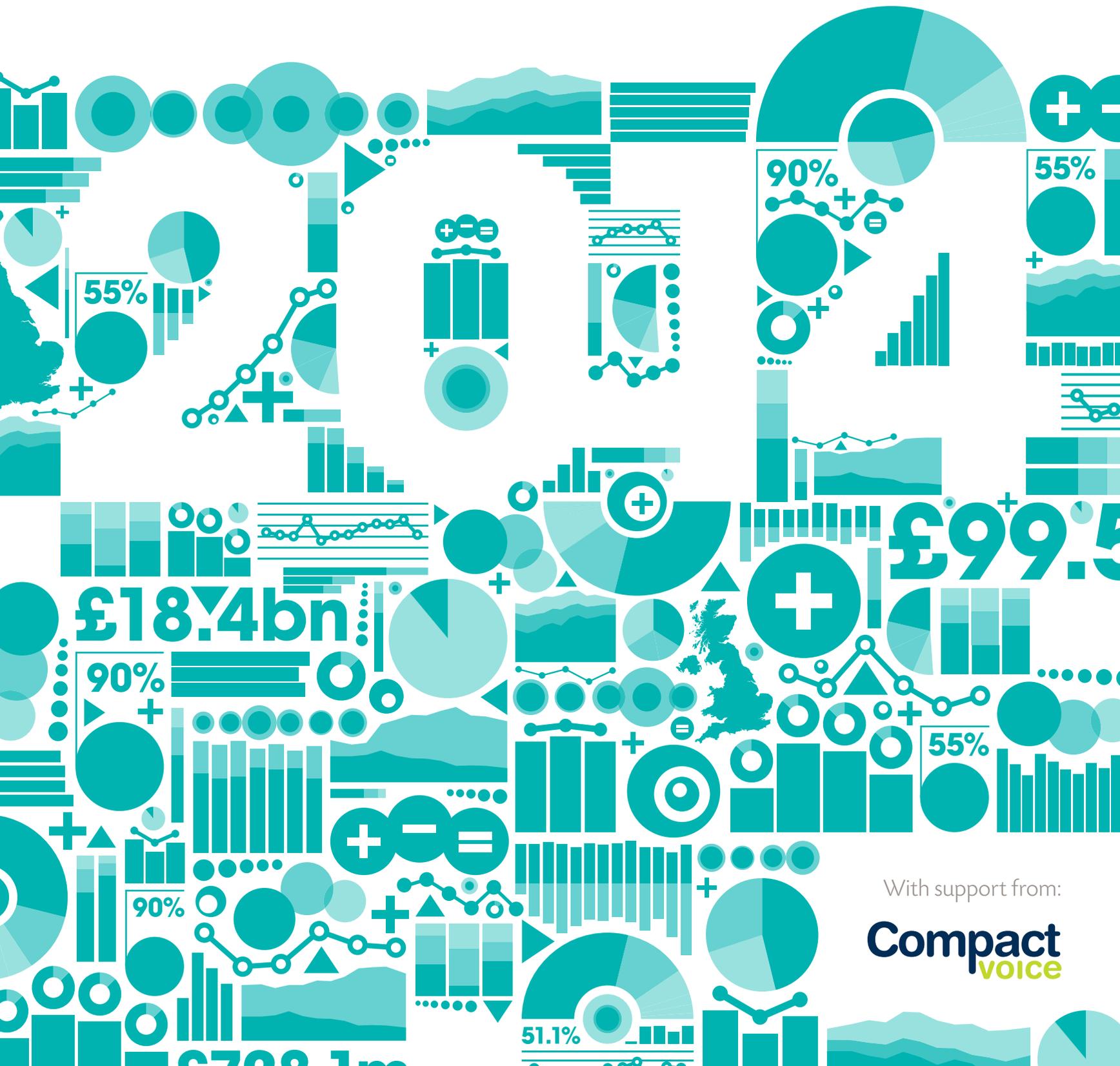


# The UK Civil Society Almanac

The reference guide to the key facts  
and figures on the voluntary sector



With support from:

**Compact**  
voice

# Voluntary Sector Intelligence

Information you need to make decisions about the voluntary sector, from NCVO and TSRC

The analysis at the core of the Civil Society Almanac is based upon over 10 years' worth of data and evidence collected jointly by NCVO and the Third Sector Research Centre (TSRC). Working together, we already support clients in government, business and the voluntary sector with a range of products and services, from bespoke intelligence reports to simple lists of organisations tailored to people's needs and interests.

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Every effort has been made to ensure the accuracy of the information contained within this publication. However, NCVO cannot be held responsible for any action an individual or organisation takes, or fails to take, as a result of this information.

# The UK Civil Society Almanac 2014

# Sponsor's Foreword

**Simon Blake OBE**  
Chair, Compact Voice

Compact Voice is delighted to sponsor the 2014 edition of the UK Civil Society Almanac.

It is essential that this information is widely available; the Almanac gives us a real sense of the breadth of voluntary action in this country, and is an invaluable source of key statistics, trends and emerging themes within wider civil society.

A central part of the Almanac is the information it provides on the different partnerships and relationships between voluntary organisations and the state. This data allows us to gain real insights into the changing nature of these relationships, and how partnerships are evolving at a national and local level. This information underpins how we create positive engagement, to balance independence and interdependence across civil society and the state.

The Almanac also highlights the sheer diversity of the voluntary sector, and helps us provide clarity around the types of activities taking place and the many varied relationships that exist. This includes but extends beyond financial relationships: the data provides insights into who benefits from the work of voluntary organisations and how these organisations work with those they support.

By understanding the voluntary sector and the trends affecting it, Compact Voice can ensure we are able to work effectively with government and commissioners across the country. The data within the Almanac helps us to focus our support on where it is most needed, at a national and local level.

I am sure you will find this important Almanac as useful as we do. We will certainly be making use of it to future proof our activities; and to enable us to create dynamic relationships in a rapidly changing landscape.



**Compact**  
voice

# Foreword

**Martyn Lewis CBE**  
Chair, NCVO

Two years ago, I opened the Almanac by saying that the voluntary sector was going through a period of profound change, still emerging from recession and adjusting to sharp public spending cuts. The 2011/12 data presented in this new edition confirms the sheer scale of these challenges. Data can never tell the full story, but it confirms what many of us already knew: that the voluntary sector and the people we work with have been hit hard by spending cuts. It is clear that the government needs to do more to improve the commissioning environment for charities if it is to realise ambitions for open public services that are more responsive to local needs.

But as we reflect on how tough the last few years have been, we must also remember that the sector's efforts – and those of civil society more widely – are underpinned by much more than money. It is the tremendous energy, commitment and values of the people involved that make our sector special.

NCVO's role is to help voluntary organisations and volunteers make the biggest difference they can. We are here to champion voluntary action, but also to help shape and influence an environment in which voluntary action can flourish. The Almanac continues to provide an insight into the changing nature of the voluntary sector – and provides a basis for our policy programme.

The research presented in this Almanac, and the policy programme that builds on it, represents a significant investment by NCVO. Now in its 13th edition, the Almanac is the most widely used source of statistics on the voluntary sector. We trust that it will continue to inform practitioners and policymakers alike, in their continued support for voluntary action.



# Introduction

**Sir Stuart Etherington**  
Chief Executive, NCVO

The 2014 Almanac once again aims to provide a comprehensive overview of the scope and changing nature of civil society. A thriving and diverse civil society is a hallmark of effective democracy – where people can come together around the causes they care about and make a difference. UK civil society is diverse, yet its expression in different forms – from social activism to social enterprise, charities to credit unions, volunteering to trade unions – enables us all to participate in civic life.

Civil society is not synonymous with the voluntary sector; it is much wider. However, an active and independent voluntary sector is a vital element of civil society and a catalyst for voluntary action. The focus of much of the Almanac is on voluntary organisations.

Using the latest data available – which for the voluntary sector is mostly 2011/12 – we describe a voluntary sector experiencing significant transition. In particular, this year we describe a sector whose relationship with the state is changing. The confluence of two major political themes – economic austerity and transfer of powers – has had a direct impact on voluntary organisations, with many experiencing cuts but others anticipating new opportunities. The impact of inflation is also important to note. Unless otherwise stated, we describe trends in real terms, adjusting for the impact of inflation.

**The voluntary sector is at the heart of a broad and powerful civil society.** The 161,000 charities that make up the voluntary sector undertake an incredibly wide range of activities and benefit people across the whole of the UK and worldwide. While these figures relate to the voluntary sector in particular, we continue to recognise the value of the whole of civil society – which includes charities, social enterprises, co-operatives, trade unions, community groups and voluntary action.

**Civil society continues to be an important part of the economy,** as well as the centre of the UK's associational life. With income of £181 billion, covering large financial mutuals and co-operatives as well as the hundreds of thousands of the small unregistered organisations, civil society plays a part across national life. Its assets are worth £286 billion, covering many of the country's most valuable historic properties as well as investment assets.

**Austerity and the voluntary sector: reduced income...** The voluntary sector saw a net real-terms fall in its total income of £700m, primarily as a result of government spending cuts. At £39.2bn, the sector's total income is higher in cash terms than ever before, but in real terms, it was lower in 2011/12 than in every year since 2006/7.

**...and falling spending.** Correspondingly, the voluntary sector's expenditure fell by £450m to £38bn. Whereas in 2007/8 and 2009/10, spending held up even as income fell, this was not the case in 2011/12. This suggests organisations have reduced their spending, rather than draining their rainy-day reserves dry. Spending on grants rose slightly to £5bn, a sign of charitable foundations stepping up their game to support the sector.

**Income from government dropped significantly, as cuts kicked in.** The government's spending cuts had a significant impact on the voluntary sector in 2011/12. Overall, income from government fell by £1.3bn. The scale of cuts is worse than our most pessimistic "disproportionate cuts" forecast in Counting the Cuts. We believe a number of factors are likely to have influenced this. Councils faced frontloaded cuts, which limited their options to make savings, and is likely to have had led to many local voluntary organisations experiencing cuts in this year. Some income may also have been deferred into future years as a consequence of shifting to Payment-by-Results contracting models.

**Contracts continue to be the main way that the government funds the voluntary sector,** with 81% of voluntary sector income from government earned through the delivery of contracts, an increase from just 49% in 2000/01. Cuts were largest in income from grants, which fell by 14.5% between 2010/11 and 2011/12. However, contract income was not immune to cuts in funding, as it reduced by 7.4%.

**Income from individuals continues to be the biggest source of income for the voluntary sector,** and rose by over £500 million between 2010/11 and 2011/12. This income comes in four forms – voluntary income (donations), fundraised income, legacies and fees for services. The rise was driven by individuals paying for services from charity and fundraising, which together accounted for four-fifths of the rise.

**55% of people donated to charitable causes in a typical month** in 2011/12, according to data from the UK Giving survey. Women are more likely to donate than men, and people over 45 are more likely to donate than younger people. The Million Pound Donors Report suggests the total value of donations worth more than £1 million was £1.35 billion in 2011/12.

**The voluntary sector's assets have continued their modest recovery since falling in value during the recession,** back up to £105 billion from a trough of £87 billion in 2008/09. Income from investments has also continued to recover, providing £2.7 billion income in 2011/12. The recovery in assets has been driven largely by increases in the value of tangible fixed assets, reflecting wider trends in property prices, whereas non-tangible investment assets actually fell in value between 2010/11 and 2011/12.

**Running on empty? Voluntary sector reserves have not followed the pattern of recovery.** Because reserves figures are unlikely to include hard-to-sell assets such as property that have driven increases in asset values, the value of reserves also fell by almost £2 billion between 2010/11 and 2011/12. So while at first glance the sector's asset base appears to be strengthening, for charities that do not hold property the picture is less promising. Some charities that have already dipped into their reserves in recent years could find themselves in a fragile position.

**In 2011/12 the voluntary sector owed around £4 billion in loans,** with analysis suggesting that around 60% of those loans are secured against an asset. These loans represent around one-quarter of the sector's total liabilities, with grants committed in advance accounting for a further 31% of their liabilities. With the profile of social investment rising since Big Society Capital was established in 2012, we will be watching closely to see if there is an increase in new types of financing over the next few years.

**The voluntary sector employed 800,000 people by the end of 2012.** This is an increase from the previous peak of 792,000 at the beginning of 2010, and is over 230,000 more than the voluntary sector workforce in 2002. Employees in the voluntary sector are more likely than other employees to work part-time, with 36% of the sector's workforce working part-time. One in five voluntary sector part-time workers are part-time because they could not find a full-time job though – a trend which is also affecting the wider UK labour market.

**Volunteering retains its place at the heart of the voluntary sector's activities.** 44% of adults formally volunteered at least once a year in August 2012-April 2013, based on data from the Community Life Survey. This is higher than the last year's data from the UK Citizenship survey in 2010/11, when 39% of respondents said they formally volunteered at least once a year. The Office for National Statistics estimate that the equivalent economic contribution of this volunteering in 2012 was £24 billion – equivalent to 1.5% of GDP.

**What happened next on cuts?** The big news from 2011/12 was undoubtedly the scale of cuts that affected the voluntary sector. As cuts to council budgets were frontloaded, it is not necessarily the case that the sharp cuts passed on to charities in 2011/12 will have repeated in the years since. However, nor have our members seen much progress in the opening up of public services, despite the government's stated ambitions. Many feel they have been locked out of contracts by commissioners' focus on lowest price and biggest scale. This is a missed opportunity, because many organisations could play a transformative role in designing and delivering better public services. We hope that this Almanac will give politicians the evidence they need to take a more assertive approach to enable this to happen – at both the national and local levels.

**From 'austerity' to the 'new normal'...** With both Conservative and Labour politicians committed to further spending cuts after the 2015 general election, most charities have come to see this more constrained funding environment as the new normal. In our experience, the largest charities have had greatest capacity to adapt: increasing their trading and fundraising efforts, taking on payment-by-results contracts, experimenting with social investment, and leading the development of new consortia. The smallest volunteer-led organisations had little money to start with. Yet, others have struggled and some have argued that the impact of cuts, particularly on medium sized local charities has amounted to a 'hollowing out' of the sector. Some funders report reduced quality and application rates; infrastructure bodies have also noted the loss of core capacity within the sector, including voice and advocacy work.

**...And beyond** Planning for the future will undoubtedly require the voluntary organisations to find new ways to adapt. Many organisations will need to re-imagine how they deliver services, engage with partners and volunteers, and generate income. Yet, while we adapt, we must also hold true to the values that have always held our sector together. We must continue to speak up for the communities we serve. We must deliver services and support that helps transform people's lives for the better. And we must be open and transparent, so that our beneficiaries, donors and the wider public can see that we live our values in all that we do.



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# Civil society

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# Civil society summary

## 01 What is civil society?

Civil society has been defined as the associational life that brings people together and allows civic values and skills to develop<sup>1a</sup>. The role of voluntary groups and organisations is central to this associational life, but civil society is about more than this, it is also defined by a set of values - the values associated with the 'good society' which aims for social, economic and political progress. Finally, civil society is defined as a space: the public sphere where debate and deliberation allows the negotiation of the common interest. A healthy civil society is one where voluntary associations of people, groups and organisations focused on an identified common good can thrive.

The model of civil society adopted in this Almanac encompasses the body of organisations that exist between government, individuals, and

businesses. This definition seeks to include all of the organisations that are variously labelled as the third sector, the voluntary sector, the non-profit sector, the community sector, and so on. Increasingly these organisations are simply described as civil society organisations.

This graphic, which is based upon work by Adalbert Evers and Jean-Louis Lavelle<sup>1b</sup>, positions groups of organisations according to their distance from the state, the market, and communities. Organisations at or near the boundaries with the public and private sector are 'hybrids', sharing the characteristics of different sectors: social enterprise, for example, sits at the boundary with the market. Social movements sit at the boundary with communities. Over time, these boundaries are changing – as is the location of organisations.

In the rest of this Almanac we use a "general charities" definition (a subset of the organisations registered as charities) to define the voluntary sector. In truth the voluntary sector comprises these general charities but also many more voluntary organisations that are small and operate as unincorporated associations. The voluntary sector is at the core of civil society, appropriately placed right at the heart of the diagram opposite. The diagram serves as a reminder of the broader range of organisations that have similar characteristics, that operate independently of state control and on a not-for-profit basis.

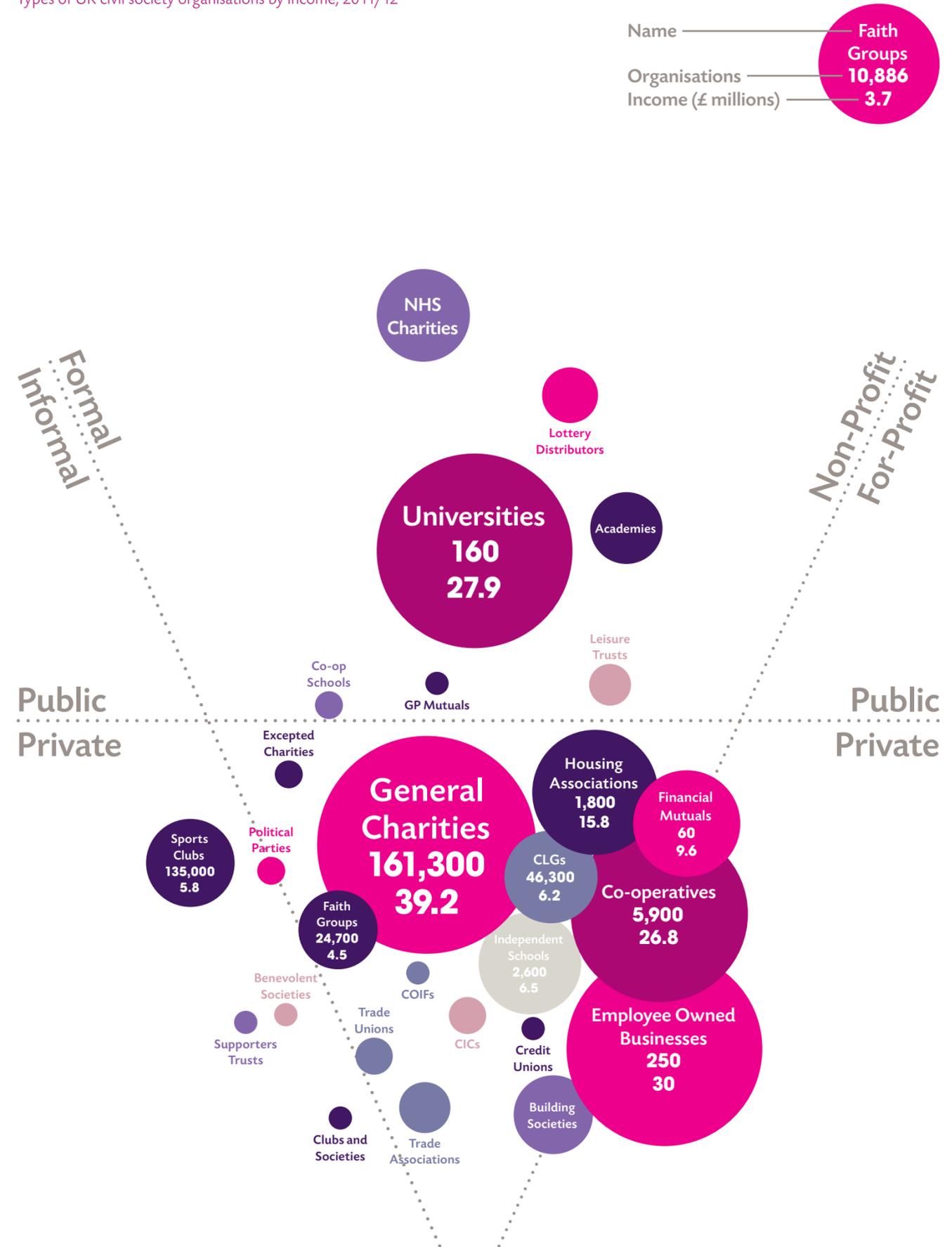
*Note: For further information on the number of organisations and financial characteristics of each type of organisation, see the databank.*

**Get all the data:**  
[data.ncvo.org.uk/a14q01](http://data.ncvo.org.uk/a14q01)  
**Source:** NCVO/TSRC, various sources

# 900,000

Estimated number of civil society organisations in 2012

Types of UK civil society organisations by income, 2011/12



# Financial resources

## 02 What is the income of civil society organisations?

Civil society organisations have an annual combined income of £181 billion. Voluntary organisations make up the largest part of civil society in financial terms, accounting for the largest share of income, assets and expenditure.

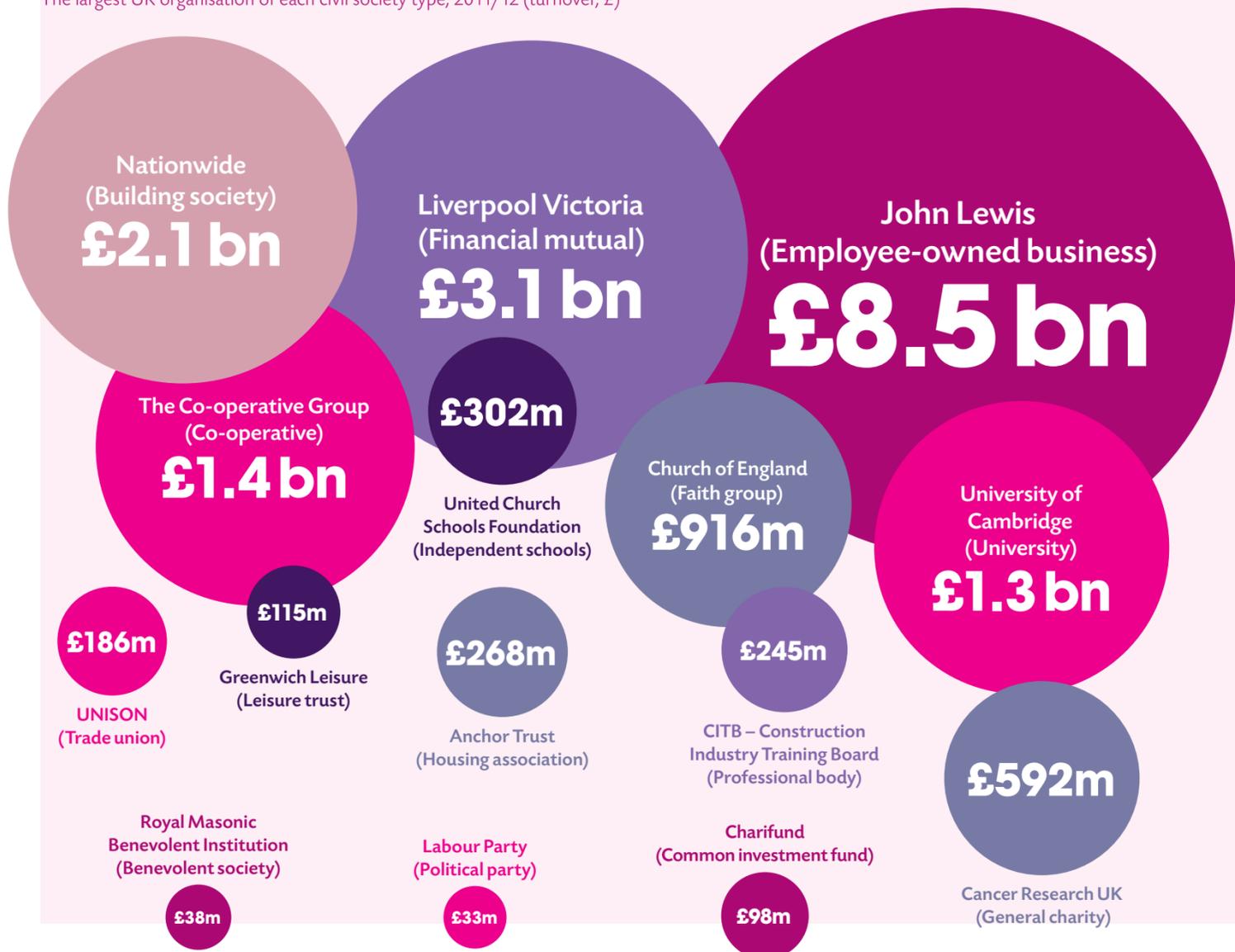
Employee-owned businesses (with an estimated income of £30 billion), universities (£27.9 billion) and co-operatives (£26.4 billion) are the other major sectors in terms of income.



Get all the data:  
data.ncvo.org.uk/a14q02

Bottom Source: NCVO/TSRC, various sources

The largest UK organisation of each civil society type, 2011/12 (turnover, £)



## 03 What assets do civil society organisations hold?

Civil society organisations control substantial assets with an estimated value of £286 billion. This figure largely consists of fixed assets such as property and investments. It will include some cash deposits, but excludes the assets of financial services industries (e.g. building societies and mutual insurance providers) which mostly comprise customer deposits. Our analysis of civil society assets may underestimate their true value because civil society organisations are often the custodians of significant historic or inalienable assets such as churches, sites of historical or cultural value, or areas of natural beauty.

Civil society's main tangible assets take the form of buildings, land or equipment. For instance, many community centres, local halls and meeting places, places of worship, and facilities for play and sports are owned by civil society organisations, as is much of the UK's affordable housing. Civil society organisations variously use their assets to provide essential space or resources to enable the delivery of their own services; to offer space for wider community use and benefit; and, importantly, to generate income – as in the case of foundations funded through returns on an invested endowment.

Get all the data:  
data.ncvo.org.uk/a14q03

Source: NCVO/TSRC, various sources

# £286bn

The value of civil society assets in 2012

UK civil society's major assets, 2011/12 (£ billion)



# People

## 04 How many people work in civil society?

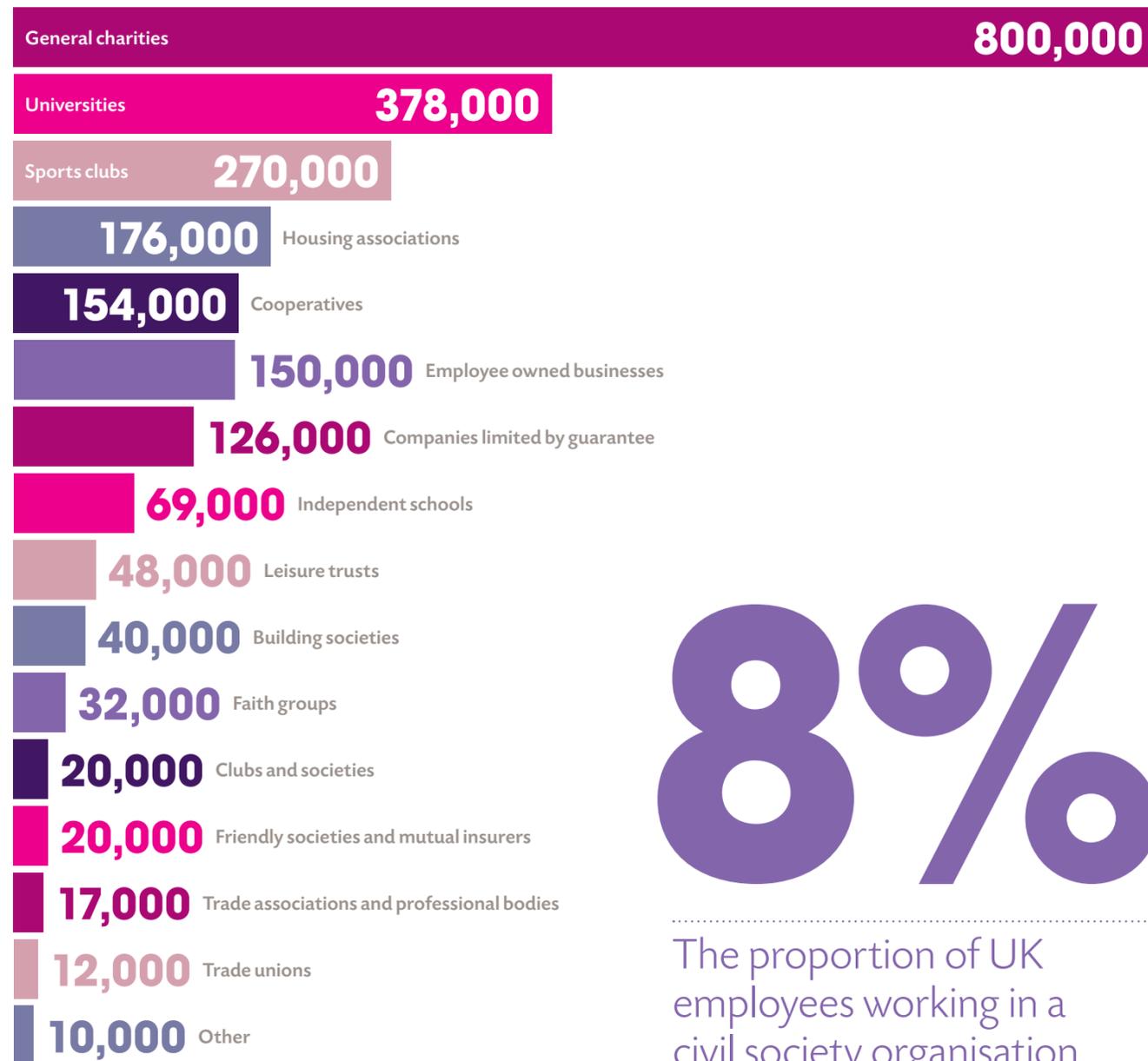
Civil society organisations are major employers with an estimated 2.3 million people employed as paid staff. This is equivalent to 8% of the total UK workforce – more than the workforce of the NHS, the UK's single largest employer (1.7 million people), and more than are employed in the

construction industry (2.1 million). Within civil society, voluntary organisations are the largest employer, employing 800,000 people – more than one-third (35%) of the civil society workforce<sup>4a</sup>. Research into working patterns across different sectors suggests that civil society organisations are a vital source of

flexible employment in the UK, with a higher proportion of the workforce employed on part-time contracts than in public and private sectors<sup>4b</sup>. For instance, we know that in both general charities, and in sports clubs a high proportion of staff are part-time or sessional workers.

**Get all the data:**  
data.ncvo.org.uk/a14q04  
**Source:** NCVO/TSRC, various sources

Paid staff by type of civil society organisation, 2011/12 (number of employees)



# 8%

The proportion of UK employees working in a civil society organisation

## 05 How many people benefit from the work of civil society organisations?

Civil society organisations exist to support a wide range of beneficiary groups, not just UK residents but people across the world, as well as many other causes that might directly or indirectly have an effect on an individual's life. This makes counting and describing the beneficiaries of civil society challenging. One could argue that the sheer breadth of needs and interests addressed by civil society organisations makes it difficult for any UK resident not to be in some way a direct or indirect beneficiary of their work.

From records of those organisations that publish beneficiary data (e.g. membership organisations), we can get some sense of the scope of engagement of the population with civil society. While some membership organisations (e.g. political parties and trades unions) have seen a fairly steady decline in their membership numbers for some time, others, including co-operatives, credit unions and some national membership organisations have experienced growth. The latest available membership data supports the suggestion that most individuals in UK society are likely to engage with and benefit from a civil society organisation at some point in their lives.

**Get all the data:** data.ncvo.org.uk/a14q05  
**Source:** NCVO, various sources

# 19%

The percentage of the population that benefit from civil society sports clubs

Civil society's beneficiaries and members: published estimates, 2011/12

	Number	Type of relationship
General charities	124,900,000	Beneficiaries
Building societies	25,000,000	Members
Faith groups	14,140,000	Active practitioners
Co-operatives	13,500,000	Members
Sports clubs	12,040,000	Members
Financial mutuals and friendly societies	8,500,000	Members
Trade unions	7,260,000	Members
Clubs and societies	7,000,000	Members
Housing associations	6,900,000	Members
Universities	2,500,000	Students
Credit unions	1,040,000	Members
Independent schools	620,000	Pupils
Political parties	460,000	Members
Football/rugby supporter trusts	300,000	Members
Co-operative trust schools	200,000	Pupils

## 06 How many volunteers are there?

Many civil society organisations across all sectors rely on the support of volunteers. There is considerable variety in who

volunteers and how frequently, their motivation for volunteering, the roles they adopt, and the length of their involvement.

**Get all the data:**  
data.ncvo.org.uk/a14q06

# 29%

The proportion of the population formally volunteering at least once a month

## Volunteering

Volunteers are a vital part of the work of civil society organisations. Find out more about volunteering on page 79.

# Trends

## 07 How has the number of civil society organisations changed?

Drawing together data from a variety of sources, we estimate there are around 900,000 civil society organisations in the UK. However, tracking the number of organisations over time is challenging – sources of information vary in quality and accuracy, categories and methodologies used by regulatory bodies are subject to change, and it is difficult to find accurate information about the many civil society organisations that

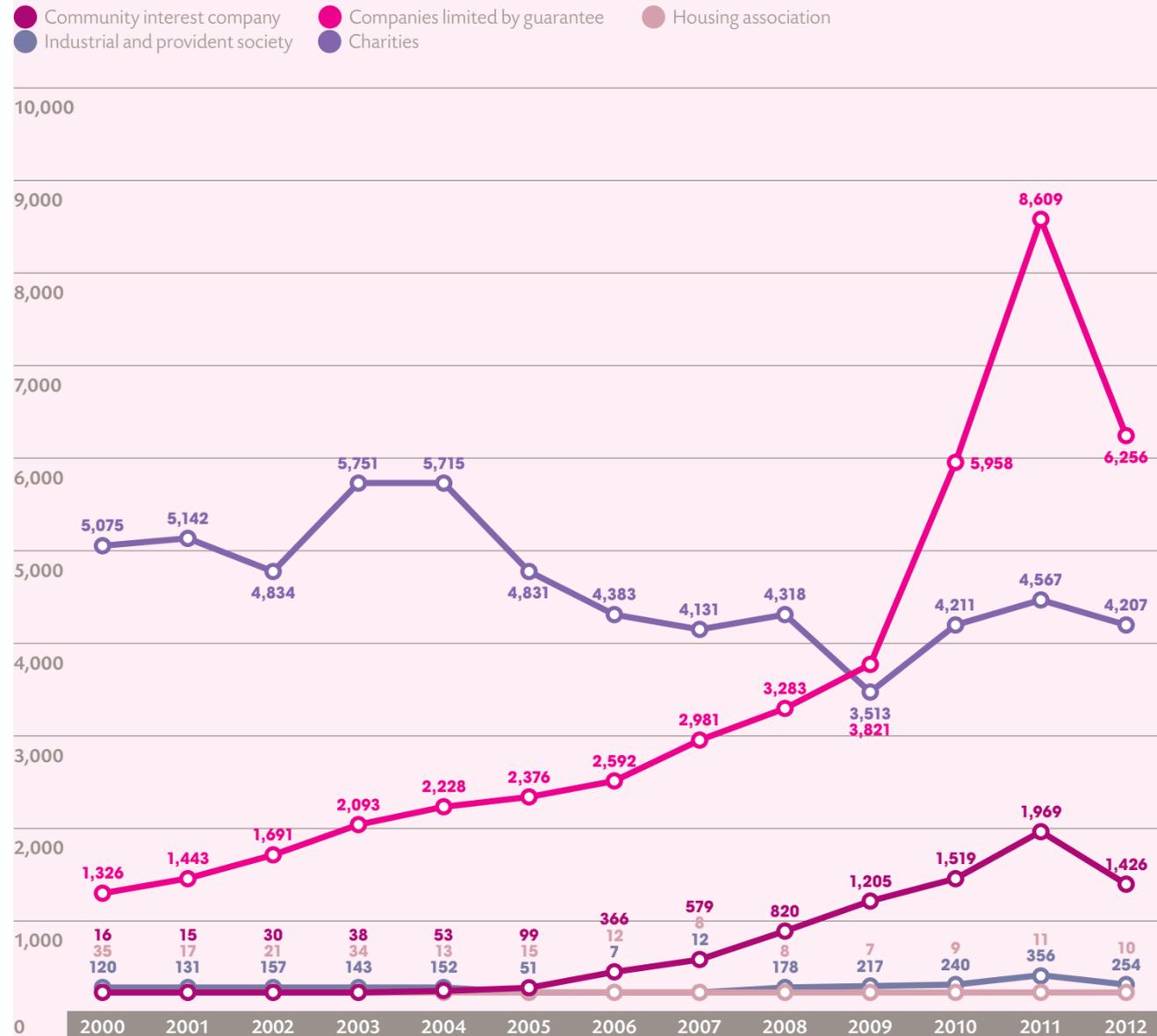
don't appear within official sources or registers (e.g. the unincorporated organisations estimated to make up perhaps as much as two-thirds of civil society)<sup>7a</sup>.

Although our estimated number of civil society organisations has remained relatively unchanged over the last two years, this hides some variation in the make-up of the sector. Outside of the large but uncertain number

of unincorporated organisations, general charities remain by far the largest proportion of civil society organisations (around 41%) but the total number of general charities has continued to decline in number since 2008. This has been in part because of administrative changes but may also reflect a growth in registrations of alternative forms of civil society organisation.

**Get all the data:** [data.ncvo.org.uk/a14q07](http://data.ncvo.org.uk/a14q07)  
**Source:** NCVO/TSRC, Companies House, Charity Commission

The number of new civil society organisations registered each year, 2000 to 2012



## 08 What is the relationship between social enterprise and civil society?

**Get all the data:** [data.ncvo.org.uk/a14q08](http://data.ncvo.org.uk/a14q08) / **Source:** NSCS 2010, NCVO/TSRC, Charity Commission, BIS Annual Survey Small Businesses 2012

Many of the civil society organisations we have described above identify themselves as social enterprises. A social enterprise is a business that trades for a social or environmental purpose and that reinvests its profits to further its social mission. Social enterprise can also be described as an activity: selling goods or services which also fulfil a social mission.

Much like civil society, while there is agreement about the concept, there is less consensus about how to precisely define it. Suggested definitions cover a wide range of attributes – from whether organisations identify with the term social enterprise, to their profit distribution, to the income they generate from trading. Some characteristics are easy to measure using available data – profit distribution – but others are more difficult and require judgement on an organisation's values and objectives.

