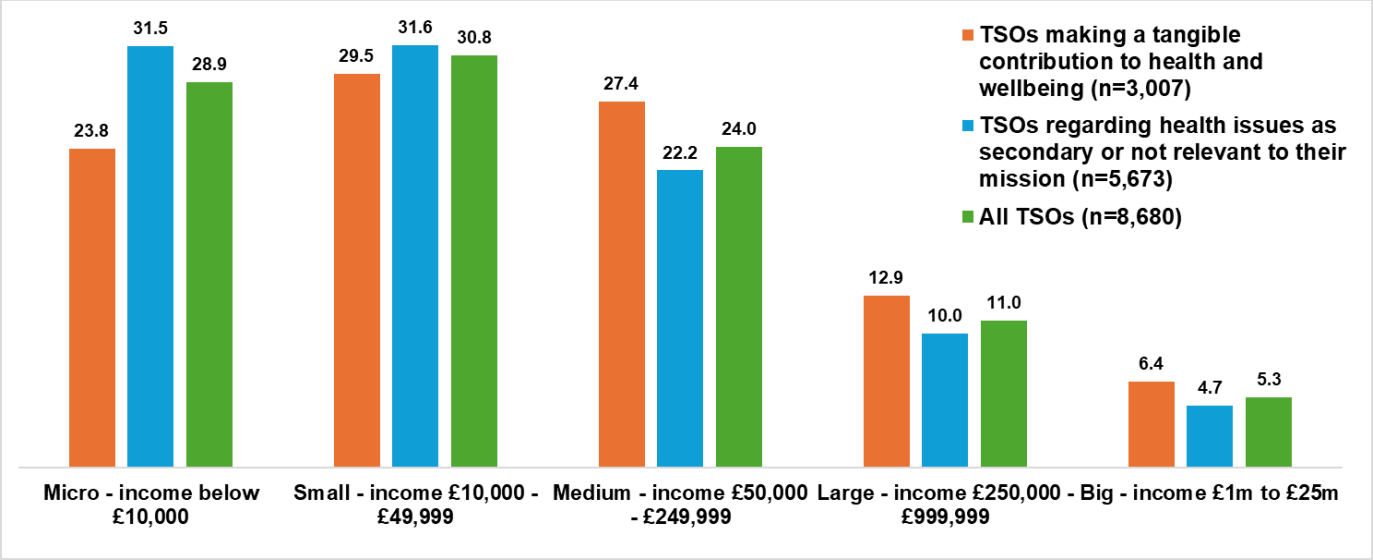
	TSOs having tangible impact on health issues as a primary concern		***TSOs having impact on health issues as a secondary or of no concern***		
	We have a very strong impact	**We make a good contribution**	**We make some difference**	**We don't try to do this**	**All TSOs which serve health and social care beneficiaries**
We improve health and wellbeing	32.8	38.7	22.9	5.6[13]	3,499
We encourage physical activity and improve people's fitness	16.6	25.4	24.5	33.6	3,415
We reduce social isolation	37.6	35.0	19.1	8.3	3,482
We improve people's access to basic services	14.5	19.8	23.4	42.3	3,365

A new variable was created on VCSE organisations' contribution to health beneficiaries which combines those organisations which claim to make a 'very strong' or 'good contribution' with those voluntary organisations which serve physical and mental health concerns, people with disabilities, learning difficulties, disabilities and carers. The new variable has a core set of 3,007 respondents which make a 'tangible' commitment to health issues.

To aid interpretation, Figure 1.1 compares the size of organisations which make a tangible contribution to health and wellbeing. It is clear that VCSE organisations attending to health issues tend to be larger. And as may be expected there are comparatively fewer micro organisations that attend to health issues (24%), but the proportion of medium-sized organisations (27%), larger (13%) and big VCSE organisations (6.4%) are higher than amongst non-health oriented voluntary organisations.

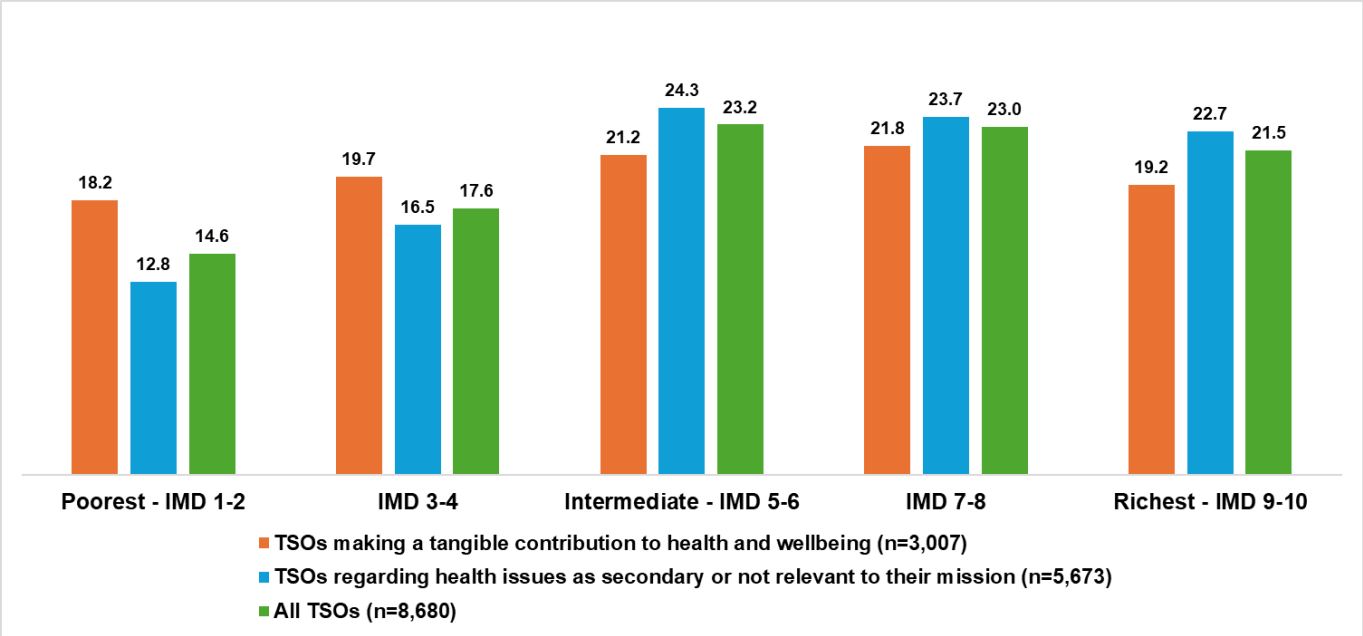
[13] It may seem odd that nearly 6% of TSOs with health beneficiaries do not aim to achieve any tangible impact. These organisations mainly include those which facilitate other voluntary organisations' impact on health such as infrastructure organisations and grant making trusts.

Figure 1.1 **Size of VCSE organisations contributing tangible impact in the field of health and wellbeing** (Third Sector Trends in England and Wales 2025)



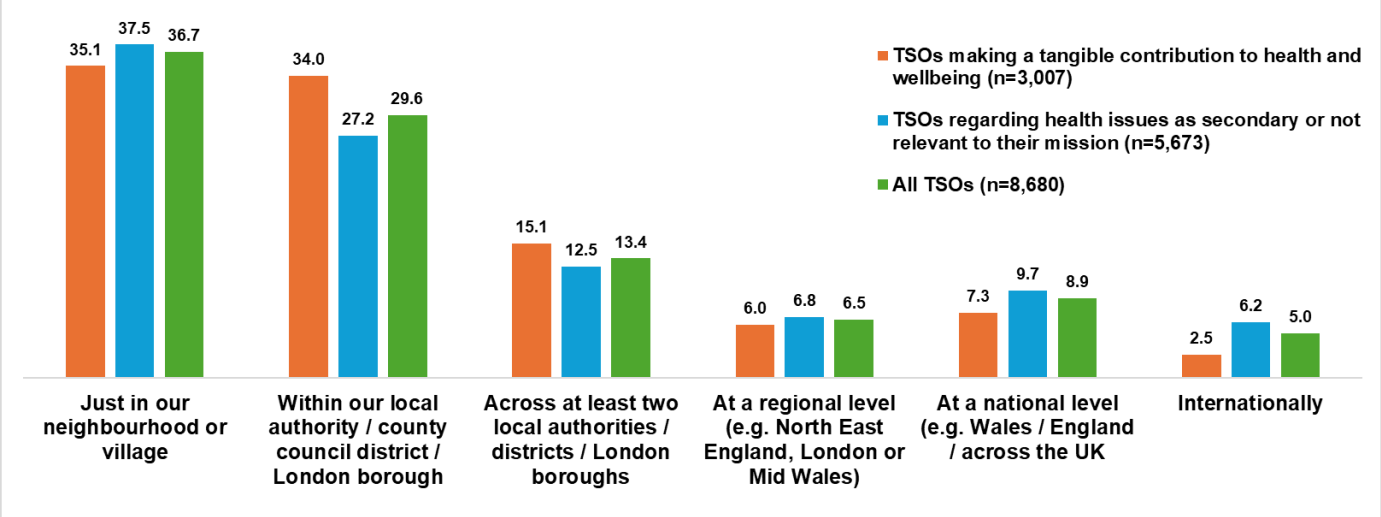
VCSE organisations which focus upon achieving impact in the field of health and wellbeing are more concentrated in poorer areas than voluntary organisations with other interests (Figure 1.2). Nonetheless, it is evident that health interests are catered for quite equally - about a fifth of VCSE organisations in each quintile of social advantage and disadvantage.

Figure 1.2 **Location of VCSE organisations contributing tangible impact in the field of health and wellbeing** (Third Sector Trends in England and Wales 2025)



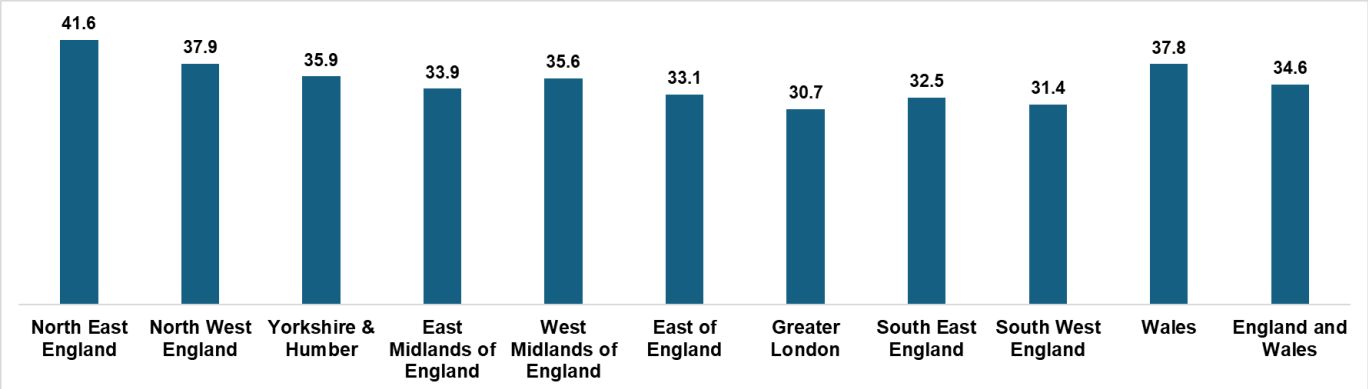
The spatial range of voluntary organisations working in the field of health and wellbeing tends to be focused locally – though less so at neighbourhood level than VCSE organisations with other objectives (Figure 1.3). In comparative terms, relatively few health oriented voluntary organisations work at regional level or beyond. (16% compared with 23% with other types of beneficiary foci).

Figure 1.3 **Spatial range of operation amongst VCSE organisations contributing tangible impact in the field of health and wellbeing** (Third Sector Trends in England and Wales 2025)



There are, unfortunately, too few cases in the sample to undertake analysis at the local level. Even at regional level, the scope for convincing analysis is quite limited although it is interesting to note that there is a greater concentration on health issues in less advantaged regions such as North East England (42%) and Wales (38%) than in generally more affluent areas such as South West England (31%) as shown in Figure 1.4. At national level, however, the sample of 3,007 is sufficient to undertake reliable analysis which can inform interpretation at local level. Evidence will be presented in sections of this report as required to deepen understanding of sector dynamics in the health field.

Figure 1.4 **Percent of VCSE organisations making a tangible contribution to health and wellbeing by region** (Third Sector Trends in England and Wales, health oriented TSOs n=3,007, all TSOs n=8,680)



Section 2

Sector structure, income and people energy

2.1 Sector structure

The Third Sector Trends study is primarily concerned with the contribution of the voluntary sector to social, economic and environmental wellbeing of localities. Consequently, the study does not report on data held on major charitable organisations with income above £25million. These data are available elsewhere as NCVO collate substantive data on the activities and resources of larger charities which is reported in their annual *UK Civil Society Almanac*.[14]

In England and Wales, it is estimated that there are about 205,000 registered VCSE organisations. These organisations are not distributed evenly across Wales and English regions. Instead, as shown in Table 2.1(a) there is a higher concentration of VCSE organisations per thousand members of the local resident population in more affluent regions such as South West England (4.2 per 1,000) than in poorer regions such as North East England (2.6 per 1,000).

Table 2.1(a) **Distribution of VCSE organisations in English regions and Wales**
(Third Sector Trends Combined Register 2025)

	Estimated Number of TSOS	Percentage of TSOs in each region	Population in each region (1,000s)[15]	TSOs per 1,000 population
North East England	7,134	3.5	2,711	2.6
North West England	20,755	10.1	7,600	2.7
Yorkshire and Humber	15,057	7.4	5,594	2.7
East Midlands of England	14,646	7.2	4,991	3.0
West Midlands of England	17,501	8.6	6,086	2.9
East of England	22,108	10.8	6,469	3.4
London	38,861	19	8,945	4.4
South East England	33,979	16.6	9,483	3.6
South West England	**24,426**	**11.9**	**5,811**	**4.2**
Wales	10,533	4.9	3,164	3.2
England and Wales	**205.000**	**100.0**	**60,854**	**3.4**

[14] The most recent data from NCVOs Civil Society Almanac is available here: https://www.ncvo.org.uk/news-and-insights/news-index/uk-civil-society-almanac-2024/. It was announced in November 2025 that NCVO had cancelled the launch of the 2025 version: https://www.civilsociety.co.uk/news/ncvo-delays-civil-society-almanac-publication-until-2026.html

[15] Statistica, 2023 https://www.statista.com/statistics/294729/uk-population-by-region/#:~:text=Population%20of%20the%20UK%202023%2C%20by%20region&text=The%20population%20of%20the%20United,West%20England%20at%207.6%20million.

Table 2.1(b) shows the distribution of VCSE organisations by unitary authority and county council districts in Devon and Cornwall. The number of VCSE organisations per 1,000 resident population has been calculated to show that there is substantive variation across local authority areas ranging from 11.2 per 1,000 on the Isles of Scilly to just 2.6 per 1,000 in Plymouth.

Table 2.1(b) **Distribution of VCSE organisations in local authorities** (Third Sector Trends Combined Register 2025)

	Resident population in local authority [16]	Number of TSOs in each local authority	TSOs per 1,000s resident population
Cornwall	570,305	2776	4.9
Isles of Scilly	2,055	23	11.2
Plymouth	264,695	683	2.6
Torbay	139,324	422	3.0
East Devon	150,823	800	5.3
Exeter	130,707	560	4.3
Mid Devon	82,853	516	6.2
North Devon	98,612	505	5.1
South Hams	88,628	681	7.7
Teignbridge	134,802	703	5.2
Torridge	68,114	334	4.9
West Devon	57,094	375	6.6
Cornwall & Scilly Isles	*572,360*	*2,799*	*4.9*
Devon	*1,215,652*	*5,579*	*4.6*
Devon and Cornwall	**1,788,012**	**8,378**	**4.7**

Table 2.2(a) shows the distribution of VCSE organisations by legal form in English regions and Wales. It is noted that the percentage of registered charities is higher in more affluent southern English regions than in the West Midlands, the North and in Wales. The newer legal form of Charitable Incorporated Organisation (CIOs) is fairly evenly distributed across English regions but is higher in Wales.

In the more industrial North East, North West and West Midlands of England the percentage of Community Interest Companies (CICs) is substantially higher than in other English regions. Wales has proportionally fewer CICs than the English regional average. In Devon and Cornwall, the proportion of CICs is higher in the urban and less affluent areas of Plymouth and Torbay, but are also well represented in Cornwall.

[16] Census 2021.

Table 2.2(a) **Distribution of VCSE organisations by legal form by English regions and Wales**
(Third Sector Trends Combined Register 2025)

Row percentages	Registered charities	Charitable Incorporated Organisations	Community Interest Companies	Registered Societies	Community Amateur Sport Clubs	Registered TSOs in each region
North East England	54.3	16.3	19.4	6.5	3.6	7,134
North West England	59.7	14.9	17.9	4.2	3.3	20,755
Yorkshire & Humber	61.0	16.9	13.4	5.0	3.6	15,057
East Midlands of England	66.2	14.2	12.3	3.7	3.6	14,646
West Midlands of England	61.4	14.5	17.0	4.2	3.0	17,501
East of England	69.4	13.8	10.4	3.0	3.4	22,108
London	63.0	17.2	15.9	2.8	1.2	38,861
South East England	66.9	15.0	10.7	3.4	4.1	33,979
South West England	**64.1**	**14.1**	**13.9**	**4.1**	**3.7**	**24,426**
Wales	59.9	19.1	12.1	5.4	3.5	10,533
England and Wales	**63.6**	**15.5**	**14.0**	**3.8**	**3.1**	**205.000**

Table 2.2(b) **Distribution by legal form in local authority areas of Devon and Cornwall**
(Third Sector Trends Combined register 2025)

Row percentages	Registered charities	Charitable Incorporated Organisations	Community Interest Companies	Registered Societies	Community Amateur Sport Clubs	Registered TSOs in each area
Cornwall	55.2	14.6	22.5	4.2	3.5	2,905
Isles Of Scilly	58.3	12.5	16.7	0.0	12.5	24
Plymouth	51.9	11.5	30.1	3.9	2.7	715
Torbay	49.5	16.5	24.4	2.5	7.0	442
East Devon	65.4	17.1	9.6	2.9	5.1	837
Exeter	58.2	15.7	19.6	2.9	3.6	586
Mid Devon	72.4	12.8	6.9	5.0	3.0	540
North Devon	58.1	15.0	15.0	4.2	7.8	528
South Hams	60.9	12.9	18.1	4.6	3.5	713
Teignbridge	59.9	15.1	15.9	5.6	3.5	736
Torridge	67.9	15.5	7.4	4.0	5.2	349
West Devon	61.7	11.7	14.0	3.6	8.9	392
Cornwall & Isles of Scilly	*55.2*	*14.5*	*22.4*	*4.2*	*3.6*	*2,929*
Devon	*60.5*	*14.4*	*16.5*	*4.0*	*4.7*	*5,838*
Devon and Cornwall	**58.7**	**14.5**	**18.5**	**4.0**	**4.3**	**8,767**

Third Sector Trends does not use precisely 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 have income below £1million. If these smaller organisations are not disaggregated into discrete definitional categories, it is not possible fully to understand how different elements of the sector is structured, how they work and how objectives are achieved.

The regional population of VCSE organisations in England and Wales is shown in Table 2.3(a). The structure of the voluntary sector is broadly similar across regions. London is the exception with a much bigger proportion of large organisations. When comparing the structure of the voluntary sector in the relatively poor North East region with the generally more affluent South West region it is apparent that variations in middling-sized VCSE organisations are relatively limited – although the proportion of large voluntary organisations in the North East is notably higher (10%) while there are proportionately more micro organisations in South West England (40%).

