

# DEVELOPMENT TRUSTS ASSOCIATION SCOTLAND

## Members Survey

This report presents the findings of DTAS's 2026 Members' Survey, showing how development trusts across Scotland are performing, what's holding them back, and what would help them be resilient

September 2026

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## How to read this report

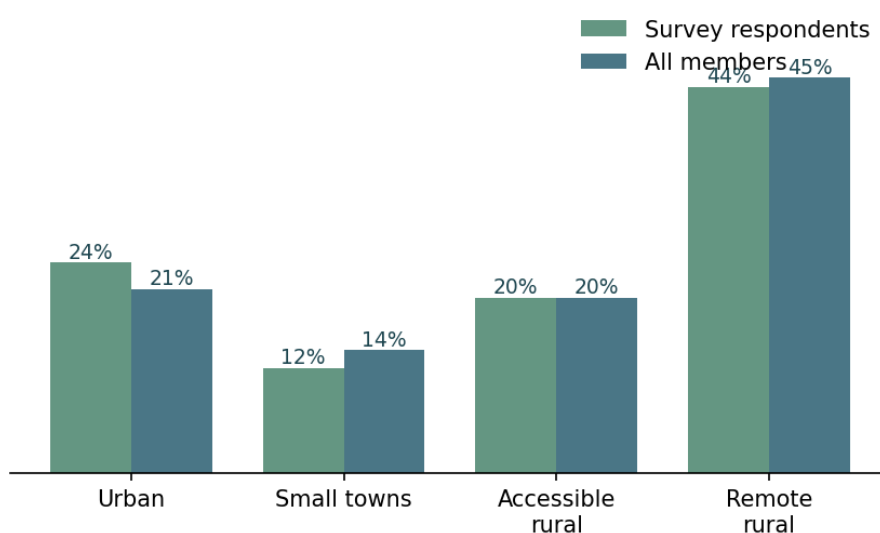
This report brings every strand of the 2026 Members' Survey analysis into one place. Everything in it is drawn directly from members' answers and from the analysis already produced for the 2026 survey: the full results report, the chart pack and its data tables, the "Where and who" place deep-dive, the "Us and the sector" SCVO comparison, the correlation analysis workbook and the "Voice of the member" quote bank.

The survey ran in mid-2026 and received 172 genuine responses – around half of the membership, in line with the 173 responses in 2023. One further entry was a test used to check the survey was working and is excluded from every figure. Each percentage is of the members who answered that particular question, not of all 172, because not everyone answered every question. Where percentages describe themes in written comments (for example, what would most help members thrive), they come from reading and grouping more than 800 comments – a single comment can touch more than one theme, so these are an indicative guide rather than a precise survey statistic. Financial figures were typed in freely by members and were cleaned and interpreted; a small number of unusable answers were left out. Most figures are rounded, so totals may not always sum to exactly 100%.

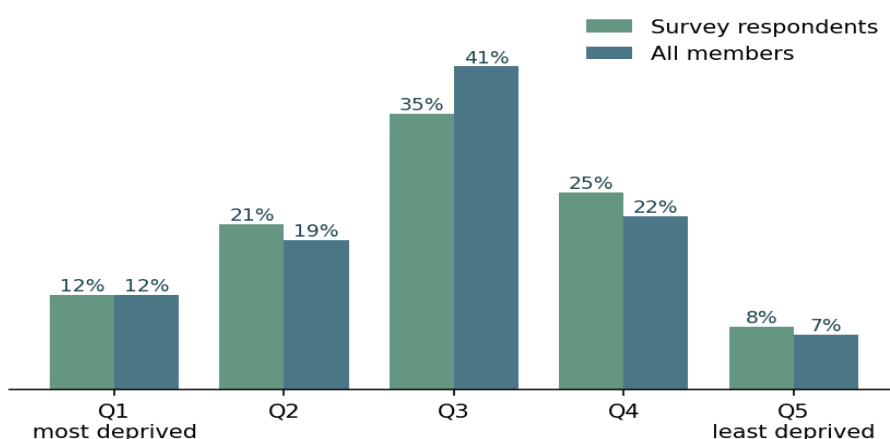
### Is this survey representative?

Before drawing conclusions, it is worth checking that the members who responded look like the membership as a whole. They do. The share of respondents in each area type, and in each deprivation band, closely matches the full membership – within a few percentage points across the board. We can therefore be confident that these findings reflect the wider network, not just those who chose to reply.

### Our respondents mirror the membership – by area type



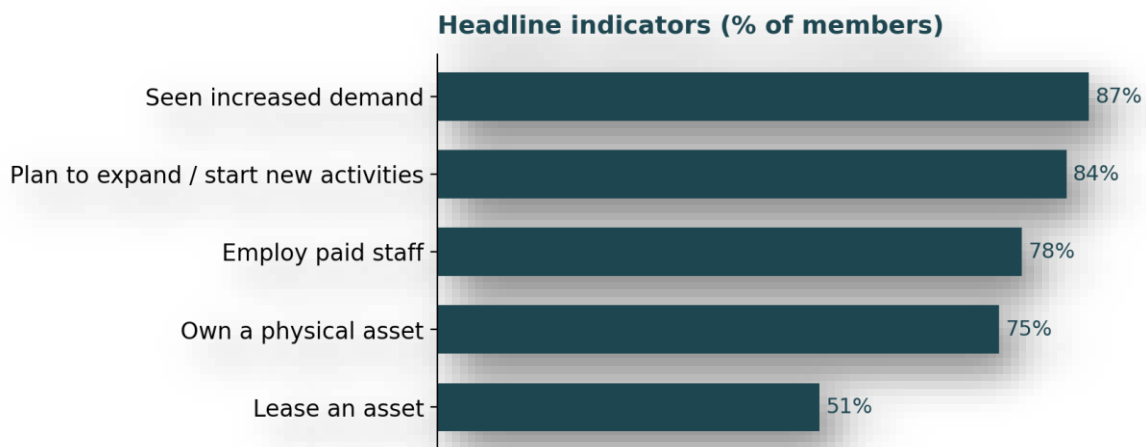
### ...and by level of deprivation (SIMD quintile)



The only small differences are a slight under-representation of small-town and mid-deprivation (Q3) trusts, and a slight over-representation of urban and Q4 trusts. None is large enough to skew the overall findings. **This is a genuinely representative sample of the DTAS membership.**

A note on the structure. The six Pillars of Resilience used to organise this report are themes drawn from the survey's own question areas – people, money, assets, activity and resilience. They are an organising device for this document, not an official DTAS framework: no formal pillar-to-question mapping existed in the survey materials, so the questions have been grouped under the theme they most naturally belong to, and each section names the questions it covers.

## The movement at a glance



Five numbers set the scene for everything that follows. 87% of members have seen demand for their activities increase, and 84% plan to expand or begin new activities in the coming year. 78% employ paid staff, 75% own a physical asset such as a building or land, and 51% lease an asset. This is a movement that is busy, ambitious and growing – and the rest of this report shows both what powers that ambition and what puts it at risk.

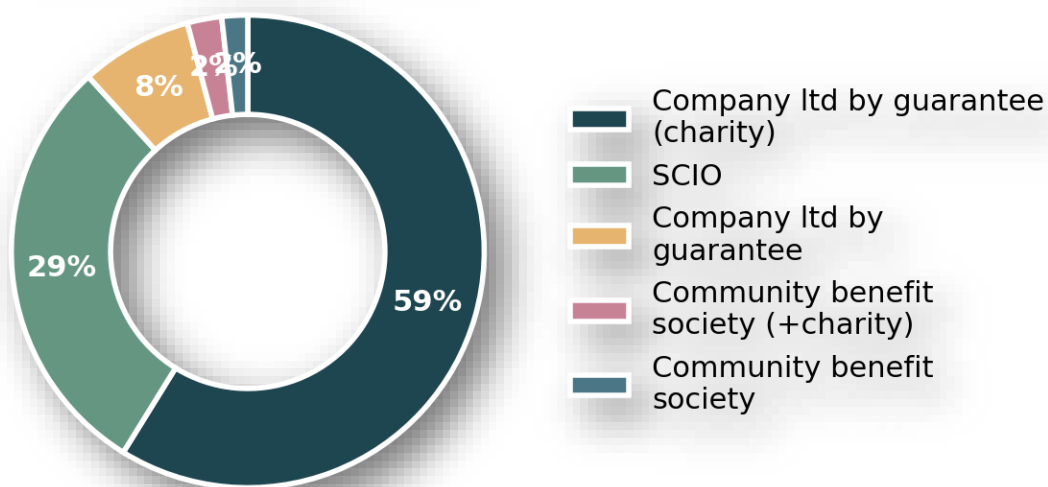
Members also reported a combined 31,535 community members, 1,341 board members, 4,818 active volunteers, roughly 900 employees by headcount, and £37.3 million of combined annual income.

## Pillar 1 — Governance

This pillar covers the survey questions on who members are as organisations, how their boards are made up, how boards recruit, and how well boards reflect the communities they serve. Governance is the foundation the rest of the movement rests on — and, as the data shows, it's also where the sector's age imbalance is most visible.

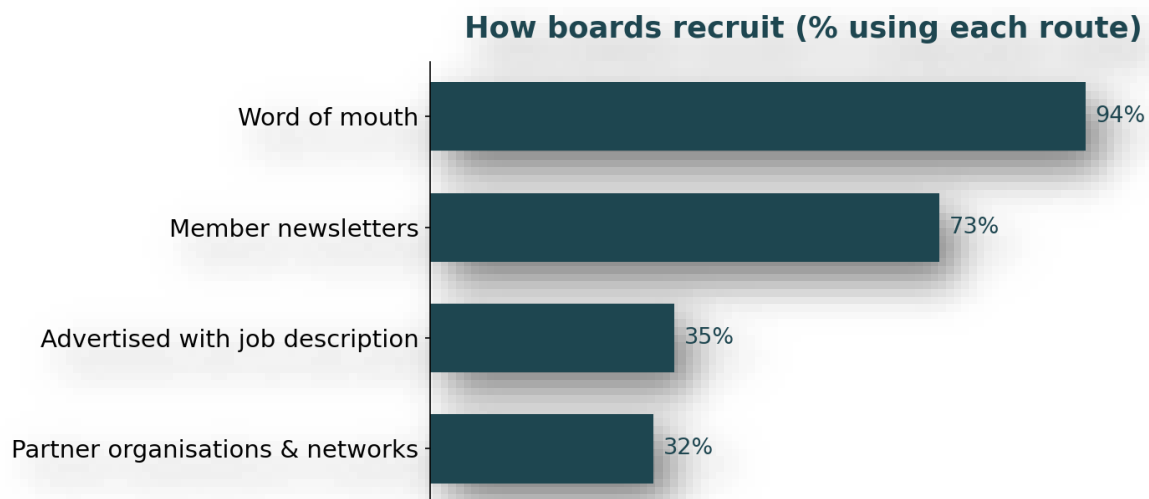
### Who responded: the organisations behind the people

#### Legal status of members



The 172 organisations that responded reflect the full range of the movement, from small volunteer-run trusts to large employers managing multi-million-pound assets. Most are charities: almost six in ten (58%) are a company limited by guarantee with charity status, and a further 29% are Scottish Charitable Incorporated Organisations (SCIOs). The remainder are companies limited by guarantee without charity status (8%) or community benefit societies (5%).