Under one definition, used by the Department for Business, Innovation and Skills (BIS), to be a social enterprise, a business must:

- consider itself "a social enterprise: a business that has mainly social or environmental aims."
- not pay more than 50 per cent of profit or surplus to owners or shareholders.
- not generate more than 25 per cent of income from grants and donations and, therefore, should not have less than 75 per cent of turnover from trading.
- consider itself a very good fit with the statement "a business with primarily social or environmental objectives, whose surpluses were principally reinvested for that purpose in the business or community rather than mainly being paid to shareholders and owners".

In the BIS Small Business Survey 2012<sup>8a</sup>, 24% of SME employers (businesses with under 250 employees) considered themselves to be social enterprises, but only 5% met all the criteria of the full definition – showing the contested nature of this definition.

Using another definition, adopted by the Cabinet Office in 2010, 45% of registered charities agreed that they were a social enterprise ("a business with primarily social objectives whose

surpluses are principally reinvested for that purpose in the business or community, rather than being driven by the need to maximise profit for shareholders and owners"<sup>8b</sup>).

Separately, based on the data collected for this Almanac, we estimate that 23% of registered charities in England and Wales, and 25% of general charities earn at least 75% of their income from trading in 2011/12. If the criteria were at least 25% of income from trading rather than 75%, 43% of registered charities could be regarded as social enterprises.

Meanwhile there has been a significant growth in the number of Community Interest Companies (CICs), a legal form that social enterprises can adopt, in recent years. Over 2,000 CICs were approved in both 2011/12 and 2012/13, taking the total number of registered CICs to nearly 8,000 by the end of 2012/13<sup>8c</sup>. At the time of going to print, the CIC regulator was considering simplification of CIC rules that could see further growth in CIC social enterprises in future.

Using another definition, adopted by the Cabinet Office in 2010, 45% of registered charities agreed that they were a social enterprise ("a business with primarily social objectives whose

Proportions of SME employers and registered charities meeting social enterprise definitions (%)





The voluntary sector:

# The big picture

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# About the voluntary sector

## 09 What is the voluntary sector?

The voluntary sector is at the heart of civil society. Our analysis of the voluntary sector is based on the “general charities” definition. Starting with all registered charities, we exclude those controlled by government, independent schools, religious organisations and some others.

Although many of these organisations have paid staff, a defining characteristic is their voluntary nature, whether in governance through a trustee board, in finance through donations and grants, or in resources through the help of volunteers.

NCVO has been tracking change in the core voluntary sector since the early 1990s, but we have focused our analysis on change over the last decade. The timeline below aims to help readers contextualise the latest elements of this change.

Get all the data: [data.ncvo.org.uk/a14q09](http://data.ncvo.org.uk/a14q09)

Quarterly change in UK GDP 2004-2013 (% change from previous quarter)



# Civil society

## Voluntary sector

## 10 Why are our estimates lower than the Charity Commission's figures?

Get all the data: [data.ncvo.org.uk/a14q10](http://data.ncvo.org.uk/a14q10)

Compared to the Charity Commission's register, which covers England and Wales, the Almanac reports more organisations but less income. To produce estimates of the size of the UK voluntary sector, we apply the “general charities” definition to the register of charities and similar registers covering Scotland and Northern Ireland. Developed by the Office for National Statistics, the definition excludes organisations that:

- are inactive, or subsidiaries of other organisations;
- belong elsewhere in civil society. These include housing associations, independent schools, government bodies, faith groups (whose main objective is the promotion of religion) and trade associations;
- have charitable status, but are not independent of government (NHS charities, the British Council etc.).

Housing associations  
 Independent schools  
 Government bodies  
 Subsidiaries  
 NHS charities  
 Independent hospitals  
 Mutuels  
 Inactive and duplicate organisations  
 Faith groups  
 Trade associations

Scottish charities  
 Northern Irish charities

# Size

## 11 How many voluntary organisations are active in the UK?

Get all the data: [data.ncvo.org.uk/a14q11](http://data.ncvo.org.uk/a14q11)  
Source: NCVO/TSRC, Charity Commission

There were over 161,000 active voluntary organisations in the UK in 2011/12. Active organisations are those that have submitted an annual return in the last 3 years. In the UK there are 2.5 voluntary organisations for

every thousand people. This is equivalent to one voluntary organisation for every 395 people. This estimate does not include a large number of 'below the radar' informal groups that are not registered charities. The private

sector is 30 times larger than the voluntary sector by number of entities, with just under 4.9 million enterprises (BIS 2013)<sup>11a</sup>.

Number of UK voluntary organisations, 2011/12

How big?	Micro Less than £10,000	Small £10,000 to £100,000	Medium £100,000 to £1 million	Large £1 million to £10 million	Major More than £10 million	Total
How many?	<b>82,391</b>	<b>52,815</b>	<b>21,257</b>	<b>4,270</b>	<b>533</b>	<b>161,266</b>

## 12 How big is a typical voluntary organisation?

Get all the data: [data.ncvo.org.uk/a14q12](http://data.ncvo.org.uk/a14q12)  
Source: NCVO/TSRC, Charity Commission

Around 82,000 voluntary organisations have an annual income of less than £10,000, which amounts to just over half (51%) of the sector. We have categorised these organisations as 'micro' organisations. A further 53,000 (33%) are categorised as 'small' and have an annual income of less than £100,000. These two categories only account for 5.3% of the

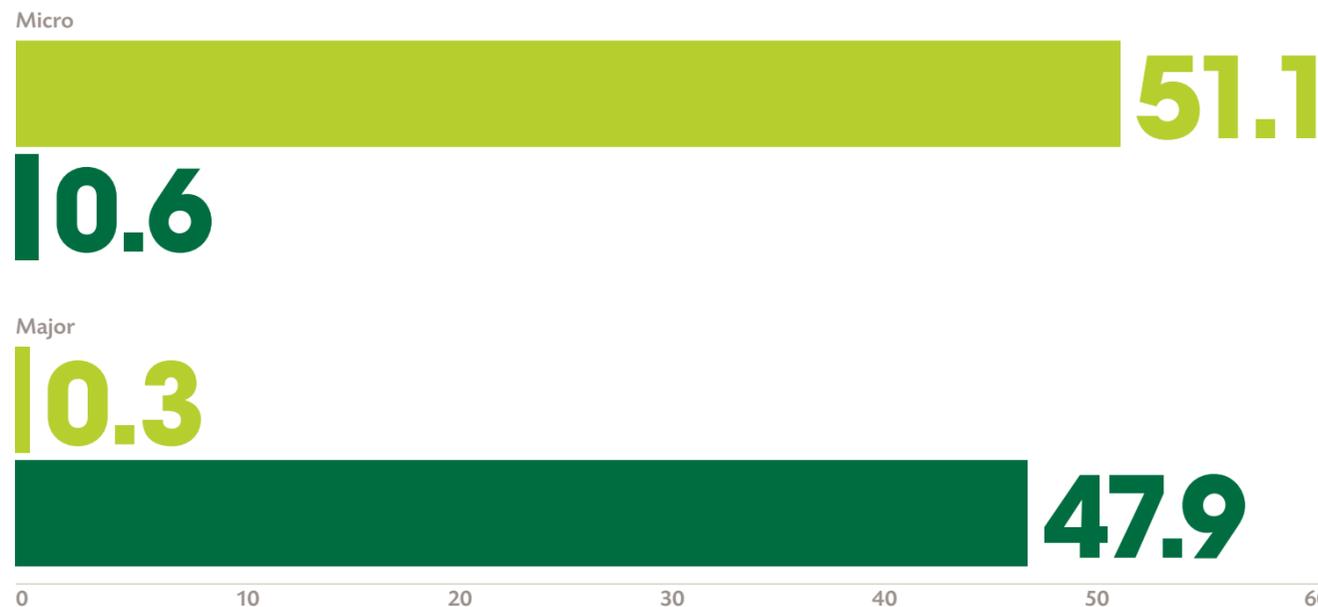
sector's total income. They are less likely to employ paid staff and rely more on donations from individuals than larger organisations.

In contrast, the 533 major voluntary organisations with annual incomes above £10 million receive 48% of all charitable income. These organisations are more likely to operate nationally or internationally and

have paid employees, whilst some have branch structures that enable them to operate at a local level. Due to the threshold for registering with the Charity Commission, there are many more organisations operating 'below-the-radar'. Estimates of these organisations vary, with some estimates proposing as many as 600,000<sup>12a</sup>.

Micro and major organisations' share of total income, 2011/12 (%)

Proportion of: ● organisations ● income



2011/12	Micro	Small	Medium	Large	Major	Total
Number of organisations	82,391	52,815	21,257	4,270	533	161,266
Proportion of organisations (%)	51.1	32.8	13.2	2.6	0.3	100.0
Income (£ millions)	228.5	18,56.1	6,544.2	11,821.5	18,798.8	39,249.1
Proportion of income (%)	0.6	4.7	16.7	30.1	47.9	100.0
Mean income (£)	2,800	35,100	308,000	2,768,000	35,270,000	243,400
Median income (£)	1,520	26,223	226,578	1,931,766	19,279,800	9,448

## 13 Which are the largest voluntary organisations in the UK?

Get all the data: [data.ncvo.org.uk/a14q13](http://data.ncvo.org.uk/a14q13)  
Source: NCVO/TSRC, Charity Commission

The sector's spending power largely resides with large and major voluntary organisations. Over three quarters of total current expenditure (£28.2 billion) is spent by the largest 4,803 organisations (or 3% of organisations). The Wellcome Trust, with an expenditure of £728.1 million, is the largest voluntary organisation by expenditure.

The thirty largest voluntary organisations by total spending, 2011/12 (£ millions)

Rank	Charity	Spending (£ millions)
1	Wellcome Trust	728.1
2	Cancer Research UK	498.3
3	The National Trust	450.0
4	Oxfam	378.7
5	The Save the Children Fund	322.6
6	British Heart Foundation	273.2
7	Barnardo's	240.6
8	The British Red Cross Society	230.9
9	Royal Mencap Society	190.0
10	Action for Children	184.1
11	Age UK	165.8
12	The Gatsby Charitable Foundation	160.5
13	The Salvation Army	159.7
14	Sightsavers	158.7
15	Leonard Cheshire Disability	157.2
16	St Andrew's Healthcare	156.3
17	Ufi Charitable Trust	153.9
18	Macmillan Cancer Support	152.8
19	The Royal National Lifeboat Institution	150.4
20	Marie Stopes International	139.9
21	The Royal British Legion	139.1
22	NSPCC	138.8
23	Marie Curie Cancer Care	136.1
24	RSPCA	120.4
25	Royal Opera House Covent Garden Limited	114.6
26	The Royal National Institute of Blind People	112.8
27	Royal Society for the Protection of Birds	112.0
28	Charity Projects (Comic Relief)	110.4
29	Genome Research Limited	104.1
30	Scope	102.9

# 3%

of organisations account for over three quarters of total spending

# Geography

## 14 Are there more voluntary organisations in some parts of the UK than in others?

Voluntary organisations can be assigned to a location based on the address registered with the Charity Commission. This means the activities of national and international organisations are mapped to the Local Authority that contains their headquarters. As the chart below shows, one consequence

of this is that the City of London has the highest number of organisations per 1,000 people. On average within the UK there are 2.6 voluntary organisations for every 1,000 people. The geographies of these organisations are complex and uneven, and the distribution of other civil society

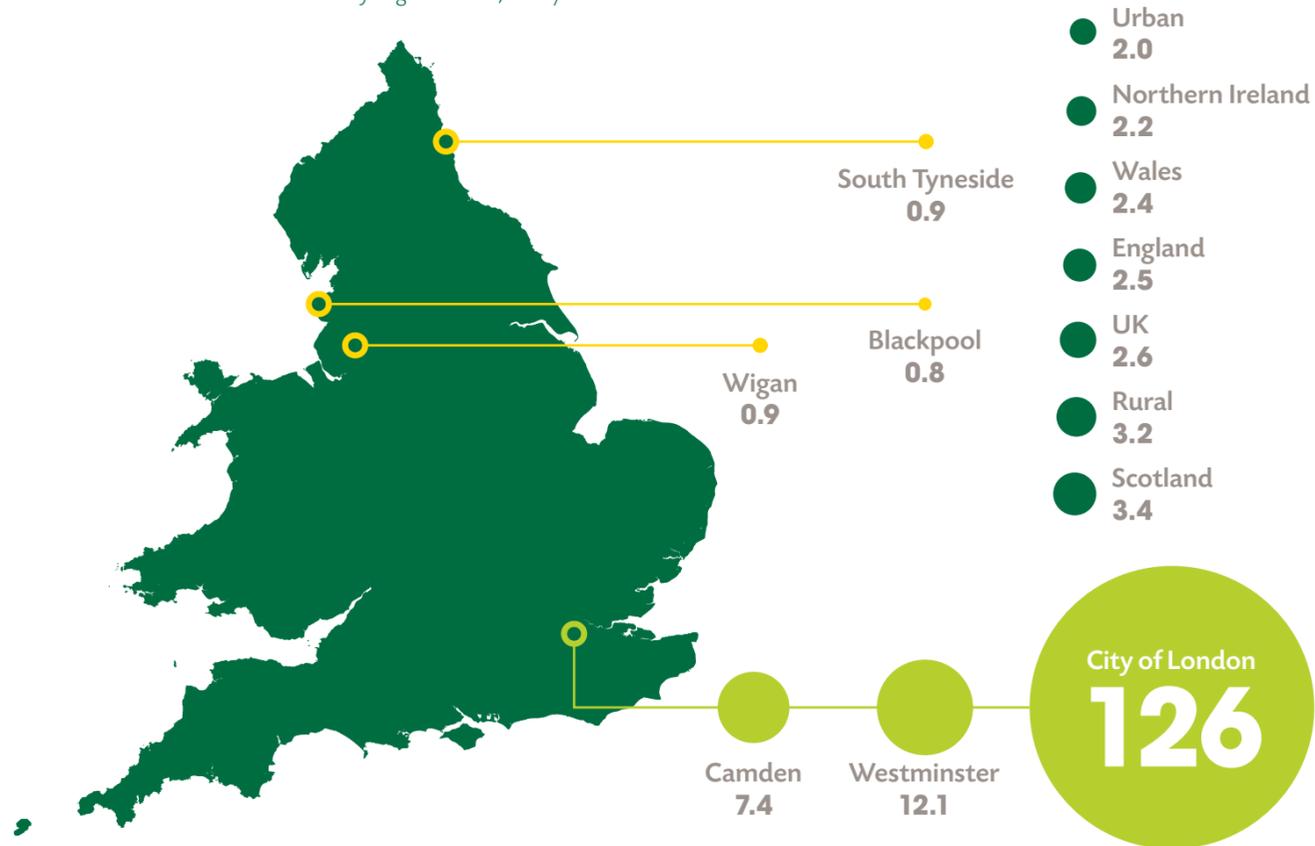
Get all the data: [data.ncvo.org.uk/a14q14](http://data.ncvo.org.uk/a14q14)  
Source: NCVO, Charity Commission

organisations may vary from this. There is a clear rural/urban split in the distribution – on average rural local authorities have 3.2 organisations per 1,000 people, compared to 2.0 in urban areas. However, organisations in urban areas have an income on average three times larger than those in rural areas.

# 31%

Proportion of UK voluntary organisations' income accounted for by organisations located in 7 London boroughs

Areas with the most and least voluntary organisations, 2011/12



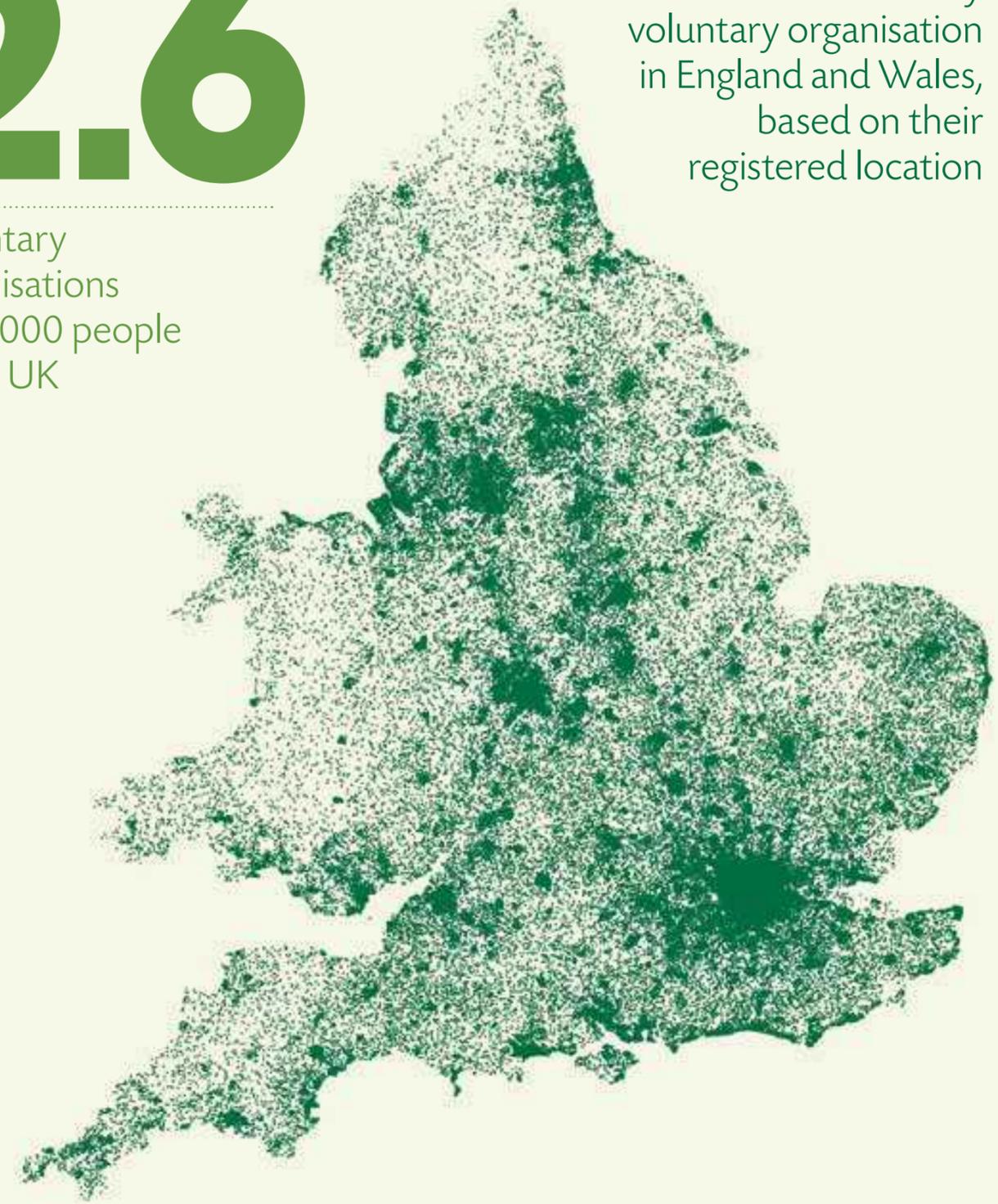
## 15 How are charities distributed throughout England and Wales?

Get all the data: [data.ncvo.org.uk/a14q15](http://data.ncvo.org.uk/a14q15)  
Source: NCVO, Charity Commission

# 2.6

Voluntary organisations per 1,000 people in the UK

This map shows the location of every voluntary organisation in England and Wales, based on their registered location



# Activities

## 16 What activities does the voluntary sector undertake?

**Get all the data:**  
[data.ncvo.org.uk/a14q16](http://data.ncvo.org.uk/a14q16)  
 Source: NCVO/TSRC, Charity Commission

The Almanac puts all of the 161,266 voluntary organisations in the UK in a discrete category based on their principle economic activity, according to the International Classification of Non-Profit Organisations (ICNPO)<sup>16a</sup>.

The largest category is social services, which includes 29,711 organisations with a total income of £9.1 billion, and assets of £13.4 billion. This sub-sector uses a broad definition of social services and includes

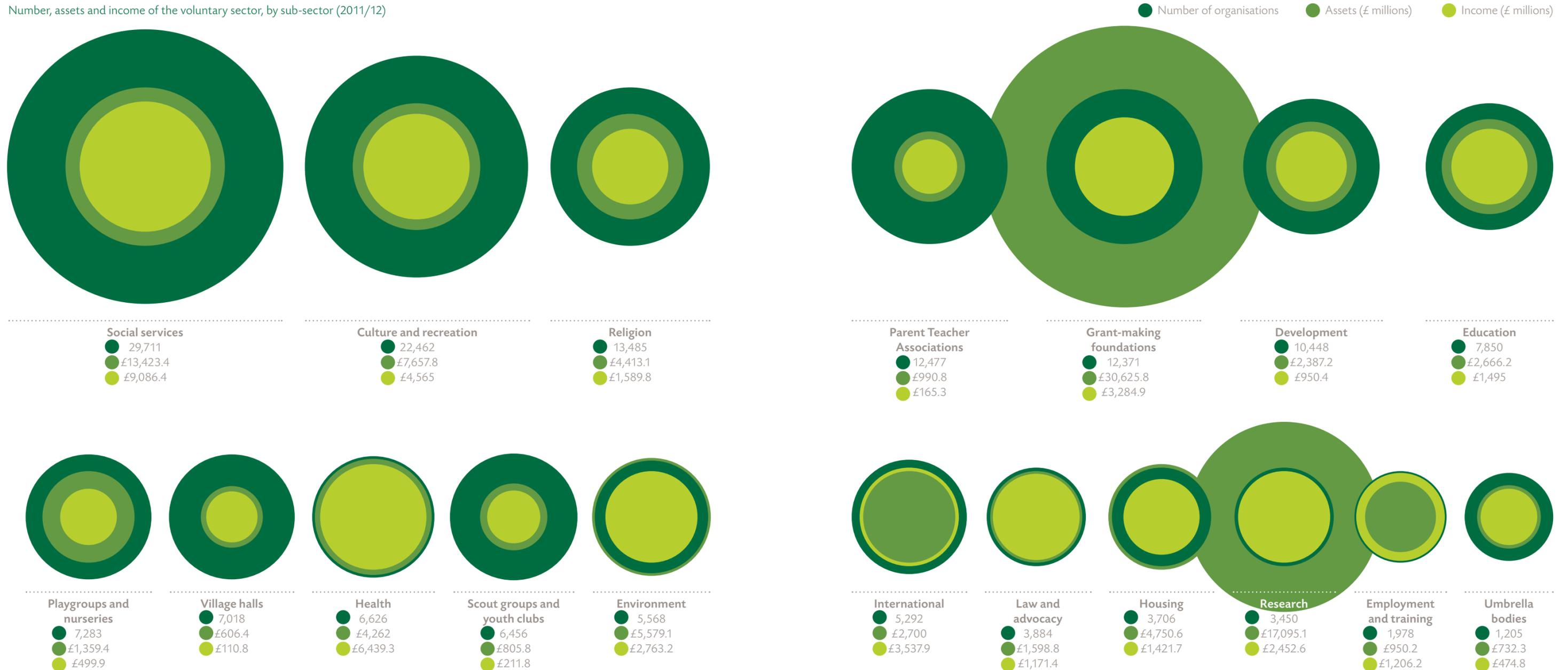
organisations such as Barnardo's, Age UK, Mencap and Crisis as well as charities engaged in emergency relief like the RNLI.

The sub-sector with the most wealth is grant making foundations, comprising 12,371 organisations with net assets of £30.6 billion. However, not all grant makers are in this category. Some of the largest grant makers are instead in the research category, which also covers medical research, and includes

charities such as Cancer Research UK and the Wellcome Trust.

There are also 22,500 organisations that exist to provide and support culture and recreation – including theatres, museums, galleries, sports clubs and zoos – for example the Royal Opera House, the Royal Shakespeare Company and the North of England Zoological Society.

Number, assets and income of the voluntary sector, by sub-sector (2011/12)



# Money

## 17 What is the voluntary sector's total income and spending?

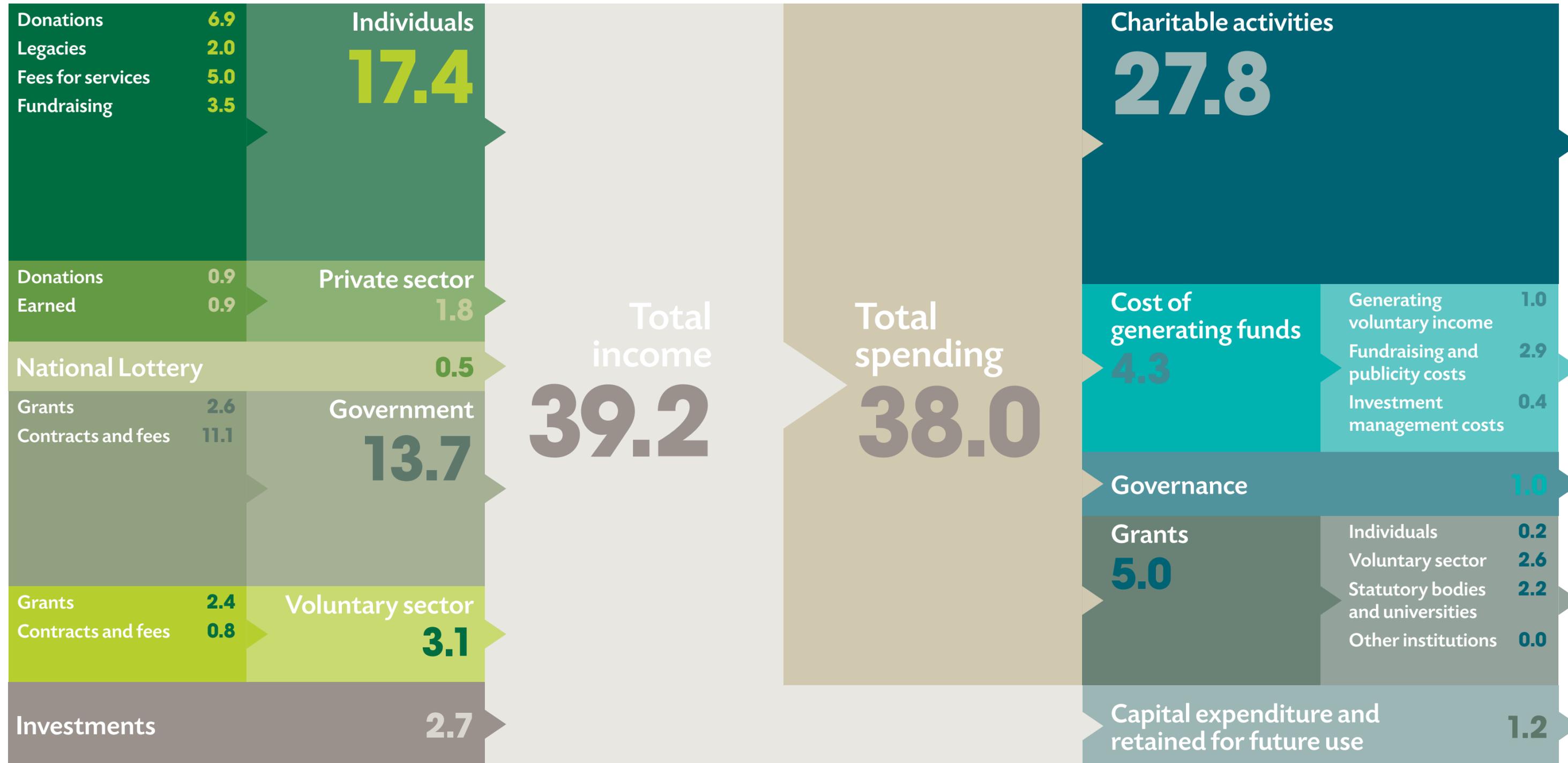
Get all the data:  
[data.ncvo.org.uk/a14q17](http://data.ncvo.org.uk/a14q17)  
 Source: NCVO/TSRC, Charity Commission

The voluntary sector's income and spending, 2011/12 (£ billions)

The total income of voluntary organisations in 2011/12 was £39.2 billion. We estimate £2.4 billion is received as grants from other voluntary organisations, so is arguably double-counting of income. In the same

year current expenditure stood at £38.0 billion, 97% of total income. This leaves a difference of £1.2 billion. However, this does not necessarily imply

that the sector has surplus income: capital expenditure on equipment or buildings is spread over the life of the asset, whilst total income includes items such as legacies that are spent over multiple years.



# Economy

## 18 What is the impact of inflation on the voluntary sector?

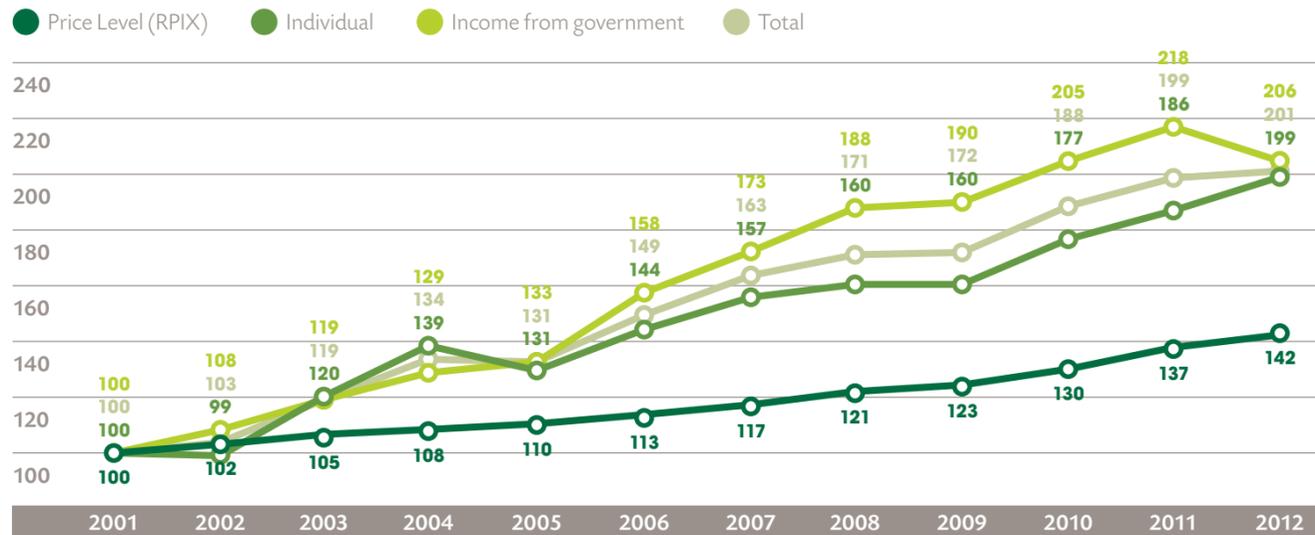
Inflation is the general increase in prices over time, which means that every year, £1 of cash is worth less in real terms. For this reason, in order to compare cash financial amounts over time, an adjustment is made to produce a real

terms figure. The inflation measure used in the Almanac is RPIX (Retail Prices Index, excluding mortgage interest payments)<sup>16a</sup>. Over the last decade, the voluntary sector's total income has increased faster than inflation. This is true

of all sources of income apart from income from the National Lottery. Put more simply, the sector has been growing in real terms, with total income increasing from £29.4 billion in 2001/02 to £39.2 billion in 2011/12.

**Get all the data:**  
data.ncvo.org.uk/a14q18  
**Source:** NCVO/TSRC, Charity Commission.

Voluntary sector total income, income from government and income from individuals, compared to the RPIX price level, 2001–2012

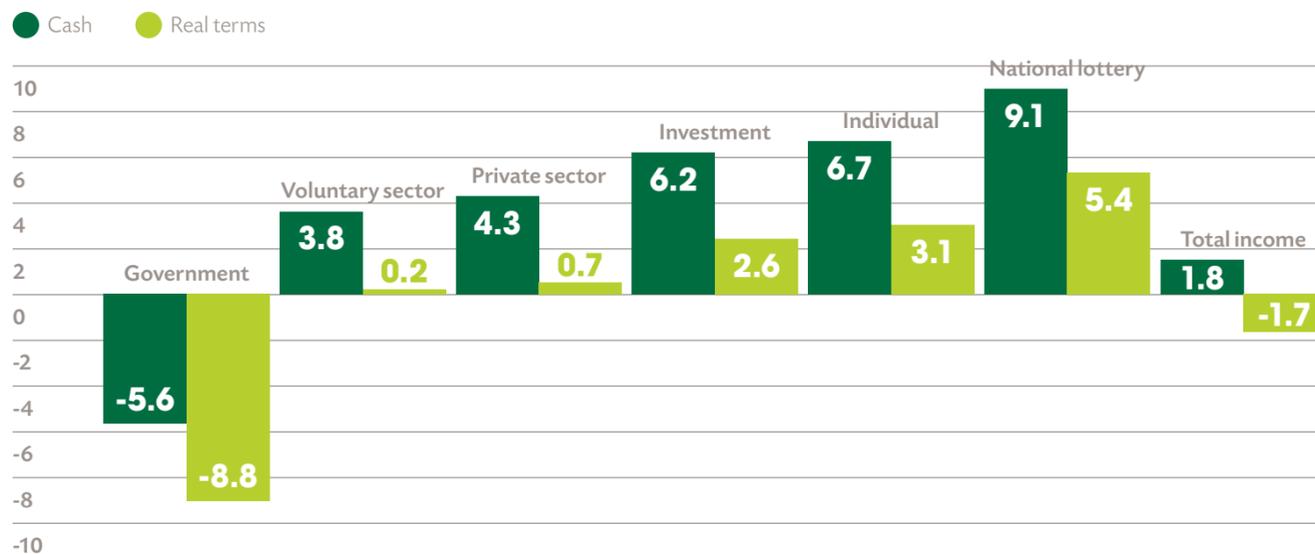


However in the 2011/12 financial year, the total income of the voluntary sector increased by 1.8% in cash terms, but once the inflation adjustment is taken into account,

this amounted to a 1.7% fall in real terms. Further analysis suggests however that it is not inflation per se that is the problem, as this fall is caused by the reduction in income

from government sources – which were 5.6% lower in 2011/12 than in 2010/11 in cash terms. Income from all sources apart from government increased in real terms.

Percentage change in voluntary sector's real and cash income by source 2010/11 to 2011/12 (%)



## 19 What is the sector's contribution to the economy?

**Get all the data:**  
data.ncvo.org.uk/a14q19

The contribution of different sectors is measured using GVA (gross value added) which measures the value of output. NCVO developed a method to estimate the voluntary sector's GVA in consultation with the ONS in the early 2000s. This method produces a figure for the year 2011/12 of £11.8 billion, which is equivalent to almost 0.9% of the GVA of all industries in the UK<sup>19a</sup>.

NCVO is working with the ONS to improve coverage of the voluntary sector in the National Accounts, which are used to create GDP estimates. This is likely to lead to further improvements in the calculation of the sector's contribution to the economy in future years.

Method for calculating voluntary sector GVA	£ billions
Staff Costs	14.4
plus	
Expenditure on goods and services	18.6
minus	
Income from sales of goods and services	-21.3
equals	
<b>Voluntary sector's gross value added</b>	<b>11.8</b>

# £11.8 billion

The voluntary sector's GVA in 2011/12

Source: NCVO

## The contribution of volunteering

The Community Life Survey<sup>19b</sup> estimates that UK adults who formally volunteer at least once a month spent more than 2.1 billion hours volunteering in 2012/13. Using a

replacement cost approach, which uses the median wage from equivalent occupational groups to calculate the cost of replacing volunteers with paid staff, the

ONS estimate<sup>19c</sup> that the value of voluntary activity is £23.9 billion – this is equivalent to just over 1.5% of GDP.