Table 2.3(a) **Distribution of VCSE organisations by size in English regions and Wales**
(Third Sector Trends Combined Register 2025)

Row percentages	Micro (£10,000 or less)	Small (£10,001-£50,000)	Medium (£50,001 - £250,000)	Large (£250,001 - £1m)	Big (£1m – £25m)	Registered TSOs in each region
North East England	34.1	28.4	22.2	10.3	5.0	7,134
North West England	35.4	27.9	22.8	9.0	4.9	20,755
Yorkshire & Humber	36.9	27.9	21.9	8.9	4.3	15,057
East Midlands of England	42.0	29.2	18.8	6.4	3.6	14,646
West Midlands of England	38.2	28.9	20.5	7.9	4.5	17,501
East of England	40.3	29.4	20.2	6.5	3.6	22,108
London	26.5	24.7	24.6	14.2	10.0	38,861
South East England	34.8	31.3	21.9	7.5	4.6	33,979
South West England	**39.9**	**29.7**	**19.8**	**7.0**	**3.7**	**24,426**
Wales	42.2	27.7	18.8	7.4	4.0	10,533
England and Wales	**35.8**	**28.4**	**21.6**	**8.8**	**5.3**	**205.000**

Across Devon and Cornwall (Table 2.3(b)), the proportion of larger and big organisations is much greater in the cities of Plymouth and Exeter, but not in Torbay. There are proportionately more smaller and micro organisations in Mid Devon, West Devon and Torridge which likely reflect higher levels of affluence. Percentages of micro VCSE organisations are particularly low in Plymouth and Torbay.

Table 2.3(b) **Distribution by size of VCSE organisations in local authority areas**
(Third Sector Trends Combined Register 2025)

Row percentages	Micro (£10,000 or less)	Small (£10,001-£50,000)	Medium (£50,001 - £250,000)	Large (£250,001 - £1m)	Big (£1m – £25m)	Number of TSOs
Cornwall	43.6	29.1	18.7	5.5	3.1	2,905
Isles Of Scilly	20.0	46.7	26.7	6.7	0.0	24
Plymouth	30.7	27.0	24.1	11.1	7.1	715
Torbay	35.6	31.6	22.4	8.4	2.0	442
East Devon	43.7	32.7	17.2	4.7	1.6	837
Exeter	27.5	27.0	25.4	12.6	7.5	586
Mid Devon	49.3	31.3	13.6	4.8	1.0	540
North Devon	45.8	29.3	15.1	6.7	3.2	528
South Hams	41.0	30.1	19.5	7.0	2.5	713
Teignbridge	43.5	30.8	17.8	5.1	2.8	736
Torridge	47.5	32.5	15.8	3.4	0.8	349
West Devon	50.4	28.3	17.1	3.9	0.4	392
Devon	*41.4*	*30.2*	*18.8*	*6.7*	*3.0*	2,929
Cornwall & Iles of Scilly	*43.4*	*29.3*	*18.7*	*5.5*	*3.1*	5,838
Devon and Cornwall	**42.0**	**29.9**	**18.8**	**6.4**	**3.0**	8,767

Table 2.4(a) compares the distribution of VCSE organisations in each region by indices of multiple deprivation (IMD). Variations in sector distribution clearly reflect comparative levels of affluence and deprivation across regions. In the South West of England, for example, only 9% of VCSE organisations are located in the least affluent quintile, while 19% are located in the most affluent (although that is much lower than in South East England at 35%). In North East England, by contrast, 28% of VCSE organisations are located in the least affluent quintile while only 15% are situated in the most affluent.

In Devon and Cornwall, the percentages of VCSE organisations based in the most deprived areas vary considerably. In East Devon, Mid Devon, West Devon, the South Hams and Scilly there are no such census areas, while in Plymouth and Torbay there are 38-39%) in the most deprived quintile (Table 2.4(b)). The absence of the poorest quintile census areas does not imply that there is no deprivation in more affluent districts – but these poorer households or individuals do not register in generalised statistics.

Many VCSE organisations do not limit their work to the immediate area within which they are based, so this must be taken into account when interpreting statistics. As Table 2.5(a) shows, the spatial patterns of work are fairly similar across English regions and Wales – but some anomalies must be noted.[17] In South West England, working at neighbourhood or village level (47%) is the highest of all regions.

Within South West England there is much variation (Table 2.5(b)). In predominantly urban West of England Combined Authority area, only 32% of VCSE organisations focus their activity purely at local neighbourhood or village level compared with 58% in Somerset.

Table 2.4(a) **Regional and national distribution of VCSE organisations by area affluence**[18]
(Third Sector Trends Combined Register, 2025)

Row percentages	Least affluent IMD 1-2	IMD 3-4	Intermediate IMD 5-6	IMD 7-8	Most affluent IMD 9-10	Number of TSOs
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**
Wales	13.8	18.6	23.8	25.5	18.3	10,533
England and Wales	**15.5**	**19.2**	**22.6**	**22.5**	**20.3**	**205.000**

[17] The distinction between local authorities / local authority districts and working across two or more local authorities has become less useful over time. This is due to local government reorganisation where several two-tier counties have either become single tier or split into two smaller local authorities. Unfortunately this has undermined analysis between waves of the study as the political geographies are no longer comparable. In analytical terms it makes sense in comparative analysis, therefore, for these two categories to be merged.

[18] Indices of deprivation in England and the Index of 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 2.4(b) **Distribution of VCSE organisations by area affluence in Devon and Cornwall** (Third Sector Trends Combined Register 2025)

Row percentages	Least affluent IMD 1-2	IMD 3-4	Intermediate IMD 5-6	IMD 7-8	Most affluent IMD 9-10	Number of TSOs
Cornwall	10.4	45.2	31.2	12.2	1.0	2,905
Isles Of Scilly	0.0	0.0	0.0	100.0	0.0	24
Plymouth	38.0	23.5	12.7	19.3	6.4	715
Torbay	38.7	29.6	17.2	10.9	3.6	442
East Devon	0.0	9.9	33.6	26.5	30.0	837
Exeter	22.5	14.5	19.6	12.5	30.9	586
Mid Devon	0.0	17.0	59.3	19.6	4.1	540
North Devon	13.8	28.8	29.0	22.3	6.1	528
South Hams	0.0	9.7	57.2	19.8	13.3	713
Teignbridge	3.9	19.4	31.5	29.8	15.4	736
Torridge	8.3	59.3	24.9	7.4	0.0	349
West Devon	0.0	21.4	57.1	12.0	9.4	392
Devon	*12.1*	*20.8*	*34.0*	*19.5*	*13.6*	*2,929*
Cornwall & Iles of Scilly	*10.4*	*45.2*	*31.2*	*13.0*	*1.0*	*5,838*
Devon and Cornwall	**11.5**	**28.8**	**33.0**	**17.3**	**9.4**	**8,767**

Table 2.5(a) **Spatial range of VCSE organisations' operation in Wales and English regions** (Third Sector Trends 2025 survey data)

	Just in our neigh-bourhood or village	Within our local authority / county council district / London borough	Across at least two local authorities / districts / London boroughs	At a regional level (e.g. North East England, London or Mid Wales)	At a national level (e.g. Wales / England / across the UK	Inter-nationally	N=
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**
Wales	30.2	28.5	13.7	7.3	15.8	4.5	709
England and Wales	**36.7**	**29.6**	**13.4**	**6.5**	**8.9**	**5.0**	**8,663**

Table 2.5(b) **Spatial range of VCSE organisations' operation in South West England** (Third Sector Trends in England and Wales 2025)							
	Just in our neigh-boarhound or village	**Within our local authority / county council district**	**Across at least two local authorities**	**At a regional level**	**At a national level**	**Inter-nationally**	**N=**
Devon	**44.7**	**27.6**	**12.8**	**3.1**	**7.0**	**4.7**	**257**
Cornwall & Scilly	**50.9**	**26.9**	**9.3**	**1.9**	**10.2**	**0.9**	**108**
Dorset	36.4	35.6	11.4	3.0	6.8	6.8	132
Wiltshire	53.6	21.7	7.2	5.1	8.7	3.6	138
Somerset	58.2	23.8	5.8	2.6	5.3	4.2	189
Gloucestershire	48.0	28.7	8.7	1.3	9.3	4.0	150
West of England CA	32.5	20.8	12.5	9.2	14.2	10.8	120
South West England	**46.9**	**26.5**	**9.8**	**3.6**	**8.3**	**4.9**	**1,094**

2.2 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 2.6). It is estimated that this represents a small increase of around 25,000 employees nationally since 2022. The full cost of employees to voluntary organisations is estimated at around 69% of total organisational expenditure. In South West England, the voluntary sector employs around 102,000 people, constituting about 3.4% of regional employment – which is just above the national average. The cost of employing staff is estimated to be about 69% of sector income which is the national average.

Table 2.6 **The contribution of the voluntary sector to overall employment in England and Wales** (Third Sector Trends statistical model 2025)					
	Estimated number of voluntary sector employees	**Regional employment[19]**	**Estimated percentage of regional employment**	**Estimated sector income** (£millions)	**Approximate percentage of sector income spent on wages**
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[20]	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**
Wales	42,600	1,457,000	2.9	2,258.1	67.3
England and Wales	**1,148,500[21]**	**30,683,000**	**3.1[22]**	**61,260.2**	**69.1[23]**

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

[20] 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.

[21] Includes London-based organisational employees which are distributed elsewhere in England and Wales.

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

[23] Average percentage cost excluding London.

Table 2.7 provides estimates on the distribution of the workforce by unitary local authorities and county council district areas.[24]

Table 2.7 **Estimated employee numbers and costs in Devon and Cornwall** (Third Sector Trends statistical model 2025)

	Total number of registered voluntary organisations	Estimated sector income (£millions)	Estimated number of employees
Cornwall	2,776	614.2	11,549
Isles Of Scilly	23	5.1	95
Plymouth	683	151.2	2,843
Torbay	422	93.5	1,757
East Devon	800	177.0	3,328
Exeter	560	123.9	2,330
Mid Devon	516	114.2	2,147
North Devon	505	111.6	2,099
South Hams	681	150.8	2,835
Teignbridge	703	155.6	2,926
Torridge	334	73.8	1,387
West Devon	375	82.9	1,558
Devon	*5579*	*1,234.4*	*23,210*
Cornwall and Isles of Scilly	*2,799*	*619.3*	*11,644*
Devon and Cornwall	**8,378**	**1,853.7**	**34,854**

2.3 Support from volunteers

National estimates for the number of volunteers in the UK are published annually in NCVO's Civil Society Almanac.[25] 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 VCSE organisations rely upon to provide practical hands-on support to achieve their objectives.[26] 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 TSO 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 TSO such as Pro-Bono Economics).

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

[25] NCVO UK Civil Society Almanac 2024 https://www.ncvo.org.uk/news-and-insights/news-index/uk-civil-society-almanac-2024/.

[26] 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.

- 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*[27] 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 VCSE 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 in VCSE organisations (see Table 2.8(a)). In England and Wales, regular volunteers number around 4.3 million people who contribute 308 million hours of work valued at between £3.8bn and £5.6bn in 2025.

In the South West of England, the number of regular volunteers is about 493,000 and the hours worked amounts to ~£36 million. The proxy replacement value of volunteers would be between £433m and £606m in South West England. Estimated numbers and proxy financial replacement values for regular volunteers at local authority and county council district levels are provided in Table 2.8(b).

Table 2.8(a) **Estimated number and proxy replacement value of regular volunteers in VCSE 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)
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[28]	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**
Wales	212,300	15.3	186.6	8,900	28,471	255.1
England and Wales	**4,277,400**	**308.0**	**3,760.2**	**180,400**	**29,899**	**5,601.1**

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

[28] 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.

Table 2.8(b) **Estimated number and proxy replacement value of regular volunteers in VCSE organisations in Devon and Cornwall** (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)
Cornwall	55,583	4.0	48.9	68.4
Isles Of Scilly	460	0.0	0.4	0.6
Plymouth	13,596	1.0	12.0	16.7
Torbay	8,422	0.6	7.4	10.4
East Devon	16,213	1.2	14.3	19.9
Exeter	11,374	0.8	10.0	14.0
Mid Devon	10,502	0.8	9.2	12.9
North Devon	10,290	0.7	9.0	12.7
South Hams	13,923	1.0	12.2	17.1
Teignbridge	14,402	1.0	12.7	17.7
Torridge	6,843	0.5	6.0	8.4
West Devon	7,701	0.6	6.8	9.5
Devon	113,266	8.2	99.6	139.4
Cornwall and Isles of Scilly	56,043	4.0	49.3	69.0
Devon and Cornwall	**169,309**	**12.2**	**148.8**	**208.3**

Reliance on regular volunteers is high in South West England (Table 2.9a/b)), but that pattern of reliance is similar to national average on most criteria. There are, however, higher expectations on volunteers to work unsupervised (83%).

Conversely, in North East England, a higher percentage of VCSE organisations report that many of their service users are beneficiaries (74%) compared with just 63% in South West England. In all regions, a substantial proportion of VCSE organisations state that they have yet to recover to pre-pandemic levels of volunteering (39%). In South West England, the percentage stands at 38%.

In the South West of England, reliance upon volunteers varies to some extent, but not dramatically so and in Devon and Cornwall percentages mirror those of the region as a whole. The exception is the percentages of VCSE organisations which have not yet recovered volunteer numbers since the pandemic – these are higher in Devon (44%) and Cornwall (41%) than the regional average.

Table 2.9(a) **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
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**
Wales	83.6	79.0	69.8	84.9	41.5
England and Wales	**85.1**	**78.4**	**66.8**	**87.6**	**38.8**

Table 2.9(b) **Reliance on volunteers in South West England ceremonial counties** (Third Sector Trends in England and Wales 2025, percentage 'agree' or 'strongly agree n=1,093)

	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/benefic iaries	We could not keep going as an organisation or group without volunteers	We have never fully recovered our volunteer numbers since the pandemic	N=
Devon	**84.8**	**83.6**	**64.3**	**89.4**	**43.6**	**258**
Cornwall & Scilly	**83.5**	**83.9**	**68.3**	**91.6**	**41.0**	**108**
Dorset	88.8	82.5	64.0	93.0	36.7	132
Wiltshire	87.4	77.9	53.3	91.5	29.1	138
Somerset	89.9	86.3	64.6	89.0	37.5	187
Gloucester	83.8	88.0	63.4	85.5	41.2	149
West of England CA	85.4	79.1	62.0	83.3	32.1	121
South West England	**86.3**	**83.2**	**63.0**	**89.1**	**38.0**	**1,093**

2.4 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 2.10 shows, the situation in South West England is more stable than in others, such as North East England where it is reported that rising full-time employment is higher than in any other region (32%). There are stronger signs of growth in part-time employment in the South West – but this is still below the national level.

VCSE organisations in some regions report significant changes in the numbers of regular volunteers and trustees over the last two years (Table 2.11). In South West England, the percentage of voluntary organisations with rising numbers of volunteers (22%) is somewhat lower than the national average as are percentages for trustees. The balance between those voluntary organisations gaining or losing trustees in the South West of England is similar (~19%). The national indications are that the loss of trustees is more severe in smaller VCSE organisations than larger ones.

Table 2.10 **Changing levels of full and part-time employment over the last two years**
(Third Sector Trends in England and Wales 2025)

	Full-time employees			*Part-time employees*		
	Increased	**Stayed the same**	**Reduced**	**Increased**	**Stayed the same**	**Reduced**
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**
Wales	27.4	53.9	18.7	35.7	45.4	18.9
England and Wales	**25.5**	**56.1**	**18.4**	**35.8**	**49.3**	**14.9**

Table 2.11 **Changing levels of regular volunteers and trustees over the last two years**
(Third Sector Trends in England and Wales 2025)

	Regular volunteers			*Trustees*		
	Increased	**Stayed the same**	**Reduced**	**Increased**	**Stayed the same**	**Reduced**
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**
Wales	35.0	44.0	20.9	19.5	61.9	18.6
England and Wales	**32.8**	**47.3**	**19.8**	**19.4**	**63.3**	**17.3**

Recruitment and retention problems have become a matter of concern to many VCSE organisations in recent years. These difficulties vary substantially across regions (Table 2.12).

- In the North East, 41% of TSOs report employee recruitment problems compared with just 32% in South West England where employee retention problems are also comparably low (17%).
- Volunteer recruitment (44%) and retention (24%) problems are widespread in the South West, but are close to the national average.
- Trustee recruitment difficulties are above the national average in the South West of England (39%) and retention problems are also slightly higher (18%).

Table 2.12 **Difficulties associated with recruitment and retention by English region and Wales**
(Third Sector Trends in England and Wales 2025)

	Difficulty with recruitment			*Difficulty with retention*		
	Employees	**Volunteers**	**Trustees**	**Employees**	**Volunteers**	**Trustees**
North East England	41.0	42.5	37.3	22.3	25.4	16.6
North West England	33.0	42.2	33.9	19.9	25.3	15.5
Yorkshire and Humber	33.2	45.3	35.4	20.5	26.9	16.8
East Midlands of England	34.4	43.0	35.3	19.9	23.0	15.6
West Midlands of England	32.1	45.1	35.7	18.6	25.7	15.8
East of England	31.5	46.9	37.2	17.4	25.0	17.9
London	27.6	34.0	26.7	18.4	22.8	13.3
South East England	32.3	44.3	35.3	17.7	22.8	13.5
South West England	**32.1**	**44.3**	**38.9**	**16.9**	**24.4**	**18.2**
Wales	36.4	44.4	38.0	21.6	27.2	16.6
England and Wales	**33.1**	**43.5**	**35.5**	**19.1**	**24.8**	**16.0**

As Table 2.13 shows, the percentages of VCSE organisations having difficulty with recruitment of employees (34%) and volunteers (50%) are quite high in Cornwall compared with Devon – but problems with trustee recruitment is close to the regional average (37%).[29] Difficulties with the retention of employees (17%) in Cornwall is higher than Devon (13%) but still below the regional average. Volunteer retention problems vary across counties, but is relatively low in Devon (21%) while somewhat higher in Cornwall (25%). Trustee retention difficulties sit at about the regional average in both Devon and Cornwall.

Table 2.13 **Difficulties associated with recruitment and retention in South West England**
(Third Sector Trends in England and Wales 2025)

	Difficulty with recruitment			*Difficulty with retention*		
	Employees	**Volunteers**	**Trustees**	**Employees**	**Volunteers**	**Trustees**
Devon	**28.2**	**42.4**	**37.8**	**13.3**	**20.6**	**18.6**
Cornwall & Scilly	**39.1**	**46.1**	**36.3**	**17.3**	**25.0**	**16.3**
Dorset	41.0	50.0	45.3	22.2	27.7	18.1
Wiltshire	44.2	46.7	40.0	22.1	29.9	21.7
Somerset	27.7	44.7	42.4	14.7	20.1	21.1
Gloucester	27.2	40.3	27.8	19.5	28.8	14.7
West of England CA	23.5	41.8	44.2	14.1	23.5	15.0
South West England	**32.1**	**44.3**	**38.9**	**16.9**	**24.4**	**18.2**

[29] There are insufficient data to undertake analysis at sub-regional level convincingly.

It is useful to note that recruitment and retention difficulties amongst VCSE organisations focusing on health are the same as voluntary organisations with other beneficiary interests. (Table 2.14).

Table 2.14 **Difficulties associated with recruitment and retention in VCSE organisations in the field of health** (Third Sector Trends in England and Wales 2025)

	Difficulty with recruitment			*Difficulty with retention*		
	Employees	**Volunteers**	**Trustees**	**Employees**	**Volunteers**	**Trustees**
TSOs making a tangible contribution to health and wellbeing (n=3,007)	34.5	44.9	38.0	19.1	24.9	16.8
TSOs regarding health issues as secondary or not relevant to their mission (n=5,673)	32.2	42.7	34.2	19.1	24.8	15.6

2.5 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 VCSE organisations is ‘income generation’ (Table 2.15(a)).

