Top tips for creating better state of the sector surveys

September 2025

Practical guidance for those gathering data about charities and other voluntary sector organisations

Are you planning to run a survey with the charities and voluntary groups you support?

At Superhighways we want to help build a better collective picture of the voluntary, community and social enterprise (VCSE) sector across London. We've been exploring how we can improve and standardise State of the Sector surveys and what makes a successful report.

Here, we share our learning, top tips and pitfalls to avoid when creating a survey for a state of the sector report. We also propose a set of core questions you should include in your survey, building on our previous state of the sector survey research.

Together, these top tips and recommended questions will save you valuable time and ensure your report builds a compelling picture of the sector locally. They will also allow us all to better understand what's happening across different boroughs and geographies in London, so that we can advocate for funding, support and shape service provision.

Contents:

Stage 1: Before you get started

1. Upskill yourself in survey design and analysis

At Superhighways, we often support small charities and voluntary organisations with survey design, analysis and presentation. Limited time, skills or capacity are often key challenges. In order to avoid survey overwhelm and analyse data effectively, the following resources can help you understand good practice:

- How to choose an online survey tool
- How to use Excel to analyse survey data
- How to analyse qualitative data

You can find guidance on how to design a survey and write good questions on most survey platforms (for example, see this guide to best practice by Survey Monkey). We find that AI tools can be helpful for ideas, feedback and suggesting alternative ways to write survey questions.

2. Write out your hypotheses (statements you hope to make from the survey results)

Before you get buried in writing your questions (or even, after you have) - it helps to take a bigger picture view about ***why*** you are asking this set of questions specifically. To do this, write a list of statements you believe to be true and that you hope you will provide evidence for, as a result of doing the research. Write as many as you can. Try to imagine your report and what you want to say in the executive summary, what you will share on a chart in a workshop presentation or what you want to promote on social media. Anyone involved in marketing and communication can be particularly helpful here, for thinking about what headline findings might look like. Think about what you already know, but simply need data to prove. Examples could be:

  - VCSEs are struggling financially this year
  - Smaller charities are struggling more than larger charities
  - Accessing funding is the biggest challenge VCSEs face
  - Many VCSEs are struggling to find suitable premises

Once you have drafted your questions, return to this list and check you've covered it. Also think through how you will use the responses (data) to prove or disprove each one.

3. Desk research - get ideas from similar reports and surveys

Looking at similar reports and surveys will also give you ideas about what you want your report to look like, what you might want to say and the questions you could ask. To help you with this, we have curated a repository of state of the sector reports in London, where the report is publicly available to download.

You should also explore existing data about the sector for comparison, inspiration and to see if you can answer some of the questions you have already:

- Superhighways VCSE dashboard can help you understand how many charities and voluntary organisations there are across London boroughs. You can find out more about their income, expenditure, funding and number of volunteers, staff and trustees. It brings together open data about registered charities, companies and community interest company structures in one place.
- London Plus data and research summarises key research about charities and community groups in the capital
- London Funders publications and news highlights funder interests and research on specific sectors in London
- The NCVO UK Civil Society Almanac is published annually and gives an overview of data about the voluntary sector across the UK. It includes data on size and workforce.
- Nottingham Trent University VCSE Barometer website includes a range of reports about topical issues, such as the wellbeing of staff and volunteers and the uncertain financial landscape for VCSEs in 2025
- Trust for London Poverty Profile gives a breakdown of data on population, demographics, poverty and topics such as child poverty.

Stage 2: Writing your questions

4. Build on our recommended questions, based on sector best practice

When you start writing a survey, the blank page, or the volume of ideas from others can feel overwhelming. Luckily, we've already looked at 382 questions asked by 10 State of the Sector surveys to look at common questions for you. We discovered that surveys typically cover 8 key themes and have 32 common questions. Your survey will follow a similar pattern, covering the following themes and questions:

- **Organisation identifiers** (organisation name, charity number)
- **Organisation attributes** (legal status, income, staff numbers, leadership diversity)
- **Service delivery** (geographical operation, social issues addressed, client groups)
- **Organisation capacity** (organisational challenges, changes, opportunities and the impact of external challenges, such as the cost of living)
- **Financial situation** (income sources, funding secured, income changes, reserves)
- **Funding** (funding accessed, funding challenges and feedback for funders)
- **External relationships** (participation in networks and forums, relationship with statutory services, partnerships for service delivery)
- **CVS services needed** (support needs, training priorities, feedback)

You can browse and search our database of questions asked by other state of the sector surveys here. You can search, group or filter on this Airtable view, by lead organisation, question theme, classification or date.