# £23.9 billion

The estimated value of the output of volunteers in 2012/13

Source: ONS

# Trends

## 20 How has the number of organisations changed?

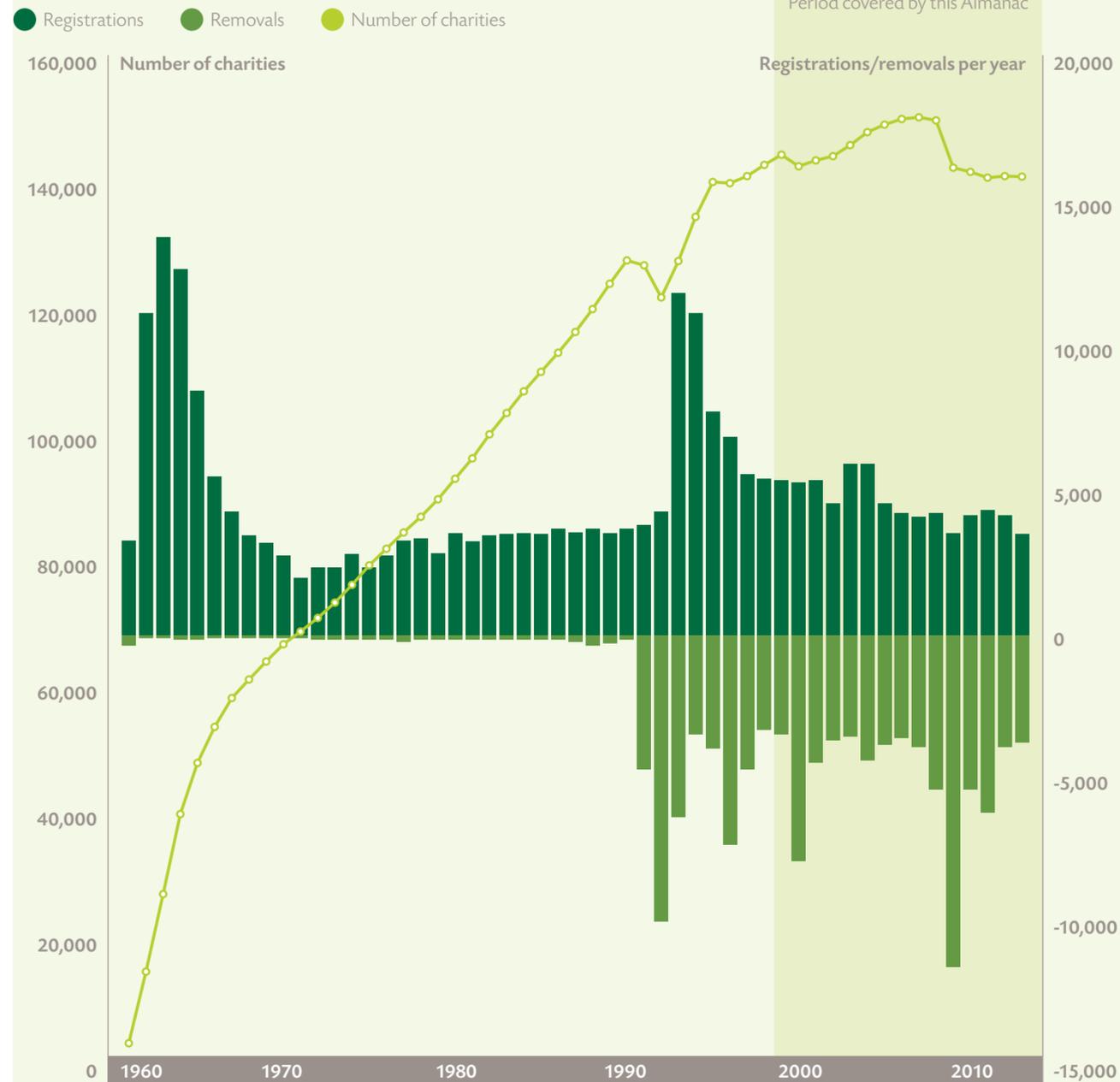
Since the register of charities was launched in the 1960s, the number of charities has grown steadily, with at least 2,500 organisations registered every year. In 2012, 4,200 new general charities were registered. Both registrations and removals are unrelated to

economic conditions: the peaks and troughs shown are the result of administrative action by the Charity Commission, not recessions. In 2007 the Charity Commission started a Register of Mergers, by January 2014 it had records of over 1,200 mergers<sup>20a</sup>. This does

not tell the full picture on mergers however, as only those mergers which involve organisations that receive legacies or have made a vesting declaration need to be registered.

**Get all the data:**  
data.ncvo.org.uk/a14q20  
**Source:** NCVO/TSRC, Charity Commission

General charities in England and Wales: registrations, removals and number, 1961 – 2013



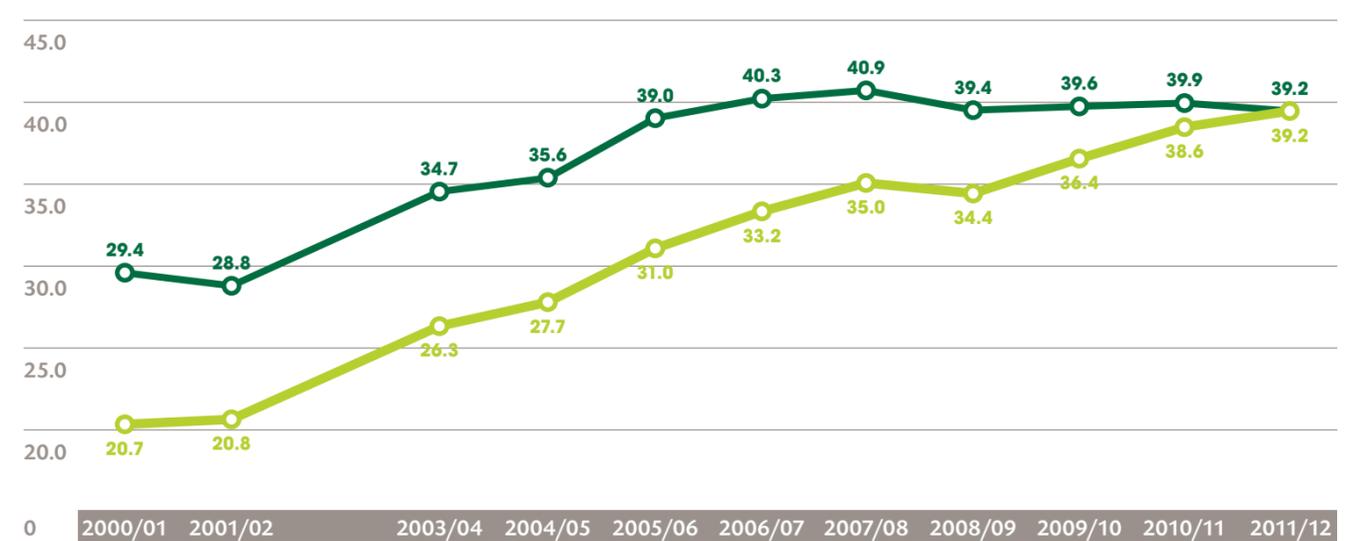
## 21 How has the sector's income and spending changed?

**Get all the data:**  
data.ncvo.org.uk/a14q21  
**Source:** NCVO/TSRC, Charity Commission

After a period of significant growth between 2000/01 and 2007/08, the voluntary sector has seen little change in its income and spending. Both income and spending have grown in cash terms between 2007/08 and 2011/12; income increased from £35.0 billion in 2007/08 to £39.2 billion in 2011/12 (12%), and spending increased from £32.4 billion in 2007/08 to £38.0 billion in 2011/12 (17%).

However, it is clear from the charts below that the impact of inflation needs to be taken seriously in any consideration of trends in income and spending, as these 'raw' figures overstate growth. After adjusting for inflation (RPIX), the income in 2011/12 was over £1.6 billion lower than that seen in the "peak" year of 2007/08, whilst the real terms increase in spending over the same period was just £200 million (0.5%).

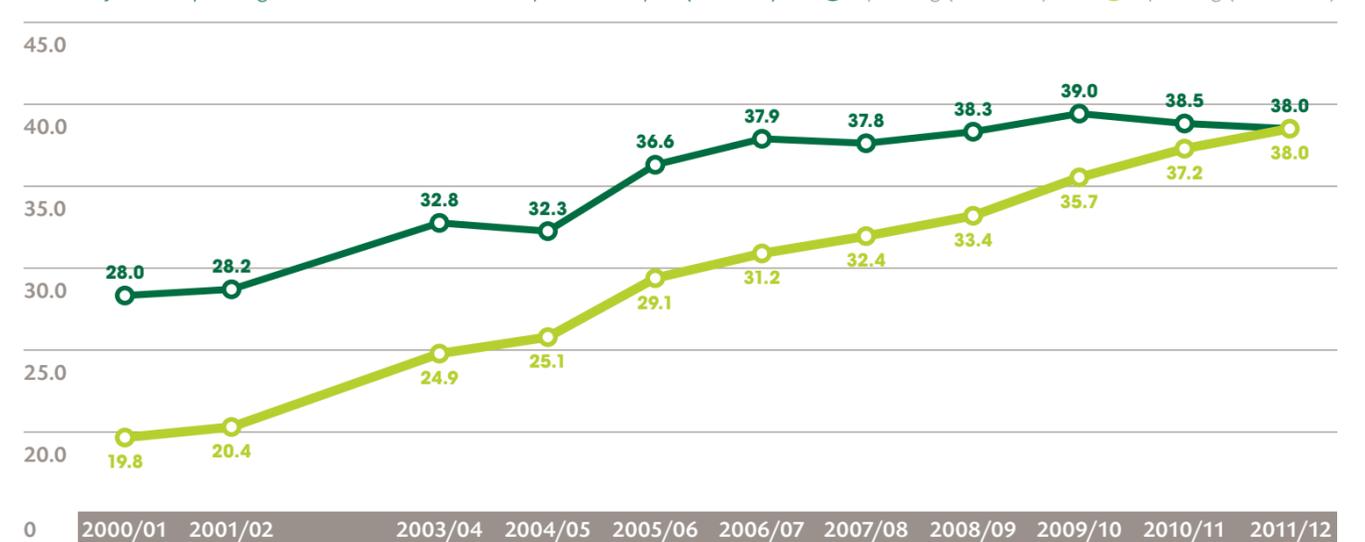
Voluntary sector income in real and cash terms, 2000/01 to 2011/12 (£ billions)



Our expectation that 2007/08 represented a medium-term peak of funding for the sector continues to hold true. While the immediate aftermath of the financial crisis and recession

in 2008 saw a loss of funding from individuals in the form of donations and income from fees, the sector now faces challenges in terms of income from government.

Voluntary sector spending in real and cash terms, 2000/01 to 2011/12 (£ billions)





The voluntary sector:

# Around the UK

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# Region and country profiles

## North West, North East



Source: NCVO/TSRC, Charity Commission

### England: North West

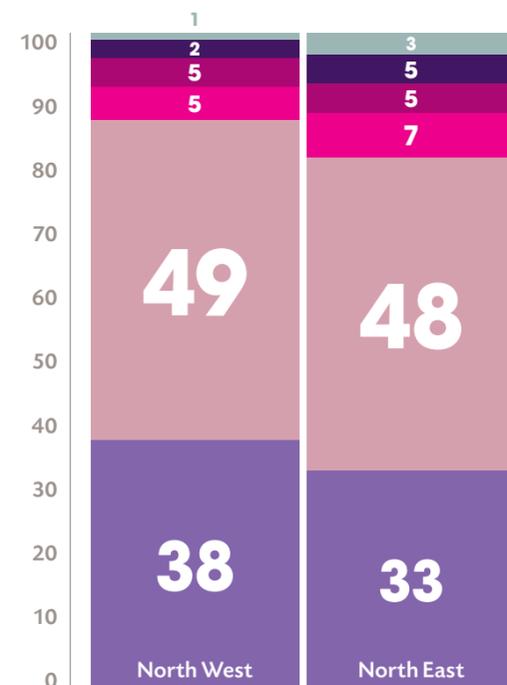
There are 13,209 voluntary organisations in total in the region, with an income of £2.5 billion and £5.0 billion of net assets. The largest voluntary organisation in the North West is Community Integrated Care, a national social care charity and one of the largest voluntary sector employers in the country, with more than 4,500 staff in 2011/12 and an income of £93m.

### England: North East

The 4,463 organisations in the North East have a combined income of £800 million, and net assets worth £1.7 billion. With 1.7 voluntary organisations per 1,000 people, the North East of England has the lowest concentration of charities relative to population. The largest voluntary organisations are Saint John of God Hospitaller Services and Creativity Culture and Education.

Income sources, 2011/12 (% of income)

- Individual
- Voluntary sector
- Private sector
- Statutory sources
- Investment
- National Lottery



## Yorkshire and the Humber, West Midlands



Source: NCVO/TSRC, Charity Commission

### England: Yorkshire and the Humber

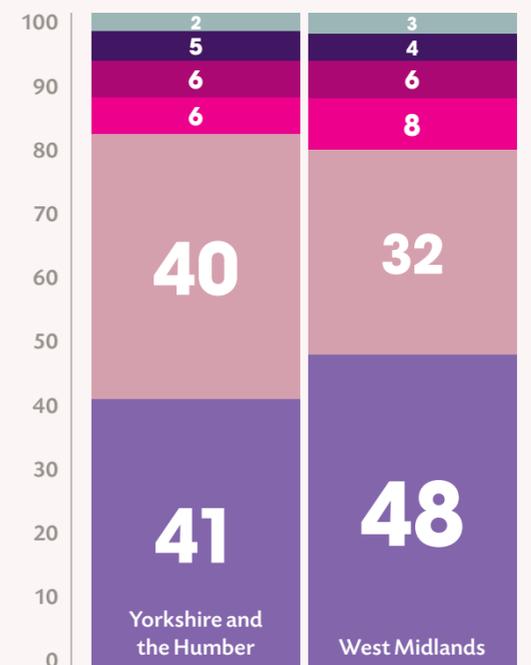
There are 10,259 voluntary organisations in the Yorkshire and Humber region, with total income of £1.5 billion and assets of £4.2 billion. National charities based in the region include StepChange Debt Charity (formerly the Consumer Credit Counselling Service).

### England: West Midlands

The 11,351 voluntary organisations based in the West Midlands include the animal charity PDSA and Islamic Relief Worldwide. The combined income of all organisations in the region amounts to £1.9 billion, with assets of £3.7 billion.

Income sources, 2011/12 (% of income)

- Individual
- Voluntary sector
- Private sector
- Statutory sources
- Investment
- National Lottery



## East Midlands, East of England

Source: NCVO/TSRC, Charity Commission

### England: East Midlands

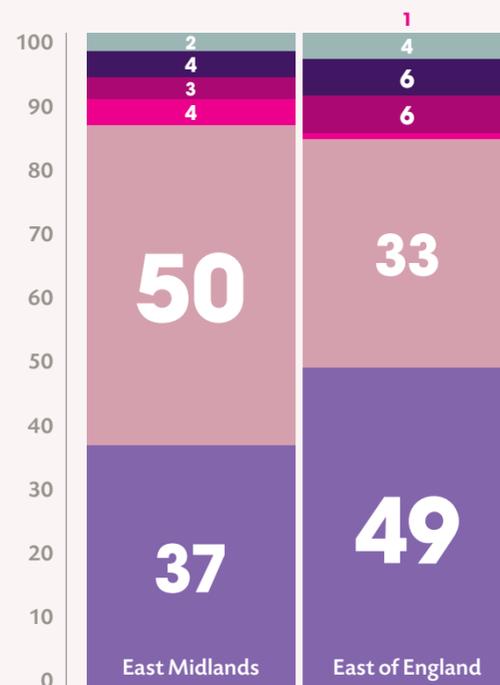
The 10,782 voluntary organisations in the East Midlands have a total income of £1.5 billion, and total funds of £2.7 billion. Major charities headquartered in the region include St Andrew's Healthcare, which provides specialist health care to the NHS, and YHA (England and Wales).

### England: East of England

There are 16,534 voluntary organisations in the East of England region, with a combined income of £2.3 billion. National charities based in the East of England region include RSPB, Action for Children, and the Scout Association.

Income sources, 2011/12 (% of income)

- Individual
- Voluntary sector
- Private sector
- Statutory sources
- Investment
- National Lottery



## South East, South West

Source: NCVO/TSRC, Charity Commission

### England: South West

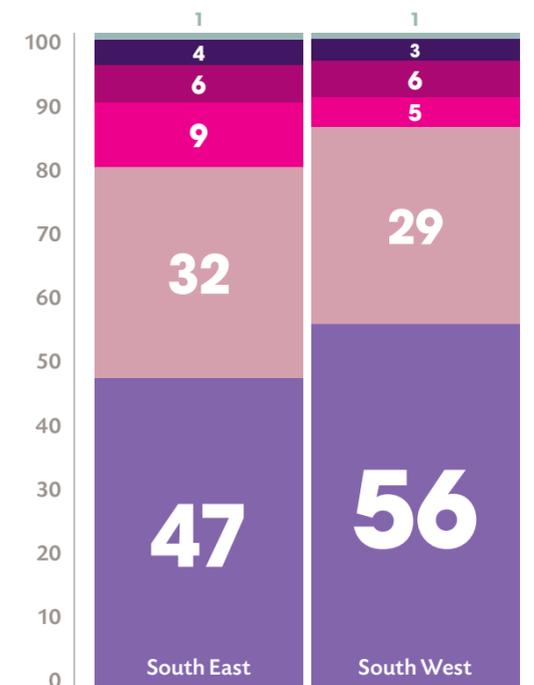
Voluntary organisations in the South West of England derive the highest share of their income from individuals. The two largest voluntary organisations in this region are the National Trust and the RNLI, both of which raise the majority of their income from individuals. The South West of England has the highest concentration of charities relative to the population, with 3.3 voluntary organisations per 1,000 people.

### England: South East

With 24,537, the South East has more voluntary organisations than any other English region, and a total income of £4.6 billion. The largest charities in terms of income based here are Oxfam and Sightsavers.

Income sources, 2011/12 (% of income)

- Individual
- Voluntary sector
- Private sector
- Statutory sources
- Investment
- National Lottery



## London, Wales



**Source:**  
NCVO/TSRC, Charity Commission

### England: London

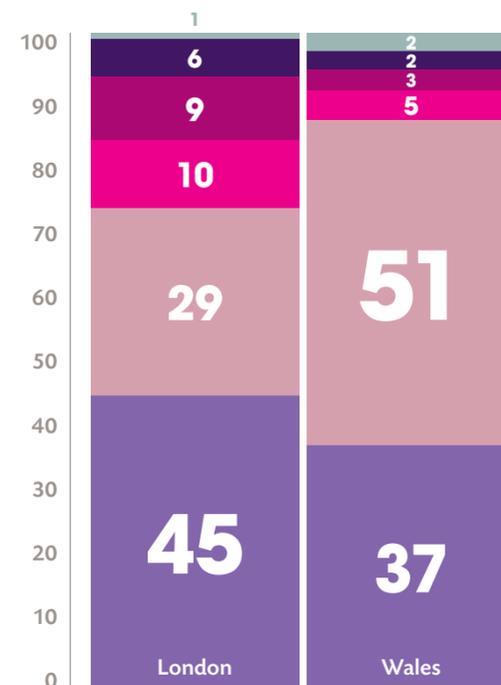
The 23,633 organisations based in London represent 14% of the organisations in the UK, but have 40% of the income and own 55% of the sector's net assets. These figures are high because many organisations have headquarters in London. Much of the associated charitable activity occurs throughout the UK, and across the world. The wealthiest charity in the UK, and in London, is the Wellcome Trust with assets of £12.4 billion in 2011/12.

### Wales

There are 7,272 voluntary organisations in Wales with a combined income of £1.1 billion. These organisations received just over half of their income from statutory sources, compared to 38% for the UK as a whole. The largest voluntary organisation in Wales is the Royal Voluntary Service (formerly WRVS). (NB: Welsh Universities that are now registered with the Charity Commission are excluded from our analysis under the general charities definition.)

Income sources, 2011/12 (% of income)

- Individual
- Voluntary sector
- Private sector
- Statutory sources
- Investment
- National Lottery



## Scotland, Northern Ireland



### Scotland

There are an estimated 45,000 voluntary organisations currently operating in Scotland. The 19,900 regulated third sector organisations in Scotland have a combined income of £4.9 billion, and employ 138,000 people. This includes 19,730 'general charities' with a turnover of £3.5 billion and 122,000 employees, plus 160 housing associations with £1.4 billion turnover employing around 16,000 staff, plus 107 credit unions with £28m income and around 350 staff.

There are currently 787 cross-border charities registered in Scotland, including many large household names, whose Scottish activities are included in the Charity Commission figures.

The data for Scotland is provided by SCVO, with input from the Office of the Scottish Charity Regulator and the Scottish Housing Regulator. For a more comprehensive picture see SCVO's Scottish Third Sector Statistics\*: [www.scvo.org.uk/stats](http://www.scvo.org.uk/stats)



### Northern Ireland

The data for Northern Ireland is provided by NICVA and their detailed State of the Sector IV report<sup>5</sup> on the sector based on their database of charities. Income from all main sources in 2009/10 is estimated to be £741.9 million, with an estimated 58% of the sector's income coming from the sale of goods and the delivery of services.

There has been an increase in the number of staff employed in the sector with around 27,773 individuals which represents 4% of the total Northern Ireland workforce<sup>6</sup>. The predominance of females in the workforce continues to be a feature of the voluntary and community sector in Northern Ireland however for the first time women are now in the majority at chief executive and director roles. While the average donation in Northern Ireland remains around the same at £17.65, donations to charity from 16-24 year olds have more than doubled from 2011, up by over £5.00 per year<sup>7</sup>.

[www.nicva.org/publications/state-sector-vi](http://www.nicva.org/publications/state-sector-vi)



Note: the figure given here for general charities in Scotland differs from the figure used elsewhere in the Almanac. This is because it uses the latest data published by SCVO and also includes a number of charities whose income is not known.



The voluntary sector:

# Income

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# Income summary

## 22 What are the sector's different sources and types of income?

Get all the data: [data.ncvo.org.uk/a14q22](http://data.ncvo.org.uk/a14q22)  
Source: NCVO/TSRC, Charity Commission

	Voluntary	Earned	Total
	<b>Donations and gifts</b> Income freely given, usually as a grant or donation, for which little or no benefit is received by the donor.	<b>Fundraising trading</b> Selling goods and services specifically to raise funds for the charity.	<b>Charitable trading</b> Selling charitable goods and services to individuals, government or others.
<b>Individuals</b> The general public, excluding payments from charitable trusts set up by individuals.	<b>8,908.7</b> Individual donations (gross, including Gift Aid reclaimed); legacies; membership subscriptions without significant benefits.	<b>3,490.4</b> Fundraising by charities where benefit is received in return, charity shop turnover, sales of merchandise, raffles and lotteries, fees for fundraising events.	<b>5,024.8</b> Fees for services provided in pursuit of charitable objects; membership subscriptions with significant benefits; rent from property where providing accommodation is a charitable purpose.
	▲1.1%	▲6.7%	▲4.3%
<b>Government</b> Government and its agencies in the UK, the European Union and international governments.	<b>2,560.3</b> Funding grants; Grants to charitable intermediaries.	<b>70.3</b> Trading with public sector to raise funds.	<b>11,026.1</b> Public sector fees; Payments for contracted services.
	▼-14.5%	▼-9.6%	▼-7.4%
<b>National Lottery distributors</b>	<b>492.0</b> Grants from National Lottery distributors.		<b>492.0</b>
	▲5.4%		▲5.4%
<b>Voluntary sector</b> Charities such as trusts and grant-making foundations.	<b>2,379.3</b> Grants from charitable trusts; Grants distributed by charitable intermediaries.	<b>81.7</b> Trading with other charities to raise funds.	<b>686.0</b> Services provided under contract that are in line with the recipient charity's mission.
	▲0.1%	▲6.5%	▲0.1%
<b>Private sector</b> Excluding payments from charitable foundations set up by businesses.	<b>933.0</b> Corporate donations and gifts in kind.	<b>393.1</b> Corporate sponsorship.	<b>496.3</b> Subcontracting, research, other services provided under contract.
	▲1.6%	▼-1.2%	▲0.7%
<b>SUBTOTAL</b>	<b>15,273.2</b>	<b>4,035.4</b>	<b>17,233.2</b>
	▼-1.9%	▲5.5%	▼-3.7%
<b>Investment</b> The proceeds generated from investments and cash balances.			<b>2,707.3</b>
			▲2.6%
<b>TOTAL</b>			<b>39,249.1</b>
			▼-1.7%

Percentage change since 2010/11 (real terms)

- Income from has increased by more than 5%
- Income relatively stable since 2010/11
- Income decreased by more than 5%

## 23 What is the sector's most important source of income?

Get all the data: [data.ncvo.org.uk/a14q23](http://data.ncvo.org.uk/a14q23)  
Source: NCVO/TSRC, Charity Commission

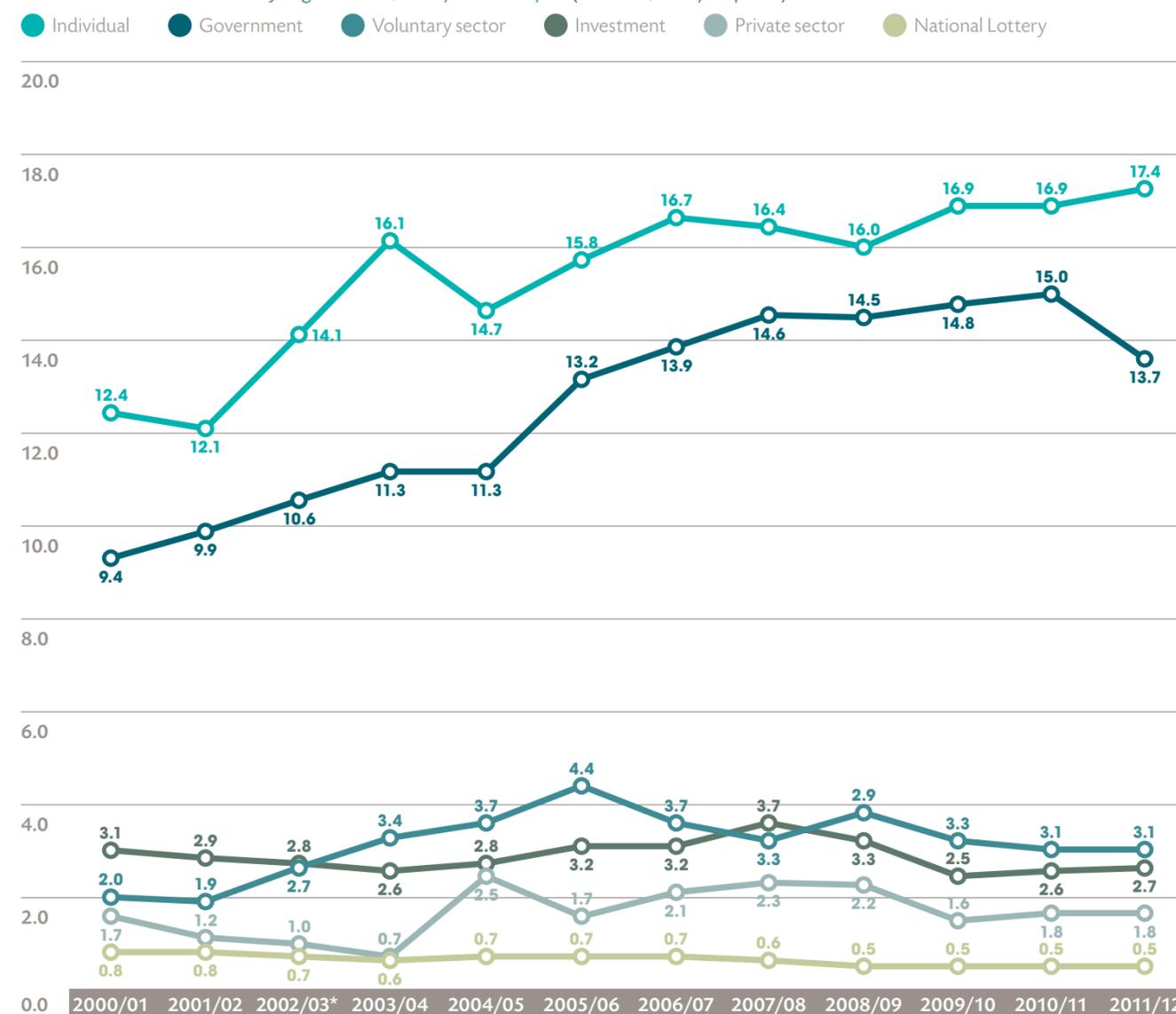
# 44%

Proportion of voluntary sector income from individuals

The voluntary sector receives income from two main sources: individuals and government bodies. Individuals are still the sector's main source, providing £17.4 billion in 2011/12 (44% of total income) via donations and purchases.

Contracts and grants from government bodies, worth £13.7 billion, generate over a third of the sector's income (35%). Together, statutory bodies and individuals account for over three-quarters of the voluntary sector's income (79%).

Sources of income to voluntary organisations, 2000/01 – 2011/12 (£ billions, 2011/12 prices)



# Income sources

## 24 How is the voluntary sector's income distributed?

Income sources vary by type and by size of organisation. Major organisations receive a larger proportion of their income from government, with 39% of their income coming from this source, compared to 17% for small organisations and 4% for micro organisations. Individuals provide the biggest source of income for every size band of organisation, but this ranges from

65% for micro organisations to 43% for major organisations.

Looking at type of organisations, there is considerable variation between sub-sectors based on a wide variety of funding models. Employment and training organisations deliver a wide variety of services for government, receiving nearly two-thirds of their income

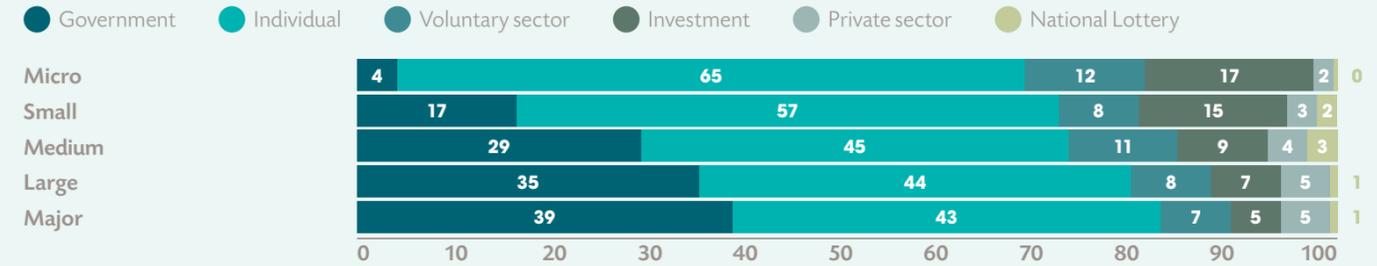
(64%) from that source. Parent Teacher Associations on the other hand receive almost all their income from individuals (88%) to carry out their activities. Grant-making foundations also receive very little income from government (8%), but receive a third of their income from the returns of investments, higher than any other sub-sector.

**Get all the data:**  
[data.ncvo.org.uk/a14q24](http://data.ncvo.org.uk/a14q24)  
**Sources:** NCVO/TSRC, Charity Commission

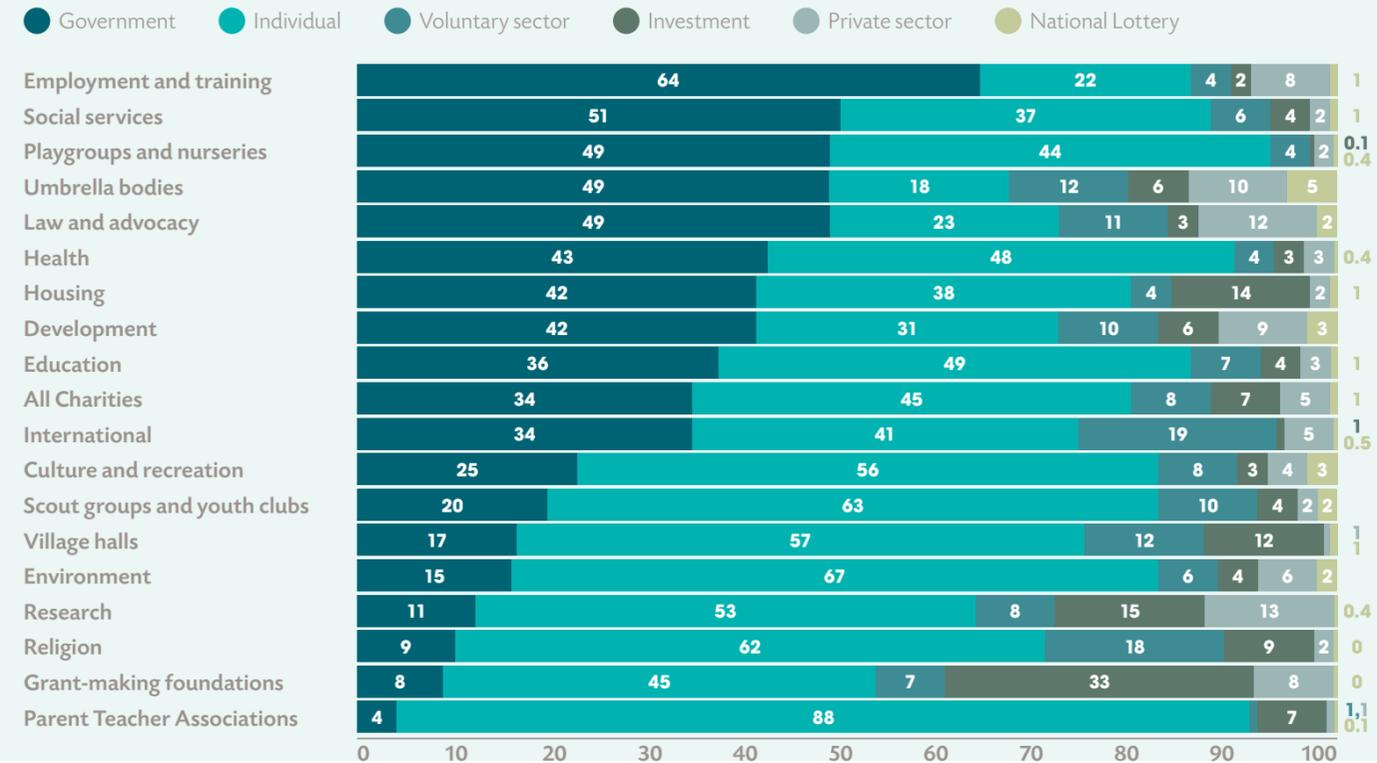
65%

proportion of micro organisations' income from individuals

Source of income to voluntary organisations by size of organisation, 2011/12 (%)



Source of income to voluntary organisations by type of organisation, 2011/12 (%)



## 25 How diverse is the voluntary sector's income?

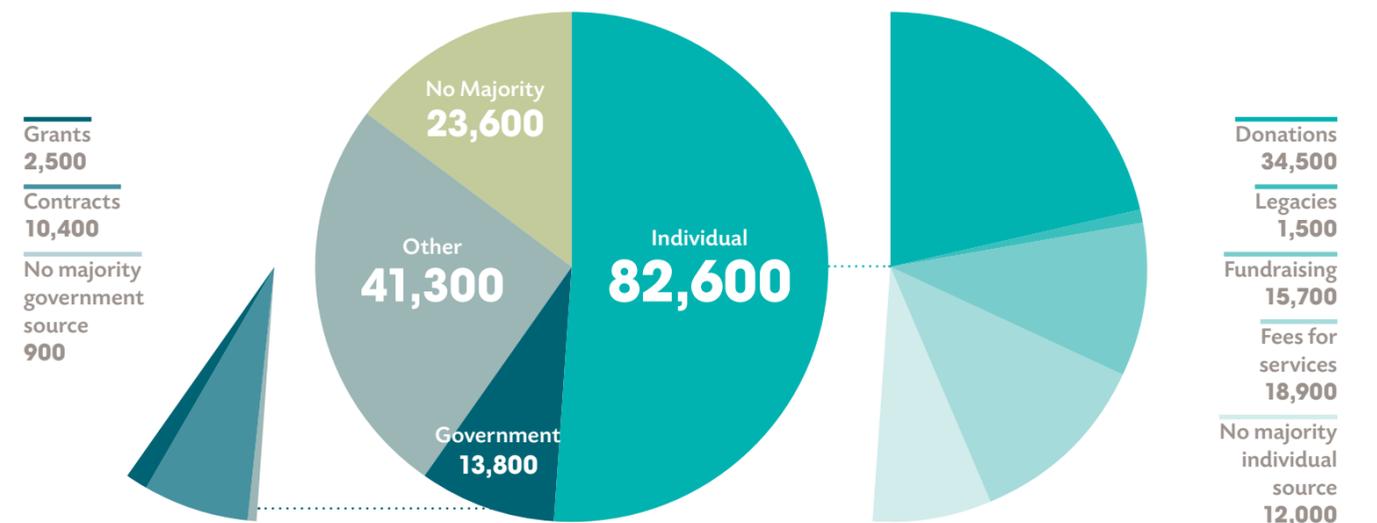
While the previous question shows the average distribution of resources by size and type of organisation, the income sources of individual organisations vary considerably from this average picture. The chart to the right shows the number

of organisations that receive the majority of their income (over 50%) from one source. Just over half of organisations (82,600) receive more than 50% of their income from

individuals, while government is the majority source of income for 13,800 charities. 23,600 organisations have a diversity of funding sources, meaning that no one source accounts for more than 50% of their income.

**Get all the data:**  
[data.ncvo.org.uk/a14q25](http://data.ncvo.org.uk/a14q25)  
**Source:** NCVO/TSRC, Charity Commission

Number of organisations that receive more than 50% of their funding from one source, 2011/12



13,800

Voluntary organisations receive more than 50% of their income from government

# Earned income

## 26 What is the voluntary sector's most important type of income?

Income from donations, legacies and grants, from which the donor receives no material benefit, are collectively known as voluntary income. However voluntary organisations also sell goods and services – the proceeds from this trading are earned income. Earned income overtook voluntary income as the largest source of income in 2003/04, and now represents 54% of total income, compared to the 39% received from voluntary income.

Earned income includes both fundraising trading – trading specifically to raise funds for the charity, and charitable trading – also known as primary purpose trading – selling services directly to beneficiaries or to government agencies in order to pursue their charitable objective.

Of the £21.3 billion of earned income in 2011/12, the vast majority – £17.2 billion was from charitable trading. Examples of charitable trading include rent for accommodation, fees for adult social care, training course fees, admission charges and membership subscriptions.

£4 billion of earned income was generated through fundraising trading – this includes selling donated goods in charity shops, admission fees for fundraising events, and the turnover of businesses wholly-owned by charities.