Clearly, VCSE 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 VCSE organisations compared with just 63% in the South West of England.

There could be stronger arguments, from an outsider’s perspective, to invest in business planning so as to work out what money is needed for; and investing in the capability of managers and trustees to make sure that they are making the right decisions. In the South West, the imperative to make such investments seems to be particularly low: only 24% of VCSE organisations prioritise trustee development compared with 33% in Wales.

As shown in Table 2.15(b) the prioritisation of training in managing employees and volunteers, business skills and trustee development in Devon is substantially lower than in Cornwall. Demand for digital training and support in both Devon and Cornwall is similar to the regional average – but well below national levels.

Table 2.15(a) **Percentage of VCSE 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** (e.g. financial accounting software)	**Artificial intelligence (AI)**
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**
Wales	47.2	33.3	46.8	72.7	25.8	11.3
England and Wales	**41.6**	**28.0**	**40.8**	**67.5**	**23.1**	**10.9**

Table 2.15(b) **Percentage of VCSE 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 (e.g. financial accounting software)**	**Artificial intelligence (AI)**
Devon	**36.2**	**24.9**	**32.9**	**64.3**	**19.5**	**7.5**
Cornwall & Scilly	**46.2**	**28.7**	**38.0**	**67.9**	**20.4**	**5.6**
Dorset	36.6	26.0	32.8	58.8	16.0	6.2
Wiltshire	38.0	21.0	36.2	58.0	20.3	4.4
Somerset	31.7	22.3	34.0	63.8	22.9	8.0
Gloucester	33.6	18.7	38.7	67.1	18.1	5.3
West of England CA	36.7	28.9	41.7	61.7	22.5	13.3
South West England	**36.4**	**24.1**	**35.8**	**63.2**	**20.0**	**7.2**

Investing in people is generally considered to be beneficial to organisational health and a major contributor to success in achieving objectives.[30] Table 2.16 presents headline data for employees and volunteers in South West England 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 VCSE organisations, but other factors will also involve direct or indirect costs.

[30] 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 third 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.

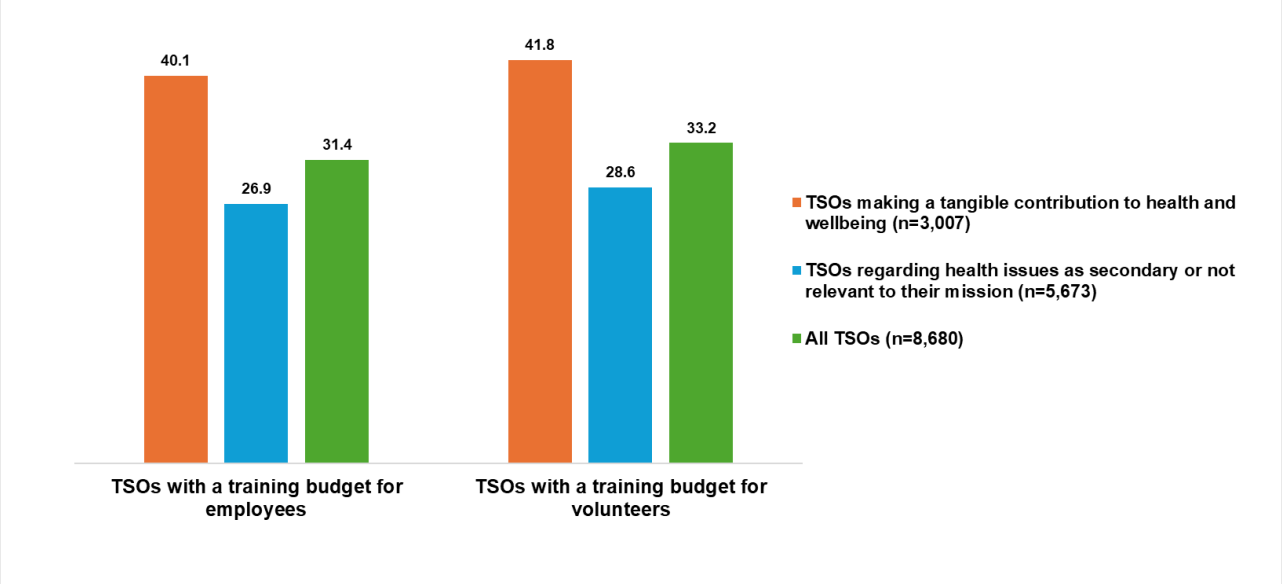
Levels of investment in employees is slightly higher in Cornwall than in Devon. For example, 34% of VCSE organisations in Cornwall have a training budget compared with 32% in Devon. Relatively few Devon VCSE organisations are making provision for personal development (40%) in comparison with Cornwall (51%).

Table 2.16 **Percent of VCSE organisations which invest in training, flexible working and personal development for employees and volunteers in South West England** (Third Sector Trends in England and Wales 2025)

	We have a general training budget	We offer flexible working arrangements	We make provisions for personal development
Devon	**32.4**	**52.9**	**39.5**
Cornwall & Scilly	**34.3**	**57.4**	**50.9**
Dorset	34.1	46.9	41.1
Wiltshire	33.8	49.6	40.1
Somerset	31.4	47.9	36.7
Gloucester	27.5	47.3	37.8
West of England CA	43.0	62.0	47.1
South West England	**33.3**	**51.6**	**41.0**

It is useful to note that VCSE organisations which have health issues as their key priority are more likely to train than other voluntary organisations. This may partly be due to their generally larger size together with statutory requirements which must be met in the field of health and social care provision (Figure 2.1)

Figure 2.1 **Percentage of VCSE organisations with training budgets in the health and social care field** (Third Sector Trends in England and Wales 2025)



Many voluntary organisations feel that they need no training and support in Devon (24%) while that percentage is lower in Cornwall (19%) – the regional average is 30%. Of those who do need support, well over half of VCSE organisations in the

South West England tackle training and development issues in house (62%) as shown in Table 2.17. In Cornwall, that percentage is even higher (68%).

Of those which seek external support for training in Devon and Cornwall, their usual source is divided fairly equally between local trusts and foundations, local infrastructure organisations and private sector providers. Fewer VCSE organisations go to the local authority.

Table 2.17 **Principal sources of support for VCSE organisations in South West England**
(Third Sector Trends in England and Wales 2025)

	From a local infrastructure body	From a local charitable grant-making trust or community foundation	From the local authority, NHS or other public sector body	From a local private sector business or specialist profession	We'd do it ourselves	Average n=
Devon	**12.4**	**11.6**	**4.6**	**8.2**	**63.2**	**257**
Cornwall & Scilly	**9.2**	**6.9**	**5.2**	**11.0**	**67.6**	**108**
Dorset	15.0	14.5	3.8	8.5	58.1	127
Wiltshire	10.5	9.0	9.2	7.5	63.8	135
Somerset	10.2	10.5	4.8	7.2	67.2	185
Gloucester	17.6	9.8	3.7	9.6	59.3	146
West of England CA	16.5	15.3	3.4	9.3	55.5	120
South West England	**13.0**	**11.1**	**4.9**	**8.6**	**62.4**	**1,078**

Section 3

Sector purpose, energy and impact

3.1 Sector purpose and beneficiaries

Third Sector Trends collects data on a limited range of broad categories of beneficiary groups. Most VCSE organisations also tend to tackle a range of issues rather than focusing upon just one. While it is not possible to undertake highly nuanced localised analysis using these data below county level, it is clear that sector purpose reflects local regional conditions. For example, emphasis on physical disability or illnesses as beneficiary areas tend to be far higher in northern areas where concentrations of deprivation are greater than in more affluent southern regions.

Table 3.1 presents data for South West England on beneficiaries served in three blocks. The first addresses specific *personal or biographical issues*. It is clear from these data that many VCSE organisations state that they serve 'people in general' (55%) while others state they have a more specific focus, such as children and young people or older people. Percentages add up to more than 100% because, as noted, many VCSE organisations serve several purposes. Nonetheless, the data provides some useful indications of variation by areas such as the non-specialist focus on 'people in general' in Cornwall and Scilly (68%).

Table 3.1 Percentage of VCSE organisations supporting beneficiaries (Third Sector Trends in England and Wales 2025)

Block 1: Personal or biographical issues	People in general	Children and young people	Older people	People of a particular ethnic or racial origin	People with concerns about gender and sexuality
Devon (n=259)	**60.6**	**35.9**	**34.0**	**4.2**	**1.2**
Cornwall & Scilly (n=108)	**67.6**	**45.4**	**28.7**	**2.8**	**3.7**
Dorset (n=132)	59.8	35.6	26.5	3.8	4.5
Wiltshire (n=138)	47.8	38.4	37.7	4.3	2.9
Somerset (n=189)	67.2	41.8	32.8	4.2	1.1
Gloucestershire (n=150)	58.7	35.3	34.7	2.7	5.3
West of England CA (n=108)	54.5	33.9	23.1	6.6	0.8

The second block of the table considers how many VCSE organisations address issues surrounding *health and wellbeing*. The focus on health related issues is well balanced across most areas of South West England. The final block in Table 3.1 focuses on *household and community issues*. This section shows that VCSE sector focus in Devon and Cornwall is especially strong on rural issues.

Block 2: Health and wellbeing issues	People with physical disabilities	People with physical health conditions	People with mental health conditions	People with learning disabilities	Carers
Devon	**17.0**	**15.4**	**18.1**	**14.3**	**9.3**
Cornwall & Scilly	**19.4**	**15.7**	**16.7**	**15.7**	**1.9**
Dorset	18.9	18.9	22.7	22.0	10.6
Wiltshire	19.6	19.6	20.3	18.1	12.3
Somerset	20.1	19.0	19.0	18.0	10.1
Gloucestershire	16.7	16.7	16.0	13.3	9.3
West of England CA	15.7	12.4	14.9	10.7	8.3

Block 3: Housing and community issues	People with homelessness and housing issues	Unemployed/ workless people	People or households living in poverty	People in disadvantaged urban areas	People in rural areas
Devon	**8.9**	**8.5**	**15.8**	**10.8**	**25.5**
Cornwall & Scilly	**4.6**	**4.6**	**13.9**	**8.3**	**28.7**
Dorset	9.1	12.9	17.4	9.1	18.9
Wiltshire	7.2	6.5	10.9	7.2	18.8
Somerset	11.6	12.2	16.9	9.5	23.8
Gloucestershire	8.7	4.7	10.0	6.0	23.3
West of England CA	8.3	9.1	14.9	17.4	11.6

3.2 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 3.2(a/b) shows the strength of impact that VCSE organisations feel that they have at regional level on each issue. Two findings immediately stand out. Firstly, at national level a higher percentage of VCSE organisations perceive that they have very strong impact on 'generalist' objectives such as 'health and wellbeing' (25%) or 'social isolation' (27%), while fewer make strong claims about more specialised aspects of impact such as 'increasing employability' (6%) or 'improving the local environment' (8%).

Perceived levels of high social impact in the South West of England are generally considerably lower than national averages in all domains apart from the environment. This may reflect the higher levels of affluence in the region compared with the poorer northern and West Midland regions and the consequent variations in the structure of the VCSE sector which tends to have fewer larger organisations as discussed in Section 2.

Table 3.2(a) **Percent of VCSE organisations stating that say 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
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**
Wales	18.6	27.5	30.8	13.8	5.5	11.3	13.0
England and Wales	**16.7**	**24.6**	**26.8**	**12.5**	**6.0**	**9.7**	**10.5**

Table 3.2(a) 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	N=
North East England	26.9	14.7	9.4	22.3	25.3	18.8	661
North West England	23.5	15.8	8.8	21.0	20.8	15.7	800
Yorkshire & Humber	22.1	14.3	7.3	19.3	19.3	16.7	953
East Midlands	15.6	14.9	7.8	15.7	11.7	11.3	613
West Midlands	20.3	15.3	8.7	19.5	16.6	13.9	739
East of England	20.5	15.2	9.0	19.8	18.9	13.9	1,122
Greater London	22.6	16.8	6.3	18.2	21.9	12.9	774
South East England	17.0	13.8	8.3	14.8	14.1	10.2	1,212
South West England	**12.8**	**14.1**	**8.7**	**14.0**	**11.5**	**10.6**	**1,097**
Wales	23.8	18.9	10.0	22.9	21.2	16.8	709
England and Wales	**20.1**	**15.2**	**8.4**	**18.4**	**17.8**	**13.8**	**8,680**

Within South West England, there are some clear variations in the extent to which the local voluntary sector feels it achieves higher levels of impact (Table 3.2(b)). Specifically, voluntary organisations in Cornwall are more likely to feel that they have a strong impact across a wider range of social indictors than Devon, though not on issues associated with critical and pernicious social need such as poverty and access to services.

Table 3.2(b) **Percent of VCSE organisations stating that they 'have a very strong impact' by ceremonial county 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
Devon	**13.0**	**18.7**	**20.2**	**8.5**	**2.5**	**6.9**	**5.3**
Cornwall & Scilly	**16.8**	**21.2**	**23.8**	**17.3**	**2.0**	**7.1**	**2.0**
Dorset	11.1	15.0	18.8	8.0	8.1	10.5	8.9
Wiltshire	12.7	18.5	20.0	10.9	2.3	4.7	6.9
Somerset	10.4	19.9	21.7	11.4	5.3	8.1	4.7
Gloucester	10.9	21.1	21.6	10.6	2.9	5.7	6.5
West of England CA	18.8	21.7	16.0	12.1	2.7	7.0	11.5

	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	n=
Devon	**14.0**	**13.0**	**7.8**	**9.9**	**12.7**	**6.9**	**253**
Cornwall & Scilly	**13.6**	**18.4**	**10.2**	**20.2**	**15.8**	**17.8**	**101**
Dorset	11.6	8.1	8.0	14.2	9.5	8.1	126
Wiltshire	13.0	10.4	5.3	7.6	7.0	10.5	134
Somerset	12.2	15.5	9.8	19.0	13.4	11.5	183
Gloucester	10.1	18.2	8.6	15.5	8.5	12.1	137
West of England CA	14.5	16.1	12.2	15.5	13.0	12.1	117

3.3 Financial estimates of sector impact

The approach to defining sector value by Third Sector Trends involves four steps.[31] 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 VCSE 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.[32]
- ***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).[33]

As shown in Table 3.3, these combined financial values reach substantial sums. But these statistics is 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.

[31] 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

[32] A report on the substantive contribution of business to the third 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 third 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 third sector liaison, research and intelligence and advice and guidance – but exclude contracts to the third sector to provide infrastructure support as this will be counted under third sector expenditure. Other forms of in-kind support would include free access to venues and equipment for third sector usage and beneficial arrangements such as peppercorn rents.

[33] 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. (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).

Table 3.3 **Estimates of the voluntary sector's financial value in Devon and Cornwall 2025**
(Third Sector Trends Statistical Model 2025)

	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)
Plymouth	144.7	14.3	8.7	1.1	168.8
Torbay	89.4	8.9	5.4	0.7	104.4
East Devon	169.4	17.1	10.2	1.3	197.9
Exeter	118.6	12	7.1	0.9	138.6
Mid Devon	109.3	11.1	6.6	0.8	127.7
North Devon	106.8	10.9	6.4	0.8	124.9
South Hams	144.3	14.7	8.7	1.1	168.7
Teignbridge	148.9	15.2	8.9	1.1	174.2
Torridge	70.6	7.2	4.2	0.5	82.6
West Devon	79.3	8.1	4.8	0.6	92.8
Devon	*1,181.3*	*119.5*	*71*	*9.0*	*1,380.7*
Cornwall and Isles of Scilly	*592.7*	*59.1*	*35.6*	*4.5*	*691.9*
Devon and Cornwall	**1,774**	**178.6**	**106.6**	**13.4**	**2,072.6**

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.[34]

- ***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

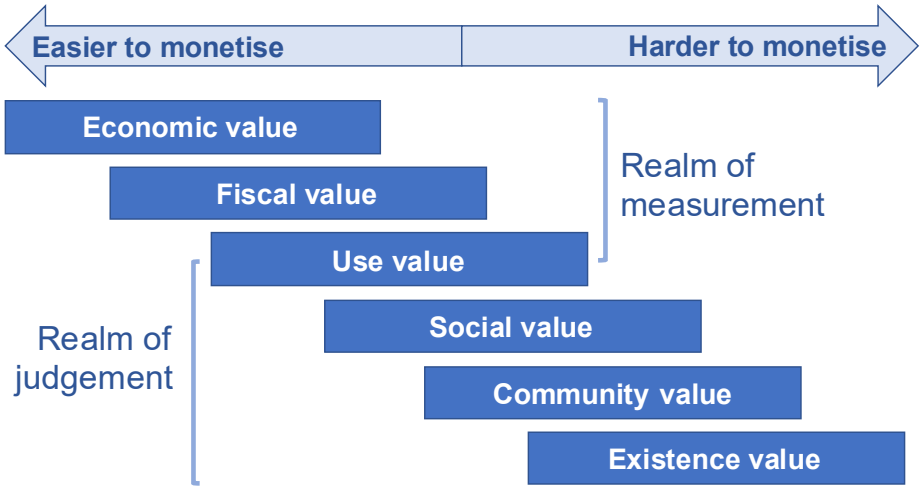
[34] There is a large academic and policy literature on the definition and measurement of value. A useful contribution has been offered by Mulgan, G., Breckon, J., Tarrega, M., Bakhshi, H., Davies, J., Khan, H. and Finnis, A. (2019) *Public value: how can it be measured, managed and grown?* London: Nesta. 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 say, hard to do.* Newcastle: Community Foundation North East. https://www.communityfoundation.org.uk/wordpress/wp-content/uploads/2017/09/Measuring-Impact-easy-to-say-hard-to-do.pdf

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 3.1 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 3.1 **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.[35]

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.[36] It would be expected that the

[35] 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

[36] There is a growing body of research literature on the social value produced by sub sectors. See for example Sport England's measuring impact guidance https://www.sportengland.org/how-we-can-help/measuring-impact. A review has also been produced for arts and culture activities, see: See also, Reeves, M. (2003) Measuring the economic and social impact of the arts: a review,

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 3.4.

Table 3.4 **Estimates of tangible added value produced by the voluntary sector in Devon and Cornwall** (Third Sector Trends Statistical Model 2025)

	Total financial value of sector energy expended by the third 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 contribution excluding direct financial value (£millions)
Plymouth	168.8	109.7	92.8	59.1	261.7
Torbay	104.4	67.8	57.4	36.5	161.8
East Devon	197.9	128.7	108.9	69.3	306.8
Exeter	138.6	90.1	76.2	48.5	214.8
Mid Devon	127.7	83	70.3	44.7	198
North Devon	124.9	81.2	68.7	43.7	193.6
South Hams	168.7	109.7	92.8	59.1	261.5
Teignbridge	174.2	113.2	95.8	61	270
Torridge	82.6	53.7	45.4	28.9	128.1
West Devon	92.8	60.3	51	32.5	143.9
Devon	*1380.7*	*897.5*	*759.4*	*483.2*	*2,140.1*
Cornwall and Isles of Scilly	*691.9*	*449.7*	*380.5*	*242.2*	*1,072.4*
Devon and Cornwall	**2,072.6**	**1,347.2**	**1,139.9**	**725.4**	**3,212.5**

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 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 VCSE 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 VCSE organisations are relevant, purposeful and produce social and community activity that people value, contribute towards and use.

London: Social Value UK, https://socialvalueuk.org/report/measuring-economic-social-impact-arts-review/. For a more critical analysis of arts measurement, see Holdon, J. (2004) *The value of culture cannot be expressed only with statistics, audience numbers give us poor picture of how culture enriches us*, London: Demos: https://www.demos.co.uk/files/CapturingCulturalValue.pdf. Similar research has also been undertaken widely in the health and social care field, for an introduction to the field, see: https://www.health.org.uk/topics/community-and-voluntary?gclid=Cj0KCQjw6NmHBhD2ARIsAI3hrM1eO53eusFbSpDO2pvaHgxGNovJRKr31zlf2ucWS48sGtAQIvQ_tNoaApJQEALw_wcB

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 far as financial evaluation exercises on intangible sector-wide impact need to go – the results of which are presented in Table 3.5.