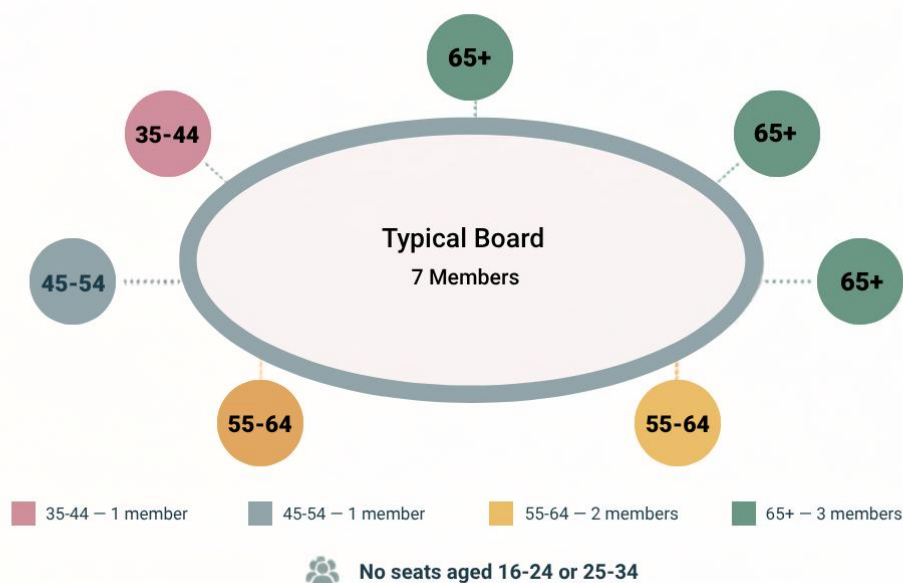
### Boards — size and how they recruit



Members reported a combined 1,341 board members. The typical organisation has around 7 board members, and boards are generally small: most have fewer than ten members, which places a heavy load on a small number of volunteer directors. Members also reported a combined 31,535 community members – typically around 120 per organisation, though the average of 188 is pulled up by a few very large trusts.

## Age Breakdown

Boards are weighted heavily towards older age groups. Members reporting a board member aged 65 or over made up the largest single age group (446 of 1,341 board members, or 33%), while only 6% of members have a board member aged 16-24. Representation rises steadily with age – from 6% in the 16-24 band up to 91% in the 55-64 band – before dipping slightly to 85% in the 65+ band.



## Gender

Board gender balance is fairly even overall. Based on the 1,333 board members for whom gender was reported, 700 are male (52.5%) and 618 are female (46.4%), a gap of just over six percentage points. Non-binary board members and those who preferred not to say or whose data was not collected make up a small remainder (3 and 12 respectively, under 1% combined).

Applied to a typical seven-person board, this works out to roughly 4 male and 3 female members, with non-binary and undisclosed representation too small to register as a whole seat at that size.

## Recruitment

Recruitment remains overwhelmingly informal. Word of mouth is used by 94% of members and member newsletters by 73%. Only around a third advertise roles with a job description (35%) or recruit through partner organisations and networks (32%). This reliance on personal networks may partly explain why boards find it hard to broaden their membership.

## How representative are boards?



Members rated how well their board reflects the diversity of their community at an average of around 3.4 out of 5. Just under half (47%) chose the mid-point of 3, and only 9% felt their board was very representative.

We asked members to rate how well their board reflects the diversity of their local community – considering age, gender, ethnicity, disability and socio-economic background – on a scale of 1 (not at all) to 5 (very well). In their comments, members most often pointed to age as the area they struggle with: boards tend to be older, and recruiting younger trustees is difficult. Gender balance was generally reported as reasonable. Lower ethnic diversity was very frequently attributed to the make-up of the local population, particularly in rural and island communities, rather than to a lack of effort to be inclusive.

*"The range of ethnicities in our area is very small, so in that light our Board is not unrepresentative. We are aware that women, young people and those with disabilities are not fully represented, but in our work we aim to include these groups."*

— Sustaining Dunbar

## Pillar 2 — People and Operations

This pillar covers the people who make development trusts work: paid staff and the volunteers and board members who govern and deliver alongside them. It looks at how many members employ staff and what that changes, the age and gender makeup of both staff and boards, the roles staff hold, and the pressures — on staff wellbeing and on volunteer capacity — that members are managing day to day.

### Paid staff — do members employ, and what does it change?



Around four in five members (78%) employ paid staff, broadly in line with 2023. Between them they reported 557 full-time-equivalent posts and, counted by headcount across contract types, roughly 900 employees. Permanent contracts are the most common (about 494 posts), followed by fixed-term (270); a smaller number of roles are sessional or zero-hours, reflecting the seasonal and project-based nature of much community work.

Members told us that employing staff transforms what they can do. The most commonly reported benefits were improved governance (54%), better coordination of volunteers (47%), stronger financial management (46%) and longer opening hours (36%). Many wrote that a single paid post — often a development officer or manager — is the difference between simply keeping going and being able to plan, grow and pursue new projects.

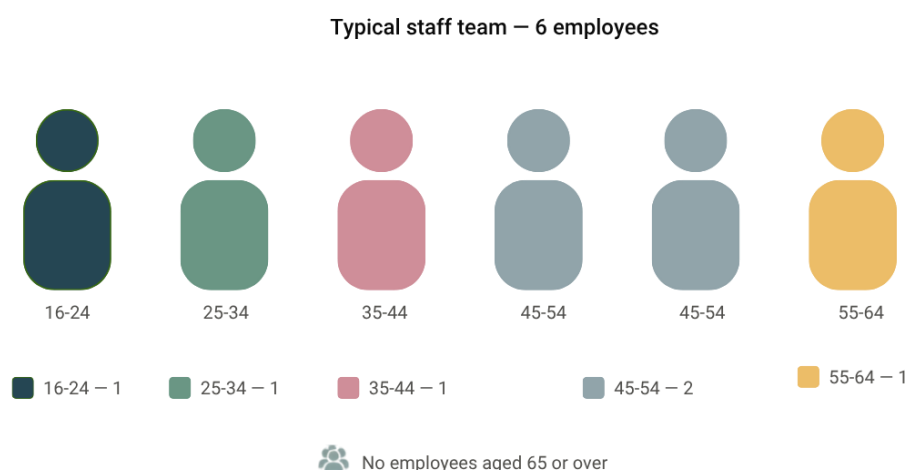
### Age Breakdown

Age data is not available for all employers — the figures below are based on the 124 organisations that provided a complete age breakdown for their staff, totalling 746

employees. Within this group, the largest age group is 45-54 (210 staff, 28.2%), followed by 35-44 (149, 20.0%) and 55-64 (145, 19.4%). The youngest and oldest bands are the smallest, at 9.8% (16-24) and 7.8% (65+) respectively, with 25-34 accounting for 14.9%.

This is a markedly different profile to boards, where representation is concentrated almost entirely in the 55 and over age bands and under-35s are close to absent. Staff, by contrast, are present in meaningful numbers across every band, with a peak in the 35-54 working-age range rather than at the older end. This suggests the age imbalance seen on boards reflects something specific to how trustees are recruited and retained, rather than a lack of younger people engaged in the sector more broadly.

A typical member employing staff has a team of around 6 people. Applying the age split above, that team would typically include 1 employee aged 16-24, 1 aged 25-34, 1 aged 35-44, 2 aged 45-54, and 1 aged 55-64 – with no one aged 65 or over. This is a far more even



spread across the working-age range than the typical board, which has no members at all under 35 and is dominated by the 55+ age bands.

## Gender

Staff gender balance looks quite different to boards. Based on 907 employees reported across the 136 organisations that submitted data, 616 are female (67.9%), 287 are male (31.6%), and 4 are non-binary (0.4%).

Applied to a typical six-person staff team, this works out to roughly 4 female and 2 male employees, with non-binary representation too small to register as a whole post at that size.

The gender profile of paid staff is markedly different from that of boards. Staff are 67.9% female and 31.6% male, while boards are close to balanced at 52.5% male and 46.4% female – effectively the reverse pattern. In other words, women make up a clear majority of paid staff delivering services day to day, but hold a smaller share of the trustee seats that govern the organisation. This is worth setting alongside the age findings: boards and staff diverge in opposite directions on both measures – staff are younger and more female, while boards

are older and slightly more male — suggesting the people who lead these organisations don't closely mirror the people who work in them.

## Roles

Based on 135 organisations reporting, staff are heavily concentrated in frontline delivery. Frontline/delivery staff make up by far the largest share (47.2%), followed by officer-level roles (15.9%) and assistant/support staff (15.6%). Management posts account for 112 roles (12.5%), while senior leadership (4.8%) and chief officer/CEO posts (4.0%) make up the smallest groups.

This shape is what you'd expect for community-facing organisations: nearly two-thirds of paid roles (62.8%) sit in frontline delivery or assistant/support positions, while formal leadership and management combined account for just over a fifth (21.3%). It reflects a workforce built to deliver services directly, with a comparatively thin layer of paid management and senior leadership sitting above it.

Applied to a typical six-person staff team, this works out to around 3 frontline/delivery posts, one management post, one officer post, and one assistant/support post — with no dedicated chief officer or senior leadership role at that size. This doesn't mean smaller organisations go without leadership; it more often means that function is carried by whoever holds the management or officer post, rather than existing as a separate title. It reinforces the point members raised elsewhere in this survey: a single paid post, often a development officer or manager, can be the difference between an organisation simply keeping going and being able to plan, grow and pursue new projects.

## Staff wellbeing



Around half of employers said **staff wellbeing has been a significant challenge** in the past year (19% “yes”, 30% “to some extent”).

Where members employ staff, most are trying to look after them: 45% said they have a culture that prioritises staff wellbeing and a further 31% do so to some extent, while 54% provide access to training and skills support. At the same time, staff wellbeing has been a significant challenge in the last year for around half of employers. Comments frequently described small teams stretched thin, staff reducing their own hours to balance budgets, and the strain of losing a key member of staff.

*"Our staff team have had to reduce our hours because of a lack of funding, and this is having a detrimental effect on staff wellbeing – no reduction in work, but a reduction in time and pay."*

— **Mayfield and Easthouses Development Trust**

## Volunteers



**4,818 active volunteers** – an average of 30 per organisation, up from 28 in 2023.

Volunteers remain the backbone of the movement. Members reported 4,818 active volunteers, an average of 30 per organisation, up from 28 in 2023. But this strength is also a pressure point: a shortage of volunteers – and of volunteer directors in particular – was the single most common barrier to resilience (see Pillar 5), and succession planning for boards was a recurring worry.