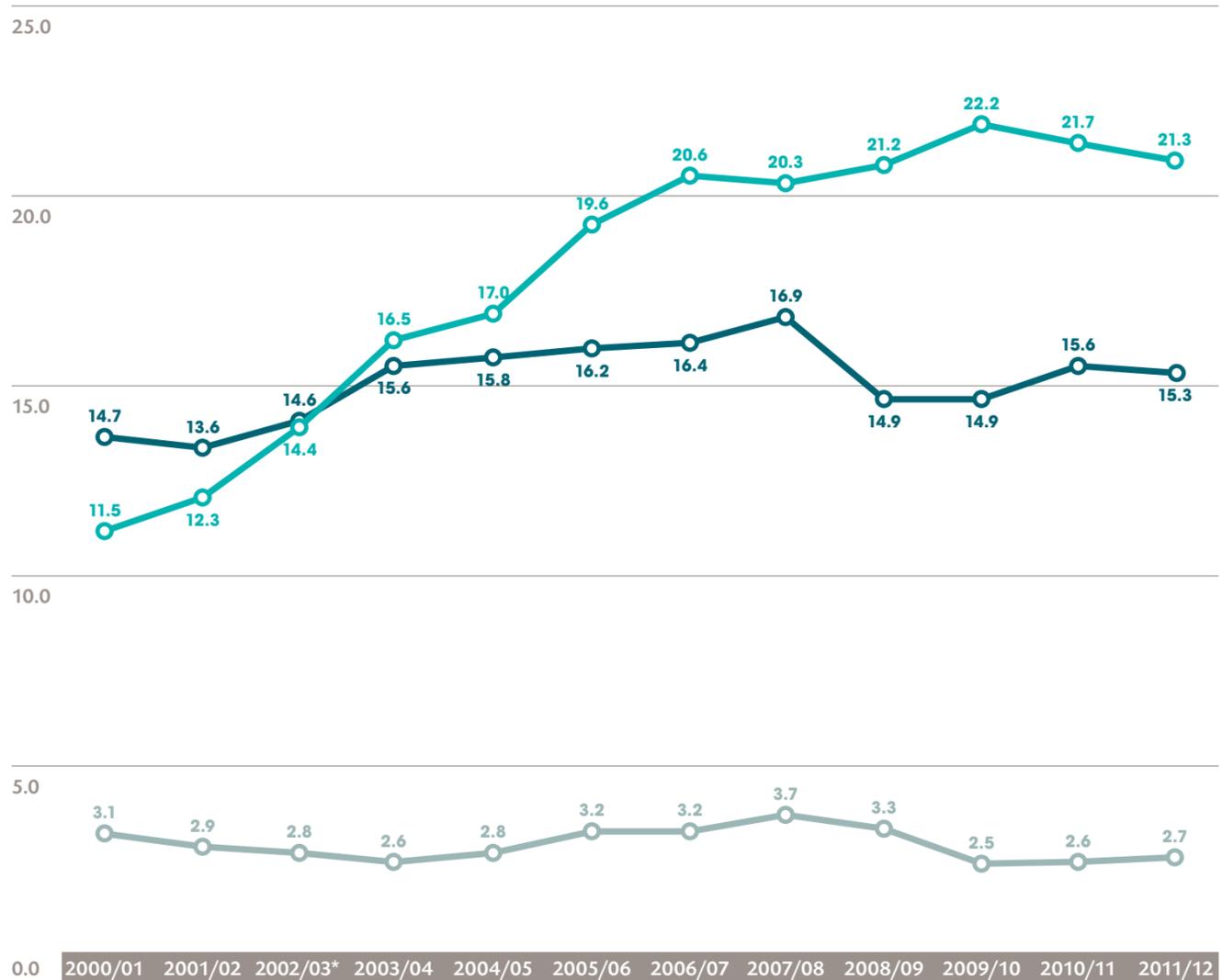
Investment income is generated by retaining income that has been donated or earned in the past, and is discussed in more depth in question 60.

Get all the data:

[data.ncvo.org.uk/a14q26](http://data.ncvo.org.uk/a14q26)

Source: NCVO/TSRC, Charity Commission

Earned, voluntary and investment income, 2000/01 to 2011/12 (£ billions, 2011/12 prices)



## 27 Who do charities trade with?

Get all the data:

[data.ncvo.org.uk/a14q27](http://data.ncvo.org.uk/a14q27)

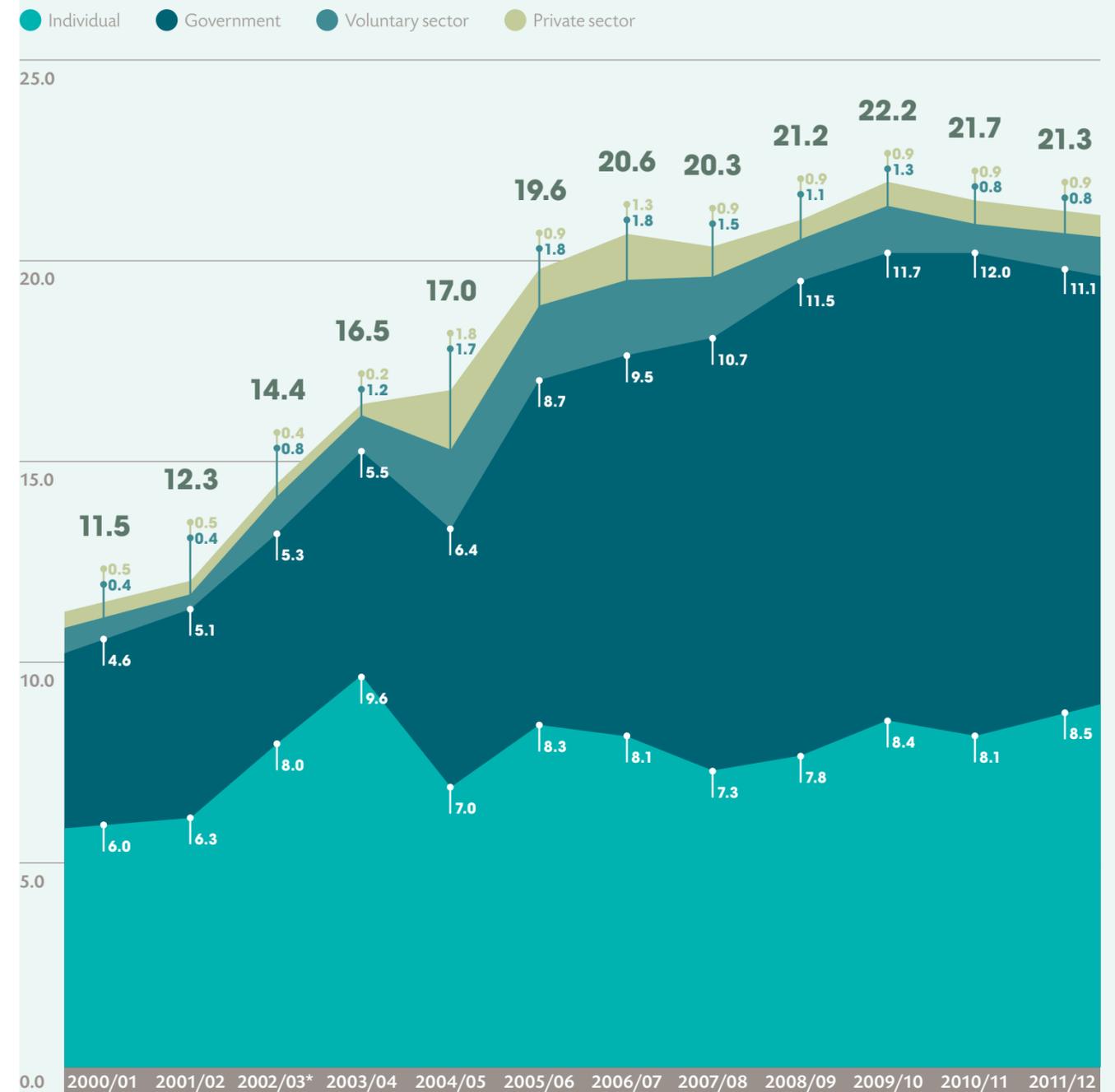
Source: NCVO/TSRC, Charity Commission

Earned income grew every year between 2000/01 and 2006/07, and peaked in 2010/11 at £22.2 billion in 2011/12 prices. This increase was largely driven by an increase in trading with government, which continued to grow every year until 2009/10, but has now begun to fall as public spending is reduced.

Trading with individuals and the general public makes up 40% of earned income. The growth of income from this source was not as rapid over the last decade as that from government, and earned income from this source is only 3% higher than it was in 2005/06. Part of the fall in income from government in the last year appears to have been offset by an increase in earned income from individuals.

Note: this chart has changed from previous editions of the Almanac as the turnover of trading subsidiaries are now assigned to individuals, government or the voluntary sector where appropriate.

Earned income by source, 2000/01 to 2011/12 (£ billions, 2011/12 prices)



# Funding from government

## 28 Where does the sector's income from government come from?

Income from government totalled £13.7 billion in 2011/12. This includes resources from central and devolved administrations in the UK; local government, international bodies;

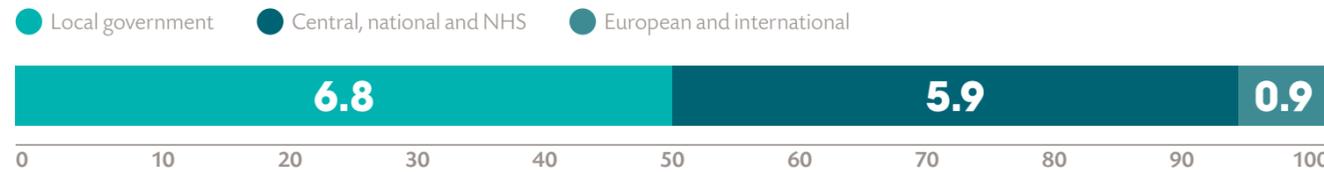
and overseas governments. Total income from government has increased by 45% in real terms from £9.4 billion in 2000/01. However, it has fallen by £1.3 billion in real

terms since 2010/11 and has fallen in cash terms from the previous year for the first time since 2000/01.

Get all the data: [data.ncvo.org.uk/a14q28](http://data.ncvo.org.uk/a14q28)

Source: NCVO/TSRC, Charity Commission

Government funding to the voluntary sector by tier of government, 2011/12 (£ billions)



## 29 How has the funding mix changed?

Voluntary organisations earned £11.1 billion in contracts and received £2.6 billion in grants in 2011/12. More than 80% of the government funding received by charities is now in the form of contracts for delivering services rather than grants to support their work, compared to 49% in 2000/01. The value of grants fell by 14.5%

in 2011/12, while the value of contracts fell by 7.4%, so the shift from grants to contracts observed over the last decade continued in a time of austerity.

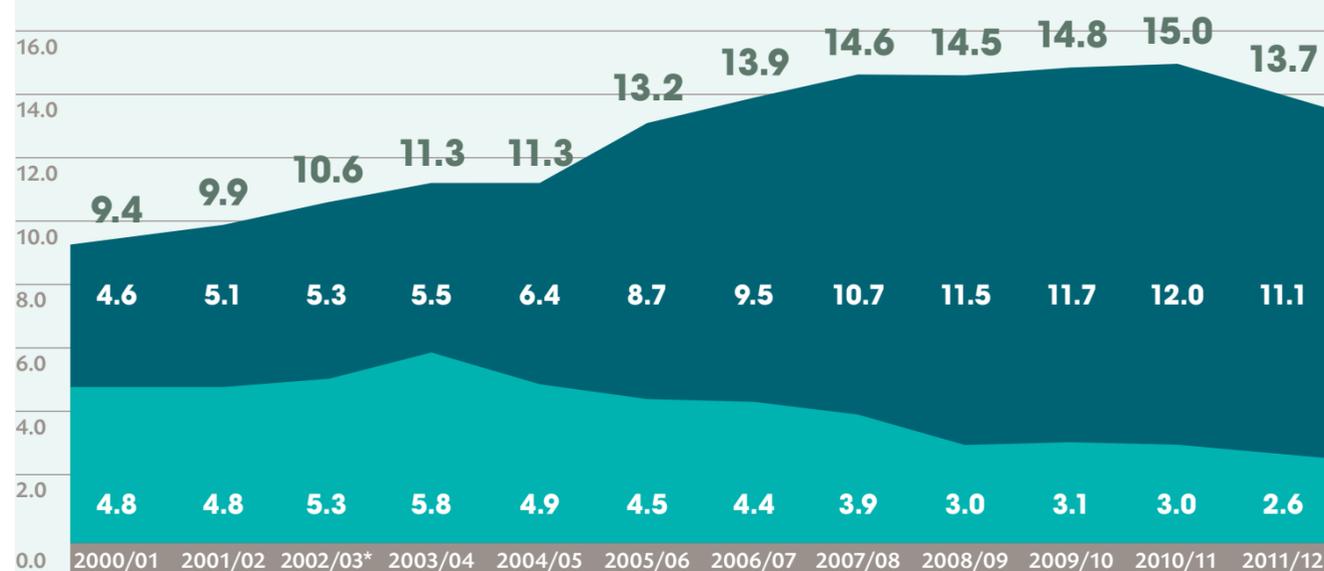
Grant income has fallen in real terms, and this has been most pronounced in grants from

local government. These grants decreased in real terms by 53% from just under £1 billion in 2008/09 to £465 million in 2011/12. Grant income from central government over the same period fell by only 4%, to £1.7 billion. Grants from European and international government sources rose by 45% over this period.

Get all the data: [data.ncvo.org.uk/a14q29](http://data.ncvo.org.uk/a14q29)

Source: NCVO/TSRC, Charity Commission

Voluntary sector grant and contract income from government, 2000/01 – 2011/12 (£ billions, 2011/12 prices)



## 30 How many voluntary sector organisations have a financial relationship with government?

Roughly a quarter (25%) of the voluntary sector organisations – 41,000 in total – have a direct financial relationship with the state. Larger organisations are much more likely to

receive funding from government, with more than two thirds of major (70%) and large (68%) charities receiving some kind of income from government compared to less than one

Get all the data: [data.ncvo.org.uk/a14q30](http://data.ncvo.org.uk/a14q30)  
Source: NCVO/TSRC, Charity Commission

third of small (30%) and a little more than one in ten micro organisations (12%).

\*Numbers are rounded and do not sum exactly.

Proportion and number of organisations receiving income from government, 2011/12 (%)

Organisation size	Income from government (£ millions)	% of organisations receiving income from government	Estimated number of organisations that receive funding*
Micro	8.4	12	10,000
Small	312.9	30	16,000
Medium	1,889.9	54	12,000
Large	4,152.9	68	3,000
Major	7,292.7	70	374
<b>Total</b>	<b>13,656.7</b>	<b>25</b>	<b>41,000</b>

## 31 Where does government funding go to?

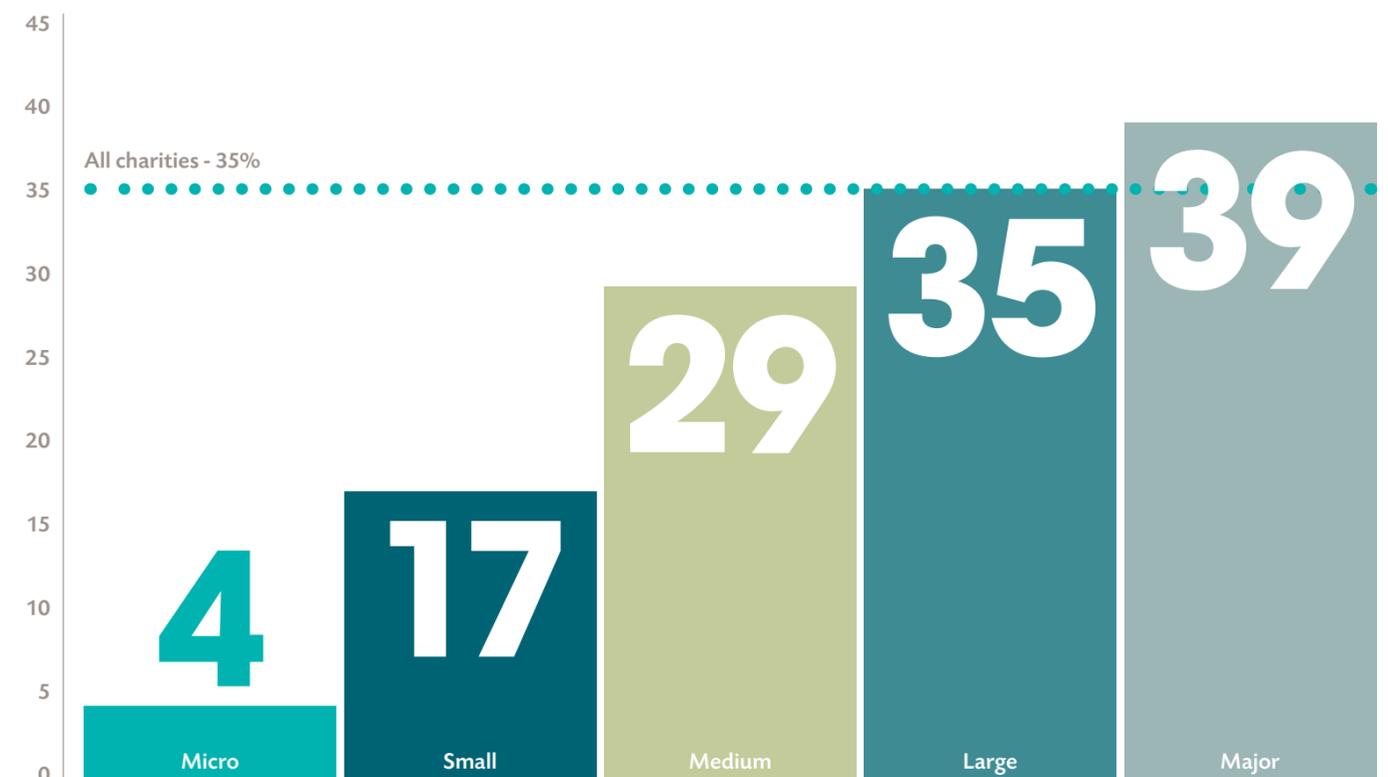
Over four-fifths (84%) of the sector's income from government is received by organisations with an annual income of £1 million or more. Major and large organisations received £7.3 billion

and £4.2 billion respectively in government grants and contracts. Small and micro organisations – over 135,000 in number – receive only 2% of the sector's total income from government. Medium

Get all the data: [data.ncvo.org.uk/a14q31](http://data.ncvo.org.uk/a14q31)  
Source: NCVO/TSRC, Charity Commission

sized organisations receive 14% of total income from government to the sector – £1.9 billion – yet funding from government accounts for 29% of their overall income.

Income from government as a proportion of total income by size of organisation, 2011/12 (%)



# Spending cuts

## 32 How have government spending cuts affected voluntary sector income?

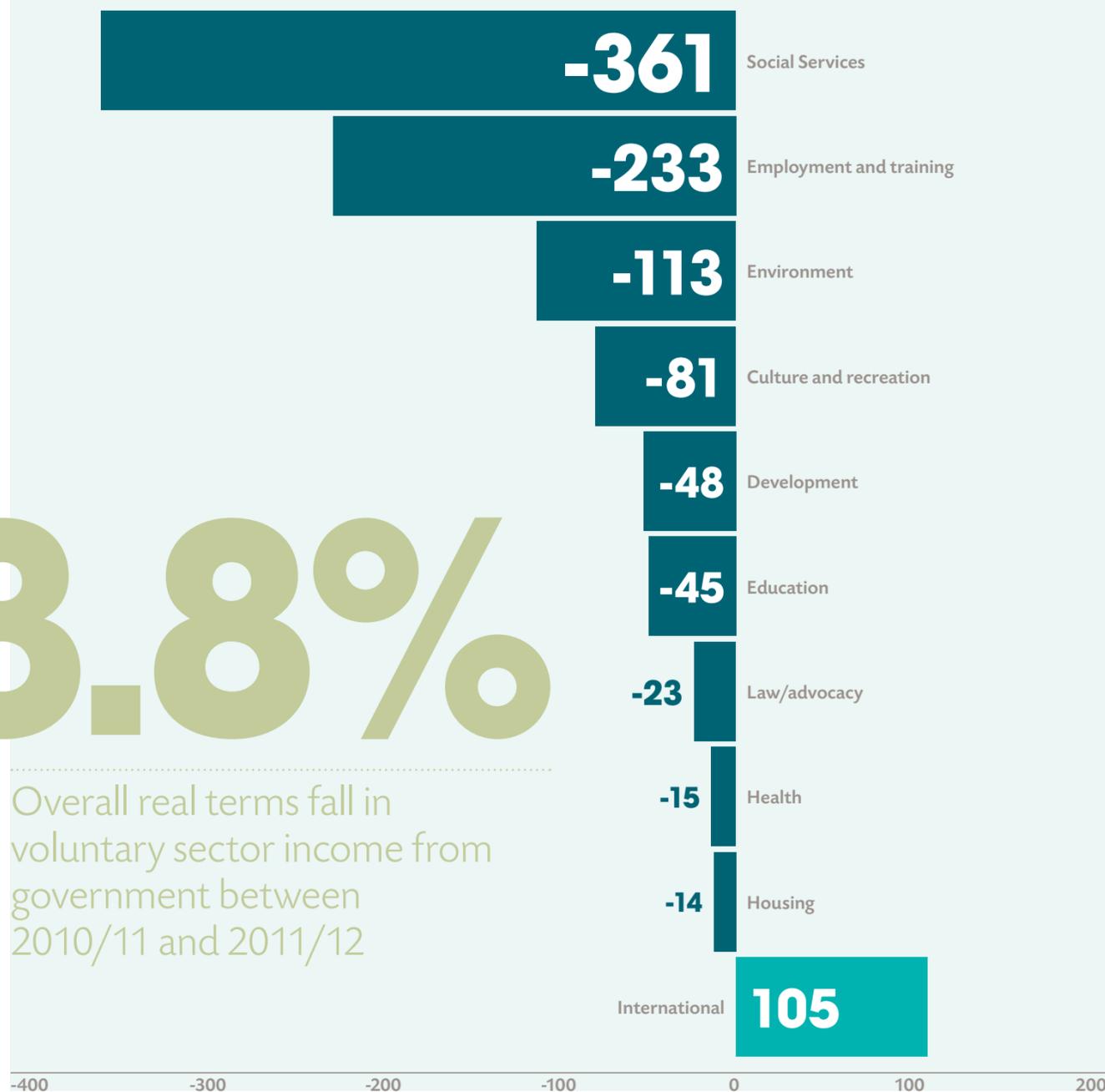
Between 2010/11 and 2011/12, total income from government to voluntary sector organisations fell by £1.3 billion in real terms. The chart below shows the change in income from government during this

period for different ICNPO categories of voluntary organisations. Only international organisations saw an increase in funding, while health organisations saw a small decrease in government funding in real terms. Social

**Get all the data:** [data.ncvo.org.uk/a14q32](http://data.ncvo.org.uk/a14q32)  
**Source:** NCVO/TSRC, Charity Commission

services organisations received £361 million less than the previous year. Employment and training organisations received over £230 million less, which amounted to a 23% reduction in government funding.

Change in voluntary sector income from government between 2010/11 and 2011/12 (£ millions)



## 33 Has the voluntary sector received disproportionate spending cuts?

**Get all the data:** [data.ncvo.org.uk/a14q33](http://data.ncvo.org.uk/a14q33)  
**Source:** NCVO, forecast based on OBR data

In April 2013, NCVO forecast that income from government would be £1.7 billion lower by 2017/18 than it was in 2010/11 (using 2010/11 prices), assuming that the voluntary sector experienced cuts in proportion to the fall in total spending.

NCVO's *Counting the Cuts*<sup>33a</sup> report also examined two alternative scenarios – a “contract winning” scenario where the sector experience proportionate cuts in grants but income from contracts remains at 2010/11

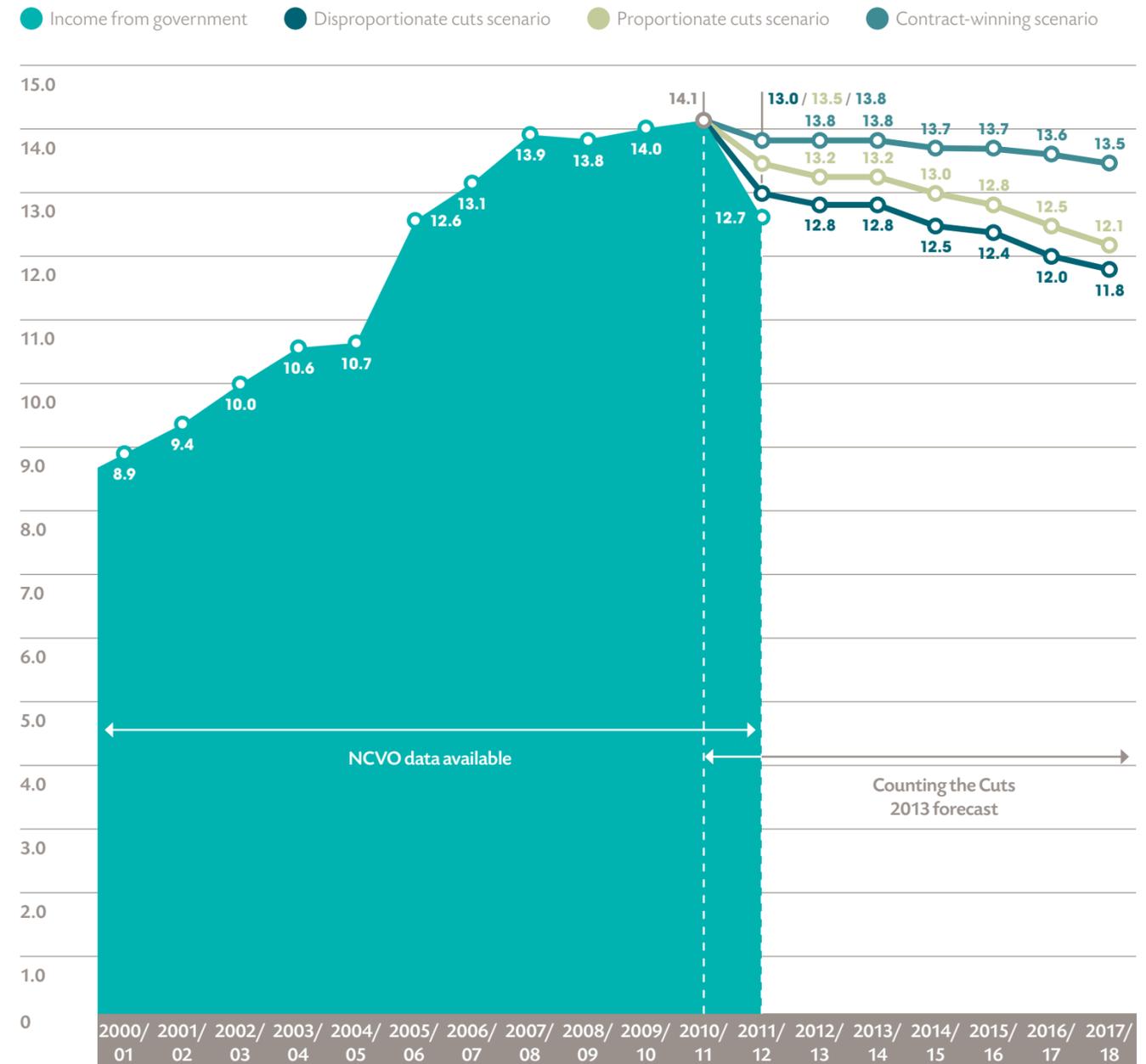
levels, and a “disproportionate cuts” scenario which would see the voluntary sector’s income falling by 3.3% more than the proportionate cuts scenario.

In fact, the voluntary sector’s income from central and local government was £12.7 billion in 2011/12, a reduction of £1.3 billion in real terms compared to 2010/11. If the amount received by voluntary organisations had fallen by the same proportion as total government expenditure<sup>33b</sup>, income from government

would have been £13.45 billion, so we can now confirm that the sector’s income has fallen faster than total government spending.

As the chart shows, the amount received in 2011/12 was lower even than the disproportionate scenario outlined in *Counting the Cuts*, suggesting that there will be a much greater reduction by 2017/18. We will shortly produce revised forecasts.

Voluntary sector income from government – forecast to 2017-18 (£ billions, 2011/12 prices)



# 34 How are cuts affecting individual organisations?

Get all the data:  
data.ncvo.org.uk/a14q34

Regional surveys indicate that spending cuts are impacting on the level of services provided by voluntary organisations. In London, one survey estimated that 51% of organisations had a reduction in their overall funding in 2012-13<sup>34a</sup>. A survey of organisations in the North East indicated that 59% of organisations had seen a decrease in funding over the previous six months<sup>34b</sup>. Due to the sample size and methodology of the surveys, these results need to be interpreted with caution.

The chart below compares the cash amount received in 2010/11 to the proportional change between 2010/11 and 2011/12 for all organisations in our sample that received at least £50,000 of income from government in either year. The values on the horizontal axis represent the total amount of state funding received in 2010/11, or in the case of organisations with no previous income, the amount received in 2011/12.

Although the total amount of funding has fallen by 8.7%, the chart below reveals that at the organisation level the picture is much more complicated. In general, more organisations faced a reduction in their funding than an increase, but many organisations managed to increase their funding level, or win new funds. Equally, many organisations faced cuts far in excess of the average, losing all or almost all of their funding.

Change in income from government between 2010/11 and 2011/12 for individual organisations



# Charitable giving

## 35 What proportion of people give to charity?

Get all the data:  
data.ncvo.org.uk/a14q35  
Source: NCVO/CAF

We have looked at voluntary income from individuals based on account information submitted by charities. We now turn to people's giving behaviour as tracked by the NCVO/CAF UK Giving<sup>35a</sup> which is a survey of individuals. According to the latest edition of this survey, the proportion of people donating to charitable causes in a typical month in the UK has decreased over the last year, from 58% to 55%, equivalent to 28.4 million adults.

The 58% level of giving in 2010/11 was the joint highest since 2004/05. Giving in 2011/12 seems to have decreased back to a more typical level; apart from the dip in 2008/09, the proportion giving was stable at 56% between 2006/07 and 2009/10.

The median donation given in a typical month in 2011/12 was £10 per donor. The median donation of £10 in 2011/12 decreased from £11 in 2010/11 and £12 in 2009/10; prior

to that the median had remained stable at £10 for the previous five years.

The mean donation in 2011/12 was £27 per donor, £4 lower than in 2010/11, and the lowest mean value since 2004. The median average is a better indicator of a 'typical' donation than the mean average which is skewed upwards by a small number of larger donations.

## 36 What is the impact of high-level donors?

Get all the data:  
data.ncvo.org.uk/a14q36  
Source: Coutts Million Pound Donors Report 2013

The percentage of donors giving £100 or more has fallen from 7% in 2010/11 to 6% in 2011/12.

This small drop has had a significant impact on the total amount donated by the population because higher donations generate a large proportion of the amount donated. In 2010/11, donors giving £100 or more

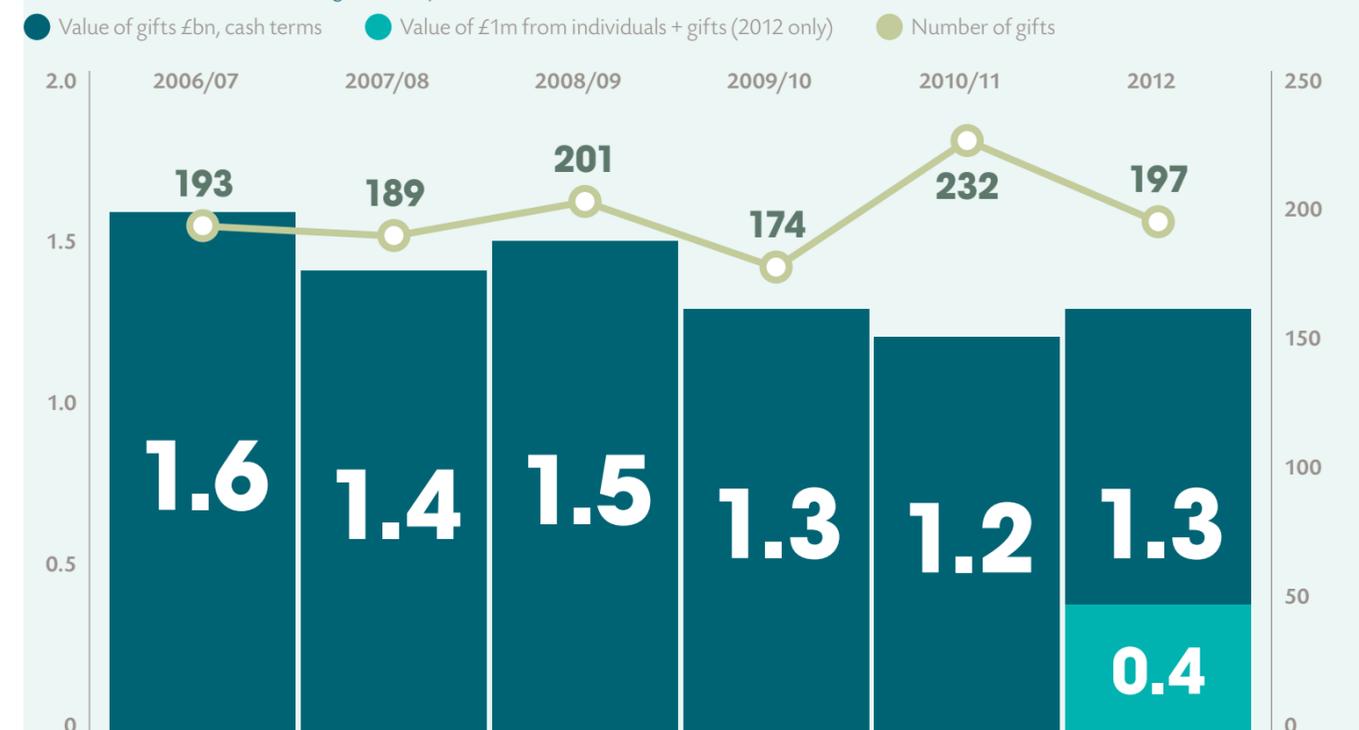
accounted for 45% of total donations, but this dropped to 40% in 2011/12.

However, according to the latest Million Pound Donors report<sup>36a</sup>, the total value of charitable donations worth £1 million or more rose 9% to £1.35 billion in 2012 from £1.24 billion in 2010/11.

For the first time, 2012 saw higher education replace charitable trusts and foundations as the most popular destination for million pound donations, accounting for 42% of the total value of all million pound donations made in that year.

Note: the Million Pound Donors report includes grants from foundations, and gifts from companies as well as donations from individuals.

Value and number of £1 million+ gifts, 2007/08 – 2012



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Change in income from government between 2010/11 and 2011/12 for individual organisations



# Charitable giving

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data.ncvo.org.uk/a14q35  
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The median donation given in a typical month in 2011/12 was £10 per donor. The median donation of £10 in 2011/12 decreased from £11 in 2010/11 and £12 in 2009/10; prior

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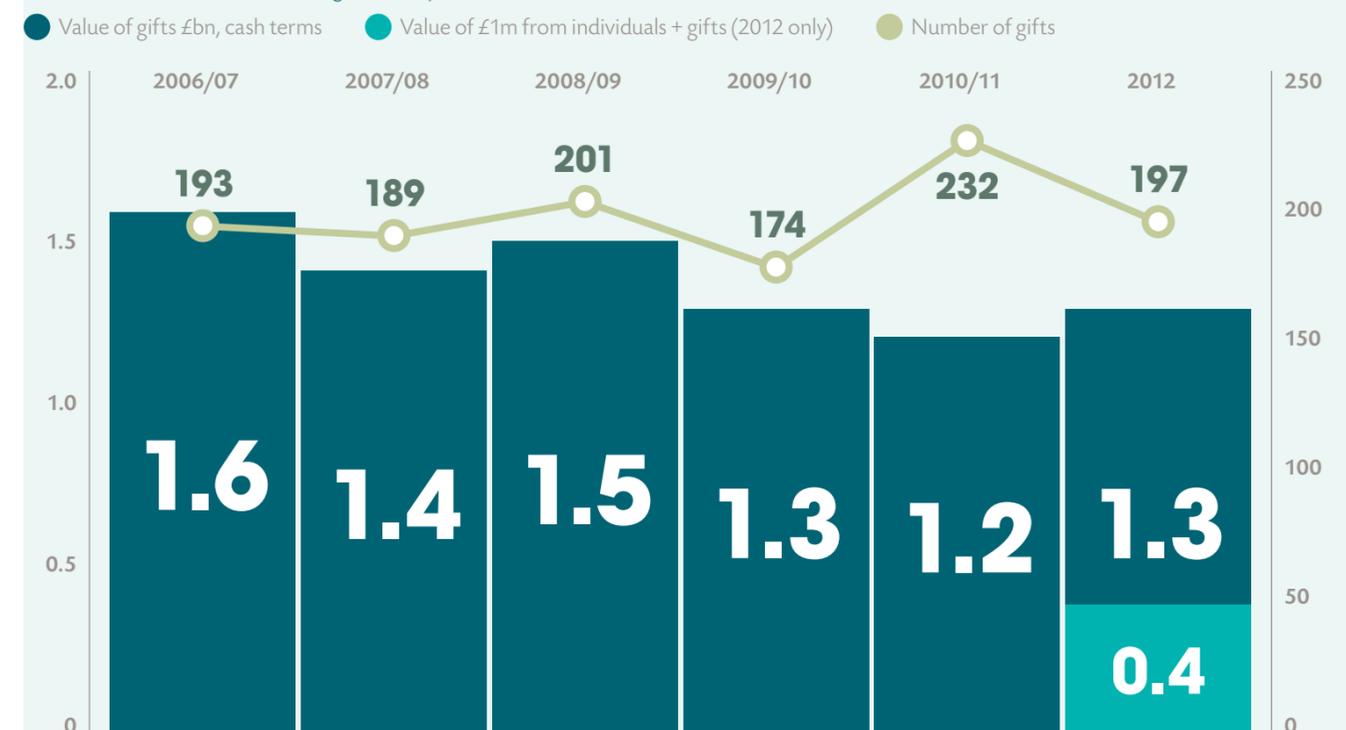
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For the first time, 2012 saw higher education replace charitable trusts and foundations as the most popular destination for million pound donations, accounting for 42% of the total value of all million pound donations made in that year.