Table 3.5 **Estimates of total value produced by the voluntary sector in Devon and Cornwall 2025**
(Third Sector Trends Statistical Model 2025)

	Actual financial value of the third sector (£millions)	**Added economic, fiscal and use value** (£millions)	**Added intangible social, community and existence value** (£millions)	**Total value** (£millions)	**Resident population in local authority**[37]	**Value per 1,000 resident population** (£millions)
Plymouth	168.8	261.70	168.8	599.3	264,700	2.26
Torbay	104.4	161.80	104.4	370.5	139,300	2.66
East Devon	197.9	306.80	197.9	702.6	150,800	4.66
Exeter	138.6	214.80	138.6	492	130,800	3.76
Mid Devon	127.7	198.00	127.7	453.5	82,800	5.48
North Devon	124.9	193.60	124.9	443.5	98,600	4.50
South Hams	168.7	261.50	168.7	599	88,600	6.76
Teignbridge	174.2	270.00	174.2	618.4	134,800	4.59
Torridge	82.6	128.10	82.6	293.3	68,100	4.31
West Devon	92.8	143.90	92.8	329.5	57,100	5.77
Devon	*1,380.7*	*2140.1*	*1,380.7*	*4,901.5*	*1,215,600*	*4.03*
Cornwall and Isles of Scilly	*691.9*	*1072.4*	*691.9*	*2,456.2*	*572,400*	*4.29*
Devon and Cornwall	**2,072.6**	**3,212.5**	**2,072.6**	**7,357.8**	**178,000**	**4.12**

[37] Statistica, 2023 https://www.statista.com/statistics/294729/uk-population-by-region/#:~:text=Population%20of%20the%20UK%202023%2C%20by%20region&text=The%20population%20of%20the%20United,West%20England%20at%207.6%20million.

Section 4

Income, assets and financial wellbeing

4.1 Income sources

Dependence upon a single income source can be risky for voluntary organisations. 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. Headline data on income sources can conceal underlying variations. Figure 4.1 compares perceptions of the value of income sources by size of organisations at national level.[38]

- ***Grant funding*** is generally regarded as a 'most important' or 'important' source of income, but this varies by size of VCSE organisations. Nationally, only 42% of micro organisations feel that grants are of importance to them compared with 79% of larger organisations.
- Nationally, income from ***contracts to deliver services*** is valued by 63% of the biggest organisations, but only by 5% of the smallest.
- The size of VCSE organisations affects how ***earned income from self-generated trading*** is valued - rising from 23% of micro TSOs to 42-43% of the biggest organisations nationally.
- Nationally, few organisations highly value ***income from investments*** - ranging from 12% of small to medium-sized VCSE organisations to 16% of larger organisations. Over a quarter of the biggest organisations highly value investments (26%).
- ***Contributions in kind*** are valued more highly as organisations grow in size, rising from 28% of micro to 35-36% of medium-sized and larger VCSE organisations. In-kind support is considered to be of lesser value by the biggest VCSE organisations (23%).
- ***Gifts and donations*** are most highly valued by medium-sized organisations nationally (63%). Micro organisations are most likely to value subscription income (38% nationally, 35% North East); percentages fall steadily to 14% of the biggest VCSE organisations nationally.
- ***Borrowing money*** is not considered to be an important source of income by most VCSE organisations: 10% of the biggest organisations nationally state that borrowed money is of importance to them while fewer than 1% of the smallest do so.

As shown in Table 4.1, there are distinct variations in the extent to which income sources are valued by region (variations within South West England are also shown but due to small sample numbers, reliability is undermined to a large extent). For example, in North East England, a relatively poor region, grants are much more highly valued (73%) than in South West England (50%). Reliance on contracts also seems to be much lower in the South West (12%) than all other regions.

[38] There are too few data to undertake this analysis convincingly at regional level.

Figure 4.1 **How sources of income are valued by organisational size in England and Wales** (Third Sector Trends in England and Wales 2025, percent 'most important' or 'important', n=8,576)

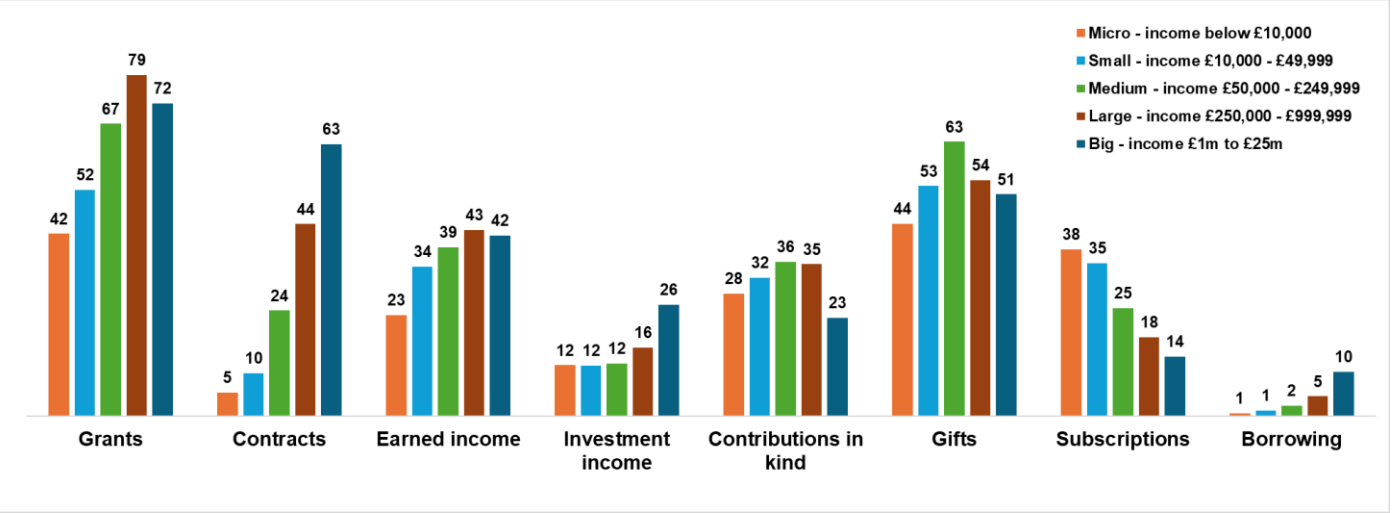


Table 4.1(a) **Percent of VCSE organisations highly valuing income sources by region** (Third Sector Trends in England and Wales 2025, n=8,576)

	Grants	Contracts	Earned income	Investment income etc.	Contribution in kind	Gifts and legacies	Subscriptions	Borrowed money
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**
Wales	68.1	24.4	36.1	10.9	32.2	49.9	28.4	1.6
England and Wales	**56.9**	**19.1**	**33.9**	**13.1**	**31.8**	**52.9**	**30.8**	**2.2**

Within the South West of England, the evidence suggests a much higher level of reliance on grants in Cornwall (59%) than in Devon (54%) but grants are generally thought to be more important in Devon and Cornwall than elsewhere in the region. Contracts are highly valued by very few VCSE organisations across the whole of the South West with the exception of the mainly urban West of England Combined Authority area (18%).

Table 4.1(b) **Percent of VCSE organisations highly valuing income sources across the South West region** (Third Sector Trends in South West England n=1,052)

	Grants	Contracts	Earned income	Investment income	Contribution in kind	Gifts and legacies	Subscriptions	Borrowed money
Devon	**54.1**	**10.8**	**34.6**	**15.0**	**26.7**	**51.6**	**30.2**	**1.2**
Cornwall & Scilly	**59.4**	**12.4**	**36.1**	**13.9**	**29.0**	**53.7**	**35.5**	**1.9**
Dorset	49.2	11.1	32.1	11.5	28.5	51.9	33.8	0.8
Wiltshire	47.0	13.5	30.8	21.9	30.1	49.3	24.3	0.8
Somerset	42.2	11.0	35.7	15.7	22.5	48.1	23.8	0.5
Gloucester	47.6	10.4	38.4	15.6	27.9	47.3	37.8	2.0
West of England CA	50.4	17.5	35.6	13.6	34.2	50.0	30.3	1.7
South West England	**49.8**	**12.1**	**34.8**	**15.4**	**27.8**	**50.2**	**30.4**	**1.2**

Relationships with grant funders

Grant funding, as shown above, is the mainstay of income for many voluntary organisations in most regions. In 2019, Third Sector Trends introduced new questions to explore the 'quality' of relationships with grant makers. It is now possible to compare responses over three waves of the study: before, during and after the Coronavirus pandemic.

Figure 4.2 shows the percentages of VCSE organisations at national level which 'agreed' or 'strongly agreed' with a series of statements on relationships with grant makers from 2019-2025. Those voluntary organisations which have no relationship with grant-making trusts and foundations are excluded. This analysis produces some remarkable findings. In 2019 only 46% of VCSE organisations stated that they received unrestricted or 'core funding' but the percentage rose to 60% in the extraordinary circumstances surrounding the Coronavirus pandemic. While the evidence suggests that some grant-makers have tightened up on unrestricted funding, 56% of VCSE organisations continued to receive unrestricted grants in 2025,

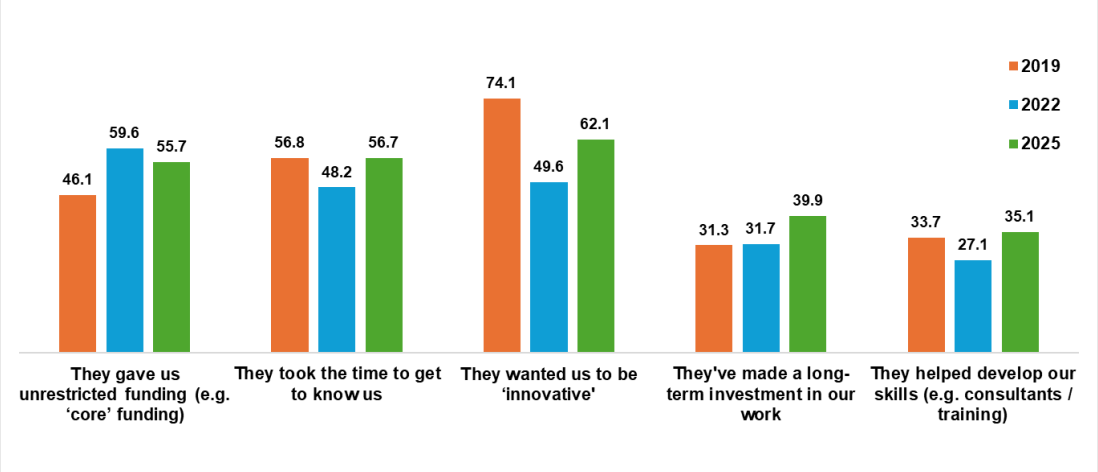
Many grant-making foundations are committed to getting to know their grantees. During the pandemic, the percentage of VCSE organisations reporting that this was so fell to 48% from a pre-pandemic level of 57%. Following the loosening of pandemic restrictions, grant-makers have reverted to previous practice – 57% of voluntary organisations now report that grant makers take the time to get to know them.

During the pandemic, grant makers adopted a 'lighter touch' approach when working with voluntary organisations and pressurised them less about being 'innovative': indeed, the percentage dropped from 74% in 2019 to 50% in 2022. Some grant funders have since gone back to demanding that innovation is a requirement – but many have not: in 2025, 62% of VCSE organisations state that innovation had been expected as a condition of grant funding.

For many years, voluntary sector organisations have complained about the short-term investment they receive from grant-making foundations. Before and during the pandemic, about 31-32% of VCSE organisations reported that they received long-term investment. That has now risen to 40%. 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 34% of voluntary

organisations pre-pandemic, but support fell to 27% in 2022. The evidence indicates that support is now slightly higher than pre-pandemic levels (35%).

Figure 4.2 **Voluntary organisations' working relationship with grant-making trusts and foundations in England and Wales: 2019-2025** (Third Sector Trends in England and Wales, , percentage 'agree' or 'strongly agree' 2019, n=4,083, 2022 n=5,978, 2025, n=8,350)



The situation in the South West of England is fairly close to the national average on most aspects of relationships with trusts and foundations (Table 4.2(a)) except for the receipt of unrestricted funding which is somewhat higher (60%) than for England and Wales (56%).

Within the region, however, there appear to be some serious inconsistencies between Devon and Cornwall. In Cornwall, the flow of unrestricted funding appears to be much higher (62%) than Devon (55%) and this is accompanied by higher percentages of organisations feeling that grant makers tried to get to know them, gave them skill support and made a long-term investment. Associated with these beneficial arrangements, there were also much higher expectations of innovation in Cornwall (69%) than in Devon (47%). While these statistics might be exaggerated due to the small sample size in Cornwall, they are sufficiently pronounced to warrant this note.

Table 4.2(a) **Relationships with trusts and foundations by English regions and Wales 2025** (Third Sector Trends in England and Wales 2025 n=8,620)

	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)
North East England	59.4	62.4	64.6	48.1	38.3
North West England	48.9	58.0	63.6	39.5	35.3
Yorkshire and Humber	56.4	55.0	66.0	36.0	37.3
East Midlands of England	49.8	53.6	59.2	39.7	33.5
West Midlands of England	54.1	49.4	54.5	37.0	29.3
East of England	58.5	60.2	60.6	41.1	35.9
London	59.6	60.9	68.9	47.2	34.6
South East England	54.0	53.8	58.8	32.9	29.6
South West England	**60.3**	**57.2**	**56.1**	**41.0**	**38.4**
Wales	51.7	53.3	66.9	37.9	37.5
England and Wales	**55.7**	**56.7**	**62.1**	**39.9**	**35.1**

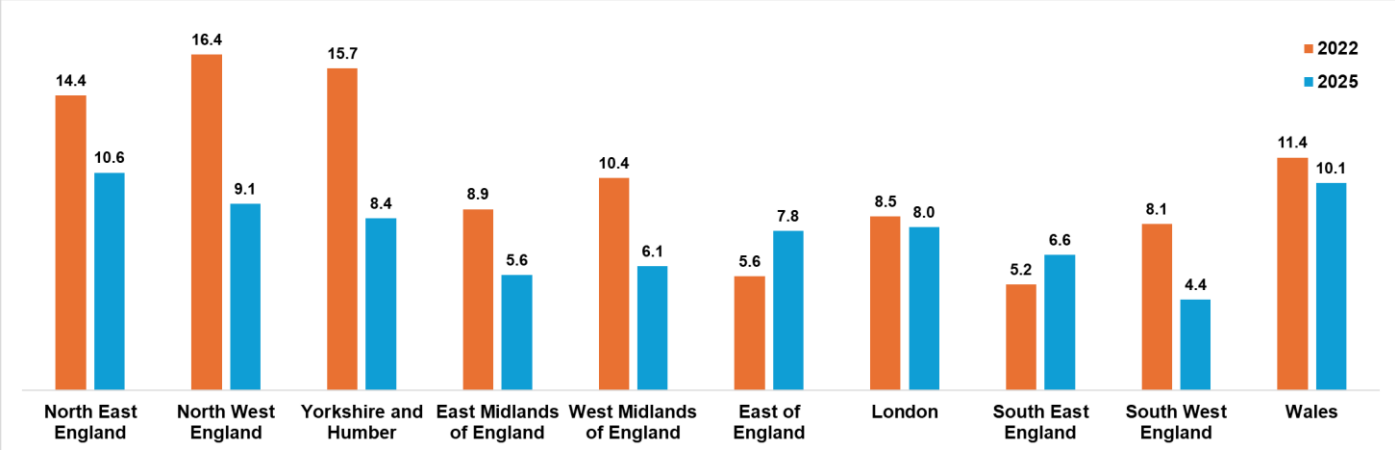
Table 4.2(b) **Relationships with trusts and foundations by ceremonial county 2025** (Third Sector Trends in South West England, n=1,093)					
	They gave us unrestricted funding (e.g. 'core' funding)	**They took the time to get to know us**	**They wanted us to be 'innovative'**	**They've made a long-term investment in our work**	**They helped develop our skills** (e.g. consultants / training)
Devon	**54.7**	**43.3**	**46.5**	**28.6**	**30.9**
Cornwall & Scilly	**62.0**	**60.4**	**68.9**	**52.3**	**45.0**
Dorset	60.7	56.4	50.0	45.7	49.0
Wiltshire	60.0	73.5	63.4	50.0	42.2
Somerset	58.8	55.7	49.1	34.9	36.4
Gloucester	60.0	71.2	66.7	47.3	39.1
West of England CA	71.7	51.9	56.5	40.4	31.7
South West England	**60.3**	**57.2**	**56.1**	**41.0**	**38.4**

Public service delivery contracts

Historically, government policy on the procurement of service delivery from VCSE organisations has lacked critical awareness of market demand for such work and mistakenly believed that sector capacity can easily be built. Current procurement policies differ little, in essentials, from previous incarnations of two decades ago.[39]

The percentage of VCSE organisations bidding for or delivering public sector contracts fell heavily between 2022 and 2025 in the South West as was the case in most English regions (apart from South East and East of England) as shown in Figure 4.3(a). Levels of participation in London and Wales also declined, although to a lesser extent.

Figure 4.3(a) **Percent of VCSE organisations bidding for or delivering public sector contracts 2022-2025** (Third Sector Trends, 2022 n=5,967, 2025 n=8,547)



In the South West of England, the preparedness of VCSE organisations to engage in public services under contract is very low. As shown in Figure 4.3(b), engagement with contracts varies substantially by region. In North East England 11% of VCSE organisations are bidding for or delivering contracts compared with fewer than 5% in South West England. Indeed, nearly half of VCSE organisations in the South West (49%) will not consider this option.

[39] For further discussion, see: *Relationships, influencing and collaborative working*, Section 4.5 and Section 5.3: https://www.stchads.ac.uk/wp-content/uploads/2025/10/Relationships-influencing-and-collaborative-working-Third-Sector-Trends-in-England-and-Wales-2025-October-2025-1.pdf

Refusal to engage in contracts is, however, considerably lower in Devon and Cornwall than in all other counties in the region – though many VCSE organisations in both counties feel ambivalent about getting involved.

Table 4.3(b) **Engagement with public service contracts by region** (Third Sector Trends in England and Wales, n= 8,547, South West n=1,054)

			Ambivalent				
	We are not aware of these opportunities	**We are aware of these opportunities but they are not relevant to our organisation' s objectives**	**We are aware of these opportunities but need more information**	**We are interested in this option but would need extra support to do this**	**We are interested in this option but feel there are barriers in the tendering process**	**We are already bidding to deliver public sector services**	**We are already delivering public sector services for which we have tendered**
North East England	32.3	35.3	5.4	7.9	8.5	2.0	8.6
North West England	31.2	42.4	4.7	6.0	6.6	2.7	6.5
Yorkshire & Humber	31.9	44.5	3.0	5.8	6.4	2.3	6.1
East Midlands of England	36.3	45.4	2.8	5.0	5.0	2.0	3.6
West Midlands of England	35.5	45.4	3.2	5.4	4.4	1.1	5.0
East of England	36.3	43.4	2.5	5.5	4.5	1.2	6.6
Greater London	34.8	39.9	3.8	7.2	6.4	1.7	6.3
South East England	35.3	46.4	2.8	3.9	5.1	1.8	4.9
South West England	**37.5**	**49.1**	**2.2**	**3.2**	**3.5**	**1.5**	**3.0**
Wales	34.4	36.6	4.6	7.1	7.1	2.4	7.7
England and Wales	34.7	43.4	3.3	5.5	5.6	1.8	5.7

Table 4.3(b) **Engagement with public service contracts in South West England** (Third Sector Trends in East of England n=1,102)

			Ambivalent				
	We are not aware of these opportunities	**We are aware of these opportunities but they are not relevant to our organisation' s objectives**	**We are aware of these opportunities but need more information**	**We are interested in this option but would need extra support to do this**	**We are interested in this option but feel there are barriers in the tendering process**	**We are already bidding to deliver public sector services**	**We are already delivering public sector services for which we have tendered**
Devon	**41.7**	**46.9**	**2.0**	**3.1**	**1.6**	**0.8**	**3.9**
Cornwall & Scilly	**41.1**	**43.0**	**3.7**	**2.8**	**3.7**	**2.8**	**2.8**
Dorset	37.7	51.5	1.5	2.3	3.1	1.5	2.3
Wiltshire	32.4	52.9	1.5	2.2	5.9	1.5	3.7
Somerset	37.8	48.4	2.1	4.8	2.1	2.7	2.1
Gloucester	36.5	50.7	1.4	3.4	4.7	0.0	3.4
West of England CA	31.7	51.7	4.2	3.3	5.8	1.7	1.7
South West England	**37.5**	**49.1**	**2.2**	**3.2**	**3.5**	**1.5**	**3.0**

Earned income

In 2025 about 60% of voluntary organisations in the South West of England earned a proportion of their income by trading (by delivering contracts or engaging in self-generated trading of goods and services). Just over a quarter of VCSE organisations are heavily reliant upon trading (only 27% earn more than 60% of their income). National reports have demonstrated that heavier reliance on trading income has declined over recent years.