*"Like most organisations we rely on a small handful of people to drive things forward, and we have too few volunteers for a range of potential priorities."*

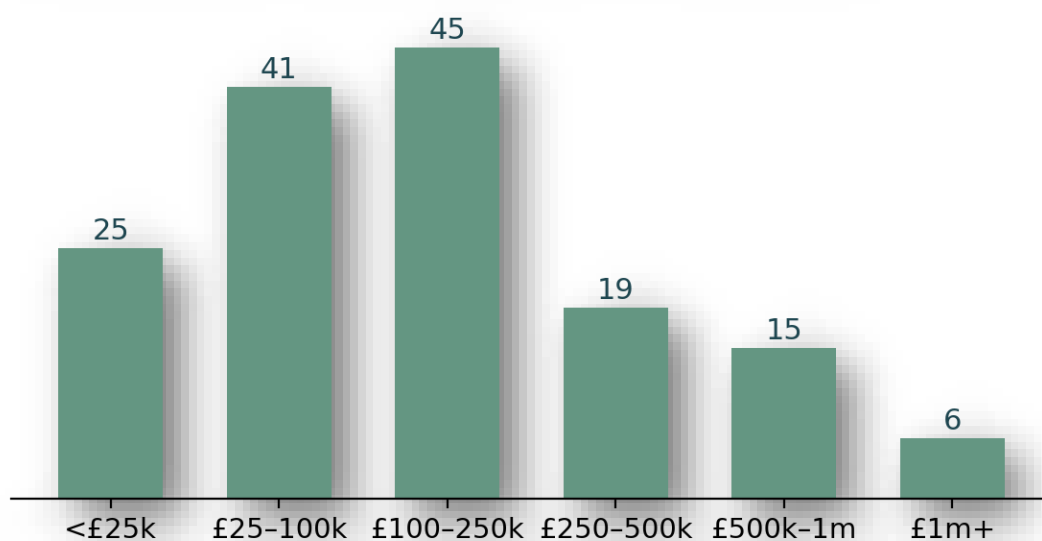
— **Borthwick Water Community Development Trust**

## Pillar 3 — Finance, Funding and Enterprising

This pillar covers the questions on annual income, earned income and grant reliance, financial reserves, community benefit funds and community energy, and alternative finance. The picture is of a movement working hard to diversify while its funding base remains fragile.

### Annual income

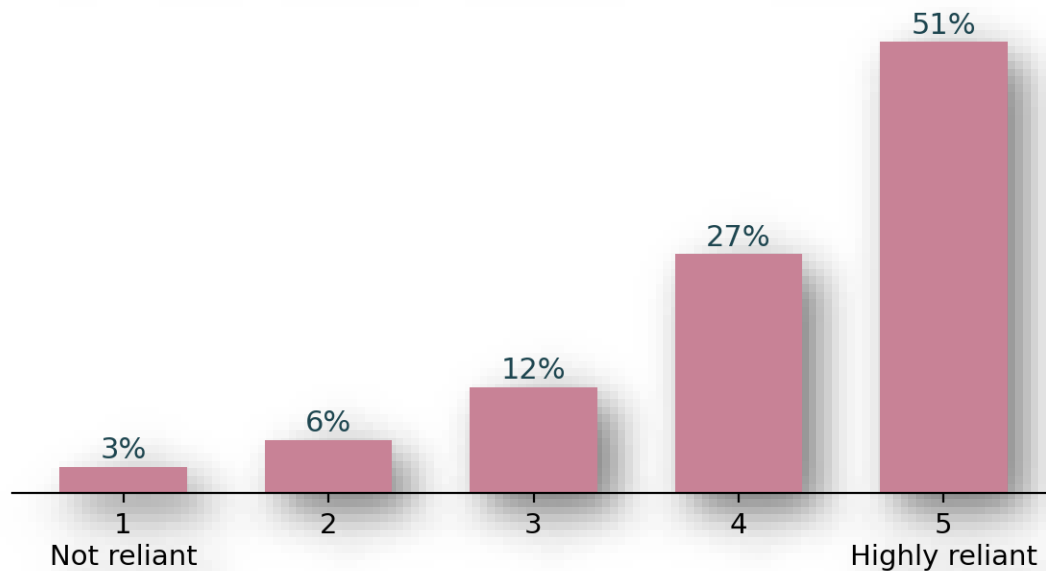
#### Total annual income (number of members)



The members who shared income figures reported a combined annual income of £37.3 million. The typical (median) organisation has an income of around £124,000, though this ranges from under £25,000 to well over £1 million: 25 members reported under £25,000, 41 between £25,000 and £100,000, 45 between £100,000 and £250,000, 19 between £250,000 and £500,000, 15 between £500,000 and £1 million, and 6 over £1 million. The spread shows just how varied the movement is. Note that the £37.3m total is the sum reported by the members who gave a usable figure, not the whole membership.

## Earned income and grant reliance

### How reliant on grant funding? (% of members)

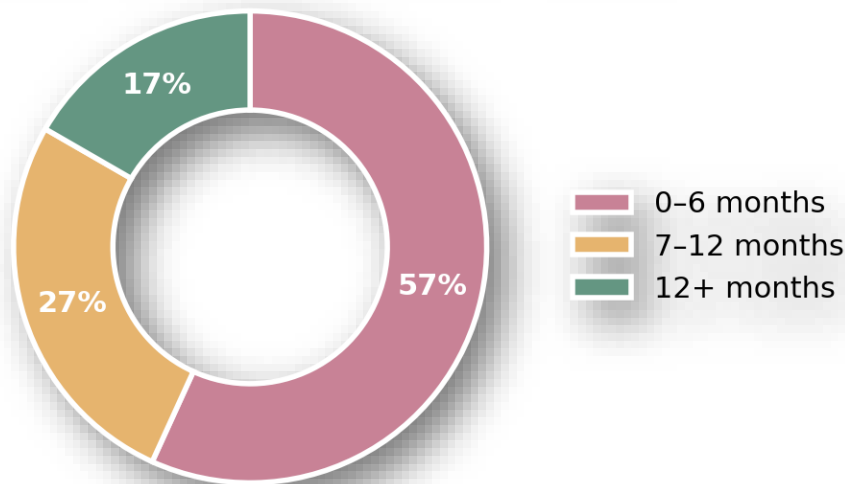


On average, members earn about 30% of their income from enterprise and trading – though this is pulled up by a small number of organisations with high trading income. The median figure (the midpoint across all members) is 20%, which better reflects what a typical member experiences). Sales (56%) and hiring out space or equipment (52%) are the most common ways of generating income, followed by service level agreements and contracted work.

But grant funding still dominates, and reliance on it appears to be deepening: 51% of members now rate themselves 5 out of 5 for grant reliance, up from 46% in 2023. More than three-quarters (77%) rated themselves 4 or 5 out of 5 this year. This is a clear signal that, despite members' efforts to trade and diversify, the funding base of the movement remains fragile

## Financial reserves

### Unrestricted funds held (financial runway)



Reserves are thin. Just over half of members (53%) hold less than six months of unrestricted funds, a quarter (25%) hold seven to twelve months, and only 16% hold more than a year's worth. For many organisations, a single delayed grant or unexpected cost could threaten services.

## Community benefit funds and community energy



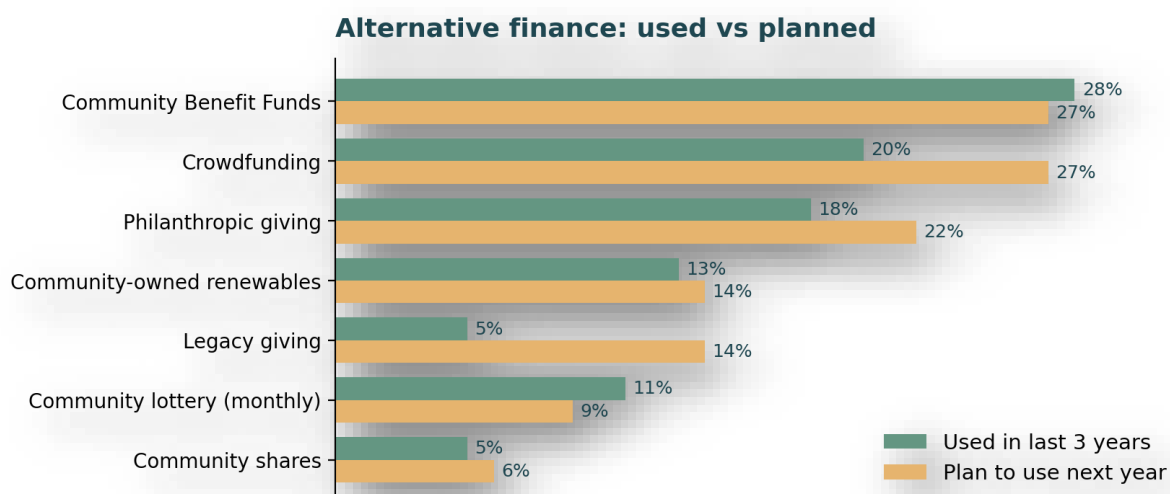
23% receive Community Benefit Funds (unchanged from 2023) · 19% wholly own a renewable installation · 7% have shared ownership · 23 members asked for community energy support and 17 for community benefit fund support.

Around 23% of members receive Community Benefit Funds from renewable energy developments — the same share as in 2023. Most receive these either through a grant application to an intermediary panel or as a recurring payment direct from the developer. Nearly one in five members (19%) reports wholly owning a renewable energy installation, most commonly solar, and a further 7% have a shared-ownership arrangement with a developer. (A few of the “wholly own” responses describe part-ownership through a

subsidiary or a share of a scheme, so treat the figure as “report owning some renewable capacity”).)

There is clear appetite for more help here: 23 members asked for support to explore or manage community-owned energy, and 17 asked for support to negotiate or manage community benefit funds – a strong mandate for the Democratic Finance team.

## Alternative finance – what members use and plan to use

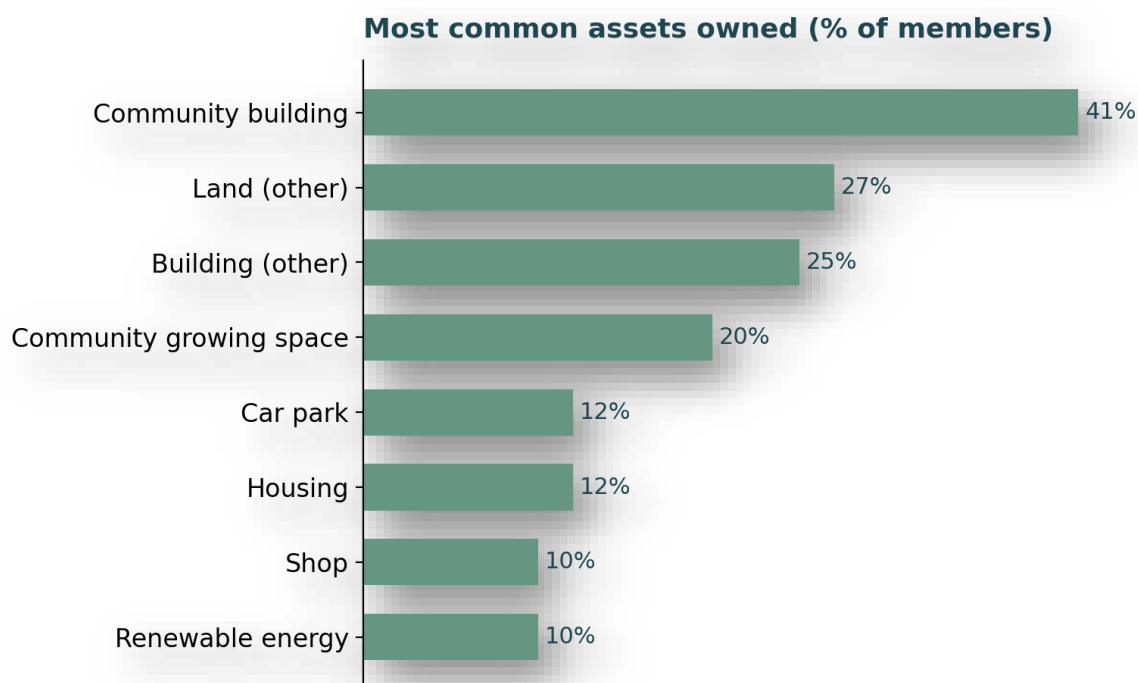


Beyond grants and trading, members are experimenting with a range of alternative finance. Community benefit funds (used by 28%), crowdfunding (20%) and philanthropic giving (18%) are the most used. Looking ahead, more members plan to try crowdfunding (27%), philanthropic giving (22%) and legacy giving (14%, up from 5% who have used it) – a sign of growing willingness to diversify.