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Value and number of £1 million+ gifts, 2007/08 – 2012



Change in income from government between 2010/11 and 2011/12

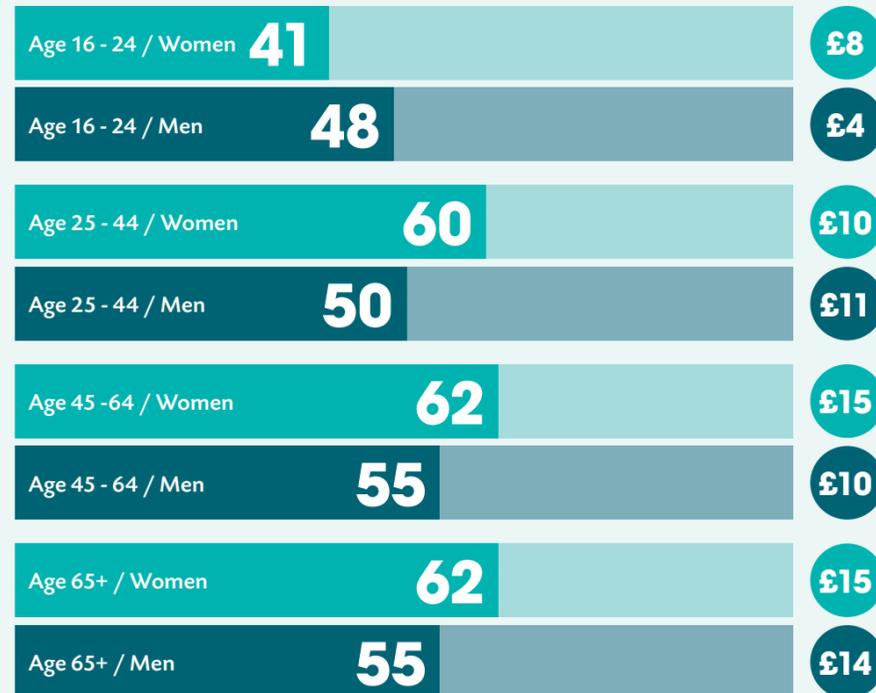
# 37 What kind of people give to charity?

Get all the data:  
data.ncvo.org.uk/a14q37  
Source: NCVO/CAF

In 2011/12, as in all previous years of the UK Giving Survey, women were more likely to give than men: 58% of women donated money to charity in a typical month, compared with 52% of men. Women continue to give higher average amounts than men, but only marginally so (with a median donation of £11 per month for women compared with £10 for men). Women aged 45-64, and 65 or more, are the groups most likely to give (62%) and they also gave the largest median amount (£15).

Although consistently the most likely to give, the percentage of people in managerial and professional groups giving decreased in 2011/12 (66% compared to 70% in the previous year), as did the amount they gave (£17 compared to £20). The proportion of people giving in the routine and manual occupation groups was lower than in 2010/11 (47% compared to 52%). However, they have continued to give on average similar amounts (£8).

Proportion giving and median donation by age and gender, 2011/12 (%)



# 38 What causes do people give to?

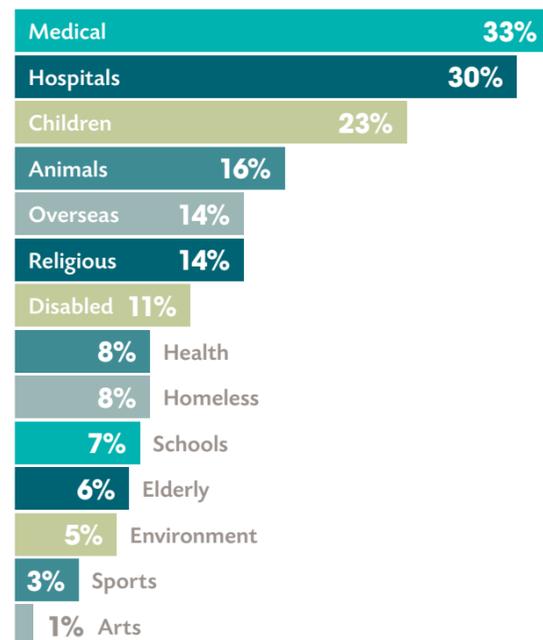
Get all the data:  
data.ncvo.org.uk/a14q38  
Source: NCVO/CAF

In 2011/12, as in all previous years of the UK Giving survey, medical research was the cause supported by the largest proportion of donors (33%).

Over the past eight years, the next two most commonly supported causes have been hospitals and hospices (30%) and children and young people (23%).

Religious causes attracted the largest donations with a median amount given of £20 per month and received 17% of all money donated.

Proportion of donors giving



Proportion of total amount



of total amount donated goes to religious causes

# 17%

# 39 How does Gift Aid contribute to the sector's income?

Get all the data:  
data.ncvo.org.uk/a14q39  
Source: HMRC

Gift Aid is part of a wider system of charitable tax reliefs worth £4.1 billion in 2012/13<sup>9a</sup>, the majority of which (£3.0 billion) was claimed by voluntary organisations, through tax repayments, national non-domestic rates, VAT and stamp duty/land tax. The remainder (£1.1 billion) was claimed by people giving to charity.

In 2012/13 64,000 organisations reclaimed Gift Aid, suggesting that over one-third (46%)

of all UK voluntary organisations reclaim Gift Aid. In 2012/13 the value of Gift Aid claims (which now include covenants) amounted to £1.1 billion; the value of donations was estimated at £4.1 billion (net) and £5.2 billion (gross).

For the first time since the UK Giving survey began, the proportion of donors using Gift Aid dropped from 42% in 2010/11 to 39%

in 2011/12. The decrease in Gift Aid use is concentrated among those making smaller donations (less than £25). Only 19% of those giving under £10 used Gift Aid, a reduction from 23% last year. For those giving between £10 and £25, the proportion is now 43%, down from 45%<sup>9b</sup>.

# £4.1 billion

value of charitable tax reliefs in 2012/13

# 40 How much does the voluntary sector receive in legacy income?

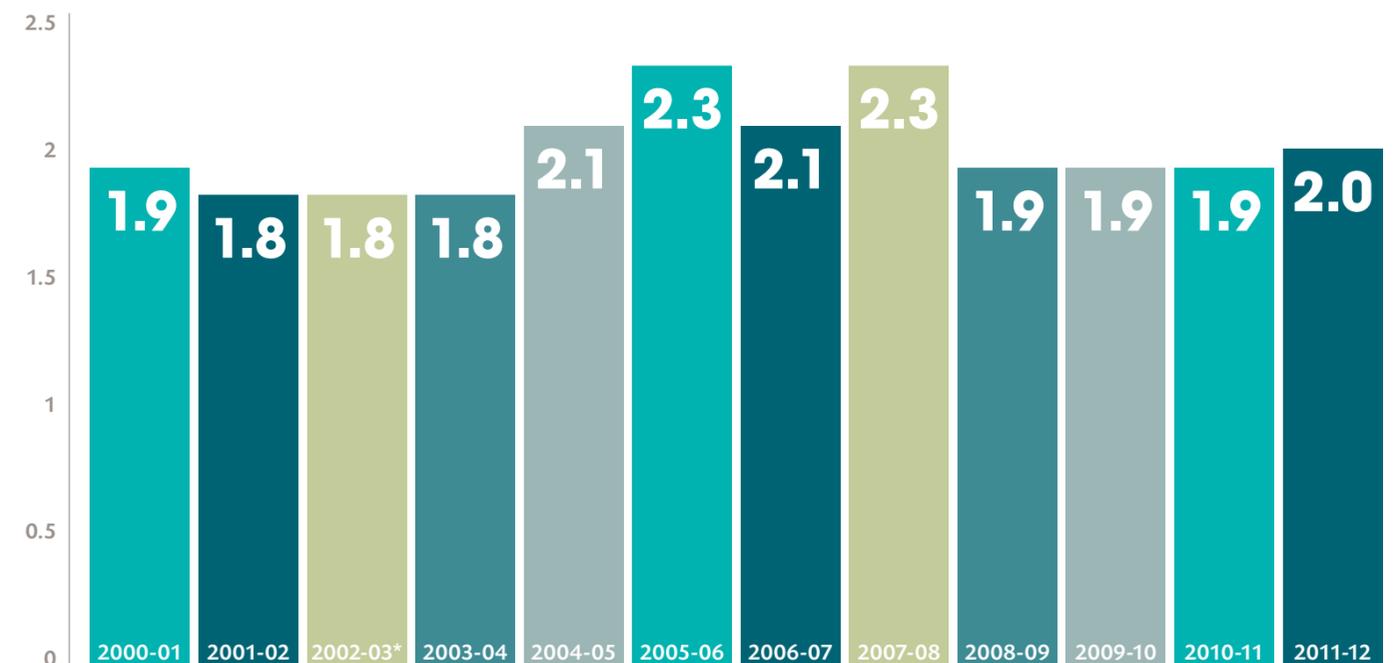
Get all the data:  
data.ncvo.org.uk/a14q40  
Source: NCVO/TSRC, Charity Commission

Legacies can be defined as "an amount of money or property left to someone in a will". The voluntary sector received £2.0 billion in

legacy income in 2011/12, 5.0% of total income. Overall, just 9,525 organisations (6.7%) received legacy income in 2011/12. Recipients received on

average £207,000. Over the last decade, legacy income to the sector has fluctuated in real terms between £1.7 billion and £2.3 billion.

Legacy income to the voluntary sector, 2000/01 to 2011/12 (£ billions, 2011/12 prices)



# Lottery funding

## 41 How is National Lottery funding distributed?

Funds from the National Lottery provide a significant source of income for the UK voluntary sector. There are currently 12 independent distributing bodies responsible for distributing Lottery money, with five focusing

on sport, five on the Arts, the Heritage Lottery Fund and the Big Lottery Fund. In 2012, £1.5 billion was distributed by the Lottery funds. The largest fund was the Big

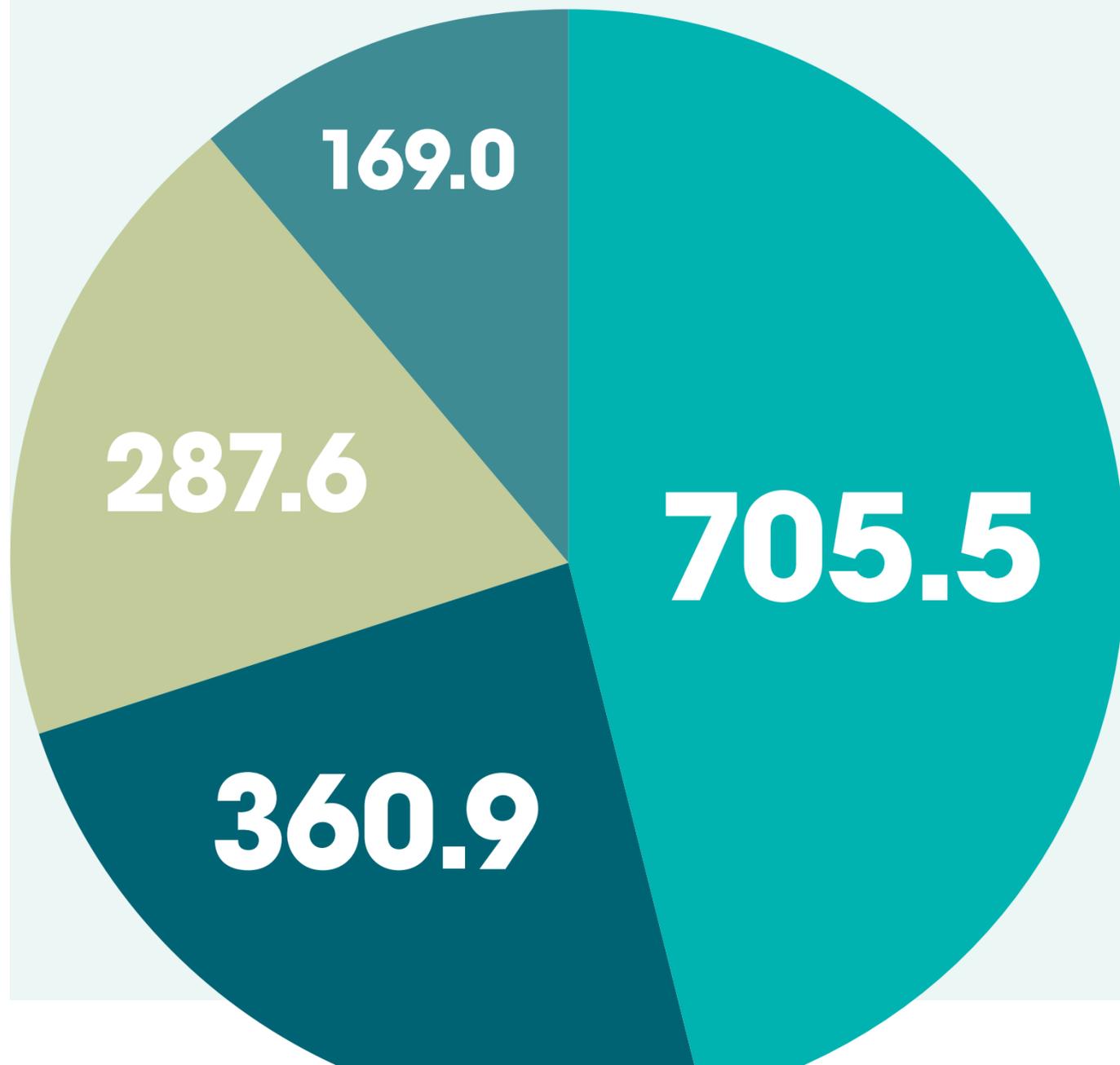
Lottery Fund, which distributed £758 million<sup>41a</sup> across the UK in 2011/12. Since the Lottery started in 1994, over £30 billion has been distributed to good causes<sup>41b</sup>.

Get all the data:  
data.ncvo.org.uk/a14q41

Source: Department for Culture Media and Sport

Value of grants awarded by good cause, 2012 (£ millions)

● Health, education, environment and charitable expenditure ● Arts ● Heritage ● Sports



## 42 Who receives national lottery funding?

Evidence from voluntary sector organisations indicates they received £492 million from Lottery Distributors in 2011/12, accounting for 1.3% of the sector's income. Lottery funding is most important to medium size organisations, who receive 3.0% of their income from this source. Over half (54%)

of lottery funding is received by large and major organisations.

Using open data released by the Big Lottery Fund<sup>42a</sup>, the chart shows the distribution of funding from the Big Lottery fund by type of organisation.

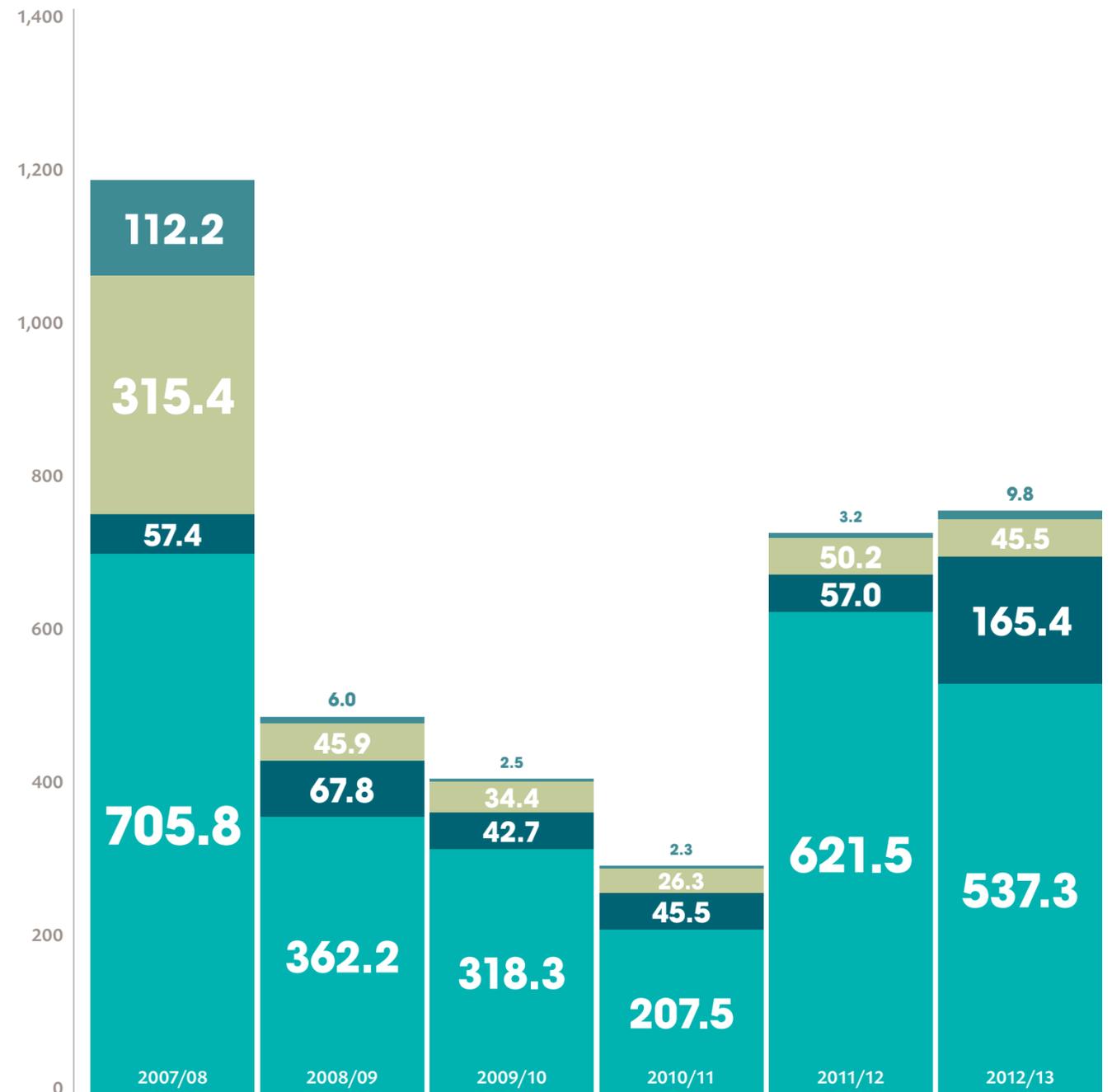
Get all the data:  
data.ncvo.org.uk/a14q42

Source: Big Lottery Fund open grants data

Note: the figure for unregistered organisations in 2012 includes a £50 million endowment to the Life Changes Trust. <http://www.lifechangestrust.org.uk/>

Distribution of Big Lottery Fund grants by type of organisation, 2007 – 2012 (£ millions)

● Registered Charity ● Unregistered organisation ● Public Sector ● Other





The voluntary sector:

# Spending

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# Spending summary

## 43 How much does the voluntary sector spend?

The voluntary sector's total current expenditure in 2011/12 was £38.0 billion. Spending is split between four main activities: charitable activities, grant-making, the cost of generating funds and governance.

Voluntary sector expenditure by activity, 2011/12 (£ billions)

Governance

1.0

Charitable activities

32.7

Grant-making

5.0

Cost of generating funds

4.3

Get all the data: [data.ncvo.org.uk/a14q43](http://data.ncvo.org.uk/a14q43)  
Source: NCVO/TSRC, Charity Commission

## 44 How do voluntary organisations report their spending?

The Charities Statement of Recommended Practice (SORP 2005)<sup>44a</sup> requires organisations with an income over £100,000 to report their expenditure using activity-based costing and accrual accounting. Smaller charities mostly prepare receipts and payments accounts, and choose their own reporting categories. This means that it is difficult to compare

them with larger organisations as different accounting treatments may lead to differences in spending allocation.

The SORP requires expenditure to be assigned to one of three categories: cost of generating funds, cost of charitable activities, and cost of governance. The totals for each category

include all costs related to the activity, including staff costs, and management and administration. Grant-making is included within charitable activities in the SORP (although we report it separately in the Almanac).

Get all the data: [data.ncvo.org.uk/a14q44](http://data.ncvo.org.uk/a14q44)

## 45 How does voluntary sector spending vary by sub-sector?

The delivery of social services accounts for a major proportion of the voluntary sector's spending – 29,700 organisations spent £8.8 billion in 2011/12, an average of £295,000 per organisation. Research organisations (including large medical research funders like Cancer Research UK) had the highest average spending – 3,450 organisations spent £3 billion in total, an average of £863,000. The smallest sub-sectors by spending are village halls, Parent Teacher Associations, and scout groups and youth clubs – predominantly small, local and volunteer-based organisations.

Voluntary sector spending by sub-sector, 2011/12 (£ billions)

Sub-sector	Spending (£ billions)	Average expenditure per charity (£)
Social services	8.8	295,000
Culture and recreation	4.3	193,000
Health	4.0	597,000
International	3.5	654,000
Grant-making foundations	3.1	250,000
Research	3.0	863,000
Environment	2.7	477,000
Religion	1.4	107,000
Education	1.4	182,000
Housing	1.3	355,000
Employment and training	1.2	591,000
Law and advocacy	1.1	292,000
Development	0.9	83,000
Playgroups and nurseries	0.5	68,000
Umbrella bodies	0.5	394,000
Scout groups and youth clubs	0.2	31,000
Parent Teacher Associations	0.2	13,000
Village Halls	0.1	14,000

Get all the data: [data.ncvo.org.uk/a14q45](http://data.ncvo.org.uk/a14q45)  
Source: NCVO/TSRC, Charity Commission

£295k

average spending of a social services voluntary organisation

# Types of spending

## 46 Do spending patterns vary by size of voluntary organisation?

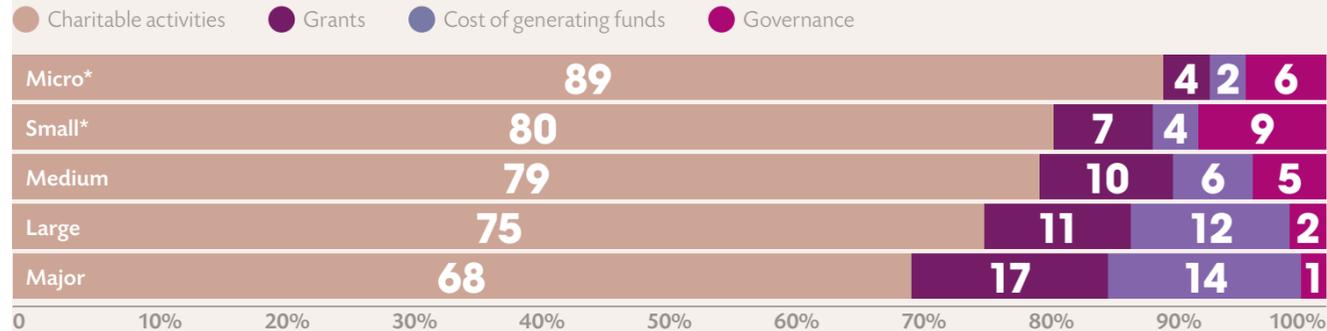
Get all the data: [data.ncvo.org.uk/a14q46](http://data.ncvo.org.uk/a14q46)  
Source: NCVO/TSRC, Charity Commission

On average, a larger proportion of smaller organisations' spending goes on charitable activities. For micro organisations, 93% of their spending goes on charitable activities and grant-making, compared to 85% for major

organisations. Large and major organisations spend more on generating funds, with these costs accounting for 12% of the expenditure of large organisations and 14% of major organisations. This difference reflects the

voluntary nature of fundraising in smaller organisations, in contrast with the largest charities, who employ professional fundraisers and raise much larger sums of money.

Type of spending by size of organisation, 2011/12 (% of spending)



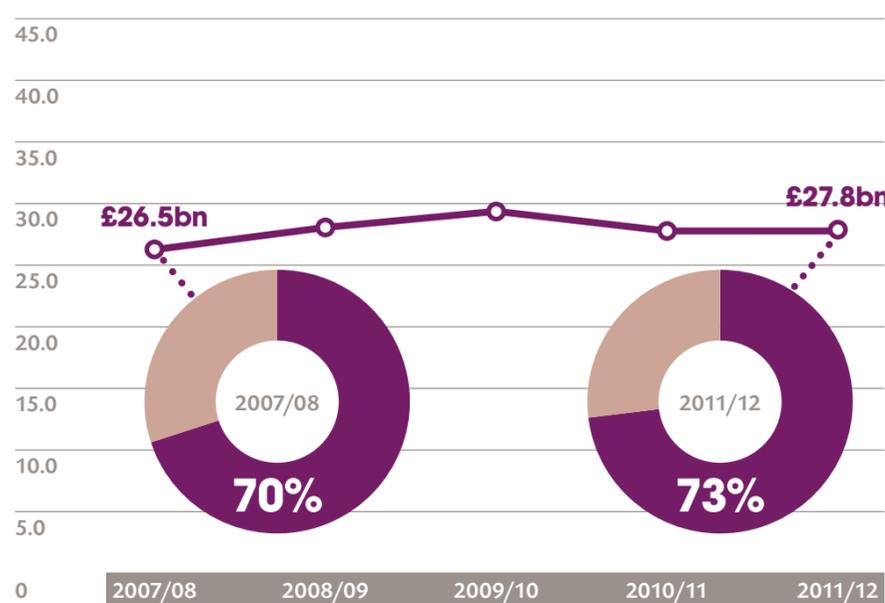
\* The high proportion of spending on governance by small and micro organisations is due to these charities reporting management and administration costs separately rather than assigned them by activity.

## 47 How much does the voluntary sector spend on charitable activities, excluding grant-making?

Get all the data: [data.ncvo.org.uk/a14q47](http://data.ncvo.org.uk/a14q47)  
Source: NCVO/TSRC, Charity Commission

In 2011/12 the voluntary sector spent £27.8 billion (73% of the total) on charitable activities excluding grant-making. This represents the second yearly fall in a row in real terms, from a peak of £29.1 billion in 2009/10. Expenditure on charitable activities is arguably a better guide to trends in overall activity in the voluntary sector than income: the latter may include large one-off items (such as legacies or endowments) that are expended over a number of years.

Voluntary sector spending on charitable activities (excluding grant-making), 2007/08 - 2011/12 (£ billions, 2011/12 prices)



## 48 How much does it cost the voluntary sector to raise funds?

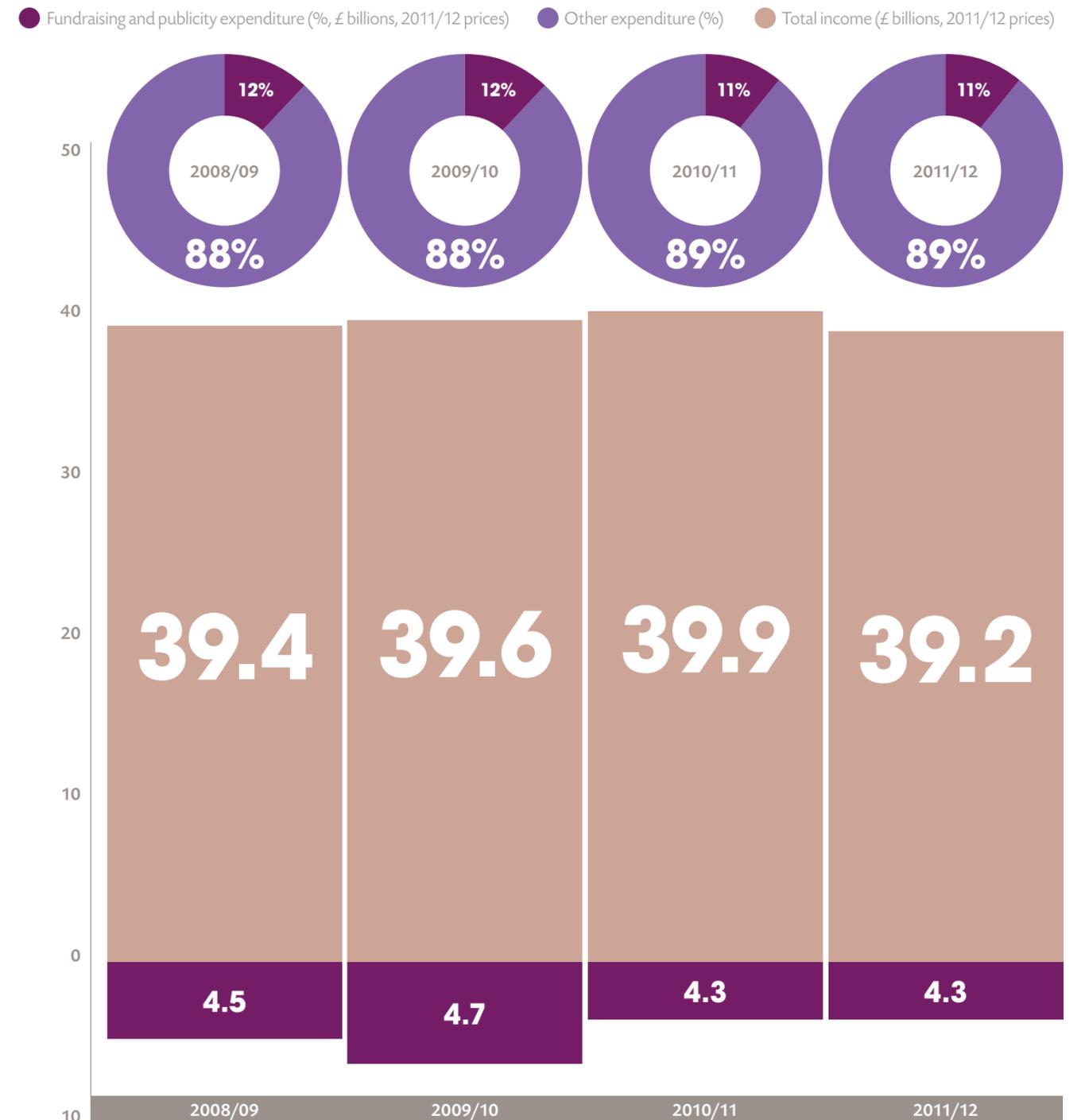
Get all the data: [data.ncvo.org.uk/a14q48](http://data.ncvo.org.uk/a14q48)  
Source: NCVO/TSRC, Charity Commission

Voluntary organisations spent £4.3 billion on generating funds in 2011/12. £2.9 billion of this was spent on fundraising trading costs (and other costs of raising earned income). £1.0 billion was spent generating voluntary income – the cost of asking for donations. The

remainder was spent on managing investments (£368 million). Overall, organisations spent 11% of their income generating funds. Expenditure on generating funds was at a similar level in 2010/11 and 2011/12, both

in terms of the total (£4.3 billion) and the proportion of total expenditure (11%). Although total income fell by £0.7 in real terms, this was due to a fall in statutory income, with income from other sources increasing, including the amount raised from individuals.

Voluntary sector spending on generating funds, and income generated, 2008/09 – 2011/12 (£ billions, 2011/12 prices)



# Grant-making

## 49 How much does the voluntary sector spend on grant-making?

The voluntary sector spent £5 billion in 2011/12 (13% of its total expenditure) making grants to other voluntary organisations, individuals and public sector organisations.

The level of grant making dropped sharply by 26% in 2008/09, as the recession hit investment income and the value of assets. Since 2008/09 grants made have increased by £740 million in real terms (a 17% increase). An equivalent increase has also been seen in the

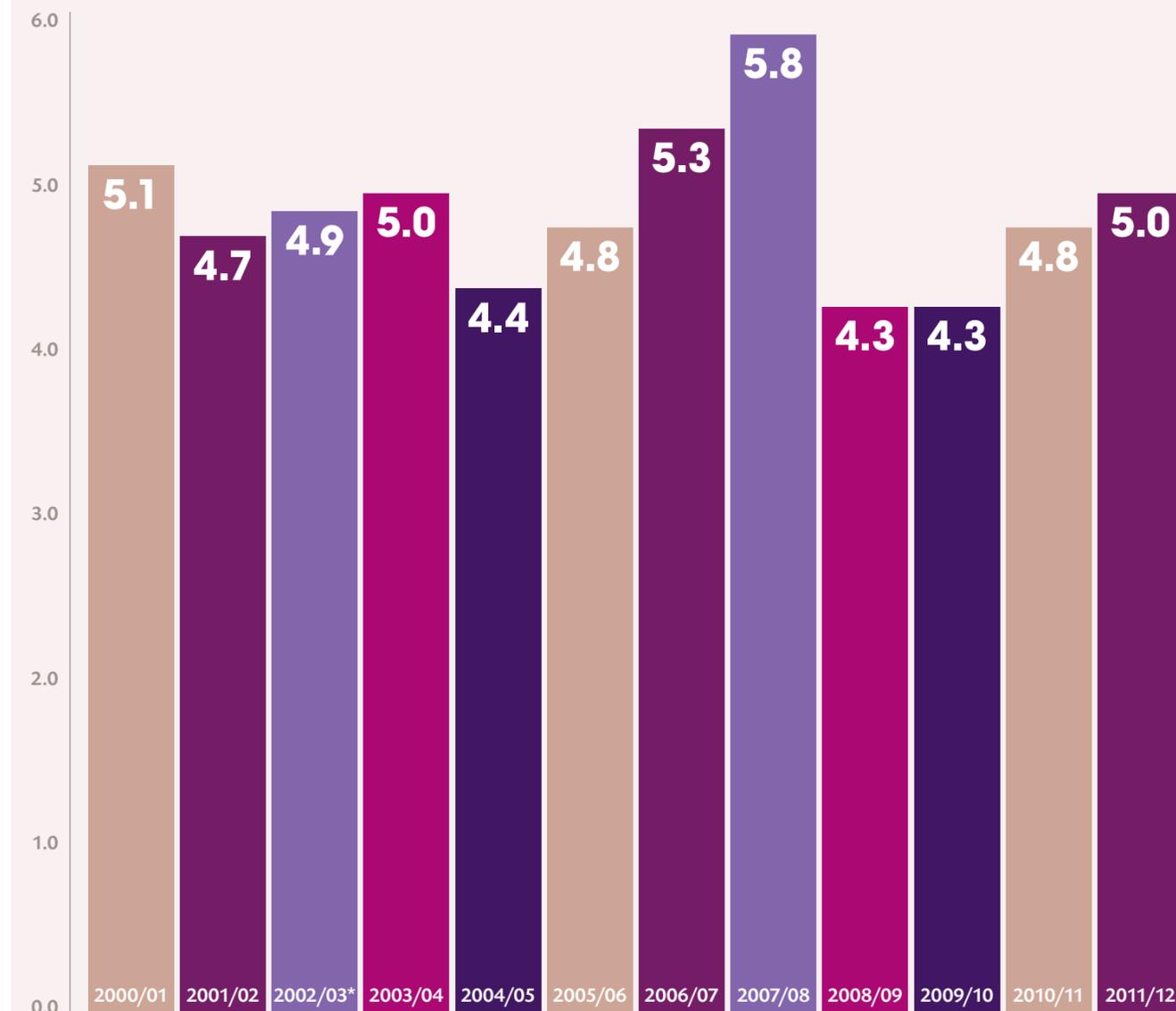
amount of grants that voluntary organisations say they receive from grant-making foundations. This increase, at a time when the sector's income has been static in real terms, could indicate that grant-makers have stepped up their support at a time when other income sources were squeezed.

Our data suggests that around 25,000 organisations make grants, representing 18% of the total number of organisations in

the sector. Grant-making is highest amongst major organisations, with one in three major organisations (35%) making grants, and lowest amongst medium sized organisations (13%). Over one quarter (28%) of all grants are made by the largest ten grant-makers, shown in the table opposite.

**Get all the data:**  
[data.ncvo.org.uk/a14q49](http://data.ncvo.org.uk/a14q49)  
 Sources: NCVO/TSRC, Charity Commission

Grants made by voluntary organisations, 2000/01 to 2011/12 (£ billions, 2011/12 prices)



The ten largest grant-makers, by total expenditure on grants, 2011/12 (£ millions)

Organisation	Grant expenditure	Total expenditure	Net assets
Wellcome Trust	521.5	728.1	12,438.3
Cancer Research UK	166.7	498.3	181.2
The Gatsby Charitable Foundation	144.5	160.5	292.3
British Heart Foundation	95.8	273.2	-15.5
The Save the Children Fund	94.9	322.6	85.1
Oxfam	90.6	378.7	73.9
Comic Relief	88.5	110.4	144.7
The United Kingdom Committee for Unicef	70.8	94.9	2.9
The Leverhulme Trust	51.0	54.2	1,736.6
International Planned Parenthood Federation	49.7	81.4	71.8

## 50 Who receives the grants that voluntary organisations make?

Using data first gathered for the 2003/04 financial year, we can estimate who receives the grants made by voluntary organisations. Higher education institutions and the public sector are significant recipients of grants, receiving £2.2 billion, which mostly funds research. We

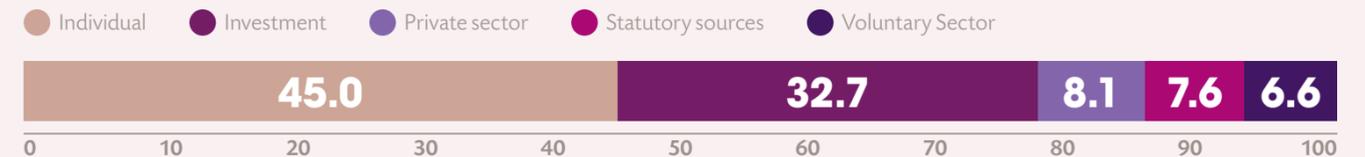
estimate that 51% of grants are made to other voluntary organisations (£2.6 billion).

Data from voluntary organisations themselves indicates that the sector receives £2.4 billion in grants from voluntary organisations: this is

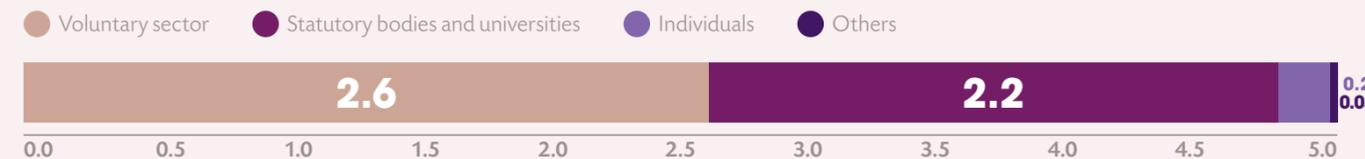
in effect an internal flow of resources within the sector. The 'missing' £0.2 billion of grant expenditure is most likely accounted for by other civil society organisations not included in our 'general charities' definition of the voluntary sector.