There is a good deal of regional variation in the extent to which VCSE organisations earn income (Figure 4.4). While VCSE organisations in North East England are most likely (together with Wales) to earn some of their income (65%), they are least likely (after London at 17%) to earn above 60% of their income (also the same as Wales at 22%). VCSE organisations in Yorkshire & Humber and South West England earn the biggest proportion of their income (27%). Within the South West, variations in the extent to which VCSE organisations trade are evident. In Dorset and Cornwall, organisations are the most likely to engage in trading while those in Devon and Wiltshire are the least. The heaviest reliance on trading appears to be in Wiltshire and Somerset, though sample sizes are too small to make confident claims.

Figure 4.4 **Percent of income from trading by region 2025**

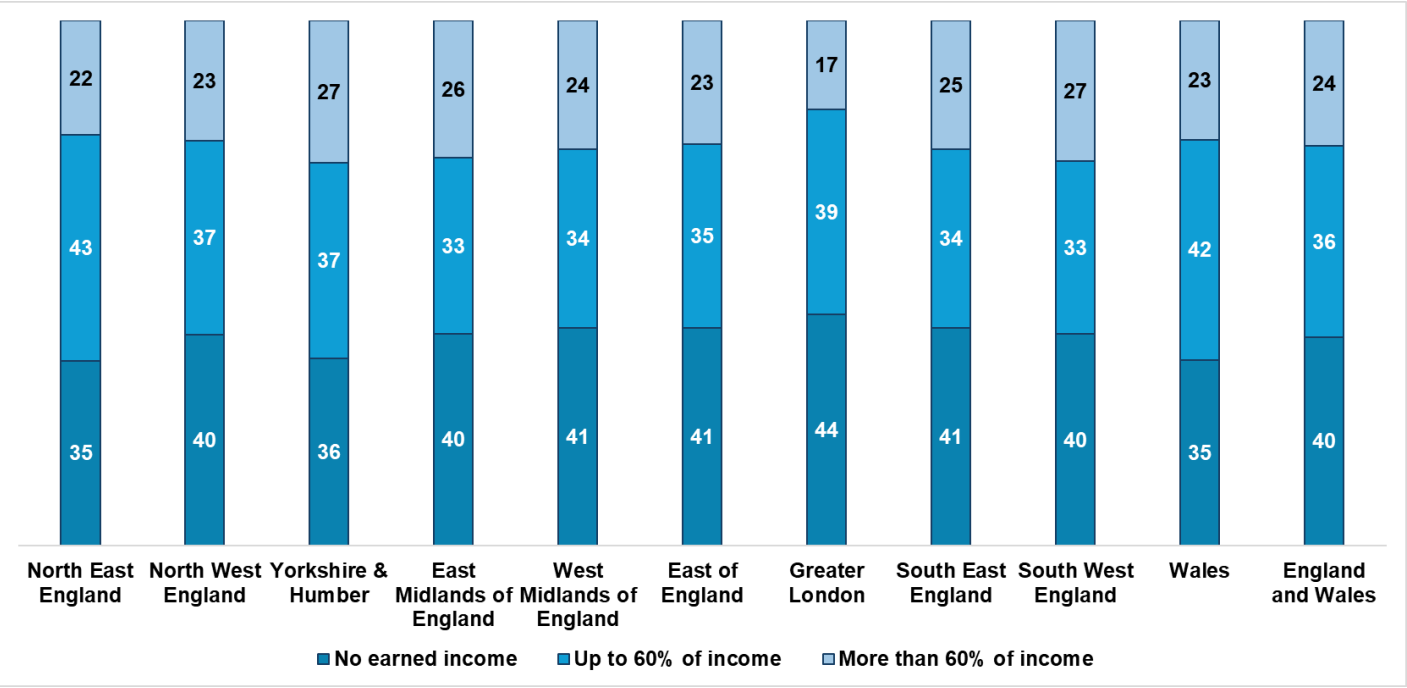


Table 4.4 **Percent of VCSE organisations earning income from trading in South West England**
(Third Sector Trends in South West England n=1,091)

	No earned income	Up to 60% of income earned	More than 60% of income earned	N=
Devon	**41.3**	**32.8**	**25.9**	**259**
Cornwall & Scilly	**35.2**	**37.0**	**27.8**	**108**
Dorset	37.7	40.8	21.5	130
Wiltshire	44.2	24.6	31.2	138
Somerset	40.2	27.0	32.8	189
Gloucester	39.5	35.4	25.2	147
West of England CA	42.5	36.7	20.8	120
South West England	40.3	32.9	26.8	1,091

4.2 Assets and reserves

Assets

As Table 4.5(a) shows, the most common forms of property tenure or usage nationally in 2025 are renting (41%), followed by ownership (29%) and free use of space in a building (30%). Ownership includes properties adopted via community asset transfer. There is little change from 2022 although ownership and asset transfer percentages have risen slightly. Tenure patterns are quite similar across regions, with the exception of community asset transfer: nearly 10% of VCSE organisations have acquired property in this way in the North East which is substantially higher than all other regions.

In the South West of England, variations are quite limited, although there are some indications that property ownership is less common in Devon (26%) than on average in the South West. Responses for Cornwall indicate higher levels of property ownership but sample numbers are small and call that finding into question.

Table 4.5(a) **Property tenure by region** (Third Sector Trends in England and Wales 2025)

	Own a property	Rent a property	Asset transfer	Free use of space	N=
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**
Wales	35.0	46.7	8.2	29.6	672
England and Wales	**28.7**	**41.3**	**5.4**	**29.5**	**8,253**

Table 4.5(b) **Property tenure within the South West England** (Third Sector Trends in South West England 2025, n=1,048)

	Own a property	Rent a property	Asset transfer	Free use of space	N=
Devon	**25.8**	**36.8**	**3.4**	**26.2**	**244**
Cornwall & Scilly	**41.7**	**36.7**	**2.1**	**24.5**	**103**
Dorset	28.6	37.8	0.8	26.8	126
Wiltshire	23.1	41.3	6.6	27.0	130
Somerset	40.3	29.4	8.0	35.4	181
Gloucester	36.5	37.1	7.1	20.0	148
West of England CA	19.0	37.3	7.1	31.6	116
South West England	**30.6**	**36.3**	**5.1**	**27.6**	**1.048**

Reserves

Holding reserves is regarded as a good indication of VCSE organisations' financial wellbeing. As shown in Table 4.6, most voluntary organisations in 2025 held reserves (82%), more than half of which did not draw upon these reserves in the previous year. About 16% of organisations used reserves to invest in new activities, while about 27% have used reserves for essential purposes such as rent, bills and wages.[40]

Holding reserves is much more common amongst larger voluntary organisations: 97% of the biggest VCSE organisations have reserves compared with 71% of micro VCSE organisations. Medium (34%) and larger sized organisations (40%) were the most likely to be drawing upon reserves for essential costs in 2025.

Table 4.6 **Ownership and use of reserves by size of organisation**
(Third Sector Trends in England and Wales, 2025, column percentages)

	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	**All TSOs**
No, we don't have any reserves	29.4	19.9	12.2	6.7	2.9	18.4
No, we have not drawn on our reserves	43.9	48.7	43.3	41.4	40.7	44.8
Yes, we have used our reserves to invest in new activities	6.2	8.4	10.4	13.0	23.1	9.5
Yes, we have used our reserves for essential costs	15.3	16.3	27.1	29.2	21.1	20.3
We have used our reserves for both investment and essential costs	5.2	6.7	6.9	9.7	12.3	7.0
N=	2,481	2,654	2,067	955	455	8,612

There is little variation in the use of reserves between 2022 and 2025 nationally (Table 4.7(a)). In South West England, however, the indications are that slightly fewer VCSE organisations were using reserves for essential purposes in 2025 than in 2022.

Data are provided for counties in South West England in Table 4.7(b). About 28% of VCSE organisations in Devon and Cornwall were using reserves in 2025 for essential costs, that is about the same level as for the region as a whole.

[40] 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 4.7(a) **Reliance on reserves by region, comparing 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		Yes, we have used our reserves for essential costs		We have used our reserves for both investment and essential costs		N=	
	2022	2025	2022	2025	2022	2025	2022	2025	2022	2025	2022	2025
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	15.3	18.6	40.4	46.5	8.0	9.7	28.8	17.1	7.5	8.1	399	607
West Midlands	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**
Wales	20.5	20.5	40.3	41.5	9.8	8.1	22.3	23.0	7.1	7.0	439	704
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**

Table 4.7(b) **Reliance on reserves in South West England**
(Third Sector Trends in South West England 2025, n=1,095)

	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	Yes, we have used our reserves for essential costs	We have used our reserves for both investment and essential costs	N=
Devon	**20.1**	**42.9**	**10.0**	**19.3**	**7.7**	**259**
Cornwall & Scilly	**20.4**	**45.4**	**6.5**	**16.7**	**11.1**	**108**
Dorset	22.9	40.5	10.7	21.4	4.6	131
Wiltshire	13.9	49.6	5.8	22.6	8.0	137
Somerset	18.5	53.4	9.0	10.6	8.5	189
Gloucester	10.1	47.7	14.1	17.4	10.7	149
West of England CA	14.2	45.0	8.3	27.5	5.0	120
Cornwall & Scilly	**17.4**	**46.4**	**9.4**	**18.8**	**8.0**	**1095**

4.3 Expectations about finance

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 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 drives sector enthusiasm and commitment. But when hopes are dashed, it can make people in the sector feel disappointed. In 2025, voluntary organisations in South West England were, on balance, feeling quite upbeat about their prospects (Table 4.8).

- In general terms, the voluntary sector in the South West of England is cautiously optimistic. 85% of VCSE organisations believe that income will remain either the same or increase – only 15% expect income to fall. In Devon, voluntary organisations are more pessimistic – 20% expect that their income will fall compared with 12% in Cornwall.
- In South West England many more VCSE organisations are optimistic (23%) than pessimistic (14%) about financial support from private sector business. Across counties, there is some variation, but 20-22% of voluntary organisations in Devon and Cornwall are the most optimistic in this respect.
- Future grant funding from trusts and foundations is considered in quite an optimistic light, with around 25% of VCSE organisations in the South West England expecting that funding will increase while only about 21% think it will fall. VCSE organisations in West of England Combined Authority are by far the most optimistic (31%) while those in Devon are the least (18%).
- Only funding from statutory agencies is regarded less positively, with 32% of VCSE organisations in South West England expecting support to *decrease* over the next two years and only 15% expecting an increase. VCSE organisations in Devon are by far the most pessimistic (37%) while those in Somerset are the least (20%).

Table 4.8 **Expectations about future finance in South West England**
(Third Sector Trends in South West England 2025, n=1,091)

	Income will...		*Financial support from private businesses will...*		*Grants from charitable foundations will...*		*Funding from statutory agencies will...*	
	Increase	**Decrease**	**Increase**	**Decrease**	**Increase**	**Decrease**	**Increase**	**Decrease**
Devon	**19.1**	**19.5**	**20.4**	**14.6**	**17.5**	**21.7**	**10.7**	**36.6**
Cornwall & Scilly	**26.2**	**12.1**	**22.1**	**10.3**	**23.5**	**25.9**	**16.1**	**30.6**
Dorset	23.6	18.1	26.0	12.3	22.2	20.0	15.4	30.8
Wiltshire	23.5	14.7	20.3	18.9	26.1	21.7	8.8	33.8
Somerset	25.8	11.3	19.8	16.7	31.5	14.5	22.8	20.3
Gloucester	25.3	15.8	17.6	15.3	26.2	20.4	17.9	30.8
West of England CA	27.7	16.0	23.9	12.7	30.5	18.3	19.6	25.0
South West England	27.5	14.7	22.9	14.1	24.6	21.1	15.0	32.1

Section 5

Relationships and influencing

5.1 Relationships within the voluntary sector

Taking the voluntary sector as a whole, there is a great deal of informal and formal interaction; and even when collaboration is absent, there is often a willingness to do so should opportunities arise (see Tables 5.1(a) and 5.1(b)).

- Nationally, 72% of VCSE organisations have useful informal 'complementary' relationships with other voluntary organisations and groups. North East England has the highest level of informal working (80%) while the South West of England is substantially lower than the national average (67%). Complementary working amongst voluntary organisations in Devon is at the regional average, but in Cornwall it is much higher (82%) but sample numbers are small and raise questions about reliability.
- 62% of VCSE organisations nationally work 'collaboratively', but informally, with other voluntary organisations. Again, VCSE organisations in the North East England and Wales are the most likely to do so (69%) while South West England (58%) sits below the national average (62%). Within South West England, voluntary organisations in West of England Combined Authority are most likely to work collaboratively (69%) while those in Wiltshire are the least (51%). Devon sits close to the regional average at 57% while Cornwall appears to be much higher (67%).
- Currently, 28% of VCSE organisations work in formal 'partnership' arrangements with other voluntary organisations nationally. VCSE organisations in North East England are by far the most likely to do so (39%) while the percentage doing so in South West England is extremely low (21%). With a large sample of over 1,000 respondents and in the context of other findings in this report, it is most unlikely that this finding is flawed. In Devon, formal partnership working is even lower (18%)

Why is complementary, collaborative or partnership working so much lower in Devon and the South West of England generally is surely an issue worthy of debate in the local voluntary sector. As shown in the national report on sector interactions, VCSE organisations in more affluent areas are less likely to work in informal or formal relationships. For example, nationally, 44% of VCSE organisations in the poorest areas work together formally compared with just 20% in the richest areas.[41]

As Table 5.2(a) indicates, formal collaborative working is more common in areas of deprivation in *all* regions including South West England's poorest areas. But in the South West the extent of partnership working even in its poorest areas is the second lowest (38%) after the East Midlands (34%). This suggests strongly that the culture of the VCSE sector in the South West is less collaborative, *irrespective* of local circumstance.

[41] See: *Relationships, influencing and collaborative workin*g, Section 2, pp.13-25: https://www.stchads.ac.uk/wp-content/uploads/2025/10/Relationships-influencing-and-collaborative-working-Third-Sector-Trends-in-England-and-Wales-2025-October-2025-1.pdf

Table 5.1(a) **Relationships within the voluntary sector by region** (Third Sector Trends in England and Wales 2025, n=8,604)				
	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=**
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**
Wales	76.0	68.9	33.5	705
England and Wales	**72.1**	**62.0**	**27.6**	**8,604**

Table 5.1(b) **Relationships within the voluntary sector by ceremonial county** (Third Sector Trends in South West England 2025, n=1,091)				
	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**	
Devon	**65.6**	**57.4**	**18.3**	**259**
Cornwall & Scilly	**81.5**	**67.6**	**25.2**	**108**
Dorset	65.4	58.1	20.9	130
Wiltshire	58.7	50.7	18.1	138
Somerset	63.3	57.8	20.9	188
Gloucester	67.6	59.2	19.6	148
West of England CA	72.5	60.3	24.6	120
South West England	**66.9**	**58.3**	**20.6**	**1,091**

Table 5.2(a) **Percent of VCSE 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=**
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**
Wales	52.6	42.8	29.1	26.9	18.6	702
England and Wales	**43.5**	**34.5**	**25.2**	**21.4**	**20.2**	**8,552**

The low level of formal partnership working recorded for South West England is not because of variations in sector structure. VCSE organisations of all sizes in the region are (with only one exception) the least likely to work in formal partnerships than in all other regions as shown in Table 5.2(b).

Table 5.2(b) **Percentage of VCSE organisations working in formal partnerships by size and region** (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 to £25m	N=
North East England	22.3	22.7	49.7	57.3	68.1	648
North West England	13.0	22.6	37.9	61.7	63.8	789
Yorkshire & Humber	15.2	21.2	36.2	51.5	64.6	936
East Midlands of England	10.9	21.2	32.1	45.8	64.0	604
West Midlands of England	15.6	20.1	35.3	36.5	65.4	717
East of England	12.5	18.4	30.0	51.5	57.1	1,109
Greater London	21.3	21.7	32.9	49.1	58.0	767
South East England	12.1	18.9	31.6	45.1	54.1	1,193
South West England	**10.4**	**17.6**	**28.6**	**44.4**	**48.0**	**1,079**
Wales	19.1	21.6	42.6	56.5	60.0	702
England and Wales	**14.3**	**20.1**	**35.4**	**50.2**	**60.1**	**8,552**

National data indicate that VCSE organisations which focus specifically on health and wellbeing are much more likely to engage in complementary working (79%), collaborative arrangements (70%) or formal partnerships (34%) than voluntary organisations with other interests. While formal partnership working in the South West happens more often in health oriented VCSE organisations (Table 5.3) it is much less common than in most other regions. Furthermore, the data indicate that interest in working this way is also very weak in the South West – where only 18% would consider formal partnership working – the lowest in the country alongside the East Midlands. Health oriented organisations in the South West are the least likely to be in formal partnerships than in any other region (25%). This is a finding of some consequence which will be discussed further in the concluding section of this report.

