

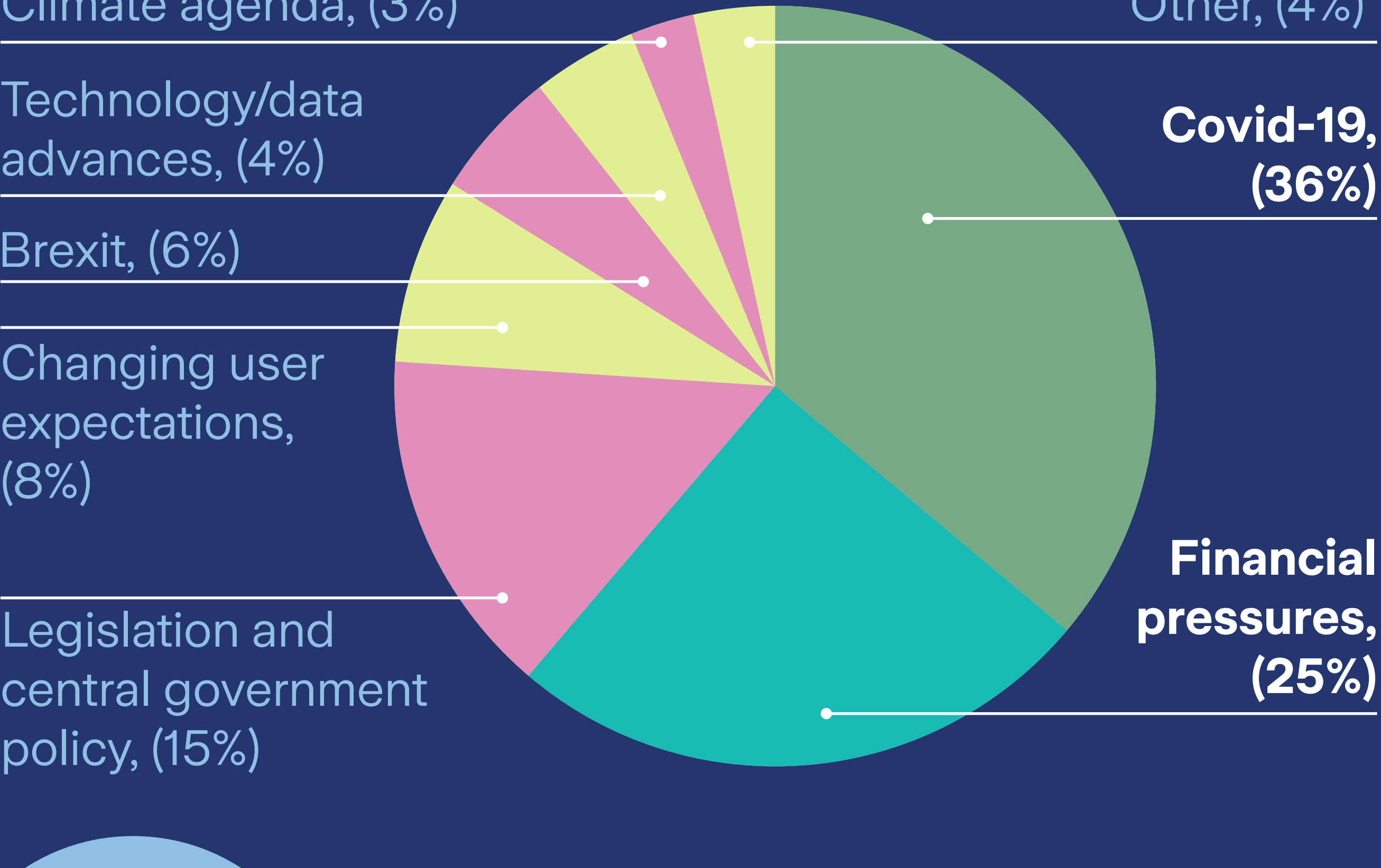
Rising to the challenge

Executive Summary

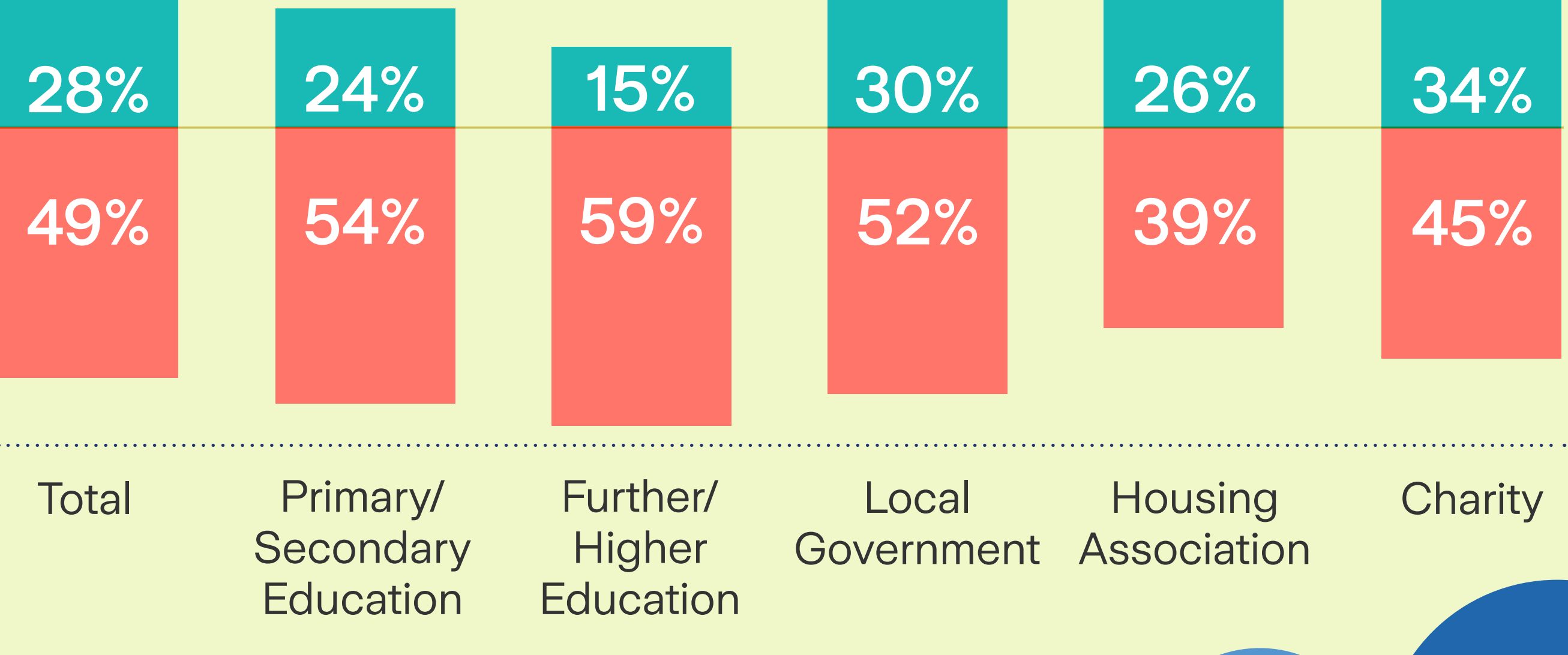
The future of the public and voluntary sectors

The context in which organisations are operating is constantly changing and becoming more challenging. Zurich Municipal recently carried out customer research in conjunction with YouGov, on current and future changes in the public and voluntary sectors. The research explored general sentiment about the future of the public and voluntary sectors; views on current and future drivers of change and their relative impact; and future challenges and opportunities and how well-placed organisations are to deal with them.

Our respondents reported that in the last five years change has been largely reactive, exacerbated by the COVID-19 and financial pressures.



The pandemic has shone a positive light on the efforts and achievements of the public and voluntary sectors and brought a strong sense of community. However, uncertainties around funding and growing pressures mean that more people are pessimistic about the future than optimistic.