**Get all the data:**  
[data.ncvo.org.uk/a14q50](http://data.ncvo.org.uk/a14q50)  
 Sources: NCVO/TSRC, Charity Commission

Income sources of grant-making foundations, 2011/12 (%)



Who receives grants from voluntary organisations? 2011/12 (£ billions)



# £521.5 million

grants made by the Wellcome Trust in 2011/12



The voluntary sector:

# Assets

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# Assets summary

## 51 What is the net worth of the voluntary sector?

The aggregate balance sheet shows the value of cash, property and investments organisations hold, taking into account loans and other debt to provide a snapshot of the total net worth of the sector.

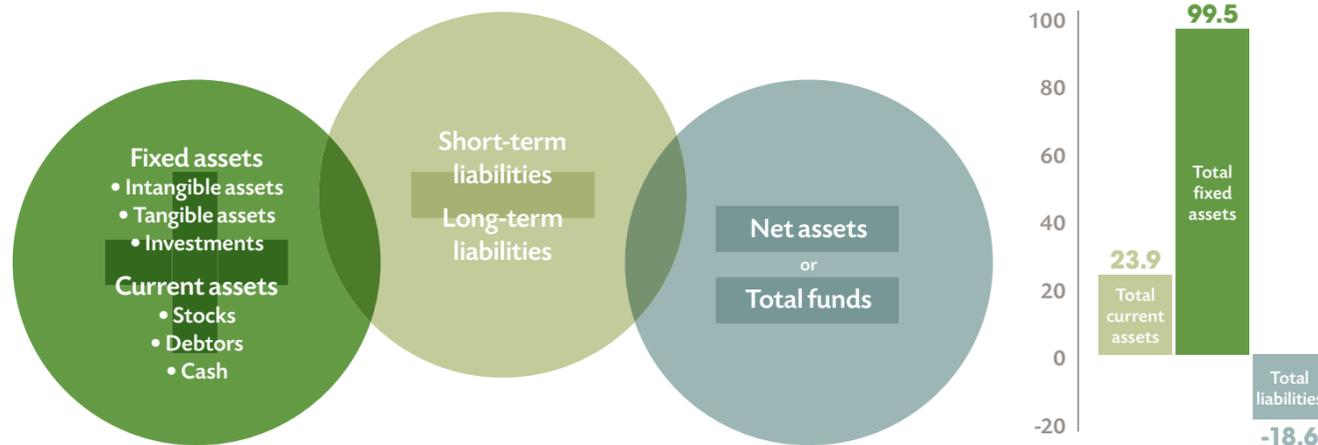
Many organisations hold assets to use in their work or to generate income. The sector's assets are worth £123.4 billion. What organisations own is set against what they owe to creditors, or liabilities.

Net assets represent the net worth of the sector and are equal to total funds. When liabilities of £18.6 billion are subtracted from total assets, the sector's total funds are worth a net £104.8 billion.

Get all the data:  
data.ncvo.org.uk/a14q51

Source: NCVO/TSRC, Charity Commission

Voluntary sector assets and liabilities, 2011/12 (£ billions)



## 52 How has the voluntary sector's net worth changed?

The net worth of the sector has staged a modest recovery following the losses that occurred during the financial crisis, as the values of assets and investments fell in

2008/09. The net worth in 2011/12 was £105 billion, higher than the previous three years but lower than the three before that in real terms.

Get all the data:  
data.ncvo.org.uk/a14q52

Source: NCVO/TSRC, Charity Commission

Voluntary sector assets and liabilities, 2000/01 - 2011/12 (£ billions, 2011/12 prices)



## 53 Is asset ownership in the voluntary sector widespread?

Get all the data:  
data.ncvo.org.uk/a14q53

Source: NCVO/TSRC, Charity Commission

While the asset base of the voluntary sector is significant, it is concentrated into a small number of organisations. Five charities with net assets of £1 billion or more own 21% of the sector's assets between them, with the Wellcome Trust alone responsible for 12%. One in five charities have no assets at all, with micro and small organisations less likely to hold assets.

Voluntary sector asset holdings, 2011/12 (£ billions)

- Other 161,261 charities
- Wellcome Trust
- The Children's Investment Fund Foundation (UK)
- National Trust
- Garfield Weston Foundation
- Leverhulme Trust



## 54 How much does the voluntary sector hold as reserves?

Get all the data:  
data.ncvo.org.uk/a14q54

Source: NCVO/TSRC, Charity Commission

There is no rule about how much charities should hold as reserves; indeed, where organisations have a reserves policy, they may not be able to generate surpluses in order to implement it. The Charity Commission defines reserves as "that part of a charity's income funds that is freely available"<sup>54a</sup>.

We estimate that the voluntary sector held reserves worth £48.8 billion in 2011/12, higher than the low of £40.7 billion in 2008/09, but a small fall from the levels seen in 2009/10 and 2010/11. This level of reserves can be expressed in terms of the number of months expenditure it would cover. The 2011/12 level

of reserves is around 15.4 months, a small fall from the previous year and over two months lower than the level seen in 2007/08. If grant-makers are excluded from this figure, the level of reserves for operating charities in 2011/12 falls to 8.3 months of expenditure.

Voluntary sector reserve levels, 2000/01 - 2011/12 (£ billions, 2011/12 prices)



# Types of assets

## 55 What are the different types of asset that voluntary organisations hold?

Get all the data: [data.ncvo.org.uk/a14q55](http://data.ncvo.org.uk/a14q55)  
Source: NCVO/TSRC, Charity Commission

Organisations hold two main classes of asset: fixed assets (£99.5 billion) and current assets (£23.9 billion). Fixed assets include tangible fixed assets (the buildings and equipment with substantial value that are owned by organisations to enable them to fulfil their mission), and investment assets (such as shareholdings or investment property), which are to generate income.

Two-thirds (67%) of the value of fixed assets is represented by investment holdings. Intangible assets are either intellectual property or as a result of merger accounting rules, and are relatively rare. Current assets consist primarily of cash at the bank, stocks of unsold goods, and monies owed to organisations.

Asset holdings: major categories, 2011/12 (£ billions)



## 56 How many voluntary organisations own buildings and equipment?

Get all the data: [data.ncvo.org.uk/a14q56](http://data.ncvo.org.uk/a14q56)  
Source: NCVO/TSRC, Charity Commission

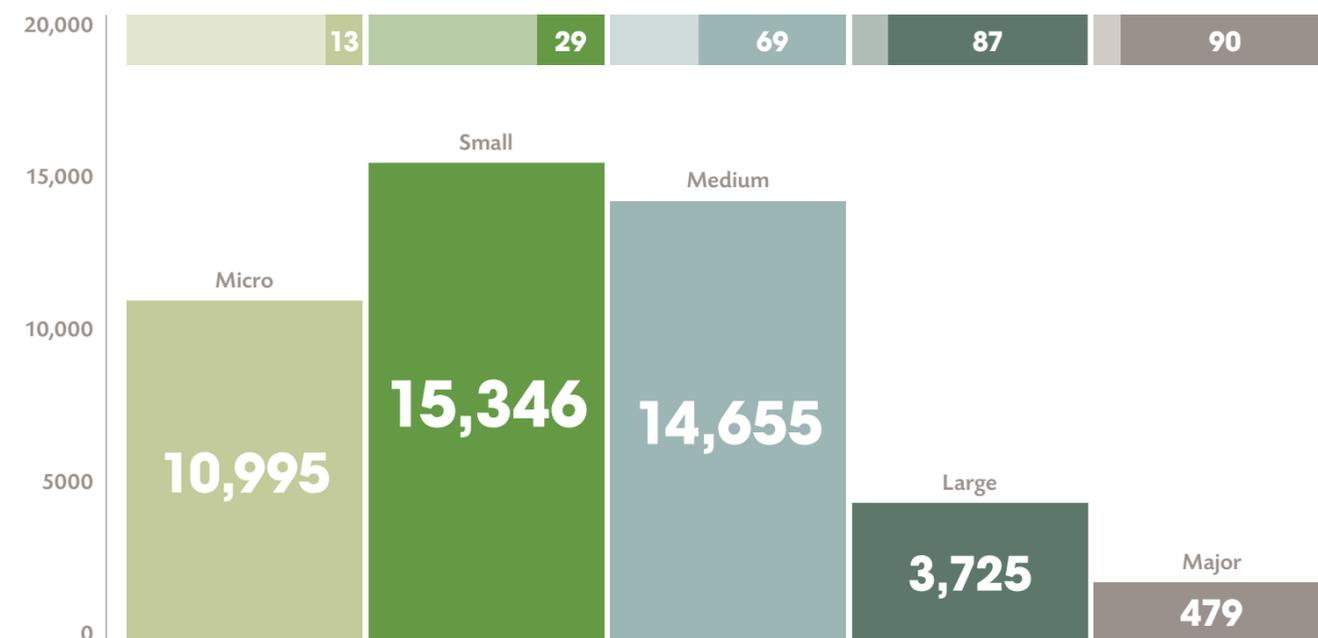
We estimate that around 45,000 organisations hold some form of tangible fixed asset: 28% of the sector. Ownership rates are highest amongst the largest organisations: around 90% of major and large charities own some

form of property, in contrast to only 29% of small organisations.

The voluntary sector's holdings of tangible fixed assets were worth £33.2 billion in

2011/12, although this doesn't include buildings held for investment purposes. The average value of tangible fixed assets for those who own them is £735,000.

Number and proportion of voluntary sector organisations with tangible fixed assets, 2011/12



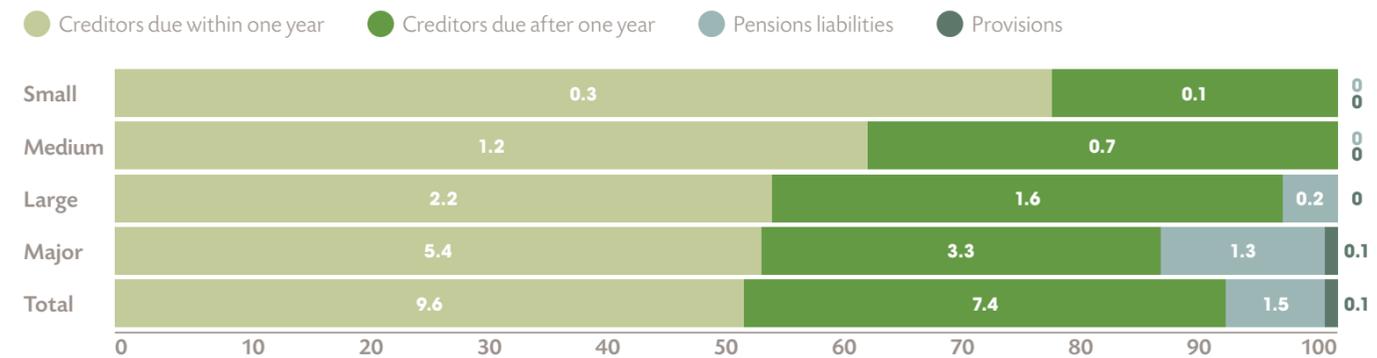
## 57 What are the voluntary sector's liabilities?

Get all the data: [data.ncvo.org.uk/a14q57](http://data.ncvo.org.uk/a14q57)  
Source: NCVO/TSRC, Charity Commission

Voluntary organisations carry both short and long-term liabilities on their balance sheet, with the largest organisations in particular also carrying provisions for future liabilities. These

are primarily for pension fund commitments. Liabilities are valued at £18.6 billion in total, nearly half of which (48%) are long-term in nature.

Voluntary sector's liabilities by size of organisation, 2011/12 (£ billions, %)



## 58 How much is the voluntary sector borrowing?

Get all the data: [data.ncvo.org.uk/a14q58](http://data.ncvo.org.uk/a14q58)  
Source: NCVO/TSRC, Charity Commission

The voluntary sector's liabilities cover a wide range of future commitments. Just over one-quarter (26%) of the liabilities relate to borrowing that voluntary organisations have undertaken. This proportion has increased since the last time that loans were analysed in 2001/02. In 2011/12, the voluntary sector owed around £4 billion in loans, equivalent to 4% of their total net assets.

Estimates of the total value of loans, 2000/01 to 2011/12 (£ millions)

Year	Loan finance	Total liabilities*	% of liabilities
2000/01	2,051.9	10,668.7	19.2
2001/02	2,426.3	11,425.1	21.2
2011/12	3,966.5	14,809.3	26.8

\* Excluding pension liabilities and micro organisations

The analysis suggests that around 60% of these loans are secured against an asset, with the remainder unsecured. Many of the unsecured loans will be more informal, perhaps lent by a donor or trustee with favourable terms. For small and medium organisations loans represent a larger proportion of their liabilities (32%).

Type of liabilities, 2011/12 (% of liabilities, excluding micro organisations)

# £4 billion

owed in 2011/12 on loans taken out by the voluntary sector



# Investment

## 59 Is the voluntary sector a significant investor?

The sector's investment assets – primarily equities, government securities, unit trusts and investment property – were collectively worth £66.2 billion in 2011/12. The voluntary sector was not immune from volatile asset prices following the financial crisis of 2008. The fall in the stock market together with

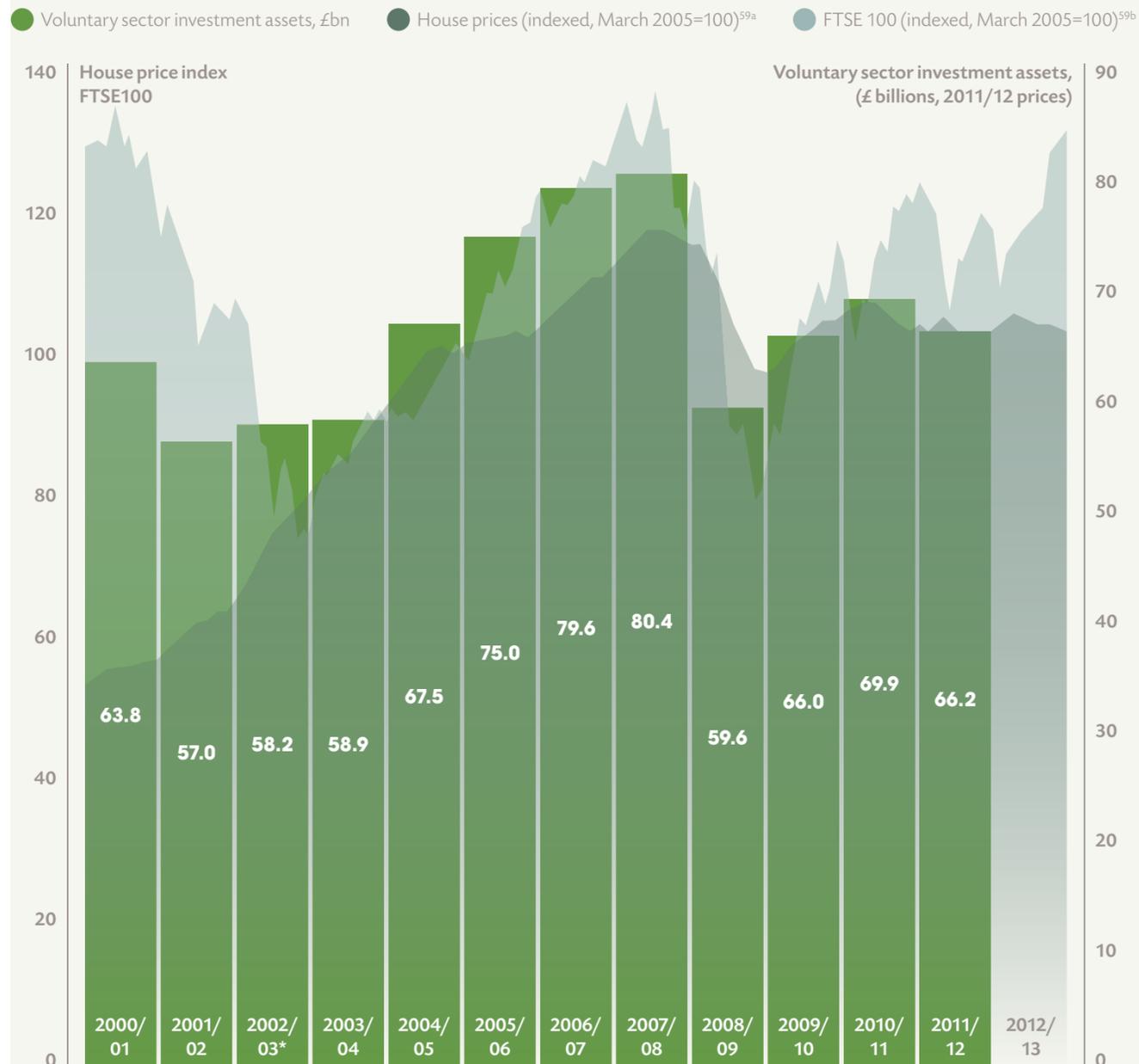
fall in property values dented the value of investment assets in 2008/09 with the sector's investment assets falling by 26%. They had recovered somewhat in 2011/12, although they have not yet reached their previous peak of £80.4 billion in 2007/08.

The cost of managing investments, including maintaining investment property and fees for investment managers was £368 million in 2011/12. These costs suggest that for every £1 spent on investment management corresponds to £7.35 generated in investment income.

Get all the data:  
data.ncvo.org.uk/a14q59

Source: NCVO/TSRC, Charity Commission

The value of investment assets 2001/02 to 2011/12 (£ billions, 2011/12 prices)



## 60 What are the main trends in investment income?

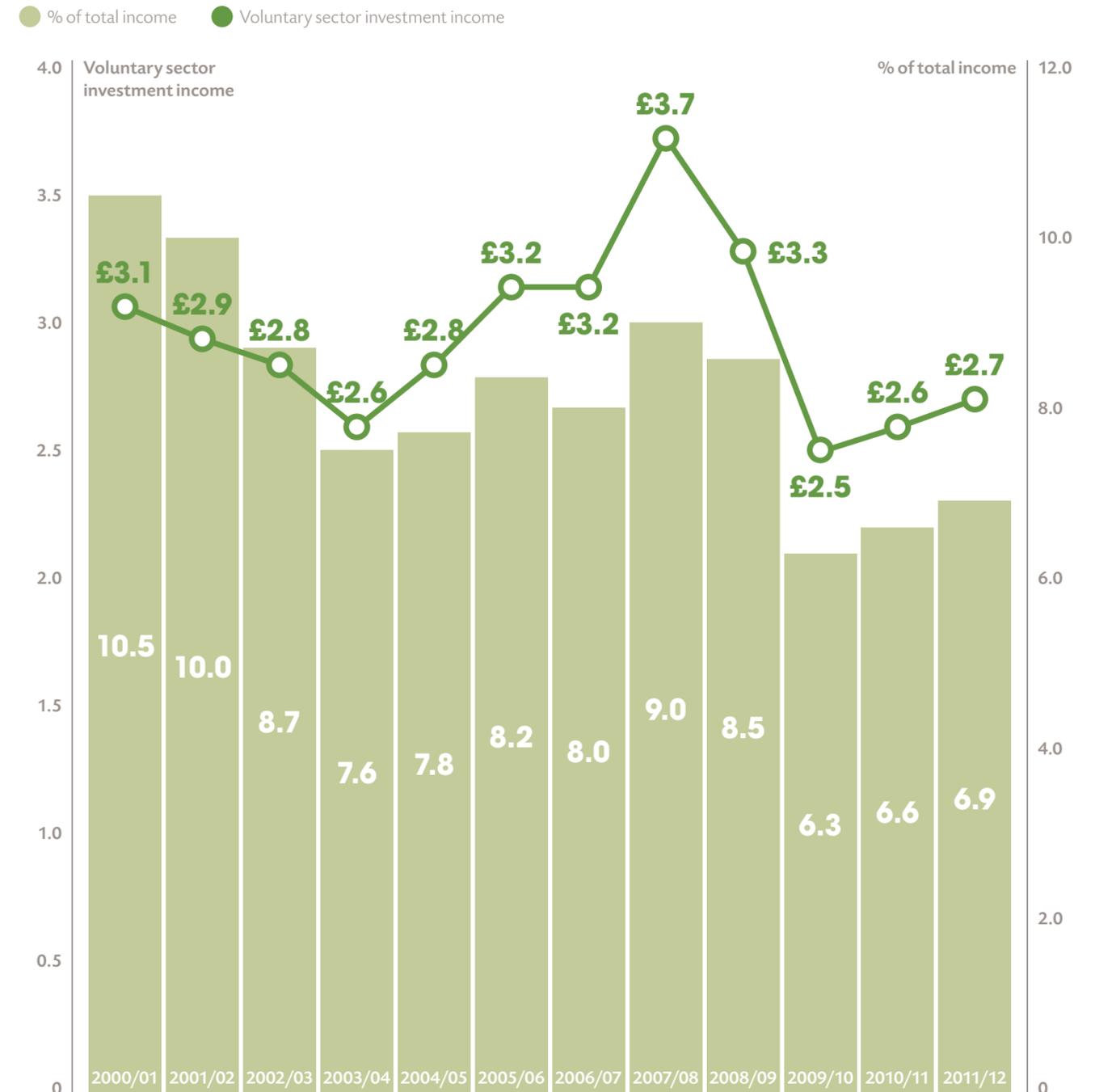
Get all the data:  
data.ncvo.org.uk/a14q60

Source: NCVO/TSRC, Charity Commission

The relative importance of investment income to the voluntary sector has begun to recover, after a strong decline after 2007/08, when it amounted to £3.7 billion in 2011/12 prices. Income from investments now represents 6.9% of the sector's total income (£2.7 billion), an increase of 6.3% from the 2009/10 values, but below historic peaks of 10% in 2000/01.

Looking at investment income in more detail shows that more than half of the total (£1.7 billion) comes from returns on financial assets such as share dividends, and 25% comes from rents on investment property (£0.7 billion), with the remaining £0.4 billion consisting of interest on cash holdings.

Voluntary sector investment income, 2000/01 to 2011/12 (£ billions, % of total income)





# People

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# Beneficiaries

## 61 Who benefits from the work of the voluntary sector?

Voluntary organisations exist to assist a wide range of beneficiary groups, covering all demographic groups within the UK population and people across the world, as well as the environment. The most popular beneficiary group is children and young

people (51%) followed by the general public (37%) and old people (25%). Research conducted by Ipsos Mori for the Charity Commission in 2012<sup>61a</sup> showed that one third of respondents (34%) said they

had benefited from the work of a charity when asked directly. But when asked about individual services that a charity might provide – such as visiting a museum or attending a youth club – a wider range of respondents answered yes.

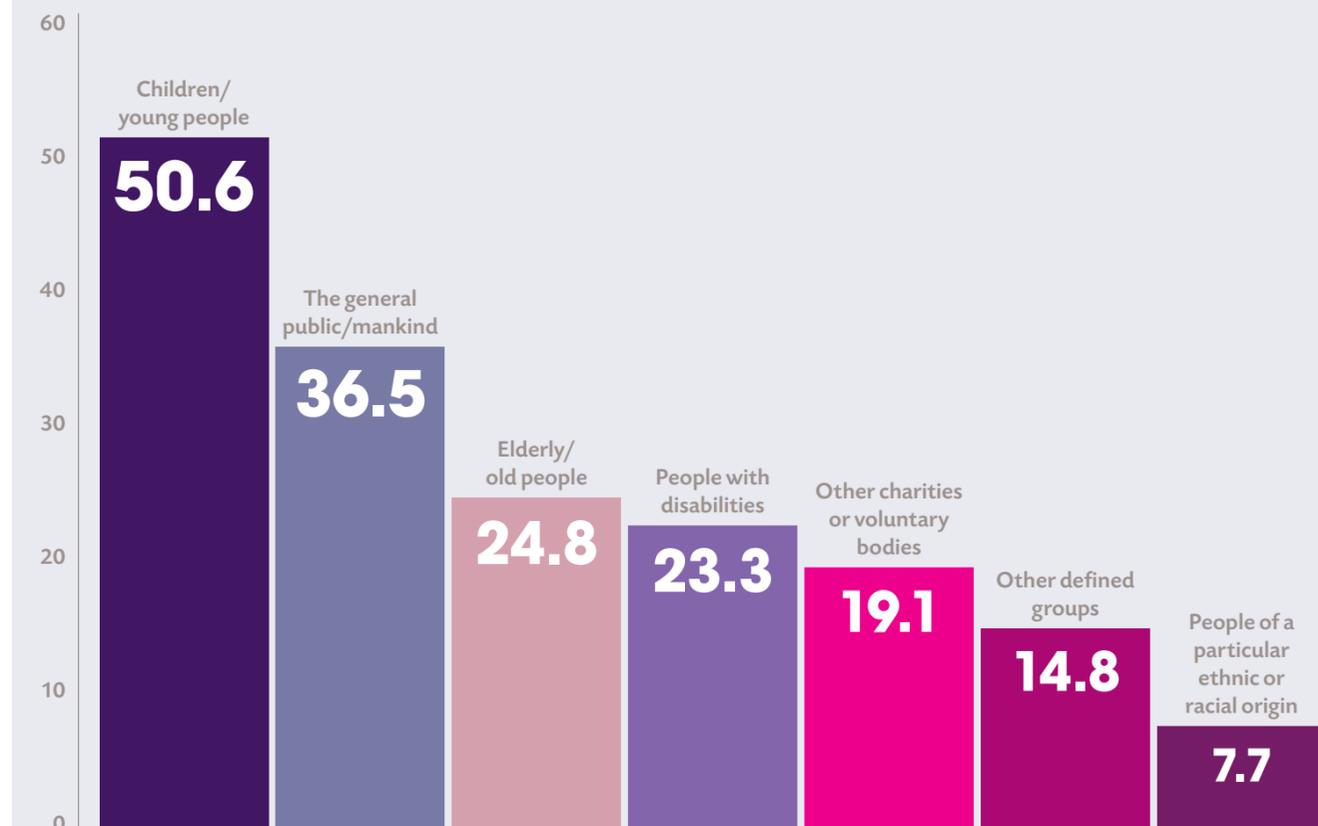
**Get all the data:**  
data.ncvo.org.uk/a14q61  
**Source:** NCVO/TSRC, Charity Commission

# 34%

of respondents say they or close friends or family have benefited from a charity

**Source:** Charity Commission, Ipsos MORI  
Base: 1,142 adults aged 18+ in England and Wales, 4th – 21st May 2012

Beneficiaries of voluntary organisations in England and Wales, 2011/12 (% of organisations)



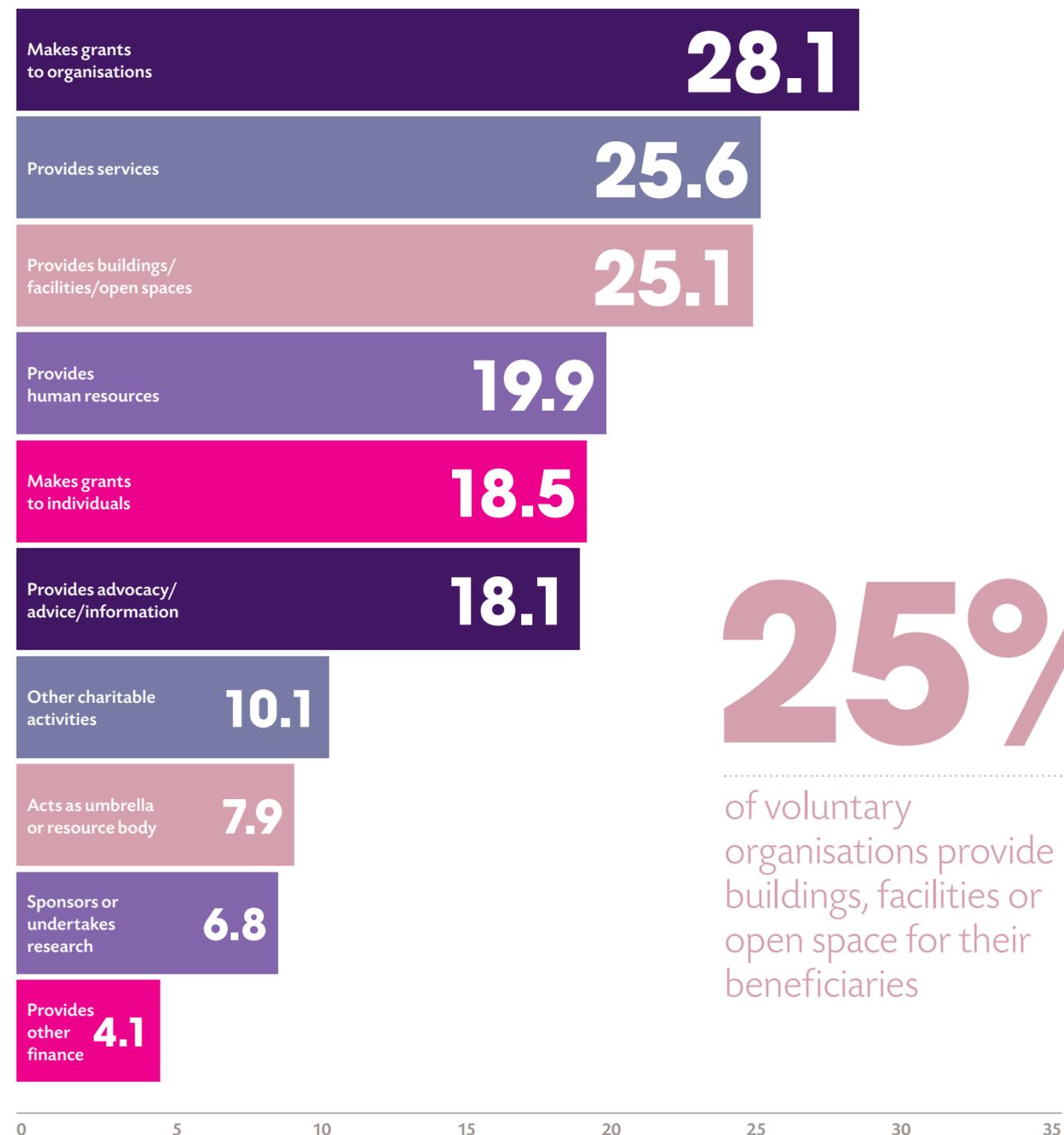
## 62 How do voluntary organisations work with those they support?

Voluntary organisations support their beneficiaries in a number of ways, from direct monetary aid, to the provision of services or facilities and enabling other organisations.

Almost a third of the sector (28%) provides services. Just over one-quarter (26%) makes grants to voluntary organisations, which can then support their beneficiaries

**Get all the data:**  
data.ncvo.org.uk/a14q62  
**Source:** NCVO/TSRC, Charity Commission  
(see question 49 for more information on grant-making voluntary organisations) and one-quarter provides buildings and facilities.

Functions of voluntary organisations in England and Wales, 2011/12 (% of organisations)



# 25%

of voluntary organisations provide buildings, facilities or open space for their beneficiaries

# Workforce summary

## 63 How many people work in the voluntary sector?

Get all the data:  
data.ncvo.org.uk/a14q63

According to our analysis of the Labour Force Survey<sup>63a</sup>, approximately 800,000 people were employed in the voluntary sector in the UK by the end of 2012. This figure represents a small increase of around 18,000 over the previous two years. Since 2002, the voluntary sector's workforce has seen an overall increase of around 234,000 employees (41%), with a dip

during 2010/11. As a proportion of the total UK workforce, it has risen from 2.1% to roughly 2.7% during this time. At the last quarter of 2012, the 800,000 people employed by the voluntary sector equalled approximately 648,000 full-time equivalent (FTE) staff. The proportion of FTE to number of employees is 81%. This proportion has not changed more than 2% since 2001.

The public sector employed 7.1 million staff at the end of 2012 and the private sector employed 21.5 million. The private sector saw an increase of around 715,000 since the end of 2010 and the public sector decreased by 272,000 over the same period.

## 64 Who works in the voluntary sector?

Get all the data:  
data.ncvo.org.uk/a14q64  
Source: Labour Force Survey

By the final quarter of 2012, 524,000 women and 275,000 men were employed in the voluntary sector, meaning that just under two-thirds (66%) of the voluntary sector workforce were women. A similar ratio was found in the public sector (66%). Both proportions are in stark contrast

to the proportion of women employed in the private sector (39%). Voluntary sector employees are on average slightly older than those in the private and public sectors. Almost four in ten (37%) of paid staff working in the voluntary sector are aged fifty

and over, compared to around a third (34%) of the public sector and just less than three tenths (29%) of the private sector workforce. Fewer than one in ten (8%) voluntary sector employees are from black and minority ethnic groups. A fifth (20%) of the voluntary sector workforce has a disability.

Voluntary Sector employees by gender, 2001 – 2013 (headcount)



## 65 Where are voluntary sector staff located?

Get all the data:  
data.ncvo.org.uk/a14q65  
Source: Labour Force Survey

More than one in three (31%) voluntary sector workers lived either in London or the South East in the last quarter of 2012. Employees in the private and public sectors were also concentrated in these regions but to a lesser extent (27% and 25% respectively). Voluntary sector employees are mainly concentrated in small workplaces. Almost half of voluntary sector workers in the fourth quarter of 2012 worked for organisations of less than 25 employees. This is different to both the private and the public sectors (42% and 16% respectively). Overall, only one in 20 (5%) of voluntary sector employees in the voluntary sector were employed in workplaces with 500 or more paid staff members. This is a much lower proportion than within the private and public sectors (13% and 34% respectively).

Number of employees per workplace by sector, 2012 (headcount, %)

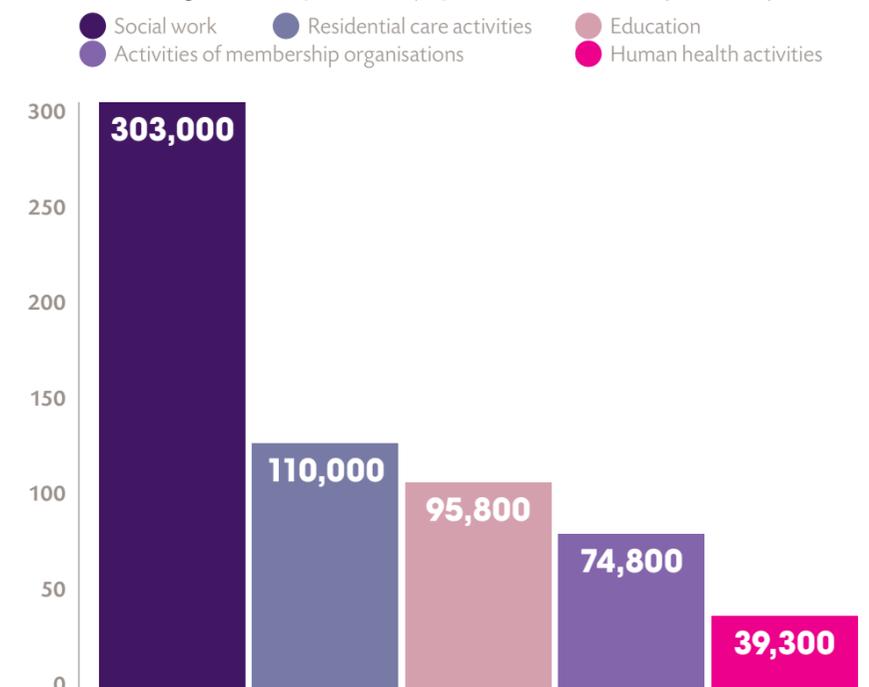


## 66 What type of work is undertaken in the voluntary sector?

Get all the data:  
data.ncvo.org.uk/a14q66  
Source: Labour Force Survey

Around 432,000 people, a little under six out of ten (57%) employees in the voluntary sector, were employed in the 'health and social work' employment category. Within this broader category, over two thirds (67%) were employed in 'social work activities without accommodation', amounting to 300,000 people. Voluntary sector employees account for 31% of the overall UK workforce within the 'social work activities without accommodation' category. A further 110,000 people (14% of the voluntary sector workforce) were employed in 'residential care activities'.

The five largest voluntary sector employment industries, 2012 (headcount)



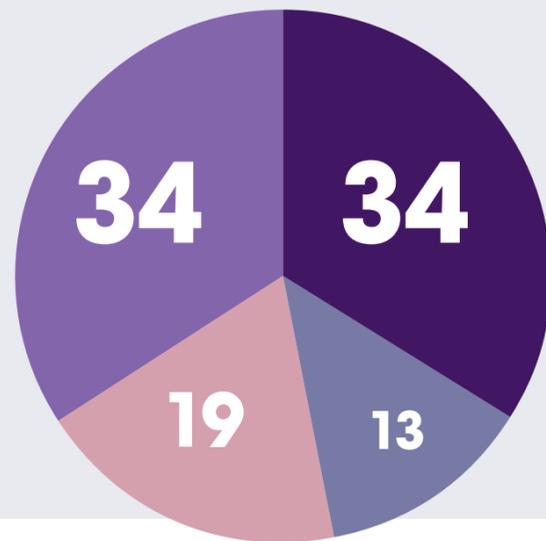
# Working patterns and skills

## 67 What training opportunities are there in the voluntary sector?

Get all the data: [data.ncvo.org.uk/a14q67](http://data.ncvo.org.uk/a14q67)  
Source: UK CES, National Employer Skills Survey

The majority of voluntary organisations (56%) provided both on-the-job and off-the-job training in their organisation, however just under one-fifth (18%) provided no training at all. Over half (59%) of all voluntary sector employers that had provided training over the last year train staff of all grades, however managers are significantly more likely to receive training than other staff: 70% of voluntary organisations stated that they trained managers whilst only 17% trained elementary positions. Half of employers reported that on average they provided less than four days training per trainee per year, and only 5% provide more than 20 days per year<sup>67a</sup>.