Figure 5.1 **Percent of health and wellbeing oriented VCSE organisations working collaboratively** (Third Sector Trends in England and Wales 2025)

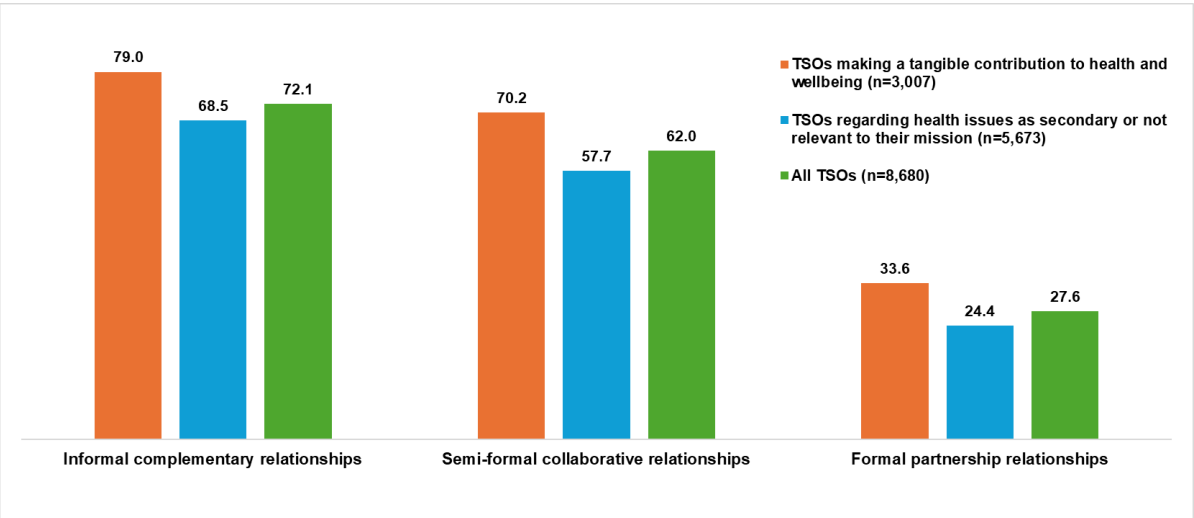


Table 5.3 **Participation or interest in working in formal partnership arrangements amongst health oriented VCSE organisations in England and Wales** (Third Sector Trends in England and Wales 2025)

	VCSE organisations with a strong focus on health (n=2,959)		***VCSE organisations focusing on other social issues*** (n=5,593)	
	Yes, this is how we work now	**Not at the moment, but we'd like to work this way**	**Yes, this is how we work now**	**Not at the moment, but we'd like to work this way**
North East England	41.0	20.7	37.6	18.7
North West England	31.2	23.2	29.9	16.1
Yorkshire & Humber	36.0	26.8	24.0	21.2
East Midlands of England	30.0	17.7	21.2	17.2
West Midlands of England	32.9	23.6	19.8	16.8
East of England	31.2	21.6	22.0	15.9
Greater London	42.1	22.6	28.4	20.9
South East England	30.7	22.5	21.3	15.8
South West England	**24.9**	**17.8**	**18.6**	**15.2**
Wales	40.0	23.8	29.5	20.4
England and Wales	**33.6**	**22.1**	**24.4**	**17.6**

5.2 Relationships with business

Private sector businesses can support voluntary organisations in several ways.[42] Third Sector Trends surveys distinguish empirically between four types of assistance (see Tables 5.4(a) and 5.4(b)). Given that survey numbers are quite small within Cornwall, findings should be regarded only as 'indicative'.

- ***Financial support***: money given to VCSE 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, about 33% of VCSE organisations nationally state that this income is of some or great importance to them; the South West of England sits well below that level (28%) while the North East has the highest score of 38%. Within South West England, there are wide variations – not least between Devon (26%) and Cornwall (33%).
- ***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 – 27% of VCSE organisations state that this is of some or great importance to them nationally, but the percentage is highest in the North East (32%). South West England has the lowest percentage by a considerable margin (21%) while the national average sits at 27%. The percentage is similar in both Devon and Cornwall (22-23%).
- ***Employer supported volunteers***: where companies allocate paid time for their employees to undertake tasks for VCSE 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. Employer supported volunteering is of some or great importance to 17% of VCSE organisations nationally and is highest in London and the North East (21%). Support the South West of England (12%) is the lowest but even lower in Devon (10%).
- ***Pro bono expert advice***: where business owners, partners or qualified employees provide unpaid professional or technical support to VCSE 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 VCSE organisations nationally, but to 25% in London and the North East. Pro bono support is equal lowest in South West England (16%) along with South East England. In Devon pro bono support is lower still (13%) but seems to be much higher in Cornwall, Dorset and West of England Combined Authority (19-21%).

[42] 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/.

Table 5.4(a) **Relationships with business in English regions and Wales 2025** (Third Sector Trends in England and Wales 2025, percentage reporting 'some' or 'great' importance, n=8,573)

	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=
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**
Wales	30.9	27.4	15.5	18.0	702
England and Wales	**33.0**	**27.4**	**16.7**	**19.8**	**8,573**

Table 5.4(b) **Relationships with business in South West England 2025** (Third Sector Trends in South West England 2025, percentage reporting 'some' or 'great' importance, n=1,089)

	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	
Devon	**25.6**	**22.0**	**10.1**	**12.9**	**258**
Cornwall & Scilly	**33.3**	**22.6**	**18.7**	**19.4**	**108**
Dorset	35.9	24.6	13.2	20.8	131
Wiltshire	22.8	16.1	13.2	12.4	136
Somerset	23.0	21.9	10.7	16.6	187
Gloucester	28.4	23.1	9.5	15.8	148
West of England CA	30.6	23.1	12.4	21.0	121
South West England	**27.7**	**21.9**	**12.0**	**16.3**	**1,089**

5.3 Relationships within the public sector

This section looks at aspects of interaction between the voluntary sector and the local public sector. Tables 5.5(a) and 5.5(b) compare levels of positive interaction regionally in 2025.

- 88% of VCSE organisations in South West England agree that they feel valued by local public sector agencies – about the same as the national level. The weakest relationships are reported in North East England (85%) where local government reorganisation has been taking place due to the establishment of a new combined authority. Within the South West of England, there is little differentiation across counties.
- VCSE organisations in Yorkshire and Humber are most likely to agree that local agencies inform them about issues of interest (68%) compared with 63% in the North East and 87% nationally. South West England sits just below the national average in this respect (61%). Within the region, Devon and Wiltshire record the lowest percentages (58%) while Somerset is highest (65%).
- Relatively few VCSE organisations in feel involved appropriately in developing or implementing local public policy nationally (42%) and the percentage is lower in South West England (38%). Voluntary organisations in North West England (46%) and Yorkshire & Humber (48%) are the most positive in this respect. In the South West, VCSE organisations feel most positive in Somerset (45%) and lowest in West of England Combined Authority (31%). Devon (39%) and Cornwall (42%) are close to the regional average.
- In some regions, VCSE organisations report that local public agencies are more likely to act upon their opinions, especially Yorkshire & Humber (47%). VCSE organisations in the South East, South West and North East of are the least confident (40-41%). There is wide variation in opinion across the South West region. In Gloucestershire only 31% of VCSE organisations feel that their opinions are acted upon compared with 52% in Devon.

Table 5.5(a) **Relationships with the public sector by region** (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=
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**
Wales	85.9	64.7	44.2	45.0	703
England and Wales	**87.4**	**63.7**	**41.5**	**43.0**	**8,618**

Table 5.5(b) **Relationships with the public sector in South West England** (Third Sector Trends in South West England , percent 'agree' or 'strongly agree', n=1,091)

	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=
Devon	**87.4**	**58.4**	**38.9**	**52.8**	**258**
Cornwall & Scilly	**88.9**	**61.4**	**42.3**	**36.5**	**108**
Dorset	84.8	61.2	34.7	37.3	131
Wiltshire	89.1	58.2	31.6	44.2	137
Somerset	89.7	65.4	45.3	38.6	189
Gloucester	86.1	62.6	33.7	31.3	147
West of England CA	85.6	59.5	31.4	41.0	121
South West England	**87.5**	**60.9**	**37.5**	**40.7**	**1,091**

Tables 5.6(a) and 5.6(b) compare VCSE organisations' attitudes about the impact of devolution strategies across regions.

- VCSE organisations in South West, South East and North East England are the least positive about improving levels of collaboration with the local public sector/NHS (52-54%) while in Yorkshire and Humber they are most positive (60%). In South West England there are wide variations in opinion ranging from 43% in Wiltshire to 62% in Dorset; Devon and Cornwall are similar (51-53%).
- Comparatively few VCSE organisations in North East England feel that policy makers now give them more notice about new initiatives (26%) while South West England (29%) is close to the national average (31%). With the region, West of England Combined Authority has the lowest score (20%) while Cornwall and Wiltshire have the highest (35-36%). In Devon, relatively few VCSE organisations feel that public bodies are doing better at giving notice on new initiatives (25%).
- A similar finding is reported on policy makers' receptiveness to VCSE organisations arguments in the North East, again with the lowest percentage with a positive attitude (35%) while voluntary organisations in the South West (38%) is close to the national average (39%). VCSE organisations in Yorkshire & Humber are the most positive (43%). Voluntary organisations in the South West of England are least positive in Cornwall (27%) and most in Dorset (47%). Devon sits at the regional average (39%).
- Nationally, 39% of VCSE organisations feel that public sector organisations are working together more effectively – especially so in Yorkshire & Humber (44%). VCSE organisations in London are the least positive in this respect (34%); voluntary organisations in the South West (37%) sit just below the national average. VCSE organisations the region are least positive in Somerset (30%) and most in Cornwall (46%). Only 35% of voluntary organisations in Devon think that public organisations are working together more effectively.
- A clear majority of VCSE organisations in all regions state that they have been asked more often to improve engagement with local people and the North East and London are most likely to say so (64%); the South West of England (55%) sits well below the national average (61%).

Organisations in Somerset (57%), Devon (59%) and Cornwall (56%) are most likely to have been asked to help with local engagement.

It would be unwise to make too much of these findings at this stage because this is the first time the question has been used. Data therefore represent a 'baseline' position from which future comparisons can be made. Even when sector opinion is currently very positive – that may change in the context of widespread local government and NHS ICB reorganisation.

Table 5.6(a) **Engagement with public organisations and policy makers by English region**
(Third Sector Trends in England 2025, n=8,557)

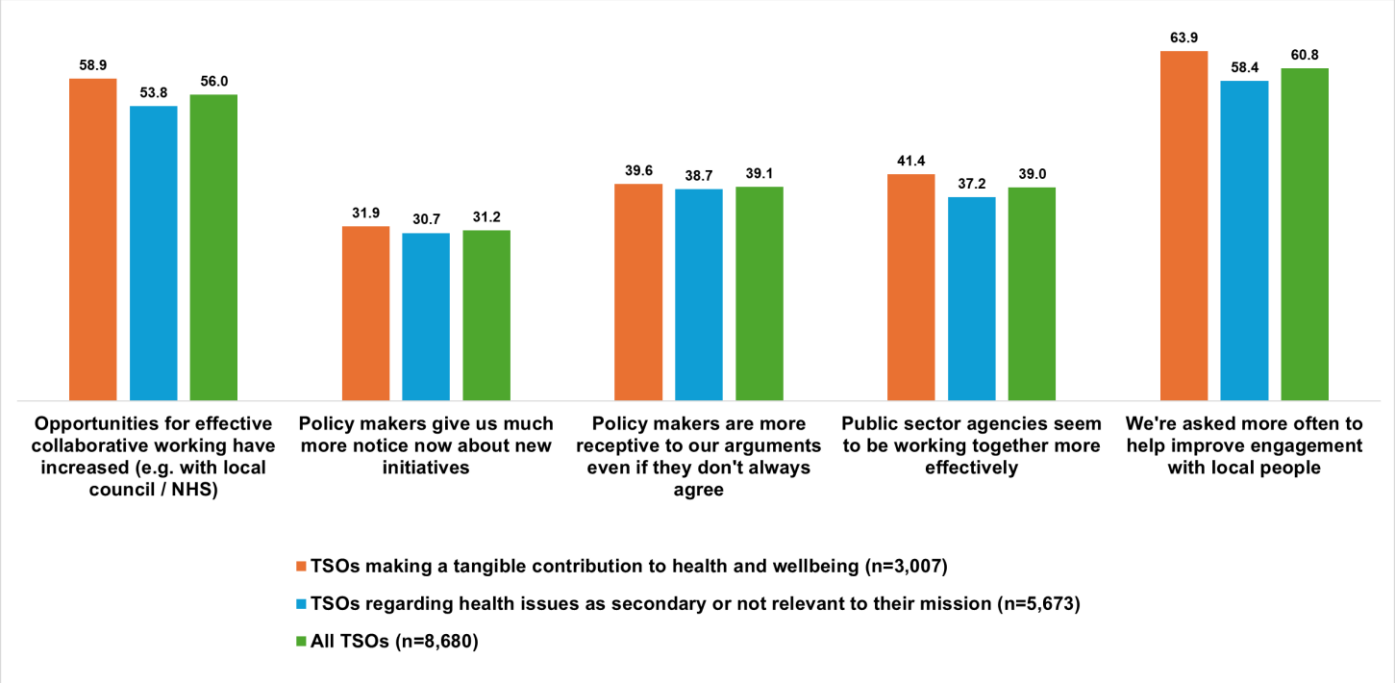
	Opportunities for effective collaborative working have increased (e.g. with local council / NHS)	Policy makers give us much more notice now about new initiatives	Policy makers are more receptive to our arguments even if they don't always agree	Public sector agencies seem to be working together more effectively	We're asked more often to help improve engagement with local people
North East England	52.4	25.7	34.6	37.6	63.6
North West England	56.7	32.0	40.0	42.6	62.8
Yorkshire and Humber	59.8	33.8	42.5	43.7	63.2
East Midlands of England	58.9	33.5	35.4	35.5	57.4
West Midlands of England	55.3	29.3	39.4	40.6	59.6
East of England	57.6	33.1	41.6	40.6	59.7
London	52.7	31.0	37.2	33.7	63.7
South East England	54.2	31.1	39.1	36.7	60.6
South West England	**54.1**	**29.2**	**38.0**	**37.2**	**55.2**
England and Wales	**56.0**	**31.2**	**39.1**	**39.0**	**60.8**

Table 5.6(b) **Engagement with public organisations and policy makers in South West England**
(Third Sector Trends in South West England 2025, n=1,059)

	Opportunities for effective collaborative working have increased (e.g. with local council / NHS)	Policy makers give us much more notice now about new initiatives	Policy makers are more receptive to our arguments even if they don't always agree	Public sector agencies seem to be working together more effectively	We're asked more often to help improve engagement with local people
Devon	**52.6**	**24.8**	**39.1**	**34.7**	**58.6**
Cornwall & Scilly	**50.8**	**35.4**	**26.7**	**45.5**	**55.9**
Dorset	62.3	30.4	47.1	36.4	50.0
Wiltshire	43.8	35.7	38.5	37.3	50.7
Somerset	56.0	30.1	35.4	30.6	57.0
Gloucester	54.7	30.5	44.6	42.0	54.9
West of England CA	59.3	19.6	31.6	37.9	55.2
South West England	**54.1**	**29.2**	**38.0**	**37.2**	**55.2**

It is useful to note how VCSE organisations which are concerned with health and wellbeing feel, at a national level, about engagement with public organisations and policy makers (Figure 5.2). It is apparent that are more likely to feel that there have been more opportunities for effective collaborative working (59%) and that they are asked more often to help improve local public engagement (64%) than voluntary organisations with other interests. In other respects, such as the willingness of policy makers to give notice or new initiatives or their receptiveness to ideas - variations are minimal. Health oriented VCSE organisations are more likely to feel that public organisations (such as the NHS and local authorities) are working together more effectively (42%) than other voluntary organisations (37%). How these responses hold up in the context of local government and NHS Integrated Care Board reorganisation remains to be seen – but that can be tested when the survey returns in 2028.

Figure 5.2 **Health focused VCSE organisations' engagement with public organisations and policy makers in England**



5.4 Sector influence on local social and public policy

It is likely that perceptions of relationships with the public sector in the South West of England are shaped to some extent by the willingness of VCSE organisations to get involved and have their say. As Table 5.7(a) shows, however, the voluntary sector in the South West is not especially keen to engage in political issues (78% 'steer clear' compared with just 66% in Wales). Devon and Cornwall voluntary sector opinion sits at regional level, while VCSE organisations in West of England Combined Authority are least averse to engaging in politics.

- VCSE organisations' level of engagement with local meetings and events is lower in South East and South West England (66-67%) but lowest in the East Midlands (63%). These percentages are far below that of the North East (79%). Voluntary organisations in Devon (68%) and Cornwall (72%) are amongst the most likely to participate while those in Gloucestershire are the least (64%).
- Campaigning to further the interest of beneficiaries is strongest in North East England (57%) where issues surrounding deprivation are the most severe. In the South West, campaigning is least less common (42%) and substantially below the national average (48%). While the sample size is small, VCSE

organisations in Cornwall appear to be most likely to campaign (59%) while many fewer do in Devon (41%).

- Many voluntary organisations trust a local infrastructure organisation (LIO) to engage in influencing of local social and public policy on their behalf (31% nationally). Reliance on LIOs varies considerably by region ranging from 25% in the South East and South West to 39% in the North East and Wales. In the South West region, confidence in LIOs to represent their interests is at the regional average (24-25%) while in Gloucestershire and West of England Combined Authority it is highest (30-31%).
- The willingness of VCSE organisations to work behind the scenes to influence local social and public policy also varies widely across regions; lobbying in Wales (48%) and the North East (49%) is more common than in the East Midlands (34%) where this option is taken relatively rarely. South West England (37%) sits substantially lower than the national average (41%). Within the region, the propensity for VCSE organisations to engage in lobbying is fairly equal apart from Cornwall (44%) where it is highest and Somerset (31%) which is lowest.

Table 5.7(a) **Influencing social and public policy in English regions 2025** (Third Sector Trends in England 2025, percentage 'agree' or 'strongly agree')

	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 third sector support agency to do this on our behalf (e.g. a CVS)	We tend to work behind the scenes to influence policy
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**
Wales	66.0	72.2	51.6	39.1	47.5
England and Wales	**73.1**	**69.6**	**47.7**	**31.2**	**42.1**

Table 5.7(b) **Influencing social and public policy in South West England**
(Third Sector Trends in South West of England, percentage 'agree' or 'strongly agree', n=1,078)

	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 third sector support agency to do this on our behalf (e.g. a CVS)	We tend to work behind the scenes to influence policy
Devon	**77.4**	**67.8**	**40.9**	**24.9**	**39.1**
Cornwall & Scilly	**77.8**	**72.2**	**58.5**	**24.3**	**43.9**
Dorset	75.8	59.4	43.0	18.1	35.2
Wiltshire	75.6	65.4	38.5	22.4	38.1
Somerset	85.4	65.0	36.6	23.5	31.3
Gloucester	79.2	63.8	40.9	30.3	38.3
West of England CA	68.6	66.7	43.7	30.8	35.8
South West England	**77.7**	**65.8**	**42.2**	**24.9**	**37.2**

Section 6
Summary, discussion and implications

6.1 Summary of key findings

Sector size and structure

The VCSE sector in Devon and Cornwall is large and productive. There are about 8,400 registered voluntary organisations in the area, that is about 4.7 per 1,000 resident population. The density of voluntary organisations is much higher, however, in the area's most affluent places such as South Hams which approaches 8 VCSE organisations per 1,000 residents, while in Plymouth and Torbay it is around 3 per 1,000 residents.

In more socially advantaged and less urbanised districts, there tends to be a greater concentration on micro and small organisations than in less affluent urban areas. Furthermore, the focus of the local VCSE sector reflects local circumstance. In more rural areas, voluntary organisations tend to concentrate their attention at neighbourhood or village level while in larger urban areas, they are more likely to work across a wider spatial area – often crossing district and local authority boundaries.

Sector finance

Sector income in Devon and Cornwall is estimated at about £1.85bn and this report has shown that the voluntary sector, in general terms, is in a reasonably good position financially, where most VCSE organisations (80%) hold reserves and around 44% have not needed to draw upon them in the last year. Some have been experiencing some financial problems however – over a quarter of VCSE organisations (28%) have had to use reserves for essential costs such as salaries, bills or rent.

The sector values grant funding above all other types of income sources at present, but most VCSE organisations manage financial risk by relying on a wide variety of income sources such as gifts, subscriptions, earned income, contracts and investments – very few choose to borrow money.

Trusts and foundations are very supportive of the sector in South West England where 60% of VCSE organisations received unrestricted income and 41% enjoyed long-term investment from grant makers. Similarly about 57% of voluntary organisations in the South West stated that trusts and foundations took time to get to know them, while 38% got support in the development of their skills. Expectations of 'innovation' by grant makers remains high amongst 56% of voluntary organisations.

Sector impact

The voluntary sector in Devon and Cornwall is highly productive and impactful over a wide range of social issues. There is a particularly strong focus on the promotion of health and wellbeing, tackling social isolation, giving people confidence to manage their lives and empowering people in the community.

It is estimated that the total value of sector energy expended in Devon and Cornwall was about £2.07bn in 2025 and that it produced about £3.2bn in fiscal, economic and use value for the county. When intangible aspects of social value are added into the equation, it is estimated that total sector contribution was £7.36bn which represents about £4.1m per 1,000 resident population.