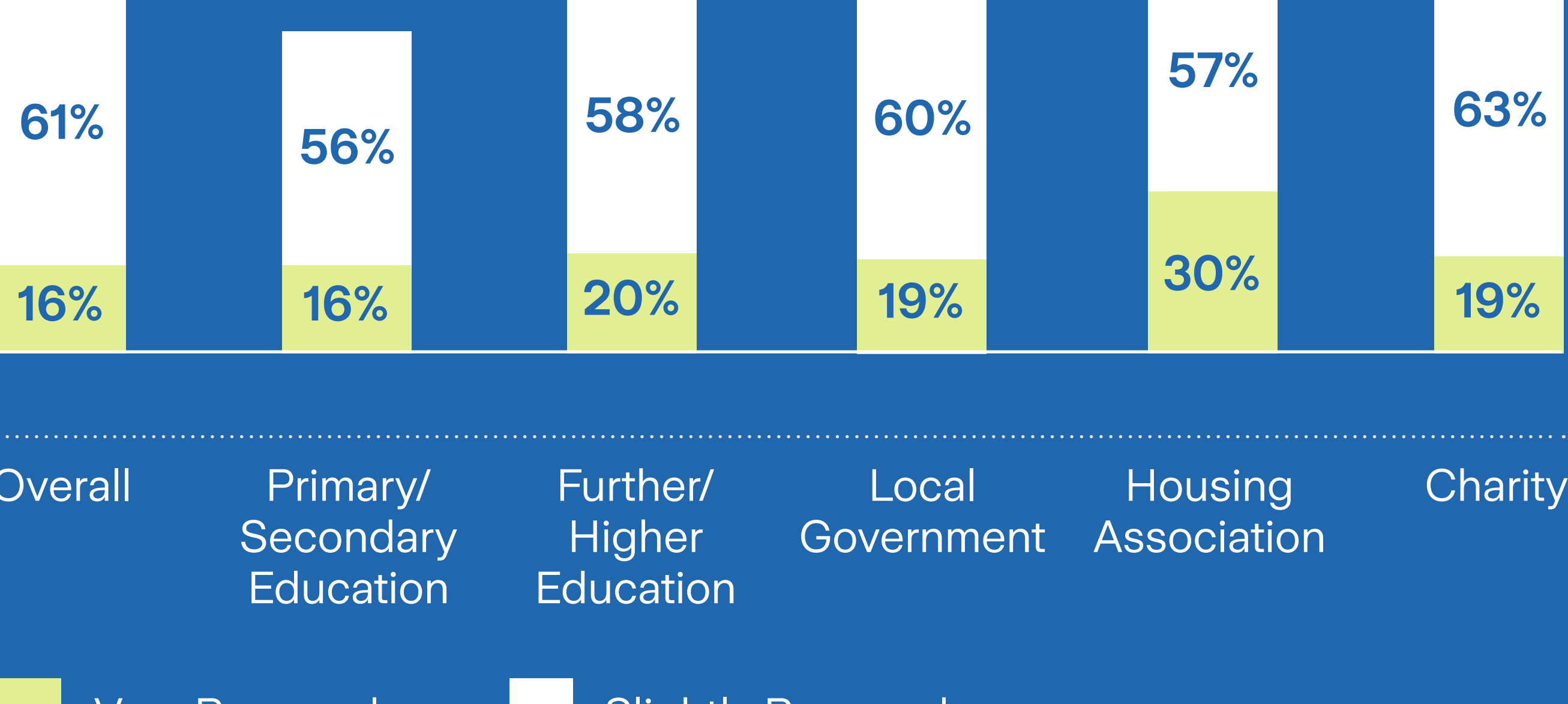
1006 total responses.
YouGov, July 2021

Funding and fiscal policy continues to be the area that respondents expect to have the biggest impact over the next 5 years. The impact of adapting to climate change is expected to increase, particularly for housing associations but remains the lowest rated issue overall.

	Total	Primary/Secondary Education	Further/Higher Education	Local Government	Housing Association	Charity
Funding and fiscal policy	78%	85%	84%	89%	71%	72%
Changing community expectations and needs	63%	58%	55%	74%	73%	66%
Mental health and wellbeing	57%	73%	68%	55%	45%	52%
Digital, data and automation	56%	48%	70%	66%	68%	47%
The changing nature of work (e.g. hybrid working)	55%	33%	69%	63%	68%	52%
Changing organisational structures	43%	44%	42%	48%	36%	38%
Adapting to climate change	34%	21%	44%	63%	82%	25%

% - Impact

However, the way organisations have dealt with the unprecedented challenges and adversity of the pandemic, has left most respondents feeling prepared to face future challenges and well placed to take advantage of future opportunities.



987 total responses.
YouGov, July 2021

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