Type of training offered within the voluntary sector (% of employers)



- Provide both off-the-job and on-the-job training
- Provide off-the-job training only
- Provide on-the-job training only
- Provide neither off-the-job and on-the-job training

## 68 How secure are jobs in the voluntary sector?

Get all the data: [data.ncvo.org.uk/a14q68](http://data.ncvo.org.uk/a14q68)  
Source: Labour Force Survey

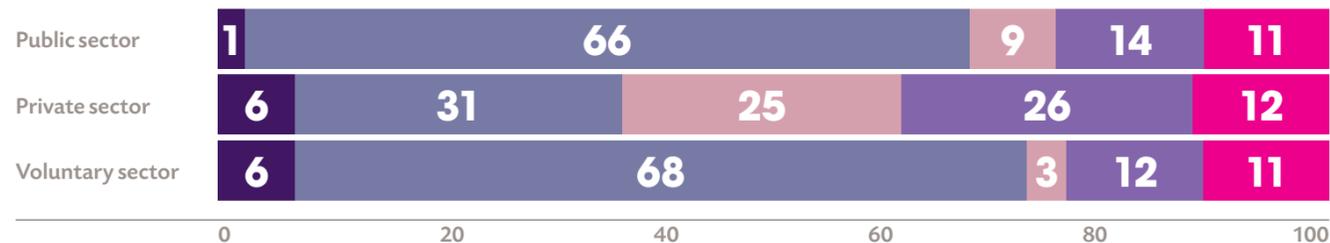
By the end of 2012, almost nine out of every ten (89%) voluntary sector employees were on permanent contracts, lower than both the private and public sectors (95% and 92% respectively). Looking at those within the voluntary sector who were not permanent employees, roughly two thirds (66%) of

temporary workers were on a casual contract, a similar proportion to the public sector (66%) and much higher than the private sector (30%). Within the voluntary sector, 30% of those employees on temporary contracts were on a contract lasting less than one year. Around 17% of temporary employees within

the voluntary sector were on contracts lasting between one and two years. Roughly 9% of voluntary sector employees were looking for a different or an additional job, amounting to 75,000 people.

Job security for temporary employees by sector, 2012 (headcount, %)

- Agency temping
- Casual work
- Seasonal work
- Contract for fixed period, fixed task
- Not permanent in some other way



## 69 What skills are required in the voluntary sector?

Get all the data: [data.ncvo.org.uk/a14q69](http://data.ncvo.org.uk/a14q69)  
Source: Labour Force Survey

At the end of 2012, voluntary sector employees were highly qualified, with more than four in ten employees (44%) holding a degree level qualification or higher. This is slightly lower than employees within the public sector (45%) but higher than employees within the private sector (25%). Overall more

than three quarters (78%) of voluntary sector employees held an A-Level qualification, its equivalent or higher. Less than one-sixth (15%) of voluntary sector employers reported having staff with skills gaps. Voluntary sector employers, who had skills gaps within their organisation, were most likely to report

gaps for administrative/clerical staff (33%), managers (28%) and caring, leisure and other services staff (25%). Of those employers who had skills gaps within their organisation, the main cause cited was staff being new to the job and their training not being completed yet (both 57%).

Highest qualification of employees by sector, 2012 (headcount, %)



## 70 What are the working patterns in the voluntary sector?

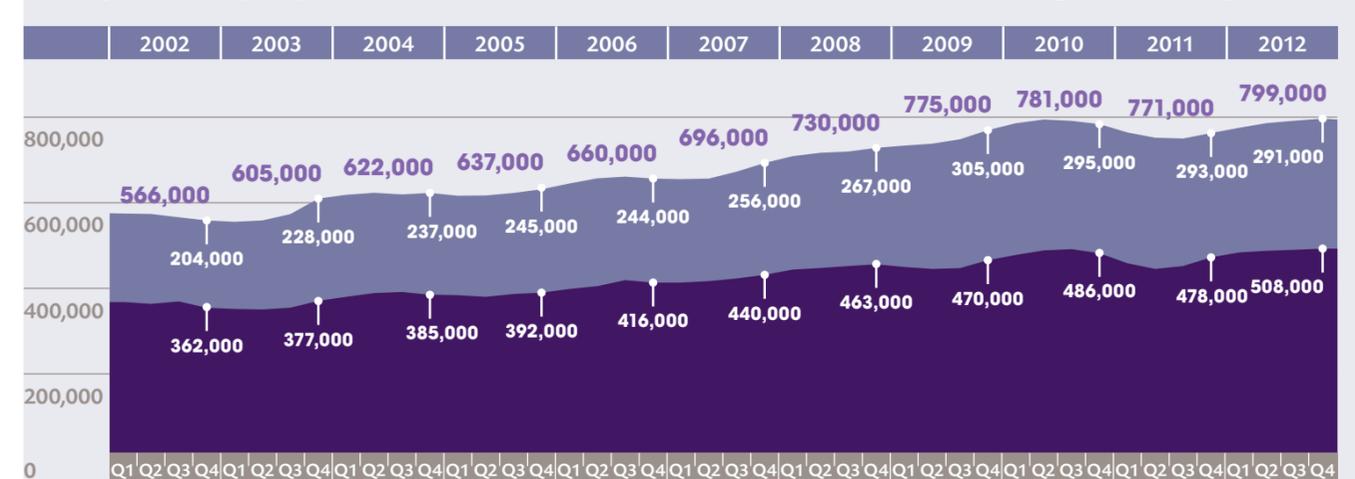
Get all the data: [data.ncvo.org.uk/a14q70](http://data.ncvo.org.uk/a14q70)  
Source: Labour Force Survey

In 2012, around 291,000 people were working part-time in the voluntary sector, amounting to almost two fifths (36%) of the sector's workforce. This proportion is larger than those of the public and private sectors (30% and 26% respectively). Nearly half (44%) of the women employed within the voluntary sector were employed part-time compared to less than a quarter (23%) of men. Men working within the voluntary sector however were more likely to be employed part-time than men working in the private and public sectors (13% and 11%

respectively). The proportion of women working part-time was similar in the private sector (45%) and a little lower in the public sector (40%). Just under one in five (17%) voluntary sector part-time employees were working part-time because they could not find a full-time job. This share is higher than the public sector (13%) but lower than in private sector (20%). In 2012, nearly three quarters (72%) of part-time employees in the voluntary sector did not want to work full-time.

Full-time employees in the voluntary sector were contracted to work an average of 37.6 hours per week (excluding overtime), less than the public sector (40.0 hours). Private sector full-time employees worked a slightly longer week of 40.7 hours. For part-time workers in the voluntary sector, the average number of hours contracted per week was 18.8, excluding overtime. This is slightly higher than in the private sector (17.8 hours) but less than in the public sector (19.4 hours).

Voluntary sector employees by work pattern, 2001 - 2013 (headcount)



# Pay and staff costs

## 71 What is the state of pay in the voluntary sector?

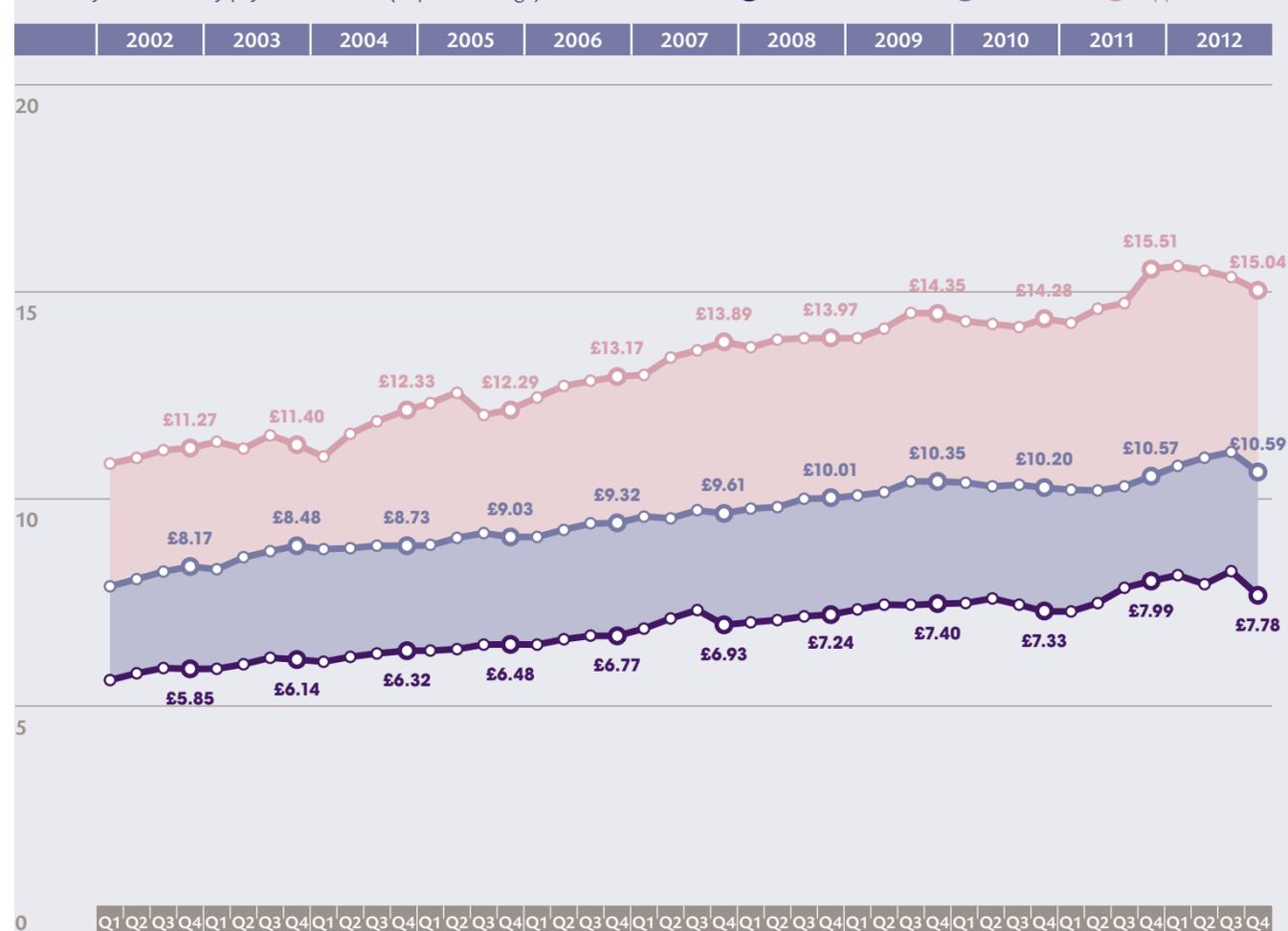
**Get all the data:**  
data.ncvo.org.uk/a14q71  
**Source:** Labour Force Survey

At the end of 2012, half of voluntary sector employees earned less than £11 per hour. This is a little higher than in the private sector, but less than in the public sector (median hourly rates of around £10 and £13 respectively). The median hourly pay in the voluntary sector has increased by a little over the previous two years. A quarter (25%) of workers in the voluntary sector earn £15 or more per hour. This is similar to the figure for the top quarter of workers in the private sector (£15.50) but lower than for the public sector (£18).

The lowest paid quarter of workers in the voluntary sector earn less than £8 per hour, which again is less than in the public sector (around £9), but more than the private sector (around £7). In the voluntary sector the difference between the minimum hourly pay of the top 25% of earners and the maximum hourly pay of the bottom 25% of earners (the interquartile range) is around £7.

In the voluntary sector, there are an estimated 4,700 employees working for general charities who earn an annual salary of £60,000 or more. Voluntary organisations spend an estimated £336 million on these employees. The majority (85%) earn less than £100,000 and roughly two-thirds (66%) work for major organisations. The categories that most frequently employ high-paid staff are: health; research; and culture and recreation (around 760, 670 and 500 employees respectively).

Voluntary sector hourly pay, 2001 – 2013 (£ quartile range)



## 72 How much does the voluntary sector spend on staff costs?

**Get all the data:**  
data.ncvo.org.uk/a14q72  
**Sources:** NCVO/TSRC, Charity Commission

Staff costs, as identified in voluntary organisations' accounts, cut across the range of expenditure categories within the accounts. In addition to salaries, staff costs also cover: the costs of employing staff who work for the charity even if the charity has not incurred those costs; employers' National Insurance costs; and pension costs.

In 2011/12, voluntary organisations spent £14.4 billion employing staff. Over time it appears that staff costs have fallen as a proportion of total expenditure, from 43% in 2001/02 to 38% in 2011/12. Nearly

nine-tenths (89%) of this expenditure goes on wages to the staff themselves, with a further 4% going on pension costs. The final 7% of expenditure relates to social security costs associated with employing staff, mainly employers' National Insurance contributions. In total, the voluntary sector spends £1 billion on these social security costs.

Over four-fifths of the sector's total spending on staff costs (82%) are incurred by large and major organisations. Large organisations in particular, spend 44% of their total expenditure on staff. Almost nine out of ten

large (86%) and major (86%) organisations employ staff, compared to 5% of small organisations and 1% of micro organisations. Overall, just over one tenth (11%) of voluntary organisations employ staff (although this figure is subject to much variation because of micro and small organisations in the sample). The average cost per FTE employee within the sector is £22,000, but this varies from £19,000 within medium organisations through to £25,000 within major organisations.

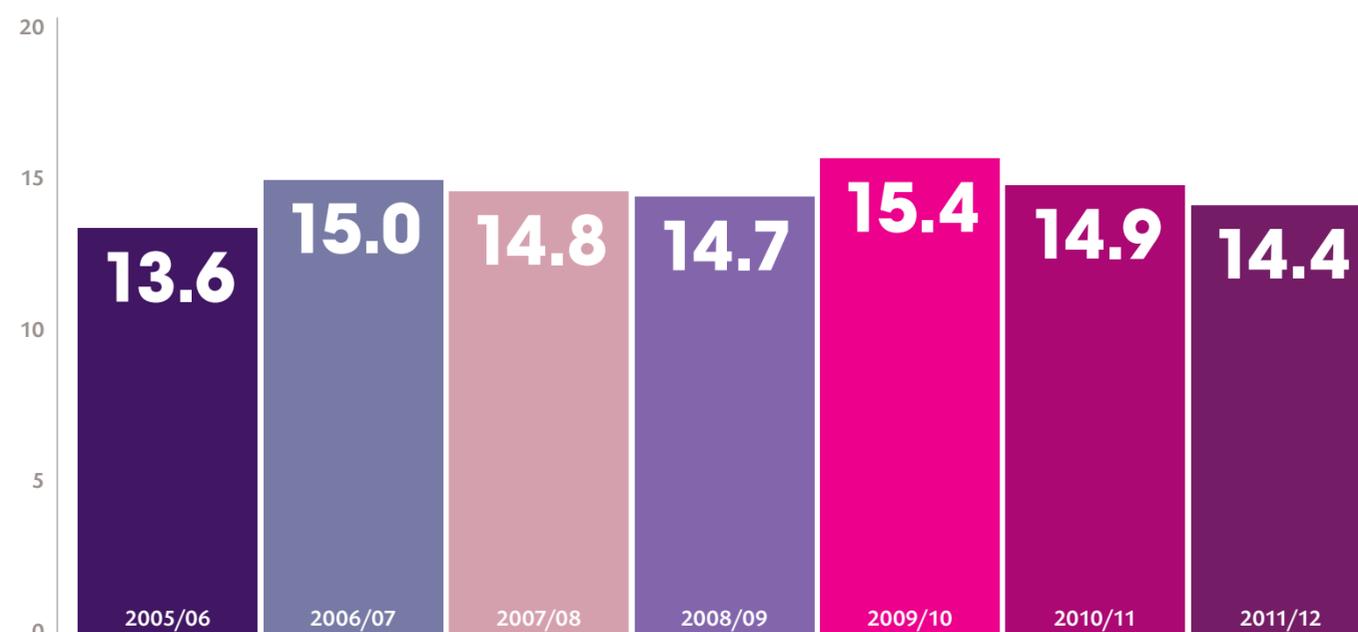
# £22,000

average cost per FTE employee in the voluntary sector

Voluntary sector staff costs spending breakdown, 2011/12 (£ million)

	Micro	Small	Medium	Large	Major	Total
Wages and salaries	6.3	205.7	2,141.6	4,347.9	6,138.1	12,839.7
Social security	0.1	13.3	161.5	342.8	483.3	1,001.1
Pension costs	0.0	2.6	59.6	187.6	338.8	588.7
<b>Staff Costs</b>	<b>6.4</b>	<b>221.6</b>	<b>2,362.7</b>	<b>4,878.3</b>	<b>6,960.3</b>	<b>14,429.4</b>

Voluntary sector spending on staff costs, 2005/06 – 2011/12 (£ billion)



# Volunteering summary

## 73 How many people regularly volunteer in the UK?

Get all the data: [data.ncvo.org.uk/a14q73](http://data.ncvo.org.uk/a14q73)

In August 2012-April 2013, 29% of adults in England said that they had formally volunteered at least once a month in the previous year, and 44% said that they had volunteered at least once in that year.

This equates to an estimate of 12.7 million people volunteering in England once a month, and 19.2 million once a year.<sup>1</sup> If the survey results are applied to the wider UK population as a whole, this would produce an estimate

of 15.2 million people volunteering at least once a month in the UK, and 23.1 million volunteering at least once a year<sup>23a</sup>.

## 74 How has the number of people volunteering changed over time?

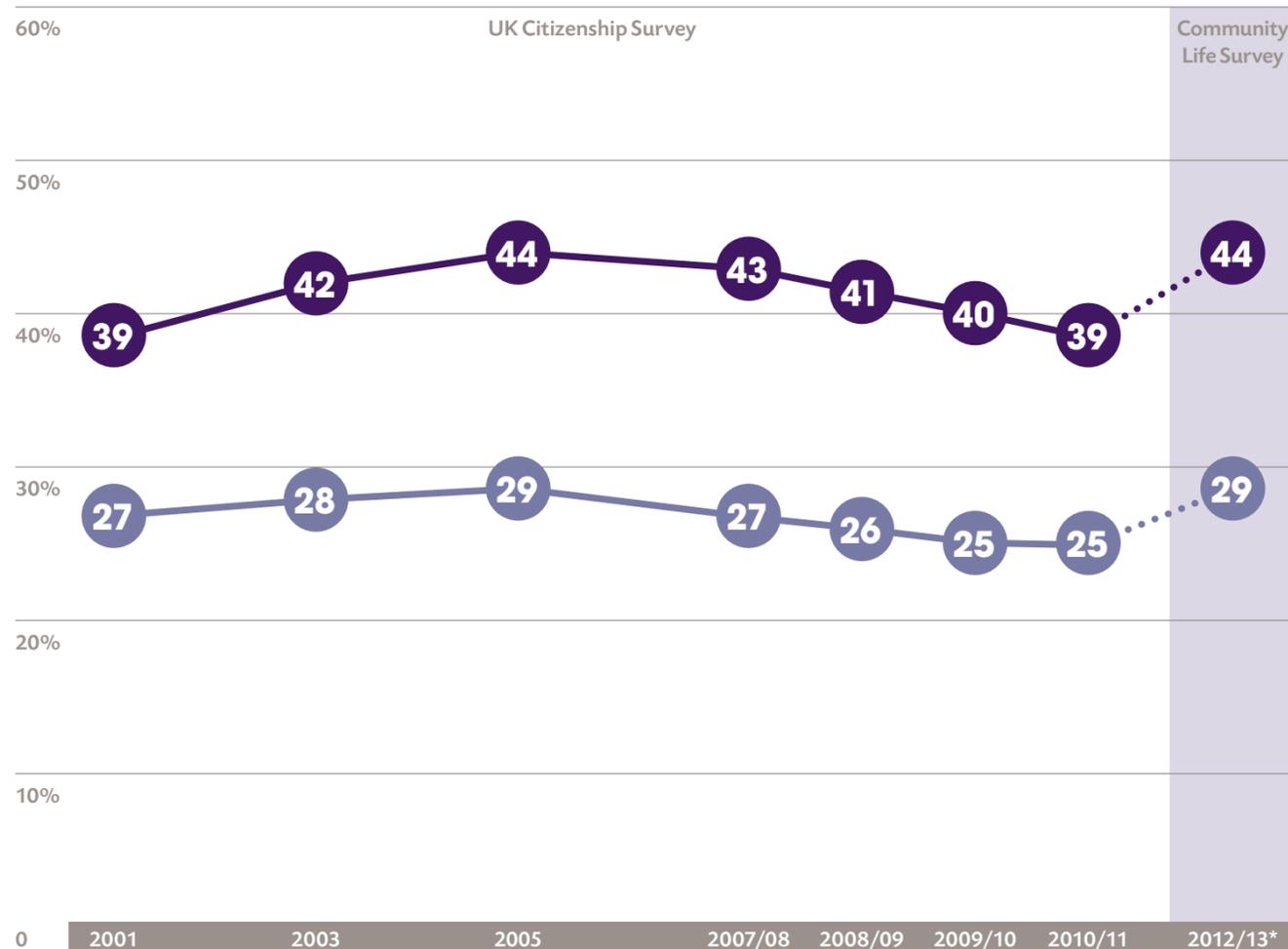
Get all the data: [data.ncvo.org.uk/a14q74](http://data.ncvo.org.uk/a14q74) / Source: Citizenship Survey (2001 to 2010/11) and Community Life Survey (2012/13)

Rates of formal volunteering peaked in 2005, when 44% of respondents to the annual Citizenship Survey<sup>74a</sup> reported that they had volunteered in the past year. This rate

declined slowly to 39% by 2010/11. However, the most recent statistics available show a return to the peak level figures, and suggest that the decline may have been halted. Data

from future years should tell us whether or not this represents a longer-term trend of increasing rates of volunteering.

Proportion of people formally volunteering, 2001 – 2012/13 (% of respondents) ● At least once a month ● At least once in last year



\*August 2012 – April 2013

## 75 What are the barriers to volunteering?

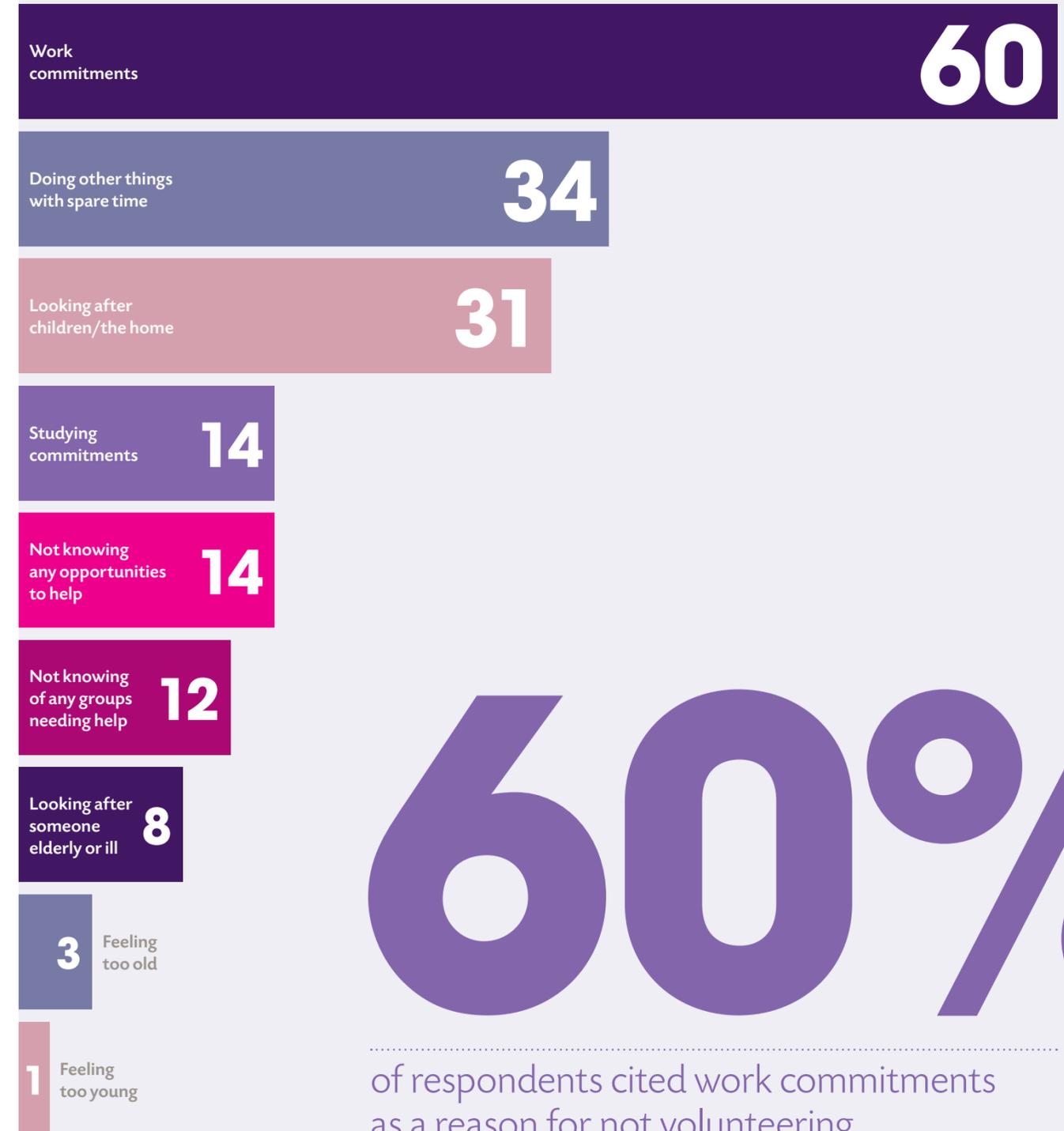
Get all the data: [data.ncvo.org.uk/a14q75](http://data.ncvo.org.uk/a14q75)  
Source: Citizenship Survey, 2010/11

A range of reasons are given by people for not participating in volunteering-related activities. In the 2010/11 Citizenship Survey the main reasons people gave for not volunteering were

broadly related to having other calls on their time (eg, work, family/caring, study or other commitments), with lack of awareness of opportunities the second most common,

and age (either feeling too old or too young) the least common reason – cited by only 4% of respondents.

Reasons given for not participating in volunteering-related activities, 2010/11 (% of respondents)



60% of respondents cited work commitments as a reason for not volunteering

# Who volunteers

## 76 Who volunteers in the UK?

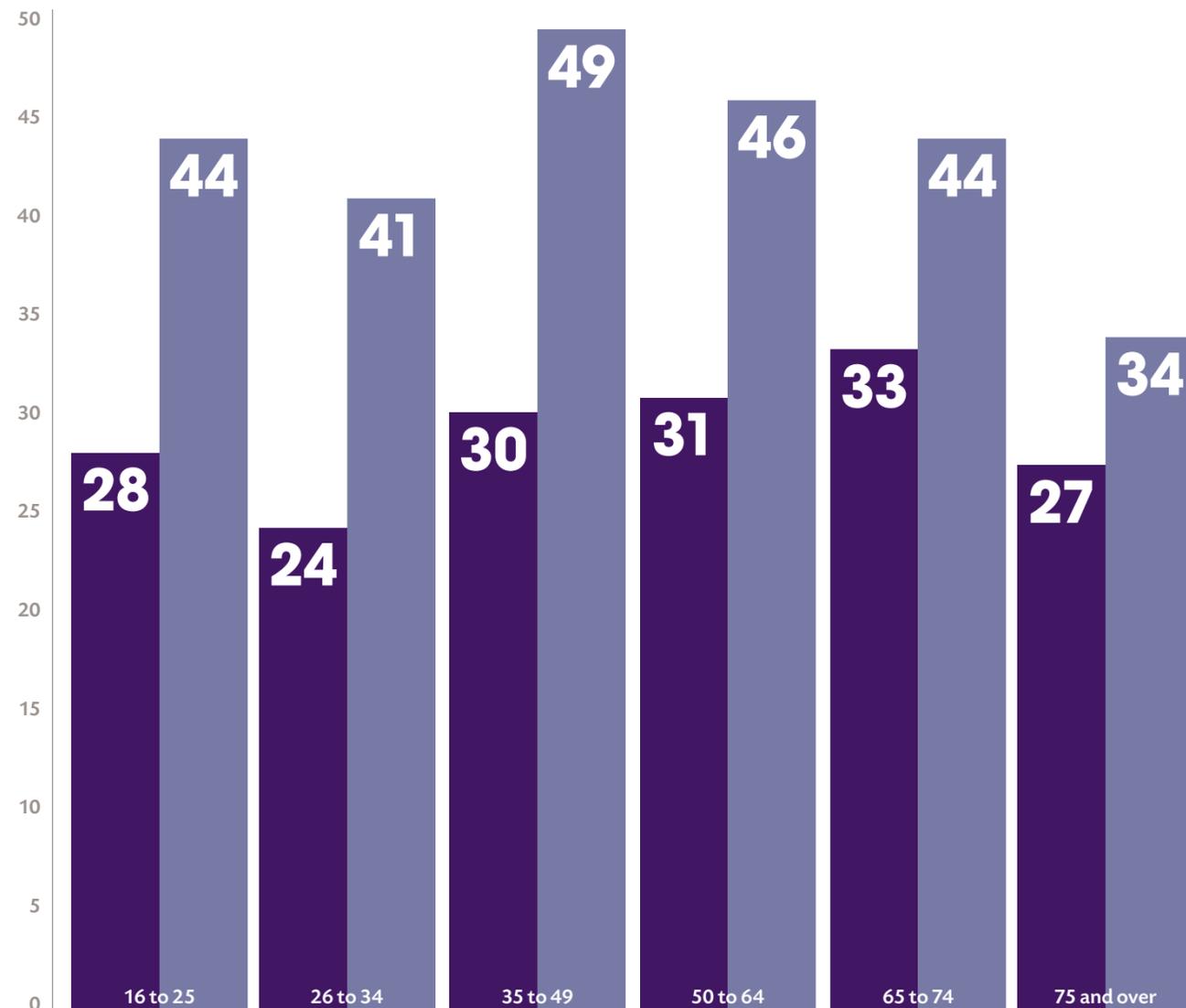
People of all ages volunteer. Despite some variation in the frequency and levels of volunteering across age ranges, between around a quarter (24%) and a third (33%) of people in each age range report volunteering at least once a month (with those aged 65-74 the most likely to volunteer this frequently). The numbers volunteering less frequently, at least once in the last year, are understandably higher, with the proportion rising to between 40-50% of people across most age ranges,

except among those aged 75 and over where the proportion drops to around a third (34%). The highest rates of volunteering (those who said that they had volunteered at least once in the previous year) were found in the Southern regions of England (49% in the South East and 50% in the South West). Most regions followed the national picture of an increase in volunteering between 2010/11 and 2012/13, with the largest increases in Yorkshire and The

Humber, London, and the East Midlands. There have also been shifts in volunteering rates by economic status. 38% of people in employment reported volunteering at least once in the last year (up from 42% in 2010/11), along with 40% of those who were economically inactive (defined as those who are not immediately available for work; up from 34%). However among the unemployed, volunteering dropped to 33% (38%).

**Get all the data:**  
[data.ncvo.org.uk/a14q76](http://data.ncvo.org.uk/a14q76)  
**Source:** Community Life Survey (2012/13)

Proportion of people volunteering by age group, 2012/13 (% of respondents) ● At least once a month ● At least once in last year



## 77 How many young people volunteer?

Amongst younger respondents to the Community Life Survey, there have been a number of changes over time. In common with the trend across all age groups, the most recent data show an increase in volunteering among the 16-25 age group (from 23% in 2010/11 to 28% in 2011/12), after several years of stability.

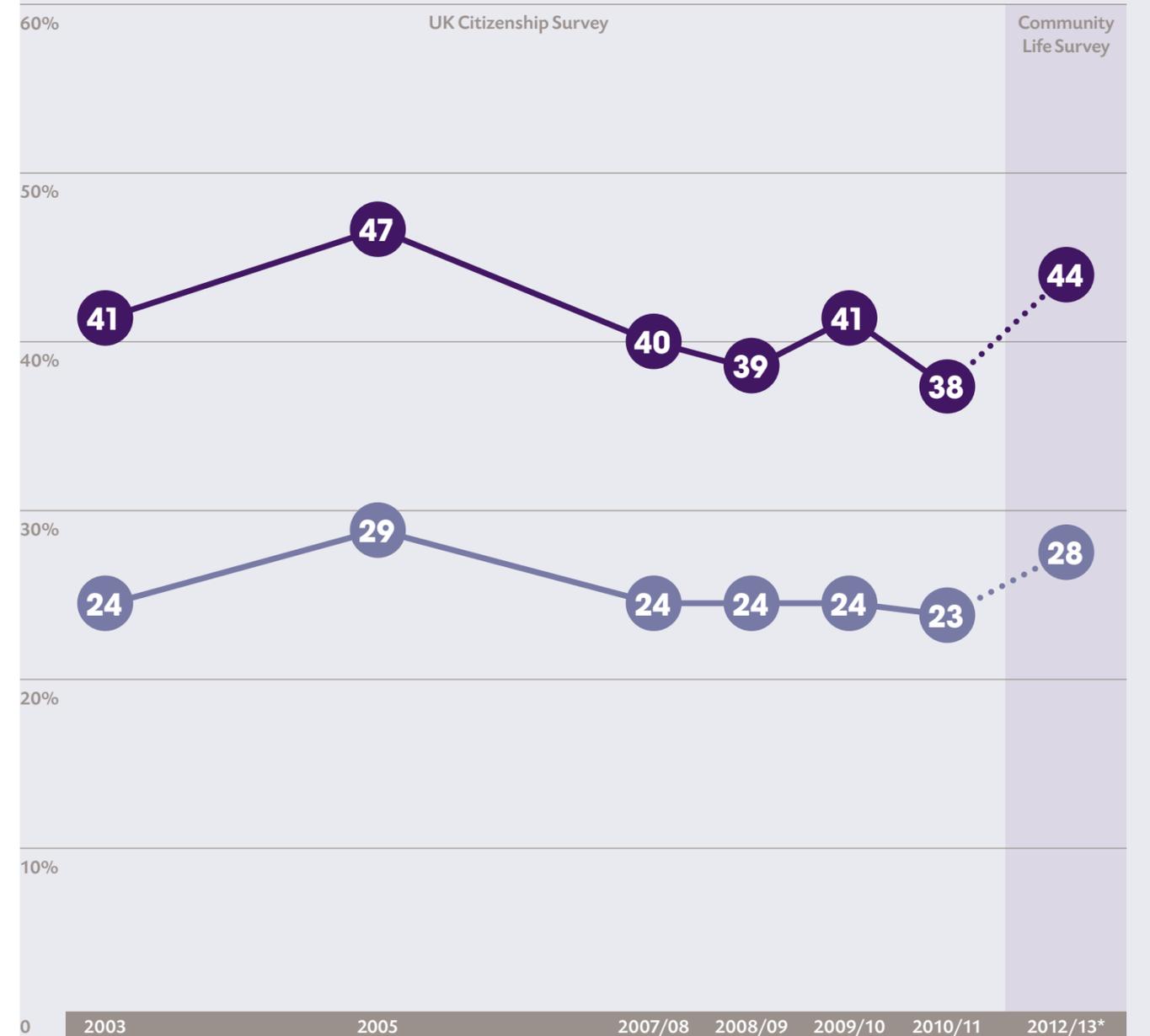
To explore volunteering in under-16s, other data is available. In the Understanding Society

survey panel<sup>77a</sup> of 4760 young people aged 10-15 in 2010 and 2011, 52% volunteered at least once per year, of which 19% did so at least once per month or more and 6% at least once per week. Young people in this age group are more likely to volunteer if their parents also volunteer. Other factors associated with likelihood of volunteering are attendance at extracurricular religious classes, and 'cultural capital' (reflecting a range of cultural activities,

such as attending cultural and social events, visiting museums, and discussing literature). Gender is also a factor, with girls more likely to volunteer, as is ethnicity: young people are more likely to volunteer if they are a member of an ethnic minority group in the UK (Bennet and Parameshwaran, 2013)<sup>77b</sup>.