Labour market dynamics

Sector employment of around 34,900 in Devon and Cornwall. While there are signs that a sizeable minority of VCSE organisations are struggling to recruit (32%) or retain (17%) employees in the South West – the indications are that overall employment has risen marginally since 2022.

Regular volunteers number about 169,300 in Devon and Cornwall and they deliver around 12.2 million hours of productive work. The proxy replacement value by employees would be between £149m (at national minimum wage) and £208m (at 80% of regional average wage).

Reliance on regular volunteers is high in Devon and Cornwall, 84% of VCSE organisations rely mainly on volunteers who support them on a regular basis and 90% of organisations could not survive without their support – and indeed, 83% of organisations relied on volunteers to work unsupervised.

Currently, volunteer numbers in Devon and Cornwall have yet to recover to pre-pandemic levels in 43% of VCSE organisations. It is a mixed picture as 44% of VCSE organisations are struggling with recruitment and 24% with retention of regular volunteers in South West England. Similarly, 39% are struggling to recruit trustees and 18% find it hard to retain them.

Organisational wellbeing and development

The success of VCSE organisations is contingent upon their ability to make good decisions about purpose, practice, finance and investing in people development. At present, the biggest priority in most VCSE organisations in Devon and Cornwall (66%) is to get support for income generation rather than invest in these other crucial aspects of organisational wellbeing.

Only about a third of voluntary organisations seek to invest in business planning and just a quarter on trustee development and training. This may be a cause for concern as raising income is not always the answer to VCSE organisations' problems – indeed it can cause them if finance is gained for purposes that the organisation is not in a position to deliver successfully. The percentage of VCSE organisations in Devon and Cornwall with a training budget (33%) is at the regional average.

When organisations identify training and development needs, about 65% attempt to tackle these in-house in Devon and Cornwall; but many mainly seek support externally from local infrastructure organisations (12%), trusts and foundations (10%), private businesses (8%) or local public authorities (5%).

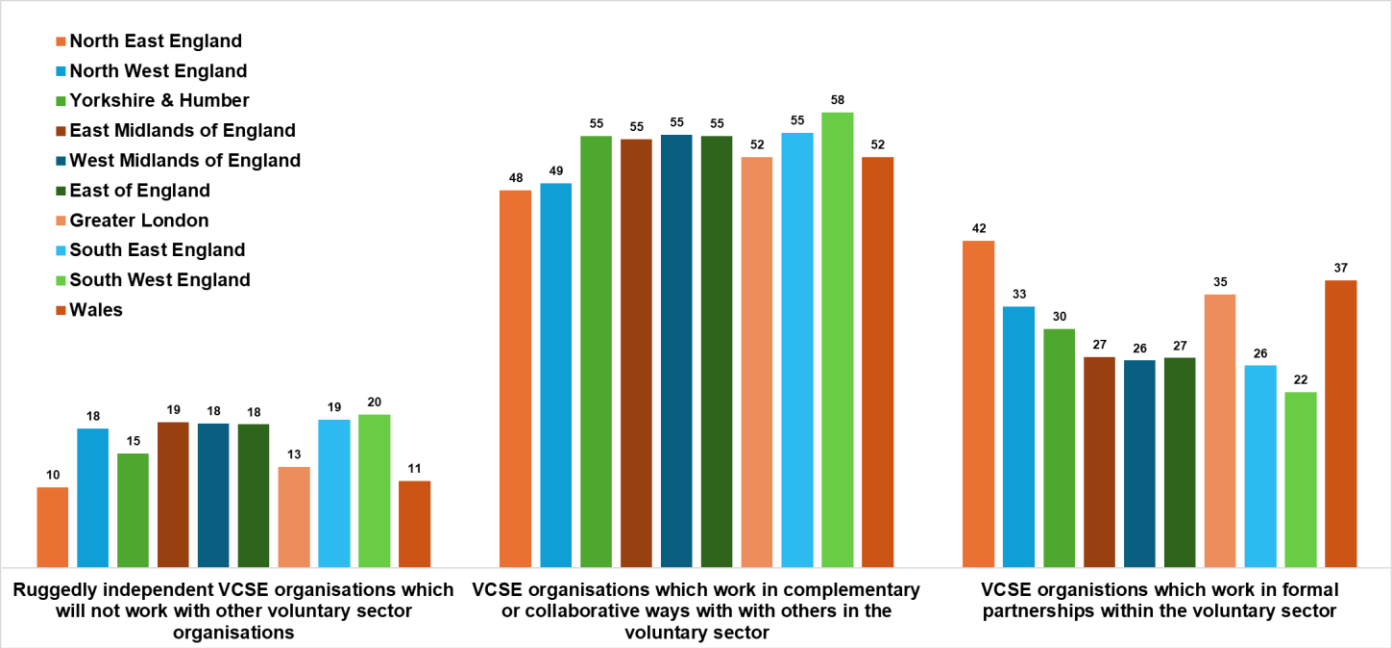
Sector interactions

Working relationships within the VCSE sector in South West England are quite weak compared with other regions. While stronger in Cornwall & Scilly, there is less evidence of a deeply-embedded culture of cooperation in Devon: 66% of VCSE organisations work together in informal 'complementary' ways, 57% in semi-formal 'collaborations', and 18% work in formally constituted 'partnerships': these percentages are far below the national average (72%, 62% and 27% respectively). And while VCSE organisations working in the field of health and wellbeing are more likely to engage with inter-sector relationships in the South West, these remain well below national levels.

There is a slightly larger proportion of 'rugged independents' in the South West (Figure 6.1) than other regions and complementary and collaborative working in the South West is substantially higher (58%). But that is largely due to the unwillingness of VCSE organisations to work together in formal partnerships: only 22% are doing

so in South West England compared with 42% in the North East, 35% in London and 37% in Wales.

Figure 6.1 **Orientation of VCSE organisations to partnership and collaborative working by English regions and Wales** (Third Sector Trends in England and Wales 2026)



Relationships with the private sector are widespread in South West England, but they are far fewer in number than at national levels (shown in parentheses). In the South West, 28%(33%) of VCSE organisations are given money by business to help them work, 22% (27%) are provided with free use of facilities or provided free goods, 12%(17%) get employer volunteer support and 16%(20%) were in receipt of *pro bono* expert advice from businesses – within the region there are widespread variations – where relationships in Cornwall seem to be substantially stronger than in Devon.

Public sector relationships are strong in Devon and Cornwall. 88% of VCSE organisations feel valued by public bodies and 60% feel well informed about issues that affect them. Fewer feel involved appropriately in the development and implementation of policies that are relevant to them (40%) but many VCSE organisations believe that local public bodies act upon their opinions or responses to consultations – although this varies between Devon (53%) and Cornwall (37%).

In response to questions about local devolution, 54% of VCSE organisations in South West England feel that opportunities for effective collaborative working have increased and 29% feel that public bodies are now giving more notice about new initiatives. Furthermore, 37% believe that public sector bodies are working together more effectively. These baseline data will be useful at local level when local government reorganisation and the configuration of NHS Integrated Care Boards are fully established – but at present there appears to be much variation of opinion between Devon and Cornwall.

The VCSE sector itself is keen to influence local social and public policy (although 78% of organisations in the South West avoid 'political' issues). Almost 80% of voluntary organisations in Devon and Cornwall will go to relevant meetings or consultations and around 40% will lobby behind the scenes to influence policy. The willingness to campaign seems to be a good deal stronger in Cornwall (59%) than Devon (25%). By contrast, many organisations in Devon and Cornwall rely on local infrastructure organisations to take charge of influencing (25%).

6.2 Discussion in comparative context

While it may not be possible to make firm predictions on what will happen next, leaders of voluntary organisations were asked in 2025 to say how they felt about some key issues. It has been possible to look at 'sector vitality' and 'optimism' in the South West of England (Table 6.1).

- Many more leaders in Devon and Cornwall were 'excited' about current bidding to do something brand new (35%) than those who were 'worried' (25%) in Devon and Cornwall.
- Most leaders felt 'excited' about collaborative working arrangements in Devon and Cornwall (45%) and very few were worried (5%).
- Of those leaders whose voluntary organisation engaged in campaigning to get the general public to see things their way in Devon and Cornwall, many more were 'excited' (40%) than 'worried' about it (19%).

Table 6.1 **Sector vitality and ambition in South West England** (Third Sector Trends in England and Wales 2025, n=1,086)

	Percent of leaders 'excited' or 'worried' about bidding for funding to do something brand new		Percent of leaders 'excited' or 'worried' about working collaboratively with other voluntary organisations		Percent of leaders 'excited' or 'worried' about campaigning to get the general public to see things our way	
	Excited	Worried	Excited	Worried	Excited	Worried
Devon	**35.2**	**25.4**	**44.3**	**5.2**	**39.5**	**23.1**
Cornwall & Scilly	**37.9**	**23.0**	**45.3**	**4.7**	**43.2**	**10.8**
Devon and Cornwall *(combined)*	***36.1***	***24.6***	***44.6***	***5.0***	***40.7***	***19.0***
Dorset	**29.3**	**22.8**	**38.7**	**6.5**	**28.6**	**14.3**
Wiltshire	**26.6**	**19.1**	**33.0**	**9.7**	**23.8**	**23.8**
Somerset	**32.8**	**29.9**	**39.0**	**3.5**	**36.1**	**16.7**
Gloucester	**37.4**	**23.4**	**34.0**	**6.6**	**28.9**	**14.5**
West of England CA	**41.2**	**22.4**	**46.2**	**6.5**	**48.5**	**16.7**
South West England	**34.3**	**24.2**	**40.3**	**5.9**	**35.5**	**17.8**

This report has also demonstrated that many leaders in the voluntary sector in Devon and Cornwall are feeling optimistic about the future. That should not be so surprising because the financial position of the sector is currently quite sound, as indicated by the widespread ownership of financial reserves and the ability of many organisations to leave them untouched since 2022. Indeed, around four fifths of survey participants in Devon and three quarters in Cornwall believed that their income levels would be sustained or increase over the next two years.

But there is evidence of underlying anxiety too, leading many voluntary organisations to sit on their reserves rather than to invest wholeheartedly in new developments and secure their own wellbeing by strengthening governance, strategic skills and enabling their employees and regular volunteers. Leaders of voluntary organisations know from experience that their financial position is fragile because of uncertainties in their working environment. That is why they try to ensure that they don't keep all their eggs in one basket in financial terms.

Nonetheless, this report shows clearly that sector mood about the reliability and relative value of income sources is shifting further towards grant funding and away from self-generated trading and income garnered from public service contracts. But

as the pot of finance available to grant makers is finite – there could be trouble ahead.

As in all other English regions and in Wales – the structure and dynamics of the voluntary sector responds to and is shaped by local social, spatial, political and economic conditions. And this explains why there is a higher concentration of VCSE organisations per 1,000 members of the local resident population in more affluent regions such as the South West of England (4.2) than in less affluent regions such as North East England (2.6).

In wealthier areas right across the country, there are more VCSE organisations per capita because local people have more disposable income and productive free time; they are better connected, richer in social capital and are, consequentially, more willing and able to buy-in to a lifestyle that embraces civil society at its core. Most of their VCSE organisations are small, relying wholly or mostly upon regular volunteers to achieve their aims and most are relatively financially resilient – often relying more heavily upon their own resources than calling upon outsiders to support their work.

That is why, in the richest areas, 69% of voluntary organisations across England and Wales had no relationship with trusts and foundations in 2025 compared with just 32% in the poorest districts. That is not to say that these organisations *never* bid for grants, but indicates that they do so on an occasional basis rather than relying upon them heavily to keep going. In poorer areas there are comparatively fewer VCSE organisations which tend to address issues produced and embedded by financial insecurity, poorer health, educational disadvantage and limited access to or use of public services. VCSE organisations in these localities are more reliant upon employees than in more affluent districts and that is why they need more money.

The balance between richer and poorer areas differs substantially across regions and that shapes the way that the voluntary sector works. In South West England, for example, only 9% of VCSE organisations are located in the poorest areas (the least affluent quintile of the Indices of Multiple Deprivation or IMD) – they work in much the same way as they do in the poorest areas of North East England. At the other end of the social spectrum, 27% of VCSE organisations in the South West are located in the most affluent quintile of the IMD compared with just 15% in the North East; but in those kinds of areas the focus and structure of the local sector is strikingly similar.

Interestingly and perhaps counter-intuitively, the report also shows that in poorer areas the spatial focus of VCSE organisations is *wider* than in affluent areas where more voluntary organisations concentrate their activities at neighbourhood or village level.[43] To some extent, that is due to the specialist foci of many VCSE organisations in poor areas on discrete aspects of service delivery which tend to be funded by large grants or contracts to deliver services over a wider spatial area. In more affluent areas, by contrast, much more of sector activity is locally focused and self-funded (by subscriptions, for example) or is facilitated by smaller, occasional grants.

Because the boundaries around areas are not impermeable, generalisations such as these need to be taken with caution. Not all VCSE organisations based in the very poorest areas concern themselves with local issues associated with critical need; just as in the wealthiest areas, many VCSE organisations are fervent in their support for people struggling in adverse conditions in communities often far from their own. And while in several statistical areas of Devon and Cornwall, there are no neighbourhoods which fall into the poorest quintile of the Indices of Multiple Deprivation – that does not mean that there is neither poverty nor social exclusion or spatial isolation.

[43] Sometimes, historians and social commentators adopt somewhat romantic notions of the 'mutuality of the oppressed' and over play their hand about community resilience and self help within poor communities. That is a dangerous assumption to make about hard-pressed areas where managing to keep going on a day-to-day basis in socially stressed communities consumes people's energy physically and emotionally. To assume that adopting middle-class values associated with civic voluntarism will get such communities out of hot water using their own mettle can be both unfair and unrealistic.

While localities undoubtedly shape sector purpose and structure to some extent and help to account for spatial variations in sector wellbeing and impact, other factors also come into play derived from national political decision making which shape the prospects of VCSE organisations. Often the impact can be direct – when, for example, government shifts policy direction and invests heavily in one aspect of social life to the detriment of others.

On other occasions, national government decisions on how it works with local and regional public sector agencies, such as the NHS or local authorities can have a profound impact on voluntary sector activity. One such challenge, highlighted in this report, is the government's squeeze on public finances which has the effect of lowering the value of contracts offered to VCSE organisations to deliver public services. This could, potentially, upset the financial dynamics of the voluntary sector now that many larger VCSE organisations are losing interest in, or have already withdrawn from delivering public services.

When this issue was raised in previous reports in this series, the emphasis was on what *government* should do if *it* wants the voluntary sector to remain engaged in public service delivery. [44] Here, the issue is the potential knock-on effect of big VCSE organisations withdrawing from contracts for grant finance on the voluntary sector as a whole over the next few years.

It is useful to take a 'medium-term' view of the situation because, realistically, the most likely response of many VCSE organisations currently engaged in public services will be to 'bide their time' and see what national politicians do if they awaken to the potential consequences of voluntary sector withdrawal from this arena. Nonetheless, a likely response is that leaders of big VCSE organisations will already be looking for alternative ways of sustaining their activity.

On this matter, the evidence from Third Sector Trends is crystal clear (Figure 6.2) – leaders in 94% of VCSE organisations which were delivering contracts in 2025 stated that they intended to bid for funding 'to deliver something brand new' (compared with 68% of leaders in organisations which have no intention of delivering public services).

Increased competition for grants could seriously upset the current equilibrium in funding opportunities in Devon and Cornwall, especially for middling-sized VCSE organisations in a marketplace with finite resources. But the extent to which that happens may vary by region because, the percentages of organisations delivering contracts has risen in the South West of England since 2022 (though, admittedly, from a lower base than in the industrial north and midlands).

More competition is potentially bad news for many other VCSE organisations which are heavily dependent upon grants in the South West. But to reiterate an earlier point, the voluntary sector in the region is currently in quite good shape with relatively few VCSE organisations using reserves for essential costs and as shown below in Table 6.2, few reported significantly falling income in 2025 irrespective of their size.

While the VCSE sector in South West England generally is currently in a strong position and most leaders are confident and optimistic about their future outlook, there are some issues on the near horizon that could affect sector wellbeing. The first of these is local government reorganisation which, as shown in the introduction of this report, could have a radical impact upon the shape of administrative boundaries across Devon.

[44] The reason why contracts have become detrimental and what consequences that may have for government have already been explored in this series of reports, see Section 4.5, *Third Sector Trends in England and Wales 2025: relationships, influencing and collaborative working*, Newcastle: Community Foundation North East, https://www.stchads.ac.uk/wp-content/uploads/2025/10/Relationships-influencing-and-collaborative-working-Third-Sector-Trends-in-England-and-Wales-2025-October-2025-1.pdf

Figure 6.2 **Percentage of leaders in VCSE organisations engaged in public service contracting who are 'excited' about bidding for funding to do something new** (Third Sector Trends in England and Wales 2025, those organisations not bidding to do something new are excluded from the analysis)

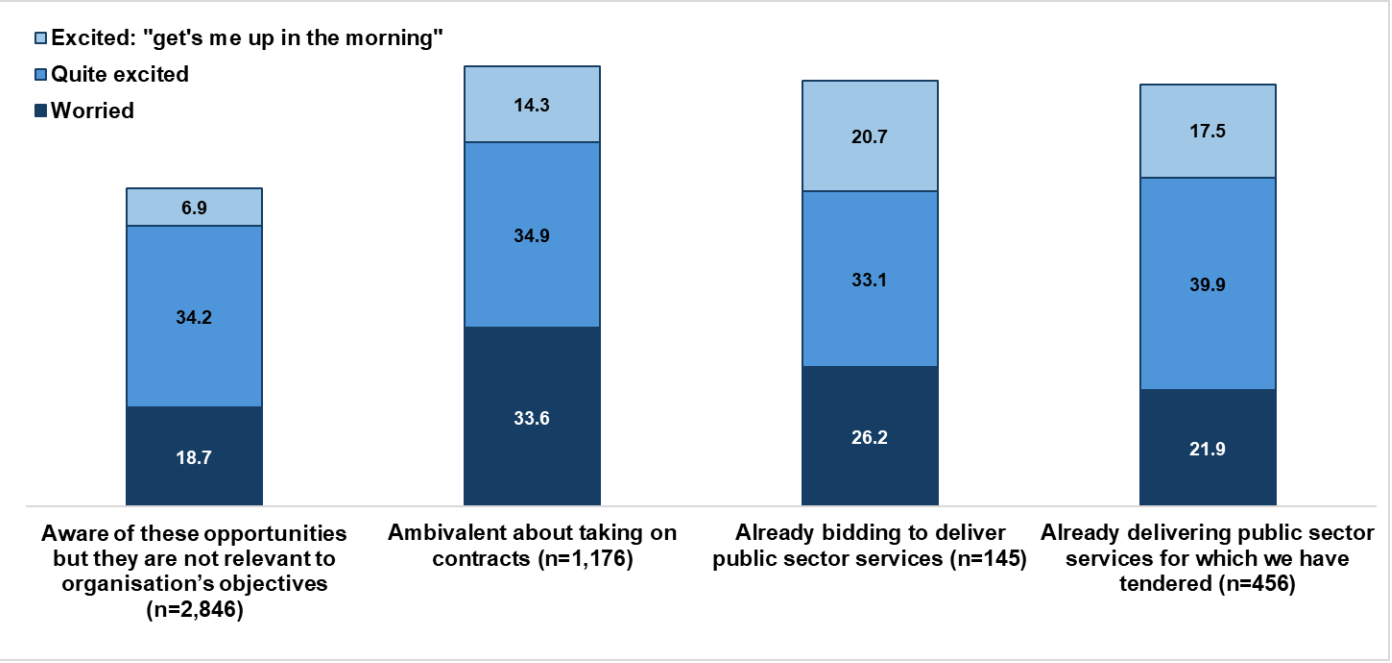


Table 6.2 **Income change over the last two years in South West England** (Third Sector Trends South West of England 2025)

	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 to £25m	All TSOs
Risen significantly	7.9	17.9	28.6	31.8	28.0	18.1
Remained about the same	80.5	70.9	59.0	58.9	56.0	70.5
Fallen significantly	11.6	11.1	12.4	9.3	16.0	11.5
N=	380	368	210	107	25	1,090

From previous studies by Third Sector Trends, it is clear that local government reorganisation can be a mixed blessing for the voluntary sector. When county councils are split up into unitary authorities it can lead to 'boundary hardening' as councillors seek to vary their policies and practices from adjacent areas. For voluntary organisations which work across these boundaries, that can produce the duplication of activities in many domains – not least in having to develop productive relationships with several local authority officers and directorates rather than just one.