## Pillar 4 — Assets

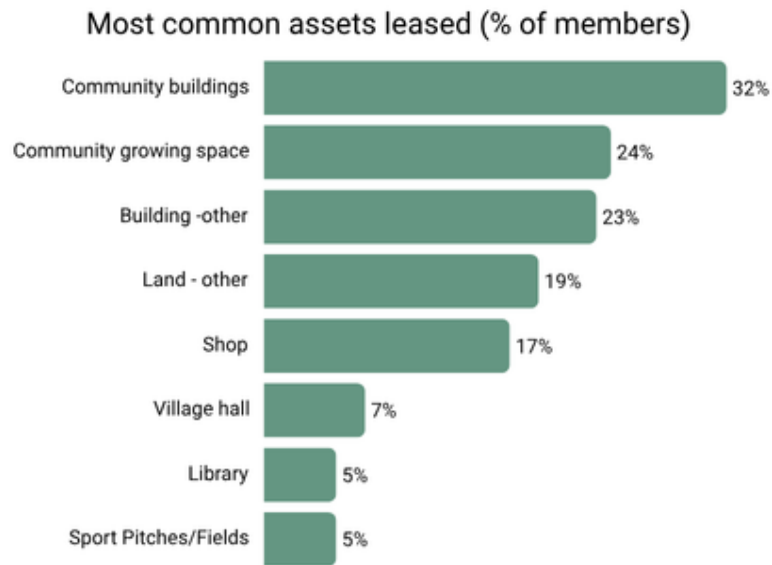
This pillar covers the questions on owning and leasing assets, which assets members hold and which generate income, how members got into ownership, and what made the journey hard. Owning and running assets is central to what development trusts do — and it is what most distinguishes them from the wider third sector.

### What members own and lease



Three-quarters of members (75%) own a fixed asset such as a building or land, and just over half (51%) lease assets — a notable rise from 35% in 2023. Community buildings are by far the most common asset owned (41%), followed by land (27%), other buildings (25%) and community growing spaces (20%); car parks, housing, shops and renewable energy installations each feature for around one in ten members.

Where members lease rather than own, community buildings are again the most common asset (32%), followed by community growing space (24%), other buildings (23%), land (19%) and shops (17%). Village halls, libraries and sports pitches feature for a smaller number of members. The pattern is broadly similar to ownership — buildings and growing space dominate either way — though leasing shows a somewhat heavier weighting towards growing space and shops relative to ownership.



Assets are not only community hubs, they are income generators: community buildings, shops, other buildings and caravan or campsites were the assets members most often reported as generating a surplus.

*"When we first learned that Forestry and Land Scotland had a redundant office building and a workshop we did not exist as a competent body to start the Asset Transfer. Indeed we had never heard of the process. All we knew was that our rural community owned no assets and that the hotel was likely to close. So starting with ZERO knowledge..."*

— Cairnbaan Community Trust

## How members reached ownership — and how hard it was



30% reached ownership through negotiated sale or lease and 28% through Community Asset Transfer; formal Community Right to Buy routes were used by only a handful.

Members who have been through the ownership journey were candid about how hard it is. The most common challenges were the time and capacity required, complex and slow processes, and the cost of funding, legal work and valuations. Several contrasted how

straightforward it is for a private buyer with how complicated and expensive it is for a community body to buy the same asset.

*"When a private company buys a publicly owned asset it's fairly straightforward. But when a community body does, it's incredibly complicated and costs a lot just to get to the point of purchase. If community bodies are going to fill the space left by local authorities, this really needs to change."*

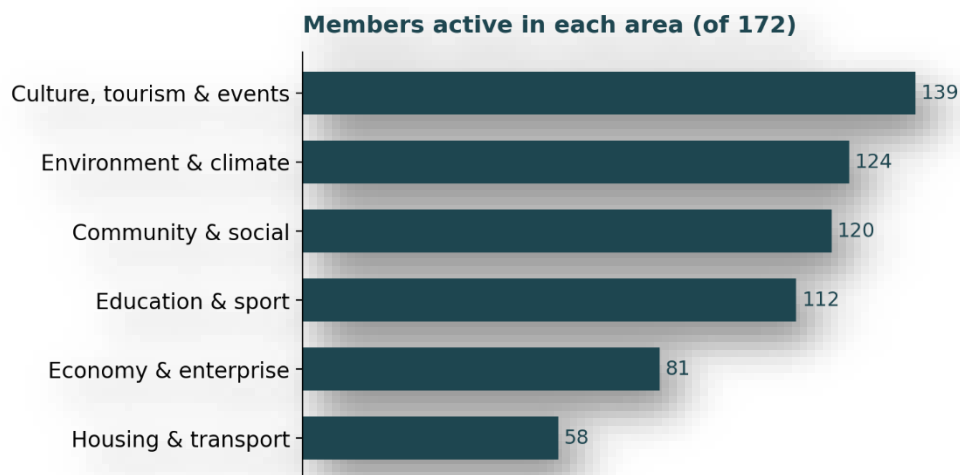
**— Glengarry Community Development Trust**

## Pillar 5 — Communication, Engagement and Impact

This pillar covers the questions on what members do, whether demand is changing, whether members delivered what they planned, and their plans for the year ahead.

### What members do

Members deliver an enormous range of services and activities. Almost all (98%) run their own activities, and around a fifth also give grants or donations to other local organisations and individuals — meaning many trusts act as funders within their own communities. The most common areas of work are culture, tourism and events (139 members), environment and climate (124) and community and social services (120), followed by education and sport (112), economy and enterprise (81) and housing and transport (58). Within these, events and festivals, health and wellbeing, community growing, and education and training stand out as the activities members deliver most.

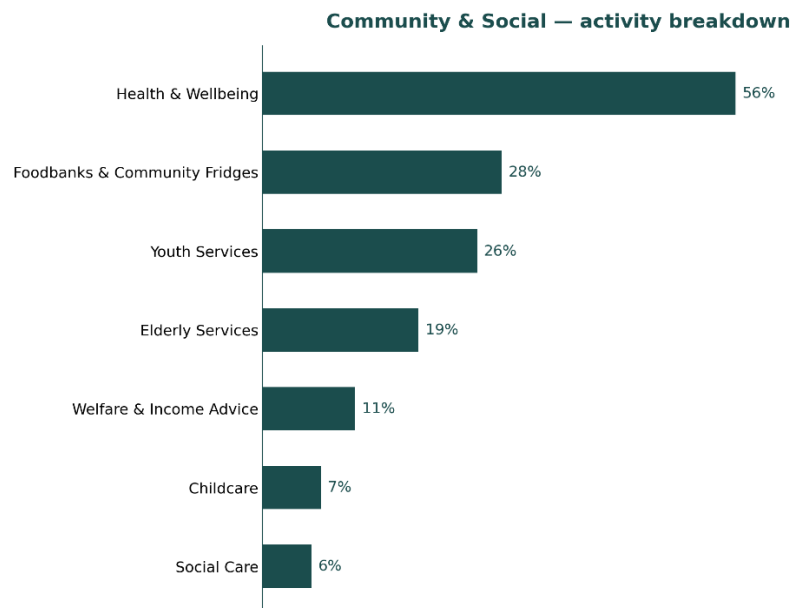


*"People resources are our biggest inhibitor — we have more work than we have people for. The Trust is built on big ambitions, but continuing to deliver on that scale creates burnout in trustees and pressure on volunteers."*

**— KPT Development Trust**

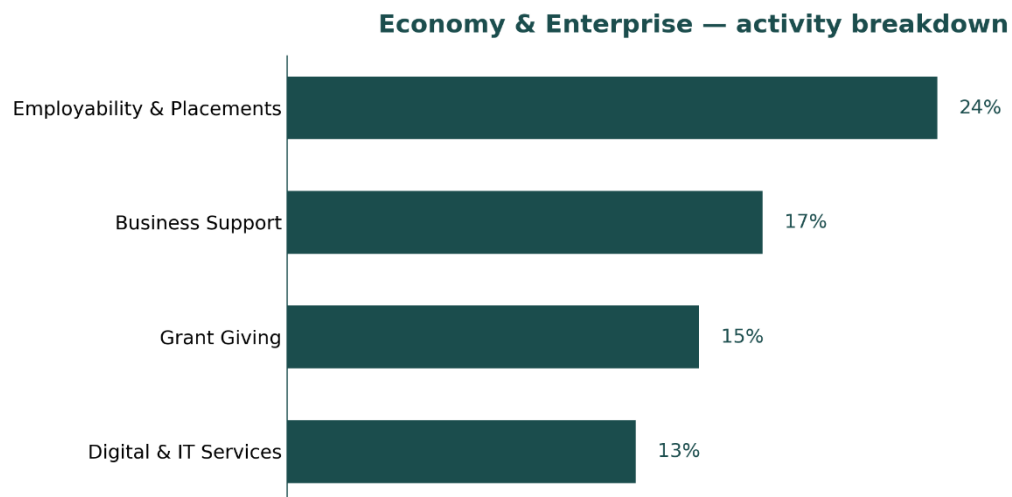
## Community & Social

Health and wellbeing is by far the most common activity in this theme (56% of members), well ahead of foodbanks and community fridges (28%) and youth services (26%).