We also believe that future surveys should follow sector best practice in terms of capturing data around diversity, equality and inclusion. The Funders Collaborative Diversity Equality and Inclusion data standard sets out a framework to monitor equity considerations in grantmaking. We propose that state of the sector surveys should ask about organisation leadership and communities supported in line with this framework, which is due to be updated late in 2025. The top level categories are most important to help create a comparable and collective data set across London. Whilst the categories shouldn't be changed, you can add to this list or include a second question with some more specific groups relevant to your area. Capturing this data overall will help funders see how your insights compare with their own. It will also help identify gaps in funding and service provision (as well as monitoring your survey reach).

To help further, we've put together a set of core questions you should ask and add to in your survey. These will ensure your survey captures valuable data for you and will be comparable with other geographies, contributing to a London-wide picture.

Core questions your survey should always ask for and why:

- **Organisation identifiers:**
    - **Organisation registration number:** To look up published information if needed (such as trustee and staff numbers)
    - **Organisation name:** To match the registration number or identify those which are not registered.
- **Organisation attributes**
    - **Organisation legal status:** To monitor responses and diversity of types of organisations in your sector.
    - **Annual income group:** To check small and large charities responded, benchmark to sector data (using the London VCSE sector dashboard for example) and to help you analyse differences in responses across your survey.
    - **Organisation leadership diversity:** This should align with the Funders Diversity Equality and Inclusion data standard (update due late 2025), where 75% or more of the Board /Management Committee AND 50% of senior staff self-identify as being led by a specific community or identity. This will allow you to identify any inequalities for organisations led by specific groups (for example, in funding accessed)
- **Service delivery**
    - **Client group / communities supported: This** should align with the Funders DEI data standard (update due late 2025). It will help you identify who your survey has reached and potentially gaps in service provision.
    - **Geographical location (office, borough):** This will help you identify which organisations are based in relevant boroughs.
    - **Geographical location (frontline services, boroughs or wards):** This will help you identify where organisations are benefiting communities locally.

You can view our core set of recommended questions here (there is an option to download these as a spreadsheet).

5. Check accessibility and relevance for smaller VCSEs

In our experience, larger charities tend to be over-represented in sector surveys. They will often have more staff (and capacity) to complete it and are more likely to hear about this from professional networks and social media. Incentives and outreach will help this (discussed below), but you also need to make sure your survey questions are tailored to smaller groups.

- **Make your questions relevant:** Small and newly formed VCSEs may not have departments, staff, trustees or grant funding. Ensure terms used are relevant and broad. For example ask about their team, staff and volunteers or their managing committee or board. You can also allow them to skip questions that may not be relevant (such as grant funding)
- **Think about the length and time taken for your survey.** We all write surveys with far too many questions when we have lots of input and we're excited by the difference this information could make. However, most people can only put aside 10-15 minutes to respond to a survey. Test the timing carefully. Surveys should rarely exceed 30 questions. Remember that tick boxes are quicker to complete than open questions. Lists of multiple choices should be capped to 10 (and less if possible)
- **Try to avoid required questions, always include a 'not applicable' option:** When we analyse survey data, we often see a high 'drop off' (participants stop completing surveys) when they reach questions with a 'required' response. Including a 'not applicable' option will help here. We also find that making questions optional will help people complete surveys overall, even if they skip a question.
- **Test the survey** with a smaller organisation (consider offering an incentive for this too). Ask for their feedback about the questions, focusing on any they struggled to answer or that put them off the survey

Filter questions and skipping page logic can be very enticing (especially when people give feedback on how to improve your survey). For example, you may have specific questions about grant funding, but some VCSEs will not have applied for or accessed this. Alternatively, you might want to ask about a topical issue (such as use of AI), but not all VCSEs will be engaging with this. However, there are some key considerations:

- The analysis can get tricky very quickly (particularly if you have limited skills, time or rely on spreadsheets). For instance, let's say 100 VCSEs complete a survey, of which 50 applied for grant funding. In a filtered question, 30 said their biggest funding challenge was regular grant rejections. In this scenario, it is easy to miss the filter in the analysis and come to the conclusion that 30% of VCSEs struggle with regular grant rejections. When you look at those who applied for funding, the figure is 60% struggle. This becomes more complex when you want to look at differences between small and large charities for example.