In other respects, relationships with public sector organisations may be simplified in Devon and Cornwall due to the establishment of a cluster of NHS Integrated Care Boards from September 2025. Having two ICBs operating in different ways across Devon and Cornwall will have made working relationships more complex and cumbersome for those VCSE organisations working across these boundaries and may, indeed, have dissuaded some to contemplate doing so.

As this report has shown many VCSE organisations in Devon and Cornwall are engaged directly or indirectly with issues concerning health and wellbeing – but determining who does what in the VCSE sector will always be hard to disentangle. That is because approaches to practice are sometimes shared, definitions of purpose are diverse and constituencies of beneficiaries are complex. At best, it is only

possible to define general areas of activity. But it is clear that VCSE organisations with concerns about health and wellbeing in Devon and Cornwall are not yet working as collaboratively as in other parts of the country and relatively few, in comparative terms, are working together formally.

The NHS's Integrated Care Systems (ICSs) policy framework[45] seeks the involvement of the VCSE sector in planning for and aligning with specific aspects of delivery. Loosening of administrative boundaries in Devon and Cornwall may help to reduce the layers of complexity for VCSE organisations with direct involvement with the NHS have had to negotiate previously.[46]

It is crucial to note, however, that much of the activity of the VCSE sector addresses 'intangible' aspects of social value which is of great importance to public health – and particularly so in the realm of prevention or in complementary but autonomous aspects of activity which contribute to the alleviation of health conditions.

This can be a good thing from an NHS point of view because it means that the VCSE sector is already finding the resources to create the energy to tackle issues on its own terms which contribute to the greater public good (see Figure 6.2). Consequently, the NHS and local authorities can learn how to value that contribution and factor it into thinking about the purpose of ICSs – but without feeling the need to take responsibility for, or to attempt to control it.

This is a complex environment for both the VCSE sector and for NHS Integrated Care Boards to understand, navigate and negotiate. But if the objective to improve prevention of health conditions is to move closer to centre stage, as indicated in NHS England Integrated Care System strategies and in the Hewitt Review[47] to shift resources from 'illness' to 'health', then recognising and valuing what is happening on the ground now in the VCSE sector is vital.

Rationalisation of NHS ICB boundaries in Devon and Cornwall is a good idea. But it should not be forgotten that the imperative to change boundaries (or to abolish *NHS England* itself[48]) were not just about smoothing and strengthening interactions but also to save money.[49] ICB cuts have been severe and resulted in the loss of many dedicated staff across the country who worked hard to build positive relationships with the local voluntary sector and between other health providers within the NHS and the private sector.

As Figure 6.2 indicates, about half of VCSE sector organisations are very unlikely to engage directly with ICS policies at a strategic level. Indeed, many may not

[45] ICS strategy and implementation documentation can be found here: https://www.england.nhs.uk/integratedcare/

[46] A good deal of groundwork has already been done to gather intelligence and public opinion on a ten year plan for public health in Devon by NHS Devon in collaboration with One Devon: One Devon (2025) *Devon 10 year health plan engagement programme findings*: https://democracy.devon.gov.uk/documents/s53414/Devon%2010%20Year%20Plan%20engagement%20findings%20-%20Final.pdf. In Cornwall there have been similar exercises which has been reported upon by Cornwall Voluntary Sector Forum, See: Rowse, E. (2025) 'The 10-year health plan for England – impacts and implications for the VCSE' (4th July), available here: https://cornwallvsf.org/health-and-wellbeing/the-10-year-health-plan-for-england-impacts-and-implications-for-the-vcse/. Third Sector Trends undertook analysis of sector dynamics in Cornwall in 2022, the report is available here: https://www.stchads.ac.uk/uncategorised/voluntary-sector-dynamics-in-cornwall-and-isles-of-scilly/

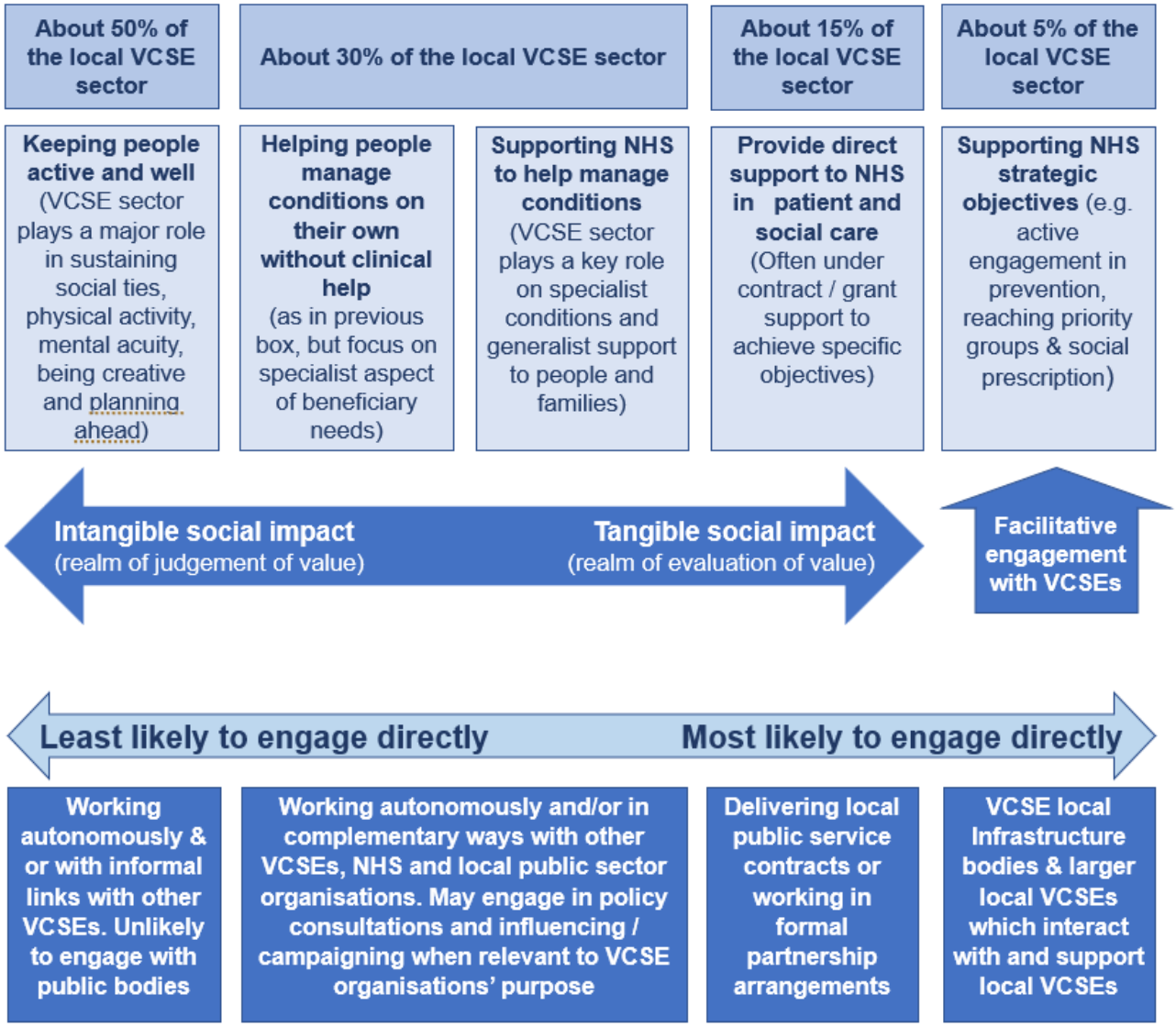
[47] (2023) *Hewitt Review: an independent review of integrated care systems,* London: OGL, https://www.gov.uk/government/publications/the-hewitt-review-an-independent-review-of-integrated-care-systems

[48] NHS Confederation (2025) Abolishing NHS England: what you need to know (13th March) https://www.nhsconfed.org/publications/abolishing-nhs-england-what-you-need-know

[49] From a government perspective, the rationale was to redirect funds to front-line patient care: Department of Health and Social Care (2025) Billions to be redirected back into patient care with NHS reform (Press release, 11th November) https://www.gov.uk/government/news/billions-to-be-redirected-back-into-patient-care-with-nhs-reform; but these decisions were made apparently without regard to other core policy objectives of improving public health through preventative measures and instigating well-accepted rationale from the Marmot Review of investing more heavily in poorer areas; Marmot, M., Allen, J., Boyce, T., Goldblatt, P. and Morrison, J. (Health Foundation (2020) *Health Equity in England: the Marmot Review 10 years on,* London: Institute of Health Equity: https://www.health.org.uk/publications/reports/the-marmot-review-10-years-on?psafe_param=1&gclid=Cj0KCQjwr82iBhCuARIsAO0EAZwSgDf6T2TZPnb8NZx3gzniFTM1VhUHsJtsc_vlzHwugnMWJCJI4bEaAq6aEALw_wcB. Other commentators have taken a different perspective: Launder, M. (2026) *'ICB cuts an "absolute shit show", say leaders', Health Service Journal* (10th March): https://www.hsj.co.uk/integrated-care/icb-cuts-an-absolute-shitshow-say-leaders/7041248.article

recognise, nor be interested in articulating how their work adds value to public health. That may be of little concern to them, but it does not mean that their contribution should be not be valued in holistic terms. And in some cases, they may have a more direct role to play, if they are enticed to do so, by – for example, an effective link worker with their ear to the ground on new avenues for social prescription. That work can not be done effectively in the context of dramatic cuts to local ICB budgets and the government's current unwillingness to invest substantively in preventative health initiatives.

Figure 6.3 **The contribution of the VCSE sector to public health**



6.3 Sector readiness to collaborate

This report represents a first step in providing intelligence on strengths and weaknesses of the VCSE sector in Devon and Cornwall. Because of its comparative stance, the report has thrown up a number of factors – as discussed above - which may need to be addressed before collaborative and formal partnership working can develop further. Three specific issues may be worthy of further debate within the VCSE sector and with their counterparts in the private and public sectors in Devon and Cornwall.

Anticipating the consequences of boundary hardening

The situation in Devon and Cornwall is quite complicated. On one hand, NHS ICB boundaries have already been blurred through the establishment of a cluster of two ICBs – that process is likely to continue as Board activities align and may eventually lead to full merger. These changes, even in a fiscally stressed environment, will help smooth procedures and may help to attract more VCSE organisations to consider contributing to public health initiatives individually or collaboratively.

In Cornwall, local government reorganisation took place in 2009 when its six districts were abolished so as to establish a unitary authority and established its first devolution deal with the Government in 2015 which was subsequently given greater powers in 2023.[50] There is limited enthusiasm within the unitary authority to establish a combined mayoral authority with Devon. Attempts were made to seek a special deal for Cornwall with Government in line with its claims to 'protected status' without the need for mayoral elections but have not, as yet, succeeded.[51] As many aspects of public health fall under the jurisdiction of local authorities, that may mean that complementary approaches to interventions across boundaries may not readily emerge or come to fruition.

Within Devon, there remains considerable uncertainty as to how local government reorganisation will play out in practical terms after a consultation process involving five separate proposals were made November 2025. The proposal consultation period closed after seven weeks on 26th March 2026. A ministerial decision was reached subsequently, but the process was paused and ultimately withdrawn.[52] No matter which of the five proposals (or alternative proposals) are ultimately accepted or imposed by the Minister, there will be substantial disruption to political relationships across the ceremonial county area and it will take time for new procedural arrangements to be put in place when areas are given the authority to do so.

From a VCSE sector point of view, this situation will cause a good deal of disruption – and especially so for those larger organisations which now work across administrative boundaries and for those planning to do so. That disruption will affect organisational leaders in many ways, including the fragmentation of existing procedural arrangements as new boundaries harden if councils decide to operate differently from each other. Boundary changes will likely also create duplication of work, involving building relationships with different sets of local authority officers and local councillors. In a tight fiscal environment, there is also a strong likelihood that the value of local authority public service contracts will be squeezed further – making them even less attractive to prospective bidders.

Facilitating VCSE sector interaction

The likely changes to arrangements outlined above may be unwelcome to leaders within the voluntary sector who are eager to establish stronger collaborative and formal partnership arrangements within and across administrative boundaries. As this report shows, sector enthusiasm for shared working arrangements is already comparatively weak in Devon and, as discussed, boundary changes may undermine them further.

[50] Government UK (2023) Policy Paper: Cornwall Devolution Deal, https://www.gov.uk/government/publications/cornwall-devolution-deal

[51] Oates, M. (2025) Cornwall devolution deal fails in House of Lords, BBC NEWS (25th March): https://www.bbc.co.uk/news/articles/ce84xjypl57o.

[52] In July 2026, the Minister confirmed that a four unitary authority model would be adopted in Devon. However, in September 2026 the local government restructuring programme was paused https://www.bbc.co.uk/news/articles/cy5zw02rgpqo and in October the plan was withdrawn https://www.bbc.co.uk/news/articles/cmwydjql2l1wo. At the time of publication of this report, further indication of how devolution may play out were outlined in the Chancellor's autumn Budget which can has been reviewed by the Local Government Association and can be accessed here: https://www.local.gov.uk/autumn-budget-2026. For further detail on the original proposals, see: https://www.gov.uk/government/consultations/local-government-reorganisation-in-devon-plymouth-and-torbay/proposals-for-local-government-reorganisation-in-devon-plymouth-and-torbay

There are signs, however, that investment in sector infrastructure via NHS Devon may help to alleviate existing or prospective problems as outlined above. In those regions where there are stronger well-established area-wide infrastructure bodies which strengthen policy and intelligence work, inter-sector relationships tend to be stronger, better integrated and more productive.[53]

That is not to say, however, that there will be no hurdles to traverse due to the changing political geography of Devon as the 'patches' of existing infrastructure organisations may become less relevant in political, policy and procedural terms and, perhaps more seriously, undermine claims for support for funds from councils to provide a representative VCSE sector voice.

Previously this has been a difficult problem in many former county council areas where individual districts were represented by individual LIOs together with some spanning the wider area with specific interests such as rural issues or social enterprise. In Devon, the situation is somewhat less complex as there are fewer LIOs currently operating – but it will nevertheless require a period of negotiation and adjustment to align with new boundaries and win financial support to provide sector leadership, training, intelligence and representation.

Current infrastructure coverage in Devon is uneven due to imbalances in organisational capacity and range to deliver a full diet of support. That is unlikely to be the primary reason many VCSE organisations in Devon, in particular, are comparably less interested in seeking external support for training and development as shown in this report – but neither will it have helped. Currently in Devon, a clear majority of VCSE organisations try to tackle aspects of development in house. But many will neither have the expertise or resources to do that effectively and thereby risk undermining their own productivity and operational sustainability.

Strengthening business support for the voluntary sector

Relationships between the third sector and business is enormously valuable financially and in developmental terms for many voluntary organisations.[54] As the Directory of Social Change's most recent *Guide to UK Company Giving* shows, the ten largest corporate contributors dispensed £256m – 45% of the £571m given by 400 businesses.[55] The financial contribution of big companies is impressive, but their generosity has diminished in recent years. In an equivalent study of 2020-21[56], the top ten businesses contributors gave £295m (or £367m when taking account of inflation[57]).

The currently challenging economic environment may help to explain why a recent *Charities Aid Foundation* report stated that 75% of British businesses currently do not offer any support. And amongst those which do, their evidence suggests a shift

[53] In Devon, a VCSE Assembly has existed since 2023 which covers the unitary authorities of Plymouth, Torbay and Devon County Council, see: https://www.local.gov.uk/case-studies/devon-plymouth-torbay-vcse-assembly The constitution of the Assembly, which is managed by an independent chair, is available here: https://www.devoncommunities.org.uk/sites/default/files/users/SarahNewman/VCSE%20Assembly%20Constitution%20and%20Terms%20of%20Reference%20v3.pdf.

[54] 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/ .

[55] Threlfall, J. (2025) *The Guide to UK Company Giving 2024/25* (15th edition), London: Directory of Social Change.

[56] Pembridge, I, et al. (2021) *The Guide to UK Company Giving* 2020/21 (13th edition), London: Directory of Social Change.

[57] All inflation proofing statistics used in Third Sector Trends reports are generated using the Bank of England Inflation Calculator, available here: https://www.bankofengland.co.uk/monetary-policy/inflation/inflation-calculator

towards in-kind support rather than providing cash.[58] This report strongly suggests that business support in Devon (though less so in Cornwall) is far below that which is enjoyed in some other regions.

In the current context of relatively high inflation, rising labour costs and soaring energy bills – it is not surprising that nationally, businesses have taken their foot off the pedal in supporting local voluntary organisations. Without active and sustained support and encouragement from key stakeholders (including community foundations, VCSE infrastructure organisations, local authorities, business representative bodies such as chambers of commerce and committed business leaders and philanthropists) support from business withers.

That is because much of the interaction between businesses and voluntary organisations is not obviously 'patterned'. Often it is as likely to occur due to 'happenstance' than as a consequence of strategic planning by business, let alone a collaborative operational venture with shared aims. Instead, much of the interaction between business and the voluntary sector is 'ephemeral' or 'occasional' which can mean that relationships do not 'cement' and 'mature' as they might with regularised collaborative action.

Certainly, the pandemic has led many businesses and voluntary organisations to become more inward looking and choosier about collaborative activity. And it looks like such behaviours have become *more*, not *less*, embedded since – as if, perhaps, people have got out of the habit of getting together on the off-chance to see what happens.

Keeping the dialogue going between the voluntary sector and businesses is important so that when economic and market conditions improve, productive interactions can resume. Local community foundations, as trusted intermediaries, are often particularly well placed to help with that because most of them have deep connections with local businesses and the voluntary sector.

Continuous and productive interactions between private sector companies and voluntary organisations are founded upon a measure of mutual understanding, trust and reciprocity. This involves investment of time and expertise on both sides. A prerequisite of relationships developing is for businesses and TSOs to have opportunities to meet in the first place. In those areas of the country, such as North East England, where business relationships with voluntary organisations are much stronger - there has been concerted effort to facilitate the building and sustaining of these connections. In short, gaining support from business is not a one way street.

While making critical points such as these, we offer them as constructive observations for debate. And when set in context, of course, these statements are offered against a backdrop of a highly positive assessment of the energy, ambition and vitality of the voluntary sector in Devon and Cornwall and the enormous social benefit it produces.

[58] The research was based on a relatively small poll of 1,085 businesses. CAF (2025) *Corporate Giving Report 2025*, London: Charities Aid Foundation: https://www.cafonline.org/home/about-us/press-office/most-british-businesses-do-nothing-to-support-charities. The calculations underpinning headline statistics from the report were made on the basis of the following assumptions: "*The estimated total amount donated by UK businesses with a turnover of £250,000 or more (£2.20 billion) was calculated by projecting our results to the 923,000 companies in the UK with a turnover of £250,000. The estimated total amount donated by the smallest companies (£206million) was calculated with the assumption that they donated at the same rate, and to the same degree as businesses with a turnover of £250,000 or more, working with an assumed profit of £12.5k across all businesses in this group*."

NOTES

Durham University

NHS Devon