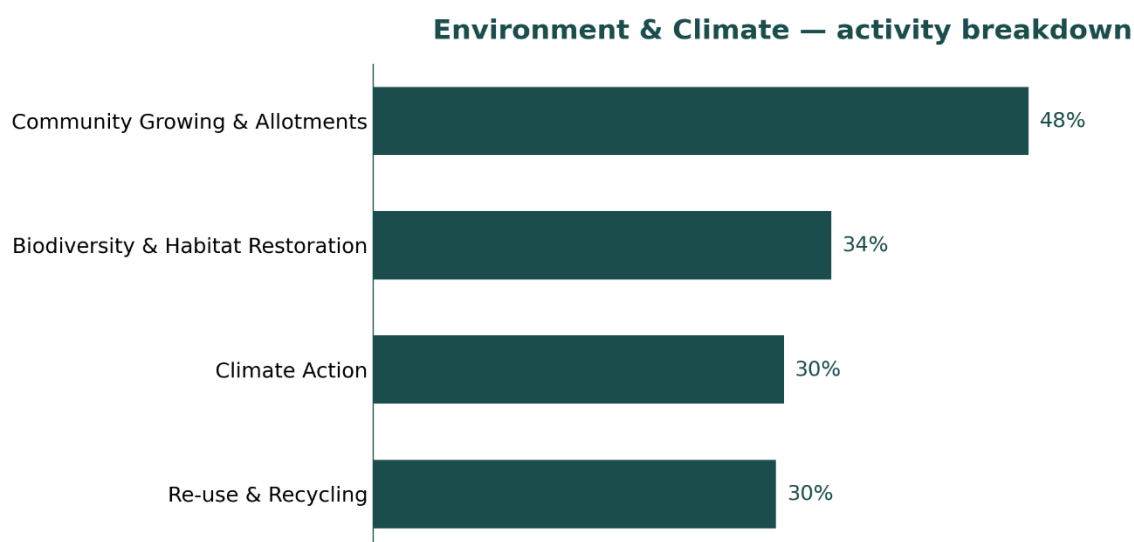
## Economy & Enterprise

Employability and placements is the leading activity (24%), followed by business support (17%) and grant giving (15%) – the figure behind the "around a fifth" grant-giving statistic above.



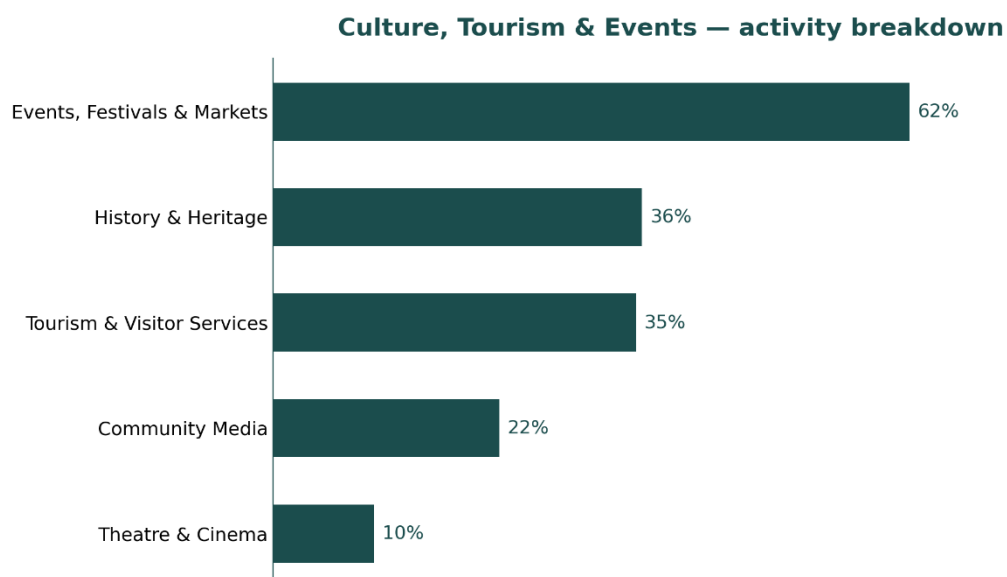
## Environment & Climate

Community growing and allotments leads (48%), but members are typically active across several strands here rather than just one – biodiversity, climate action and re-use and recycling all sit close together at 30-34%.



### Culture, Tourism & Events

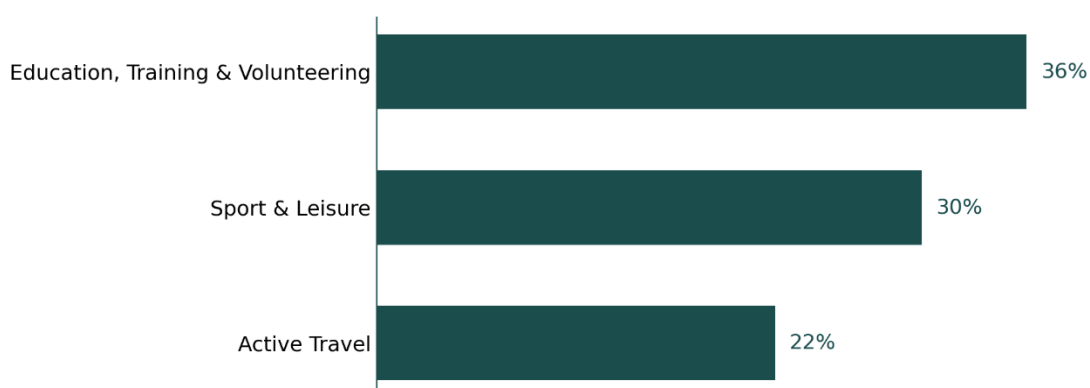
Events, festivals and markets dominate this theme (62% of members), the single most common activity across all six themes, followed by history and heritage (36%) and tourism and visitor services (35%).



### Education & Sport

Education, training and volunteering (36%) and sport and leisure (30%) are the two leading activities, with active travel (22%) also widely delivered.

### Education & Sport — activity breakdown



### Housing & Transport

Housing (26%) is delivered by more members than transport (16%), the smallest theme overall.

### Housing & Transport — activity breakdown



## Demand, delivery and plans



87% have seen demand increase · 84% plan to expand or begin new activities in the coming year.

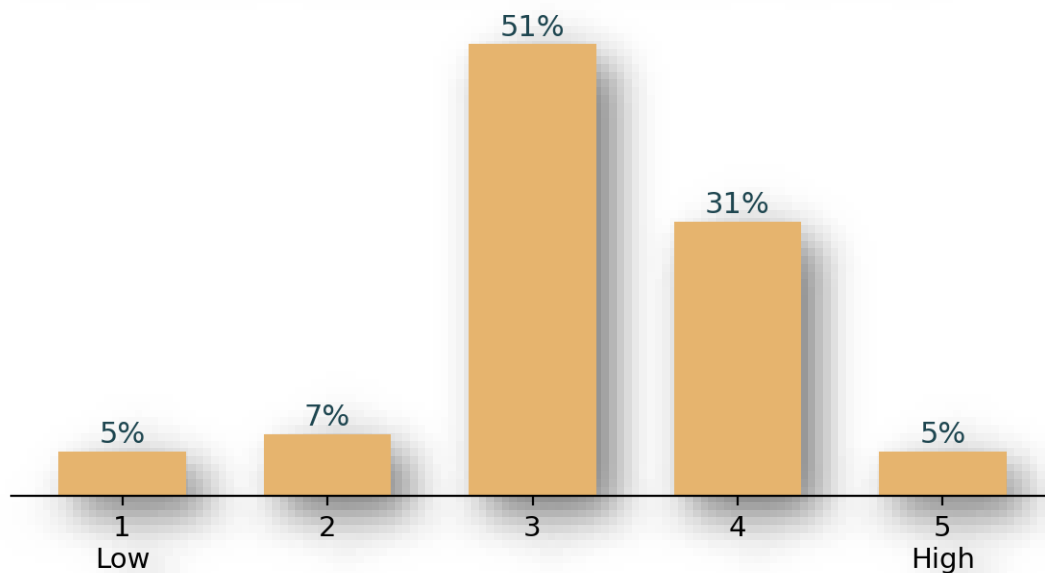
Demand is growing fast. 87% of members have seen an increase in demand for their activities, and 84% plan to expand or begin new activities in the coming year. Most managed to deliver most of what they planned last year (61% rated their delivery 4 or 5 out of 5), but a minority fell short — and where they did, the reasons were almost always the same: not enough staff or volunteer capacity, funding shortfalls, and external delays such as the planning system, contractors or weather.

## Pillar 6 — Purpose

This pillar covers the questions on how resilient members feel, the barriers holding them back, what would most help them thrive, and how they have used DTAS services. It is where the survey speaks most directly to what DTAS should do next.

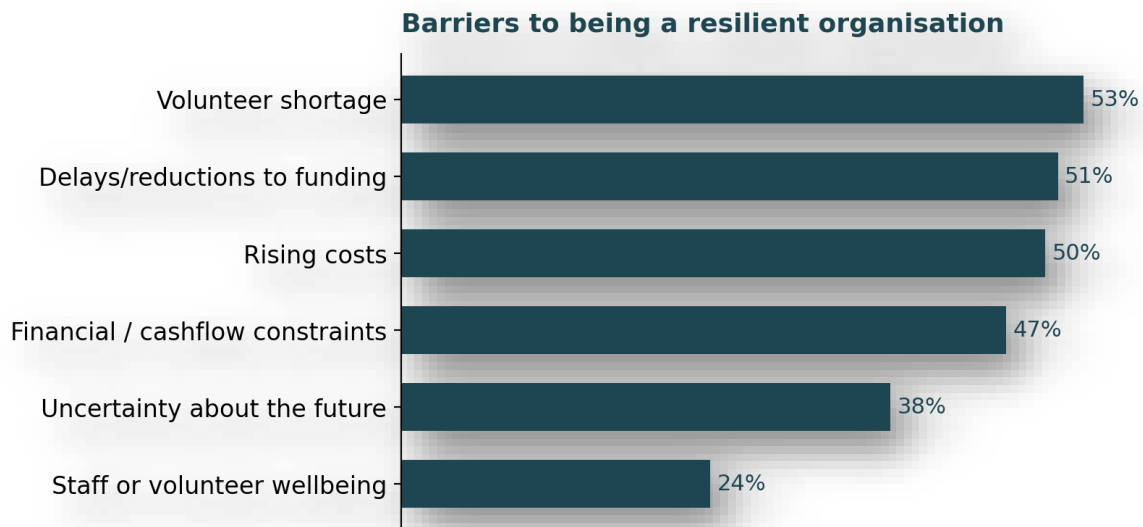
### How resilient do members feel?