- Secondly, if the issue is topical, it could become more or less relevant to VCSEs next time you run the survey. You may also find that you want to change which questions are asked of everyone and/or only asked of some people and filtered from one year to the next. In other words, once filters are introduced, comparing percentages year on year is very challenging and can lead to issues with publishing your findings (for example, if there is a big discrepancy in figures).

It is much simpler to avoid filtering and reduce the number of questions which are only relevant to some respondents. It is also still inclusive to include a not applicable option (this will help your analysis when looking at response numbers) and to specify in the question 'if relevant'. If you have 3 or more questions, it is worth including a filter page. Always document your analysis decisions (these are easy to forget and hard to work out retrospectively) and follow the same method.

6. Plan comparisons and how you will slice the data (e.g. by size)

The best state of the sector reports show the overall picture for the sector, as well as highlighting any key differences between groups of VCSEs, to help make the case for where funding and support is most needed. Size is often a crucial part of this story. For example, Merton's State of the Sector Report in 2021 highlighted how small and micro organisations were more likely to have a decline in their income after the Covid-19 pandemic. Community Southwark's 2023 State of the Sector Report also highlights that funding challenges disproportionately affect smaller groups. Some reports have also identified inequality in access to funding or financial challenges. For example, the North East London State of the Sector Survey found that 61% of Global Majority-led VCSFEs report that their financial situation has deteriorated or remains challenging after the last 12 months, compared to 46% of other organisations.

Look at your questions with this type of analysis in mind. If you want to compare specific groups, make sure you have one key question that helps you do this. The question should:

- Have clear, mutually exclusive response options (that don't overlap). These can be factual (such as annual income) or self-defined (for example, global majority led)
- Potentially be selected by a high enough number of responses, both for those who select it and those who do not. Otherwise you can't meaningfully analyse or compare responses. It helps to keep your response options broad (or if you need granular options, ensure groups can be combined later)
- Ideally to help you with your analysis, be a yes/no answer or a single select. Analysis is possible using a tick box, but you will have to manually classify and analyse data for who has not ticked that box. Some survey platforms (such as Survey Monkey) make it very simple to compare responses for yes/no or single select options.

VCSE size, using income bands, is a great example of this. Income bands are single select options and different size bands can be compared individually or grouped into small and large. This can also be benchmarked in comparison to wider sector data, using the Superhighways VCSE dashboard or the NCVO Almanac, or even other reports.

Size is currently asked about in lots of different ways across each survey. Furthermore, the NCVO Almanac uses a grouping of £100,000 - £1 million, which overlooks the nuances of small organisations. Using the following categories will allow you to do both (they can be grouped to match sector data). You can also break this down further, but this will lead to small response numbers for each group, making the differences harder to compare. You can also combine the groups, but the analysis will take a lot longer.

- £0 - £10,000
- £10,000 to £100,000
- £100,000 to £500,000
- £500,000 to £1m
- £1m - £10m
- £10m+
- We are newly formed / do not have a year of accounts yet
- I don't know/prefer not to say

Stage 3: Launching your survey and report

7. Offer incentives

More often than not, people complete your survey because they know and trust you and/or your organisation. However, they are still giving their time and they will be more likely to do this if they can see clear benefits for them, their organisation and the sector.

Take time to really consider and build on why it's valuable to them. Once you've done this, include it in your survey design, introduction and outreach. Examples we've used or seen in sector surveys include:

- A chance to reflect on where your organisation is
- A copy of your responses to take back to your team / board
- Influence funding and support in your sector (you can demonstrate this by sending a thank you note later on and saying what you did)
- Links to key guidance and advice online
- Learn about this by completing the questions
- Sign up to receive a copy of the report
- Invites to take part in further workshops for support
- Follow up one to one advice session or information on support
- It will help us demonstrate our impact and report to our funders
- Other charities found it helpful to…(e.g. decide on their next steps)
- Our stakeholders use the data (quotes or data helps!)

Voucher payments or a prize draw for financial incentives can also show potential respondents that you appreciate their time and may give a final nudge to complete the survey.

8. Promotion is vital, create a comms plan

The biggest hurdle to creating a great state of the sector survey is getting enough responses to analyse. Ideally, you want at least 100, especially if you want to compare responses (for example for small and large organisations. More responses will give your report greater legitimacy.

Ideally, your survey should be open for a minimum of 4 (and ideally 6 weeks, any longer and it may be forgotten). This should give enough time for charities to find out about the survey, with time to complete it. It takes time to schedule completing a survey around any important meetings, holidays, funding or report deadlines, staff sickness or capacity issues.

The following actions will help you reach more VCSEs:

- Create a timeline and plan for promoting the survey before you launch it. Ensure there are no likely competing surveys or events
- Let key networks, stakeholders and contacts know you plan to launch this survey (and the date) well in advance. This will give them time to schedule content in newsletters and social media which features your survey
- Organise meetings with like minded organisations to share your work and survey in advance, getting their ideas and support for promotion
- Identify where you could encourage VCSEs to complete the survey with you in person, for example, when they contact you or attend events
- Newsletters and Linkedin are great ways to reach VCSEs. Try to feature in as many ways as possible.
- Maintaining an active mailing list throughout the year will give you a great starting point

Whilst the survey is live, the following will also help

- Share an interim update about responses, any gaps and emerging findings to attract interest. Consider writing a blog post or article to promote this and invite more people to take part.
- Check who is responding - identify any gaps in responses by size or other key characteristics (such as area or EDI). This will give you time for further outreach if there are any gaps (see our next recommendation).
- Identify opportunities to share the survey in sector press (writing articles)
- Share the survey at conferences, workshops and meetings. A QR code may help.
- Accessible and alternative formats to complete the survey, such as paper, telephone calls and time at the end of events may also aid completion

It is always tempting to extend your deadline if you don’t get enough responses, but from experience, this typically only attracts one or two extra. This will only be worthwhile if you put significant extra effort into your outreach (such as an event where people can complete the survey). You can avoid this by investing in promotion upfront.

9. Collaborative analysis

It's always tempting to analyse your data solo (or pay someone to do this), but a good report needs a whole team involved from start to finish. Both are possible to coordinate. From our experience, the following can help the process:

- **Create data tables.** When analysing the data, spreadsheets and notes can quickly get messy. One person should be responsible for the data and they should create a finalised set of data tables to share across the team. You can find a public example of data tables here (Survey Monkey allows you to extract these automatically). In this, summarise responses for each of your questions overall and data tables for any further analysis you do to compare groups. You could also include any sector data you use (with dates and links) as well as the tables used to create key visuals and charts. Reports often take time to create and questions always crop up later, so it helps to have a point of reference to return to and discuss further.
- **Don't forget your open responses.** Highlight those which will be great to include as quotes in a report or on social media. You can also identify key themes as a source of data for your report. Use this Superhighways guide to help you get started with analysing qualitative data.
- **Write a dedicated internal analysis document.** Share this with your team and discuss. This will help you all identify what's interesting, ask questions of the data and identify further analysis that everyone wants to spend time on. The process will give you all confidence about what to include in the report and start thinking about visualisations you want to create.

10.Make your report stand out

We all know that reports are often skim read, at best. Those which are easy to read, visually attractive and well designed are more likely to attract attention.

You need to make sure that when the right people come across your report, they can understand the key insights and why they matter quickly. The rest of your report gives those key insights legitimacy and a point of reference to return to when it matters most.

Even if you cannot pay a designer (or if you can) we have several top tips for making your report stand out.

- Canva is a free design tool for charities to use and is ideal for a report. This will also give you ideas for design templates and colour schemes you can use (or adapt to your own branding). You can get ideas from this Superhighways resource showcasing options to visualise state of the sector data as well as from existing State of the Sector reports.
- Data visualisations are key to communicating your findings quickly. Test options to create simple but clear infographics, charts and maps to communicate your insights. Datawrapper is another free tool to create charts and maps. These can be embedded in webpages or Canva. You can also download an image to use.
- Include quotes, case studies, stories and photos to make your report less text heavy.
- Find a proofreader who checks your data thoroughly in your report, with your data tables - it is very easy to mix up figures as different people get involved in the report writing and design.

Taking your next steps

We hope you now have a clear idea of the steps you can take to design a great state of the sector survey and report.

We hope you use our recommended questions and we would love to hear feedback on these.

Please contact us at Superhighways to share any challenges and learning from using any of the tools or methods we suggested.