#### How resilient does your organisation feel? (%)



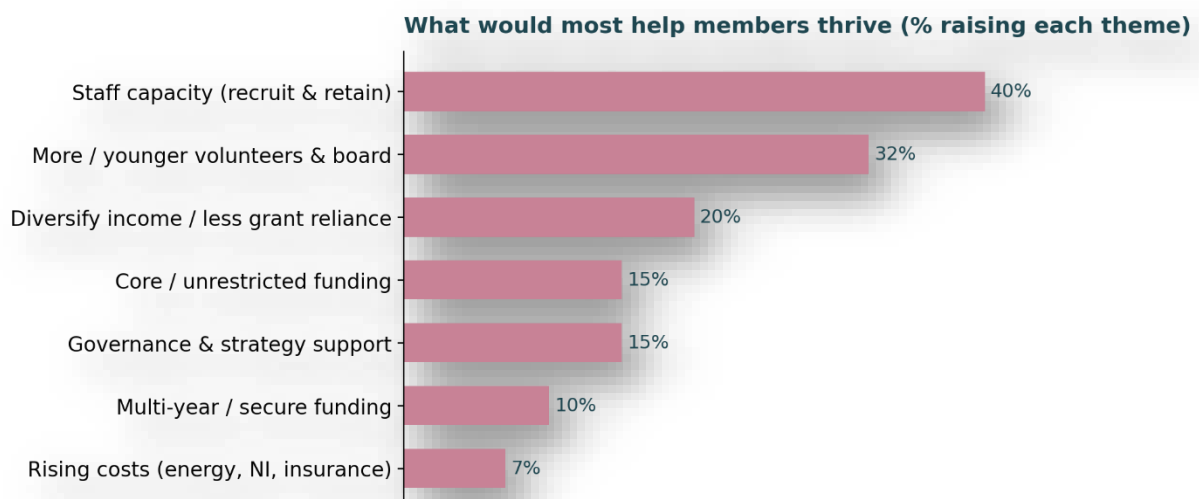
Most members sit in the middle: half (51%) chose 3 and just under a third (31%) chose 4, but only 5% felt very resilient and around one in eight (12%) rated themselves 1 or 2. The picture is of a movement that is coping and determined, but rarely comfortable.

## What is holding members back



The barriers to resilience are closely linked, and they cluster around people and money. A shortage of volunteers tops the list (53%), followed closely by delays or reductions to funding (51%) and rising costs (50%). Financial and cashflow constraints (47%), uncertainty about the future (38%) and staff or volunteer wellbeing (24%) complete the picture.

## What would most help members thrive



We asked members what would most help their organisation to thrive over the next year, and their written answers were remarkably consistent. Grouped into themes, staff capacity was

raised by 40%, more and younger volunteers and board members by 32%, diversifying income and reducing grant reliance by 20%, core and unrestricted funding by 15%, governance and strategy support by 15%, multi-year and secure funding by 10%, and rising costs by 7%. (These percentages come from coding written answers into themes; a single answer can touch more than one.)

Two needs came through above all others. First, capacity to employ and keep the right people: the most common single request was funding for staff – a development officer, a manager, or simply more paid hours – so that trustees can govern rather than run day-to-day operations. Second, funding that is core, flexible and multi-year: members repeatedly contrasted plentiful short-term project funding with a scarcity of the unrestricted, longer-term funding needed to cover core costs, retain staff and plan ahead.

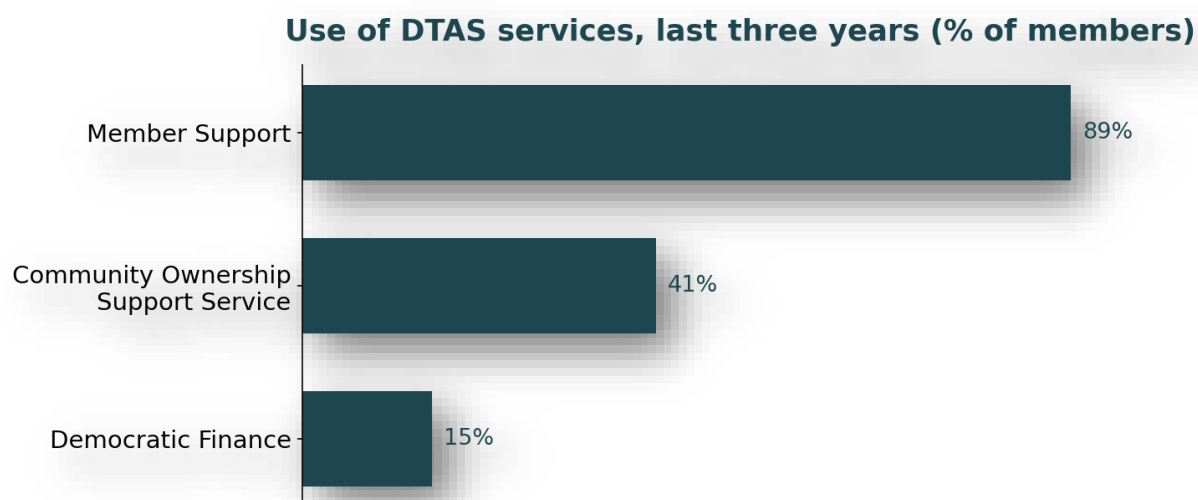
*"The resilience funding we received from DTAS has shown just how much difference even one additional part-time member of staff can make in helping us manage workloads, progress projects and keep momentum going."*

**– Inchinnan Development Trust**

*"Access to longer term core funds that allow the organisation to properly plan and function... funders seem blind to this and only want to provide funding for projects."*

**– DTAS member (2026 survey)**

## How members are using DTAS



Members drew on DTAS services widely over the past three years: 89% used Member Support (including wellbeing, crisis, aspiring trust and funding programmes), 41% used the Community Ownership Support Service, and 15% used Democratic Finance. The demand signals in this survey – for energy, community benefit funds, asset support and core-funding advocacy – map directly onto these teams. DTAS’s own support, including the Resilience and Recovery programme, was singled out for praise many times and by name.

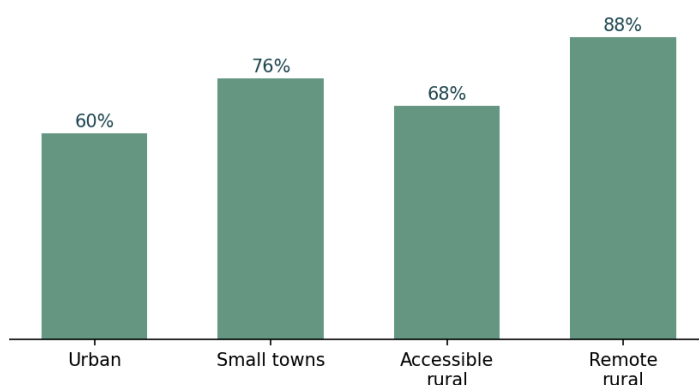
## By area type: town, small town and rural Scotland

Scotland’s development trusts do very different things in very different places. Grouping members into four area types reveals patterns the averages hide.

### Remote rural trusts are asset-rich but people-stretched

Remote rural trusts are the largest group (**74 of the 170**). They are by far the most likely to own a community asset (**88%**), yet they have the fewest active volunteers on average (about **22 per trust**) and below-average incomes. They carry a great deal – buildings, land, often energy assets – on comparatively few shoulders.

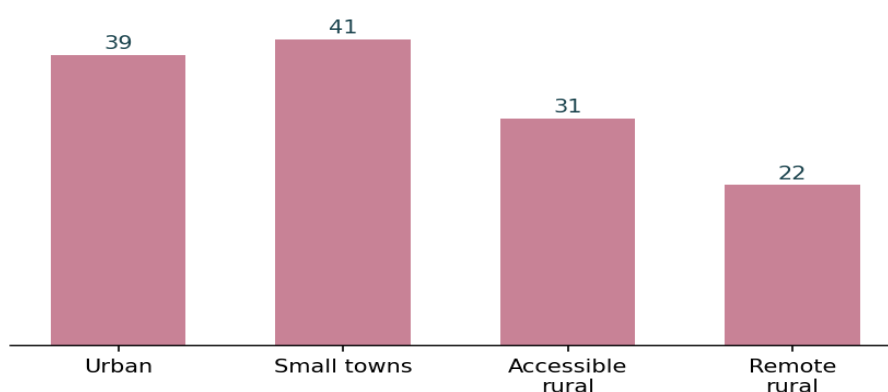
Community-owned assets are highest in remote rural areas (% owning)



## Urban trusts lease more than they own, and rarely see community benefit funds

Urban trusts are the least likely to own an asset (60%) and the most likely to lease (60%). They report the highest median income (about **£199,618**), but almost none receive Community Benefit Funds (5%) – those flow overwhelmingly to rural areas with renewable developments.

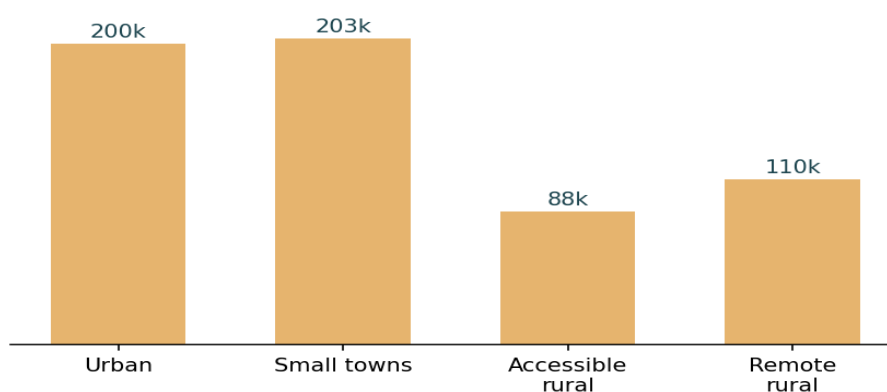
Average active volunteers per trust, by area type



## Small-town trusts are the most likely to employ staff

**86% of small-town trusts employ paid staff** – the highest of any group – and 29% receive Community Benefit Funds. Accessible-rural trusts, meanwhile, report the lowest median income (about **£88,300**) yet the highest sense of resilience of any group. Income and confidence do not always move together.

**Median annual income by area type (£000s)**



## The area-type picture at a glance

| Area type        | Members | Employ staff | Own asset | Lease | Get CBFs | Avg volunteers | Median income |
|------------------|---------|--------------|-----------|-------|----------|----------------|---------------|
| Urban            | 40      | 78%          | 60%       | 60%   | 5%       | 39             | £199,618      |
| Small towns      | 21      | 86%          | 76%       | 57%   | 29%      | 41             | £203,171      |
| Accessible rural | 34      | 74%          | 68%       | 47%   | 29%      | 31             | £88,300       |
| Remote rural     | 74      | 81%          | 88%       | 46%   | 27%      | 22             | £109,834      |

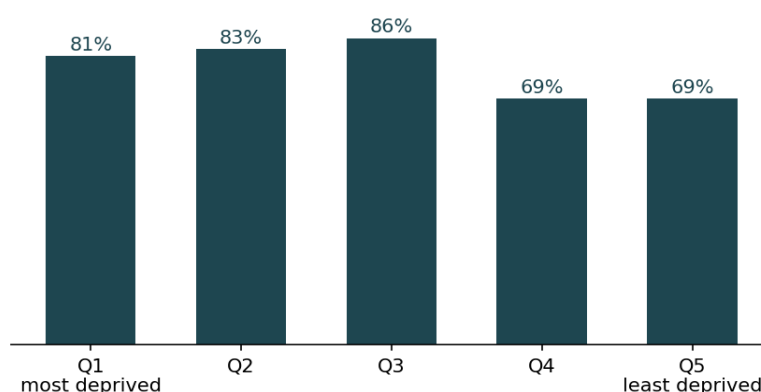
## By level of deprivation

Each area is also ranked by the Scottish Index of Multiple Deprivation – a standard measure of how deprived an area is. Here members are grouped into five bands from **Q1 (most deprived)** to **Q5 (least deprived)**. Two clear patterns stand out – and both echo the 2023 findings.

### Trusts in more deprived areas are more likely to employ staff

In the most deprived areas, **81% of trusts employ paid staff, rising to 86% in mid-range areas**, compared with just **69% in the least deprived areas**. Development trusts are often at their most active as employers exactly where local need – and unemployment – is greatest.

Trusts in more deprived areas are more likely to employ staff (%)



### The least deprived areas are the most volunteer-led – but feel least resilient

Trusts in the least deprived areas report the highest average number of volunteers (about **47 per trust**), but also the lowest sense of resilience (**2.69 out of 5**) and, like the most deprived areas, receive no Community Benefit Funds. Community Benefit Funds concentrate in the mid-range bands (**36% of Q4 trusts**), reflecting where rural renewable developments sit.

### The deprivation picture at a glance

| Deprivation band   | Members | Employ staff | Own asset | Get CBFs | Avg volunteers | Median income |
|--------------------|---------|--------------|-----------|----------|----------------|---------------|
| Q1 (most deprived) | 21      | 81%          | 57%       | 0%       | 33             | £239,698      |
| Q2                 | 35      | 83%          | 77%       | 20%      | 30             | £122,428      |
| Q3                 | 59      | 86%          | 83%       | 27%      | 21             | £112,500      |

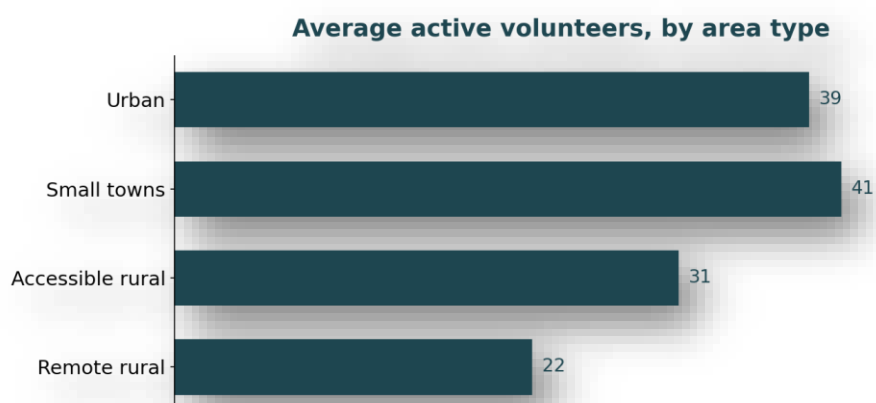
| Deprivation band    | Members | Employ staff | Own asset | Get CBFs | Avg volunteers | Median income |
|---------------------|---------|--------------|-----------|----------|----------------|---------------|
| Q4                  | 42      | 69%          | 76%       | 36%      | 34             | £93,518       |
| Q5 (least deprived) | 13      | 69%          | 69%       | 0%       | 47             | £109,410      |

## A place lens: where members are changes what they face

The 2026 responses were matched to DTAS membership records (170 of 172 matched) to compare members by area type and level of deprivation. The sample closely matches the wider membership on both, so these findings speak for the network as a whole. Four patterns stand out.



Remote rural trusts are asset-rich but people-stretched. They are the largest group (74 of the 170 matched) and by far the most likely to own a community asset (88%), yet they have the fewest active volunteers on average (about 22 per trust) and below-average incomes. They carry a great deal – buildings, land, often energy assets – on comparatively few shoulders.



Urban trusts lease more than they own, and rarely see community benefit funds: they are the least likely to own an asset (60%), the most likely to lease (60%), report the highest median

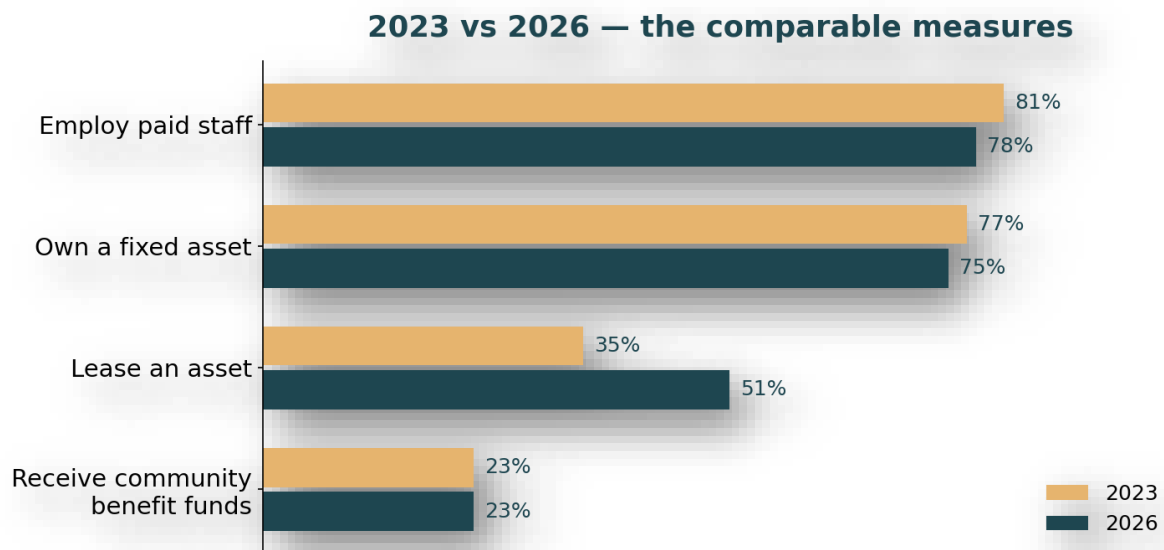
income alongside small towns, and almost none receive Community Benefit Funds (5%) – those flow overwhelmingly to rural areas with renewable developments. Small-town trusts are the most likely to employ staff (86%). Accessible-rural trusts report the lowest median income (about £88,300) yet the highest sense of resilience of any group – income and confidence do not always move together.



By deprivation, trusts in more deprived areas are more likely to employ staff: 81% in the most deprived areas, rising to 86% in mid-range areas, compared with 69% in the least deprived. Development trusts are often at their most active as employers exactly where local need is greatest. Meanwhile the least deprived areas are the most volunteer-led (about 47 volunteers per trust) but report the lowest sense of resilience (2.69 out of 5), and – like the most deprived areas – receive no Community Benefit Funds, which concentrate in the mid-range bands (36% of Q4 trusts).

Respondents came from every corner of Scotland. Highland leads with 33 responding trusts, followed by Argyll and Bute (15), Dumfries and Galloway (15) and Glasgow City (11). Some place-based groups are small – the least-deprived band has 13 trusts and small towns 21 – so their percentages are indicative rather than precise.

## How 2026 compares with 2023



The questionnaire changed between surveys, so not everything can be compared directly; only genuinely comparable measures are shown here. Engagement held steady: 173 members responded in 2023 and 172 in 2026, around half the membership each time.

The share employing paid staff is broadly steady, from 81% in 2023 to 78% in 2026, and asset ownership likewise, from 77% to 75%. The average number of active volunteers rose from 28 to 30. Leasing rose sharply, from 35% to 51%. The share receiving community benefit funds was 23% in both years. The earned share of income slipped slightly, from 33% of total income in 2023 to around 30% on average in 2026 (with a typical figure of 20%). And grant reliance has risen: 2023 reported “almost half” of members as heavily reliant on grants, while in 2026 77% rated themselves 4 or 5 out of 5.

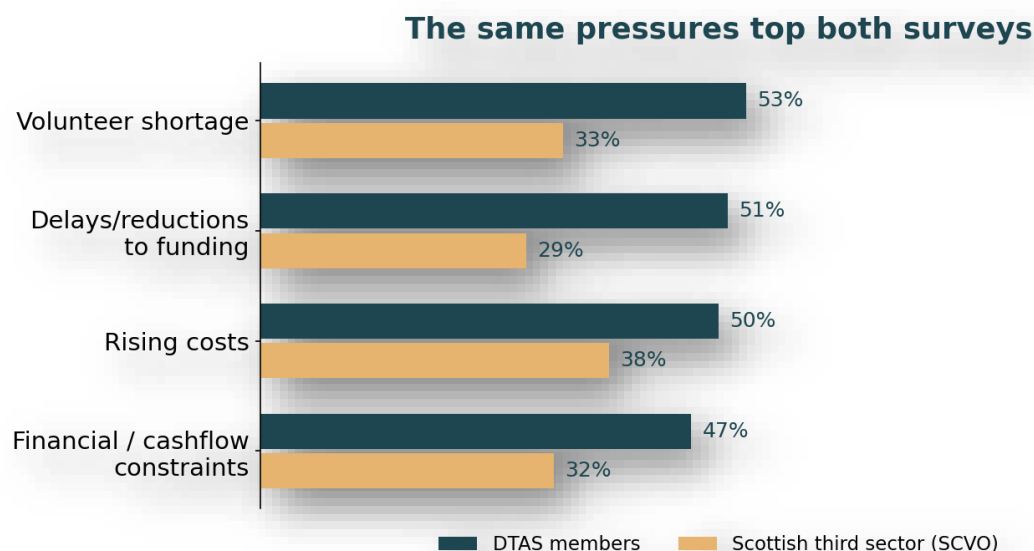
The headline story is one of a resilient, busy movement facing tightening finances. Volunteering and leasing have grown, and demand is clearly up — but reserves are thin and reliance on grant funding has, if anything, deepened. That combination is the central challenge this survey puts before both members and DTAS.

# Development trusts and the wider sector: DTAS vs the SCVO Third Sector Tracker

In spring 2026, SCVO published Wave 12 of the Scottish Third Sector Tracker — a survey of 495 voluntary organisations weighted to represent the sector as a whole — at a similar time to our own survey. Setting the two side by side shows where development trusts mirror the wider sector, and where they stand apart.

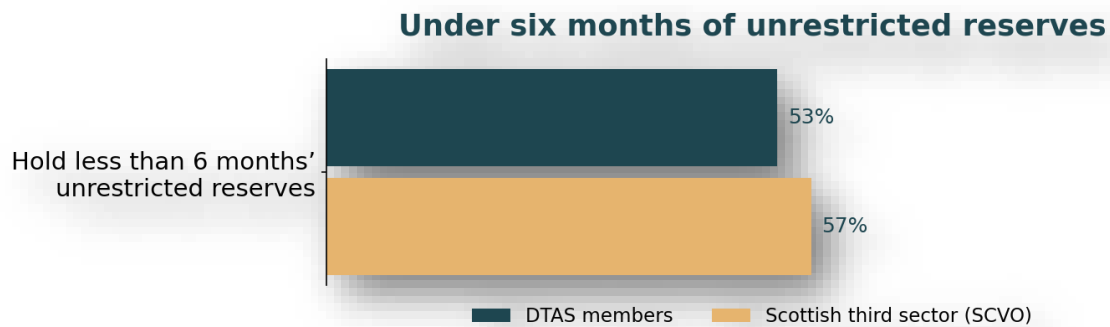
A caution before quoting any comparison: these are two different surveys, not one survey of two groups. We asked members to tick every barrier that applied; SCVO asked organisations to rank their top three challenges, which alone makes our percentages look higher. Where the wording differs, compare the pattern and the ranking, not the size of the numbers. Comparisons below are labelled fair or indicative accordingly. SCVO covers the six months to April–May 2026; our survey covers twelve months.

## Where the two surveys agree



*Different question formats: DTAS asked members to tick all barriers that applied; SCVO asked for top-three challenges — compare the pattern, not the size of the numbers.*

Strip away the different question wording and the two surveys identify an identical set of pressures. For SCVO, the biggest single challenge was difficulty fundraising (40%), followed by rising costs and inflation (38%) and volunteer shortages (33%). For our members, volunteer shortage came first (53%), then delays or reductions to funding (51%) and rising costs (50%). Same pressures, near-identical ordering — our members are not an outlier; they are living the sector's reality. (Indicative comparison: select-all versus ranked questions.)



*Fair comparison — very similar questions. Sources: DTAS Members' Survey 2026; SCVO Tracker Wave 12.*

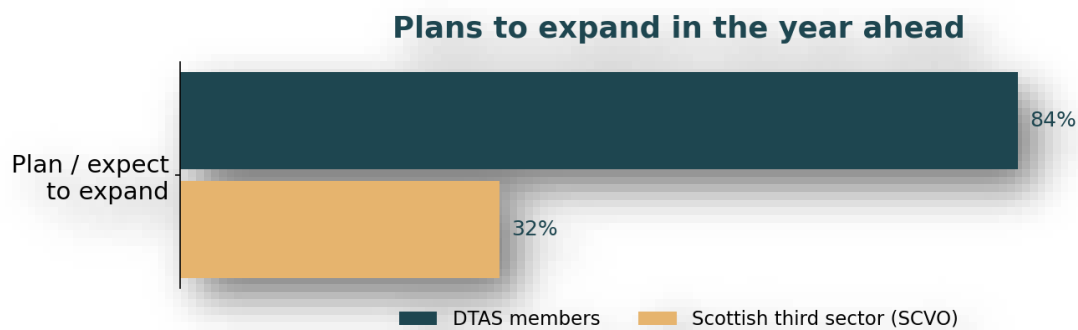
Reserves are the fairest like-for-like comparison in the whole analysis, and the numbers land almost on top of each other: 53% of our members hold less than six months of unrestricted reserves; SCVO found 57% across the sector, a figure that has worsened by four percentage points in a year. Financial fragility is sector-wide. (Fair comparison.) Volunteer recruitment is similarly close: 53% of our members named volunteer shortage as a barrier, while 56% of SCVO organisations report moderate or significant difficulty recruiting. (Fair comparison.)

The most striking agreement is not a statistic — it is the ask. When SCVO asked organisations what support would help, the dominant theme was, in their words, “sustainable and flexible funding... particularly longer-term (multi-year), unrestricted, core funding rather than short-term project funding.” That is precisely what our members told us. When DTAS calls for core, flexible, multi-year funding, it speaks for the entire Scottish third sector — with SCVO’s independent, weighted evidence to prove it.

*“Consistent (multi-year) funding streams that are reliable and not just every 12 months.”*

**— SCVO Tracker respondent**

## Where development trusts stand apart



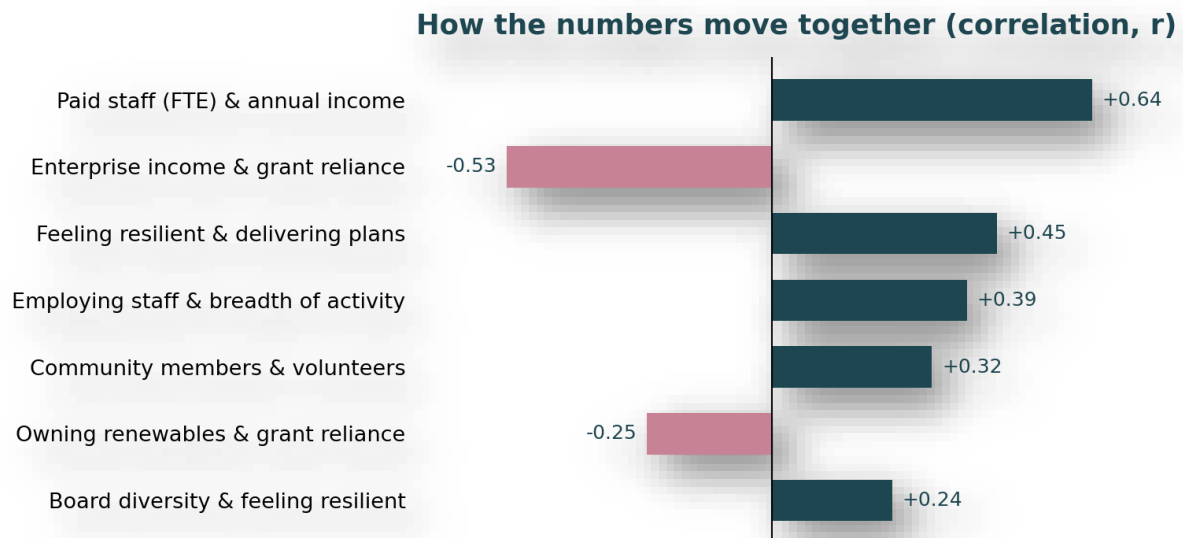
*Indicative comparison — different wording, but a very large gap. SCVO: 51% expect to stand still.*

The single biggest difference is ambition. 84% of our members plan to expand or begin new activities in the coming year; across the wider sector, only 32% expect to expand, with half (51%) expecting simply to stand still. Even allowing for the different wording, the gap is too large to be explained away. (Indicative comparison.) Development trusts are growth organisations by instinct — built to develop their places, not just hold a service line steady — and that ambition is exactly what a lack of core funding puts at risk.

The wider third sector survey also has no equivalent of our asset story, because most voluntary organisations do not own assets: 75% of our members own a building or land, 51% lease, and around a fifth own renewable energy. That gives development trusts something most of the sector lacks — a genuine, ownable route out of grant dependency — and gives DTAS a distinctive advocacy position: not only asking for better funding, but demonstrating a model that reduces the need for it.

SCVO measured three pressures our survey did not, all relevant to our members. Procurement is largely closed to smaller organisations: only 10% found applying for contracts easy, and smaller, volunteer-led and rural organisations feel actively disadvantaged — a description that fits much of our membership. Artificial intelligence is arriving fast: 45% of organisations already use AI in some form, but only 17% have a policy for it. And a third of organisations report challenges from policy change, social division and difficulty engaging public bodies. All three are worth considering for the next DTAS survey, which would allow direct comparison in future.

# Relationships and connections: how the numbers move together



The correlation analysis workbook examines how members' answers move together across the 172 responses. An important caution first: correlation is not causation – a relationship does not tell us which factor drives the other, or whether a third factor explains both. Each pair uses only the organisations that answered both questions, so sample sizes differ (they range from 119 to 172 across the pairs cited below); yes/no measures use point-biserial correlations, which are indicative. As a rough guide,  $r$  below 0.2 is negligible, 0.2 to 0.4 weak, 0.4 to 0.6 moderate, and above 0.6 strong.

The strongest link in the data is between paid staff and income: full-time-equivalent staff and annual income rise together ( $r = +0.64$ ,  $n = 119$ ) – bigger organisations employ more people.

The most strategically important link is between enterprise and grant reliance: the more an organisation earns through trading, the less reliant it is on grants ( $r = -0.53$ ,  $n = 135$ ) – a moderate relationship and a key argument for supporting enterprise. It is echoed by two weaker relationships pointing the same way: owning renewable energy is associated with lower grant reliance ( $r = -0.25$ ), and asset-owning organisations earn a higher share of income commercially ( $r = +0.27$ ). Together these connect Pillar 2 and Pillar 3: assets and enterprise are the survey's clearest route out of grant dependency.

Resilience connects to delivery: organisations that feel more resilient also delivered more of what they planned ( $r = +0.45$ ,  $n = 168$ , moderate) – linking Pillar 5 to Pillar 4. Feeling resilient is also weakly associated with lower grant reliance ( $r = -0.20$ ) and with more representative

boards ( $r = +0.24$ ) – a quiet piece of evidence that governance and resilience travel together.

People and reach connect too: organisations with paid staff deliver across more areas of activity ( $r = +0.39$ ), a larger community membership tends to bring more active volunteers ( $r = +0.32$ ), and larger boards sit alongside more volunteers ( $r = +0.27$ ) – linking Pillar 1 to Pillar 4. Higher-income organisations are more likely to employ staff ( $r = +0.31$ ) and to own renewables ( $r = +0.29$ ).

Finally, the place analysis adds one more connection worth naming: income and confidence do not always move together. Accessible-rural trusts report the lowest median income but the highest sense of resilience, and the least deprived areas have the most volunteers but feel least resilient. Resilience, as members experience it, is about more than money.

## Overall summary

Scotland's development trusts are busy, ambitious and delivering more than ever — but they are doing so on tight budgets, thin reserves and the goodwill of a small number of people. Demand for their work is rising sharply (87%), and 84% plan to grow further, yet their finances are becoming more, not less, dependent on grants: 77% describe themselves as heavily grant-reliant, over half hold less than six months of reserves, and the earned share of income has slipped slightly since 2023.

People are the movement's greatest strength and its biggest worry. Four in five members employ staff, and even a single paid post changes what is possible — improving governance, coordinating volunteers, strengthening financial management. Volunteer numbers are up on 2023, but volunteer shortage is the most common barrier members face, boards recruit almost entirely by word of mouth, and around half of employers say staff wellbeing has been a significant challenge.

Assets are what set development trusts apart. Three-quarters own a building or land, half now lease, and the data shows that trading and asset ownership are associated with lower grant reliance — a genuine, demonstrable route out of grant dependency that most of the third sector does not have. But the ownership journey remains slow, complex and expensive, and members asked for stronger support to navigate it.

The two clearest asks are consistent across every part of the survey: funding for people, so trusts can recruit and retain staff and free trustees to govern; and core, flexible, multi-year funding, to cover running costs, build reserves and plan beyond the next short-term grant. The SCVO Tracker shows the wider Scottish third sector making the same ask almost word for word — so DTAS's advocacy case stands on independently evidenced, sector-wide ground, while its members' ambition, assets and enterprise give it a story the wider sector cannot tell.

What members delivered in the last year alone makes the stakes concrete: Balerno Village Trust turned the local police station into a community hub with 32 new childcare places; South Islay Development Trust completed a seven-year, £2.8 million community hub project; Tìree Community Development Trust built a community-owned solar array with battery storage; Tighnabruaich District Development Trust bought out the local petrol station to protect a vital rural service; and Annan Harbour Action Group began a £16 million construction programme. 84 members offered to share their stories — evidence, in bricks, land and services, of what this movement does with the support it gets.

**In one sentence: our members are doing more for their communities than ever, and they will do more still — but they need funding that lasts and people to deliver it.**



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