**Get all the data:**  
[data.ncvo.org.uk/a14q77](http://data.ncvo.org.uk/a14q77)  
**Source:** Community Life Survey (2012/13)

Proportion of 16 to 25 year olds volunteering, 2003 – 2012/13 (% of respondents) ● In last year ● Once a month



\*August 2012 – April 2013



# Data bank

Civil society	85
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# Civil society

Source:  
NCVO/TSRC, various sources

Table 1: Size of Civil Society by type of organisation, 2011/12

	Number of organisations	Income (£ million)	Spending (£ million)	Net Assets (£ million)	Paid staff	Data quality
General Charities	161,300	39,200	38,000	104,800	800,000	Good
Universities	160	27,900	26,700	26,300	378,000	Good
Housing Associations	1,800	15,800	14,200	76,100	176,000	Good
Independent Schools	2,400	6,500	6,100	9,200	69,000	Good
Building Societies	50	3,700	3,600		40,000	Good
Trade Associations and Professional Bodies	290	2,100	1,900	2,700	17,000	Good
Trade Unions	170	1,200	1,100	970	12,000	Good
Common Investment Funds	50	520	400	1,400		Good
Benevolent Societies	1,800	290	280	1,700	3,200	Good
Political parties	320	100	100	30	600	Good
Employee owned businesses	250	30,000	29,100	10,000	150,000	Limited
Cooperatives	4,500	26,400	26,000	7,800	154,000	Limited
Friendly Societies and Mutual Insurers	50	9,900	9,900		20,000	Limited
Faith groups	24,700	4,500	4,500	26,100	32,000	Limited
Leisure Trusts	100	740	720		48,000	Limited
Clubs and societies	9,000	460	450		20,000	Limited
Credit Unions	420	90	80	960	1,500	Limited
Football/Rugby supporter trusts	190	10	10		300	Limited
Companies Limited by Guarantee	46,300	6,200	6,000	17,300	126,000	Poor
Sports Clubs	135,000	5,800	5,500		270,000	Poor
Co-operative trust schools	340	480	470			Poor
Community Interest Companies	7,700	230	230	1,300	4,700	Poor
Unincorporated organisations	600,000					Poor
<i>Duplicates</i>	59,600	1,100	1,100	420	47,000	
<b>Total</b>	<b>900,000</b>	<b>181,000</b>	<b>174,000</b>	<b>286,000</b>	<b>2,275,000</b>	

# Scope

Source:  
NCVO/TSRC, Charity Commission, SCVO, NICVA

Table 2: Distribution of voluntary organisations and their financial characteristics by region and UK country, 2011/12

	Number of organisations	Number of organisations (per 1,000 people)	Income (£ millions)	Spending (£ millions)	Assets (£ millions)
North East	4,463	1.7	794.7	770.6	1,719.1
North West	13,209	1.9	2,489.6	2,347.4	5,003.3
Yorkshire and the Humber	10,259	1.9	1,516.6	1,490.6	4,181.5
East Midlands	10,782	2.4	1,454.2	1,412.5	2,702.9
West Midlands	11,351	2.0	1,922.0	1,831.0	3,729.6
East of England	16,534	2.8	2,312.8	2,208.8	4,810.0
London	23,633	2.9	16,087.7	15,794.7	54,407.8
South East	24,537	2.8	4,593.3	4,461.7	9,610.1
South West	17,306	3.3	2,967.6	2,848.1	6,845.0
<b>England</b>	<b>132,074</b>	<b>2.5</b>	<b>34,138.5</b>	<b>33,165.4</b>	<b>93,009.3</b>
<b>Wales</b>	<b>7,272</b>	<b>2.4</b>	<b>1,088.7</b>	<b>1,024.5</b>	<b>2,250.9</b>
<b>Scotland</b>	<b>18,007</b>	<b>3.4</b>	<b>3,213.5</b>	<b>3,087.6</b>	<b>8,454.5</b>
<b>Northern Ireland</b>	<b>3,913</b>	<b>2.2</b>	<b>808.4</b>	<b>770.2</b>	<b>1,066.7</b>
<b>UK</b>	<b>161,266</b>	<b>2.6</b>	<b>39,249.1</b>	<b>38,047.7</b>	<b>104,781.4</b>

Source:  
NCVO/TSRC, various sources

Table 3: Distribution of voluntary organisations and their financial characteristics by area of activity, 2011/12

	Number of organisations	% of organisations	Income (£ millions)	Spending (£ millions)	Assets (£ millions)	Average income (mean, £)
Culture and recreation	22,462	13.9	4,565.0	4,328.0	7,657.8	203,232
Education	7,850	4.9	1,495.0	1,431.8	2,666.2	190,443
Parent Teacher Associations	12,477	7.7	165.3	167.4	990.8	13,249
Playgroups and nurseries	7,283	4.5	499.9	492.9	1,359.4	68,638
Research	3,450	2.1	2,452.6	2,976.4	17,095.1	710,904
Health	6,626	4.1	4,262.0	3,952.4	6,439.3	643,221
Social services	29,711	18.4	9,086.4	8,779.6	13,423.4	305,826
Scout groups and youth clubs	6,456	4.0	211.8	201.4	805.8	32,804
Environment	5,568	3.5	2,763.2	2,653.2	5,579.1	496,267
Development	10,448	6.5	950.4	871.7	2,387.2	90,963
Village Halls	7,018	4.4	110.8	101.1	606.4	15,788
Housing	3,706	2.3	1,421.7	1,315.3	4,750.6	383,620
Employment and training	1,978	1.2	1,206.2	1,169.5	950.2	609,785
Law and advocacy	3,884	2.4	1,171.4	1,135.7	1,598.8	301,592
Grant-making foundations	12,371	7.7	3,284.9	3,093.4	30,625.8	265,535
Umbrella bodies	1,205	0.7	474.8	474.7	732.3	394,039
International	5,292	3.3	3,537.9	3,463.1	2,700.0	668,542
Religion	13,485	8.4	1,589.8	1,440.2	4,413.1	117,896
<b>Total</b>	<b>161,270</b>	<b>100.0</b>	<b>39,249.1</b>	<b>38,047.7</b>	<b>104,781.4</b>	<b>243,375</b>

Source:  
NCVO/TSRC, Charity Commission

# Income

Table 4: Voluntary sector income by size of organisations, 2011/12 (£ millions)

	Micro	Small	Medium	Large	Major	Total	Number of organisations with income stream*
Individuals (excluding legacies)	67.5	497.3	1,222.1	1,867.4	3,284.4	6,938.7	92,341
Legacies	2.8	30.0	168.9	406.4	1,361.9	1,970.0	9,525
Statutory sources (excluding National Lottery distributors)	4.9	80.3	468.0	787.0	1,220.1	2,560.3	17,247
National Lottery distributors	0.8	27.9	195.2	125.1	143.0	492.0	5,136
Voluntary sector	12.6	109.9	557.2	745.4	954.2	2,379.3	27,985
Private sector	3.5	38.1	118.4	320.8	452.2	933.0	11,897
<b>Voluntary income</b>	<b>92.1</b>	<b>783.5</b>	<b>2,729.8</b>	<b>4,252.0</b>	<b>7,415.7</b>	<b>15,273.2</b>	<b>104,754</b>
Individuals	39.7	312.5	1,008.9	1,712.8	1,950.8	5,024.7	71,825
Statutory sources	3.3	229.1	1,408.1	3,332.8	6,052.9	11,026.1	31,634
Voluntary sector	10.7	27.7	124.1	174.7	348.8	686.0	15,460
Private sector	0.1	9.6	92.1	174.3	220.2	496.3	4,977
<b>Earned income from charitable activities</b>	<b>53.9</b>	<b>578.9</b>	<b>2,633.1</b>	<b>5,394.5</b>	<b>8,572.7</b>	<b>17,233.2</b>	<b>82,217</b>
Individuals	39.4	210.7	539.0	1,194.0	1,507.2	3,490.4	58,483
Statutory sources	0.1	3.5	13.8	33.2	19.6	70.3	2,263
Voluntary sector	4.2	3.0	22.2	27.1	25.2	81.7	5,287
Private sector	0.1	5.1	41.0	112.8	234.1	393.1	5,425
<b>Earned income from fundraising activities</b>	<b>43.8</b>	<b>222.3</b>	<b>616.1</b>	<b>1,367.1</b>	<b>1,786.1</b>	<b>4,035.4</b>	<b>61,146</b>
<b>Total earned income</b>	<b>97.7</b>	<b>801.2</b>	<b>3,249.3</b>	<b>6,761.6</b>	<b>10,358.8</b>	<b>21,268.6</b>	<b>96,709</b>
Rent from property	8.2	50.9	159.6	272.8	171.8	663.3	9,116
Dividends etc	6.7	166.0	327.3	404.4	771.8	1,676.2	32,191
Interest on deposits	23.8	54.5	78.2	130.7	80.7	367.8	81,183
<b>Investment income</b>	<b>38.6</b>	<b>271.3</b>	<b>565.1</b>	<b>807.8</b>	<b>1,024.3</b>	<b>2,707.3</b>	<b>98,510</b>
<b>Total income</b>	<b>228.5</b>	<b>1,856.1</b>	<b>6,544.2</b>	<b>11,821.5</b>	<b>18,798.8</b>	<b>39,249.1</b>	<b>142,439</b>
<b>Number of organisations with incoming resources</b>	<b>63,564</b>	<b>52,815</b>	<b>21,257</b>	<b>4,270</b>	<b>533</b>	<b>161,266</b>	

\*18,827 organisations received no income in 2011/12.

Source:  
NCVO/TSRC, Charity Commission

Table 5: Voluntary sector income source by size of organisation, 2011/12 (£ millions)

	Micro	Small	Medium	Large	Major	Total	Number of organisations with income source
Individuals	149.5	1,050.5	2,939.0	5,180.6	8,104.3	17,423.7	118,165
Statutory sources (excluding National Lottery distributors)	8.4	312.9	1,889.9	4,152.9	7,292.7	13,656.7	40,611
National Lottery distributors	0.8	27.9	195.2	125.1	143.0	492.0	5,136
Voluntary sector	27.5	140.6	703.5	947.3	1,328.2	3,147.0	39,348
Private sector	3.6	52.9	251.6	607.8	906.4	1,822.4	19,765
Individuals	38.6	271.3	565.1	807.8	1,024.3	2,707.3	98,510
<b>Total Income</b>	<b>228.5</b>	<b>1,856.1</b>	<b>6,544.2</b>	<b>11,821.5</b>	<b>18,798.8</b>	<b>39,249.1</b>	<b>142,439</b>

Table 6: Voluntary sector income, 2003/04 to 2011/12 (£ millions, in April 2012 prices)

	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12
Individuals (excluding legacies)	4,687.9	5,577.6	5,246.6	6,512.3	6,757.6	6,340.2	6,619.8	6,876.1	6,938.7
Legacies	1,808.0	2,116.5	2,267.7	2,117.6	2,336.7	1,906.3	1,933.5	1,931.8	1,970.0
Statutory sources (excluding National Lottery distributors)	5,794.7	4,874.7	4,537.0	4,380.8	3,908.1	3,017.9	3,057.7	2,992.9	2,560.3
National Lottery distributors	569.5	681.5	703.8	710.9	610.2	478.9	522.1	466.8	492.0
Voluntary sector	2,194.7	1,943.5	2,612.6	1,920.7	1,875.6	1,762.9	2,019.4	2,377.4	2,379.3
Private sector	520.3	613.9	806.6	804.5	1,398.2	1,361.9	727.2	918.7	933.0
<b>Voluntary income</b>	<b>15,575.1</b>	<b>15,807.7</b>	<b>16,174.2</b>	<b>16,446.8</b>	<b>16,886.4</b>	<b>14,868.2</b>	<b>14,879.7</b>	<b>15,563.6</b>	<b>15,273.1</b>
Individuals	9,571.0	7,023.1	8,296.1	8,084.9	7,270.0	7,801.7	8,364.3	8,089.1	8,515.1
Statutory sources	5,467.8	6,445.8	8,659.8	9,506.9	10,651.6	11,476.6	11,725.2	11,982.0	11,096.4
Voluntary sector	1,244.5	1,722.6	1,756.1	1,768.3	1,468.6	1,089.4	1,251.5	762.3	7,67.7
Private sector	189.1	1,847.9	898.7	1,252.3	939.7	867.9	903.1	890.4	889.4
<b>Earned income</b>	<b>16,472.3</b>	<b>17,039.3</b>	<b>19,610.6</b>	<b>20,612.5</b>	<b>20,329.9</b>	<b>21,235.6</b>	<b>22,244.0</b>	<b>21,723.8</b>	<b>21,268.6</b>
Rent from property	708.7	621.7	690.4	715.0	602.2	814.1	712.4	622.7	663.3
Dividends etc	1,520.1	1,644.5	1,823.0	1,796.0	2,438.4	1,662.3	1,289.9	1,661.8	1,676.2
Interest on deposits	404.8	506.8	671.5	692.7	657.2	862.4	504.6	353.7	367.8
<b>Investment income</b>	<b>2,633.6</b>	<b>2,773.0</b>	<b>3,184.8</b>	<b>3,203.8</b>	<b>3,697.9</b>	<b>3,338.8</b>	<b>2,506.9</b>	<b>2,638.3</b>	<b>2,707.3</b>
<b>Total income</b>	<b>34,681.0</b>	<b>35,620.0</b>	<b>38,969.7</b>	<b>40,263.0</b>	<b>40,914.2</b>	<b>39,442.5</b>	<b>39,630.6</b>	<b>39,925.6</b>	<b>39,249.1</b>

# Spending

Source:  
NCVO/TSRC, Charity Commission

Table 7: Voluntary sector spending by size of organisation, 2011/12 (£ millions)

	Micro	Small	Medium	Large	Major	Total	Number of organisations
Generating voluntary income	0.0	0.5	24.2	217.5	796.6	1,038.8	2,482
Fundraising and publicity costs	5.1	55.7	254.6	991.4	1,626.7	2,933.5	32,438
Investment management costs	1.2	21.8	82.1	102.2	161.0	368.3	10,065
<b>Cost of generating funds</b>	<b>6.3</b>	<b>78.0</b>	<b>360.9</b>	<b>1,311.1</b>	<b>2,584.3</b>	<b>4,340.5</b>	<b>42,116</b>
<b>Grants</b>	<b>14.9</b>	<b>144.5</b>	<b>635.3</b>	<b>1,194.8</b>	<b>3,006.0</b>	<b>4,995.4</b>	<b>25,107</b>
<b>Charitable activities</b>	<b>323.1</b>	<b>1,586.7</b>	<b>5,141.9</b>	<b>8,377.3</b>	<b>12,322.2</b>	<b>27,751.2</b>	<b>130,908</b>
Audit costs	3.8	19.2	49.0	43.6	43.2	158.7	45,571
Other governance costs	16.6	156.2	304.8	204.2	120.1	801.9	54,500
<b>Governance</b>	<b>20.4</b>	<b>175.4</b>	<b>353.8</b>	<b>247.8</b>	<b>136.2</b>	<b>960.6</b>	<b>72,520</b>
<b>Total current spending</b>	<b>364.7</b>	<b>1,984.6</b>	<b>6,491.9</b>	<b>11,130.9</b>	<b>18,075.7</b>	<b>38,047.7</b>	<b>140,028</b>
Number of organisations	with spending	61,702	52,301	21,224	4,268	533	140,028
	without spending	20,689	514	33	2	0	21,238

Table 8: Voluntary sector spending, 2003/04 to 2011/12 (£ millions, in April 2012 prices)

	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12
Fundraising and publicity costs	2,439.0	2,120.7	2,541.6	2,700.6	3,004.8	3,498.7	4,348.6	3,940.4	3,972.3
Trading subsidiary costs*	893.3	909.1	1,136.0	1,102.8	1,214.0	768.6	-	-	-
Investment management costs	100.8	110.8	419.9	499.8	505.5	265.3	354.9	387.1	368.3
<b>Cost of generating funds</b>	<b>3,433.1</b>	<b>3,140.6</b>	<b>4,097.5</b>	<b>4,303.2</b>	<b>4,724.3</b>	<b>4,532.7</b>	<b>4,703.5</b>	<b>4,327.5</b>	<b>4,340.5</b>
<b>Grants</b>	<b>5,016.7</b>	<b>4,417.2</b>	<b>4,795.3</b>	<b>5,310.2</b>	<b>5,778.1</b>	<b>4,255.5</b>	<b>4,316.0</b>	<b>4,815.3</b>	<b>4,995.4</b>
<b>Charitable activities</b>	<b>22,039.3</b>	<b>22,795.3</b>	<b>26,493.6</b>	<b>27,458.1</b>	<b>26,488.2</b>	<b>28,536.7</b>	<b>29,098.4</b>	<b>28,388.7</b>	<b>27,751.2</b>
<b>Governance</b>	<b>2,266.2</b>	<b>1,953.6</b>	<b>1,257.6</b>	<b>790.0</b>	<b>855.9</b>	<b>983.6</b>	<b>835.4</b>	<b>959.1</b>	<b>960.6</b>
<b>Total current spending</b>	<b>32,755.2</b>	<b>32,306.7</b>	<b>36,644.0</b>	<b>37,861.5</b>	<b>37,846.5</b>	<b>38,308.5</b>	<b>38,953.3</b>	<b>38,490.7</b>	<b>38,047.7</b>

\*note that from 2009/10 trading subsidiary costs are no longer calculated separately.

# Assets

Source:  
NCVO/TSRC, Charity Commission

Table 9: Voluntary sector assets and liabilities by size of organisation, 2011/12 (£ millions)

	Micro	Small	Medium	Large	Major	Total	Number of organisations with type of assets
Intangible fixed assets	0.0	28.9	1.2	11.2	13.3	54.6	540
Tangible fixed assets	4,047.7	3,959.6	5,035.6	7,802.2	12,396.0	33,241.1	45,200
Investments	624.6	4,375.4	11,294.1	17,253.2	32,634.2	66,181.5	27,530
<b>Fixed assets</b>	<b>4,672.3</b>	<b>8,363.9</b>	<b>16,330.9</b>	<b>25,066.6</b>	<b>45,043.5</b>	<b>99,477.2</b>	<b>64,427</b>
Current assets	2,478.3	2,583.6	4,780.0	6,122.1	7,924.2	23,888.2	127,433
Creditors due within one year	569.8	295.8	1,163.2	2,177.0	5,401.0	9,606.8	67,088
<b>Net current assets</b>	<b>1,908.5</b>	<b>2,287.8</b>	<b>3,616.8</b>	<b>3,945.0</b>	<b>2,523.2</b>	<b>14,281.4</b>	<b>127,492</b>
<b>Total assets less current liabilities</b>	<b>6,580.9</b>	<b>10,651.6</b>	<b>19,947.7</b>	<b>29,011.7</b>	<b>47,566.7</b>	<b>113,758.6</b>	
Creditors due after one year	1,689.5	75.7	669.0	1,609.8	3,321.2	7,365.2	10,537
Provisions	-	2.2	2.3	19.3	72.9	96.7	156
Pension assets	-	-7.5	-38.5	-193.3	-1,276.3	-1,515.4	875
<b>Net total assets</b>	<b>4,891.4</b>	<b>10,566.4</b>	<b>19,238.0</b>	<b>27,189.3</b>	<b>42,896.3</b>	<b>104,781.3</b>	<b>130,589</b>
Number of organisations							
with assets	57,084	47,912	20,810	4,254	529	130,589	
without assets	25,307	4,903	447	16	4	30,677	

Source:  
NCVO/TSRC, Charity Commission

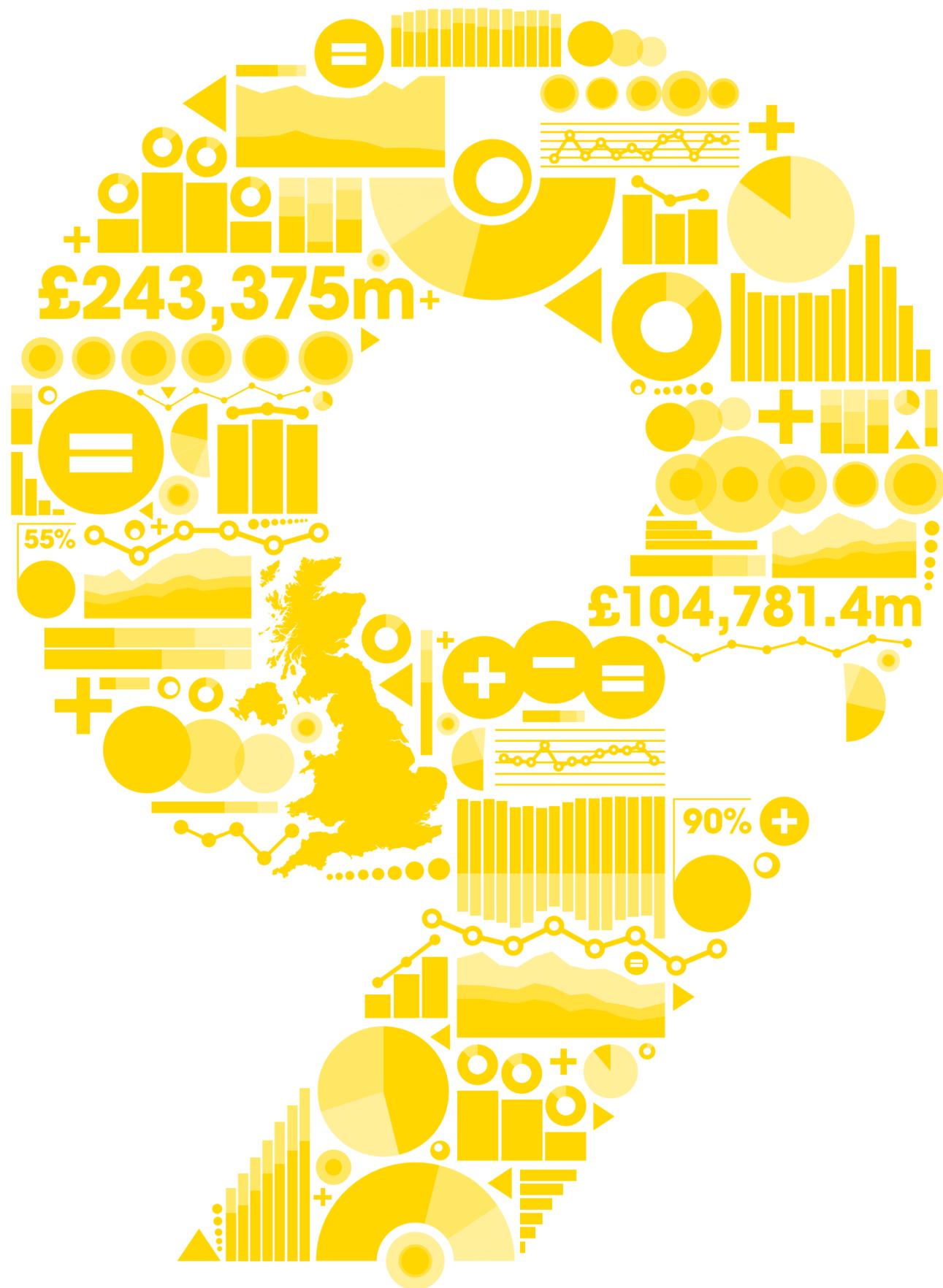
Table 10: Voluntary sector funds by size of organisation, 2011/12 (£ millions)

	Micro	Small	Medium	Large	Major	Total
Unrestricted funds	4,402.4	8,003.4	13,396.3	15,123.8	27,293.4	68,219.3
Restricted funds	386.1	847.2	2,251.1	3,155.6	4,648.0	11,288.1
<b>Income funds</b>	<b>4,788.5</b>	<b>8,850.7</b>	<b>15,647.5</b>	<b>18,279.4</b>	<b>31,941.4</b>	<b>79,507.4</b>
<b>Endowment funds</b>	<b>102.8</b>	<b>1,723.2</b>	<b>3,629.0</b>	<b>9,103.2</b>	<b>12,231.2</b>	<b>26,789.4</b>
<b>Pension funds</b>	<b>0.0</b>	<b>-7.5</b>	<b>-38.5</b>	<b>-193.3</b>	<b>-1,276.3</b>	<b>-1,515.4</b>
<b>Total funds</b>	<b>4,891.4</b>	<b>10,566.4</b>	<b>19,238.0</b>	<b>27,189.3</b>	<b>42,896.3</b>	<b>104,781.4</b>

Table 11: Voluntary sector assets and liabilities, 2003/04 to 2011/12 (£ millions, April 2012 prices)

	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12
Intangible fixed assets	26.2	54.7	25.4	32.0	21.8	157.8	52.9	48.8	54.6
Tangible fixed assets	22,109.4	22,751.3	24,191.1	24,367.9	24,659.2	23,576.0	23,599.8	27,891.0	33,241.1
Investments	58,916.8	67,468.8	75,008.7	79,570.6	80,353.2	59,608.7	65,969.4	69,898.4	66,181.5
<b>Fixed assets</b>	<b>81,052.4</b>	<b>90,274.8</b>	<b>99,225.1</b>	<b>103,970.4</b>	<b>105,034.2</b>	<b>83,342.6</b>	<b>89,622.1</b>	<b>97,838.2</b>	<b>99,477.2</b>
Current assets	22,708.0	23,760.5	22,914.2	22,560.3	23,368.3	23,267.5	28,315.0	22,620.6	23,888.2
Creditors due within one year	8,950.0	8,832.6	7,490.3	8,268.4	7,592.6	8,848.6	8,766.4	8,732.7	9,606.8
<b>Net current assets</b>	<b>13,758.0</b>	<b>14,927.9</b>	<b>15,423.9</b>	<b>14,291.9</b>	<b>15,775.7</b>	<b>14,418.9</b>	<b>19,548.6</b>	<b>13,887.9</b>	<b>14,281.4</b>
<b>Total assets less current liabilities</b>	<b>94,810.4</b>	<b>105,202.7</b>	<b>114,649.1</b>	<b>118,262.3</b>	<b>120,809.9</b>	<b>97,761.5</b>	<b>109,170.8</b>	<b>111,726.1</b>	<b>113,758.6</b>
Creditors due after one year	5,192.8	4,924.4	5,853.0	7,139.0	8,965.7	9,090.8	8,468.9	5,747.0	7,365.2
Provisions	1,557.3	289.8	531.1	309.1	244.0	43.8	119.6	126.4	96.7
Pension assets	-	-	-	-	-	-1,199.4	-2,235.2	-1,433.2	-1,515.4
<b>Net total assets</b>	<b>88,060.3</b>	<b>99,988.4</b>	<b>108,265.0</b>	<b>110,814.2</b>	<b>111,600.2</b>	<b>87,427.5</b>	<b>100,582.3</b>	<b>104,419.5</b>	<b>104,781.4</b>

\*note that from 2009/10 trading subsidiary costs are no longer calculated separately.



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# Methodology

This Almanac is based on data from a wide range of sources. Due to the number of civil society areas covered and the variety of methods used, only a brief outline of the methodology can be given here.

## Voluntary sector

### Voluntary sector definition

As in previous Almanacs, the “general charities” definition is used within this Almanac to obtain estimates for the voluntary sector. This is to enable comparisons over time for this core part of the sector. The clear limits to the definition enable the production of robust, clearly defined estimates for both numbers of voluntary organisations and their financial characteristics. Included in this definition are those registered charities that meet the following criteria: formality, independence, non-profit distributing, self-governance, voluntarism and public benefit. We do, however, recognise its limitations as a definition and now include a range of other civil society organisations within the Almanac as well.

### Voluntary sector methodology

Financial information on voluntary organisations is based on their annual accounts submitted to the Charity Commission. The “general charities” definition is applied to all charities on the Commission’s register, producing a usable population for England and Wales. Financial data for a sample of 10,000 of these organisations was obtained by entering data from the charities’ annual accounts. This data entry process was carried out on behalf of NCVO and the Third Sector Research Centre by the Centre for Data Digitisation and Analysis at Queen’s University, Belfast.

Before use, the data is cleaned to remove significant errors, and undergoes a series of checks to ensure validity. These checks include:

- comparison of income, expenditure, assets and workforce data between this year and last year to look for particularly large increases and decreases, and
- construction of various ratios between financial variables (for example between income and expenditure, and investments and dividend income) to look for anomalies.

More detail on the methodology used to extract raw data from charity accounts and produce aggregate data can be found in a detailed working paper on the TSRC website<sup>a</sup>.

Those records where accounts were submitted in a foreign currency were converted to Pounds Sterling using an average of the exchange rate over the year. Organisations have a range of financial year ends, distributed throughout the year.

## Voluntary sector – population and sample, England and Wales, 2011/12

Source: NCVO/TSRC, Charity Commission

	Micro	Small	Medium	Large	Major	Total
Registered with the Charity Commission	81,082	51,676	23,250	5,237	977	162,222
General charities	71,372	45,873	17,913	3,706	482	139,346
Sample	115	1,232	2,498	2,595	443	6,883
Sample (% of general charities)	0.2%	2.7%	13.9%	70.0%	91.9%	4.9%

To ensure consistency all values were converted to April 2012 prices using the retail price index. Once cleaned, mean amounts are produced for all financial variables within each income band and are multiplied to the UK population size by income band. Supplementary data from the Scottish Council for Voluntary Organisations and the Northern Ireland Council for Voluntary Action is used to produce estimates of the UK population. Due to rounding figures, some percentage totals may not sum to 100%.

### Analysis by sub-sector

Voluntary organisations conduct a wide range of activities, which are often grouped into sub-sectors or industries. The International Classification of Non-profit Organisations (ICNPO) is designed for voluntary organisations and other non-profit groups, and so is the most useful for comparisons between groups of organisations. In reality many organisations undertake multiple activities (e.g. housing and advice), but our analysis groups organisations into a single category based upon their primary activity. For the figures presented in this Almanac some categories have been grouped together<sup>b</sup>.

### Analysis by size

Within the Almanac, voluntary organisations are divided into five groups based on their income. Each group is named to make it easier to discuss the findings and place them in context.

The sample data, however, is gathered in nine bands to accommodate Charity Commission registration thresholds. These bands are aggregated to produce the five bands used in the Almanac.

Income	Income (sample bands)	Name
Less than £10,000	Zero income £1 - £10,000	Micro
£10,000 to £100,000	£10,001 - £25,000 £25,001 - £100,000	Small
£100,000 to £1 million	£100,001 - £500,000 £500,001 - £1,000,000	Medium
£1 million to £10 million	£1,000,001 - £10,000,000	Large
More than £10 million	£10,000,001 - £100,000,000 Over £100,000,000	Major

## Charitable giving

Charitable giving data is from the NCVO/CAF UK Giving Survey, gathered by the Office for National Statistics in three waves between June 2011 and February 2012. For further information see UK Giving 2012 (NCVO/CAF, 2012)<sup>c</sup>.

## Workforce

Our employment figures are largely based on Labour Force Survey (LFS) data<sup>d</sup>. The LFS surveys an estimated 60,000 private households every quarter. By pooling data for unique individuals from four quarters, it is possible to produce reliable estimates of the sector’s workforce. Weighting is used within the LFS to compensate for non-response rates in certain groups and produce population estimates.

To identify the sector a respondent is employed in, a two-stage self classification process is used. Respondents are first asked whether they work for ‘a private firm, business or a limited company’ or ‘some other kind of organisation’. Those respondents who choose the second option are then asked, ‘what kind of non-private organisation is it?’. They are then presented with a range of options including ‘charity, voluntary organisation or trust’. For the purposes of the analysis for the Almanac, responses to these questions were recoded into a sector variable and defined as ‘private’, ‘public’ or ‘voluntary’.

## Volunteering

The most recent statistics on volunteering are available from the 2012 Community Life Survey<sup>e</sup> run by the Cabinet Office, which was designed as a replacement for the Citizenship Survey run by Communities and Local Government<sup>f</sup>. At the time of writing data from the Community Life survey is only available for three quarters (August 2012 – April 2013), and so caution should be taken in comparing this with full years from the Citizenship Survey.

## Civil society

Some organisations that are registered with the Charity Commission but excluded from the voluntary sector definition are included within other parts of civil society. For these organisations, a similar process was followed to that of voluntary organisations in order to produce figures for income, expenditure, assets and staff numbers. The parts of civil society this included are: trade associations and professional bodies, common investment funds, faith groups and benevolent societies.

### Mutuals

Data on co-operatives and mutuals was sourced from the Mutuals Yearbooks for 2012 and 2013 and the UK Co-operative Economy 2013 report<sup>g</sup>, written by Co-operatives UK. The Mutuals Yearbook data is sourced from the umbrella body for each of the types of mutual organisation. For further information see Mutuals Yearbook 2013 (Oxford Centre for Mutual and Employee-owned Business, 2013)<sup>h</sup>. Missing asset and expenditure figures were estimated using data from Co-operatives UK and ratios from previous Almanacs.

### Universities

Financial data was sourced for all UK Universities from the Higher Education Statistics Agency (HESA)<sup>i</sup>. HESA data is based on the audited annual accounts of universities.

### Housing associations

Financial data for Registered Social Landlords was sourced for England from the Homes and Community Agency Global Accounts of Housing Providers<sup>j</sup>, for Scotland from the Scottish Housing Regulator<sup>k</sup>, and from the Global Accounts released by the Northern Ireland Federation of Housing Associations<sup>l</sup> and Community Housing Cymru<sup>m</sup>.

### Independent schools

The numbers of schools, pupils, and staff were compiled from National Statistics published by the Department for Education in England, the Scottish Government, the Welsh Government and the Northern Ireland Executive. The results of the Independent Schools Council Census<sup>n</sup> were used to exclude 192 for-profit independent schools. As most independent schools have charitable status, the income, expenditure and assets of registered charities in England and Wales were inflated to produce estimates for the whole of the UK, taking into account relative pupil numbers.

## Trade unions

Financial data was sourced for all trade unions in Great Britain from the Certification Office Annual Report<sup>o</sup> and aggregated by NCVO to produce totals for the UK. The Certification Office is the regulator of trade unions and uses returned annual accounts to compile their data.

## Political parties

The number of organisations includes all organisations registered as a political party within the calendar year. Accounts published by the Electoral Commission were analysed by NCVO. Membership details were estimated from a number of different sources but primarily party statements of accounts, with further information accessed from a House of Commons report on party membership (SN/SG/5125 – Membership of UK political parties, December 2012)<sup>p</sup>.

## Companies limited by guarantee

The estimates for Companies limited by guarantee draws on work done in prior years. A list of Companies limited by guarantee (CLGs) was purchased from Companies House. This list was matched with the Charity Commission register to identify and remove those CLGs which are also registered charities. Income and expenditure for these organisations is estimated based on their reporting requirements with Companies House.

## Community interest companies

The number of Community interest companies (CICs) were obtained from the CIC regulator<sup>q</sup>. Income and expenditure for these organisations is estimated based on their reporting requirements with Companies House.

## Sports clubs

Financial information on sports clubs was derived from average income and expenditure figures reported in the Sports and Recreation Alliance Survey of Sports Clubs 2013<sup>r</sup>. The figure of sports clubs in the UK was calculated from an estimate provided by the Sports and Recreation Alliance and originally derived from a Sport Scotland survey of sports clubs carried out in 1999 and published in 2001 (Allison, 2001)<sup>s</sup>. The figure was then adjusted to exclude for-profit sports clubs (an estimate again derived from the Survey of Sports Clubs). The number of beneficiaries was estimated from Sport England figures for participation in sports clubs for 2012, then extrapolated proportionately to the population in the rest of the UK, before being adjusted to exclude for-profit sports clubs.

# Glossary

## Balance sheet

A summary of the assets and liabilities of an organisation at a particular date, usually the end of the financial year.

## Benevolent societies

Societies established for charitable purposes. Benefits must be distributed wider than their members.

## Capital expenditure

Expenditure on equipment or buildings.

## Charitable activities

The activities that charities undertake to provide public benefit. Incoming resources from charitable activities result when these activities are performed in exchange for a fee, or through a contract to deliver public services.

## Charitable foundations and trusts

Charity whose primary purpose is awarding grants to other voluntary organisations, institutions or individuals.

## Charities Act

In December 2006 the government passed the Charities Act, an overhaul of the 400-year old charity law.

## Civil society

Civil society is defined in many ways. It is usually used to refer to the sphere where people come together to pursue their collective interests and make a positive difference to their lives and/or the lives of others. In the Almanac, civil society is used to refer to the body of organisations that exist between government, individuals and businesses.

## Community foundation

A fundraising and grant-making charity established to generate resources for local charities in a specific geographic area (or 'community') and to promote the effective use of these resources.

## Community interest company

A limited company which operates as a business providing community benefit.

## Company limited by guarantee

An incorporated organisation which has a legal personality separate to that of its members. In the event of business ceasing, guarantors are liable to contribute a (usually very small) amount towards winding up the company.

## Co-operative

An autonomous association of persons united voluntarily to meet their common economic, social, and cultural needs and aspirations through a jointly owned and democratically controlled enterprise.

## Current assets

Assets that can be converted into cash within a year (i.e. cash in bank, petty cash, money owed to organisations and goods for sale).

## Depreciation

The gradual decrease in the value of assets held.

## Earned income

Income generated in exchange for goods and services through trading.

## Endowment

Restricted capital funds held for the purpose of generating income. Permanent endowment funds must be held indefinitely, while expendable endowments can be disposed of at the trustees' discretion.

## Excepted charities

Charities with a small annual turnover and no significant assets. They are 'excepted' from registration – they can choose to register if they wish to do so.

## Exempt charities

Charities that are not registered and are not subject to the supervisory jurisdiction of the Charity Commission (e.g. universities, leading museums).

## Fixed assets

Assets held on a long-term basis. They can be either fixed assets for charitable use (which include buildings and equipment) or investments.

## General charities

General charities are defined in National Account terms as 'private, non-profit-making bodies serving persons'. This excludes sacramental religious bodies or places of worship.

## Gift Aid

A tax relief on money donated to charity. Charities can reclaim the basic rate of tax presumed to have been deducted by the donor, thereby increasing the value of the donation.

## Housing stock

The number of structurally separate residential dwelling units available for non-transient occupation.

## Inalienable assets

Assets which cannot be sold, usually because a charity is required to hold them indefinitely under trust law as a result of a bequest.

## Industrial and provident societies

An organisation conducting an industry, business or trade, either as a co-operative or for the benefit of the community, and is registered under the Industrial and Provident Societies Act 1965.

## Legacy

A gift or bequest of personal property or money made by a will.

## Liabilities

That which organisations owe to creditors, either long-term (payable after 12 months) such as loans or pension provisions or short-term (payable during the next 12 months).

## Mutual society

An organisation which is owned by its members and run for their benefit.

## Non-profit sector

All non-profit organisations including those for private benefit, and those that are non-commercial (e.g. housing associations). The category includes quangos and other organisations close to government (e.g. universities).

## Registered charities

Charities registered with the Charity Commission. A charity must register if it has a permanent endowment, a total income of more than £5,000 a year or a rateable occupation of any land, including buildings.

## Reserves

That part of a charities income funds which are freely available.

## Restricted funds

Funds for which the donor has specified a use. These funds must be spent in accordance with the donor's wishes and trustees cannot make the decision to remove the restriction.

## Social enterprise

Trading for a social purpose. A wide range of organisations fit the definition of social enterprise. These include co-operatives, community businesses, trading arms of charities and a variety of other businesses that use their trading activity to meet social goals.

## Statement of financial activities (SOFA)

Financial statement introduced especially for charities in the SORP. It replaces the income and expenditure account.

## Statement of recommended practice (SORP)

Official recommendation on the way a charity should report annually on its resources and activities.

## Statutory organisation

An organisation that is required by law to provide public services (i.e. statutory services) and receives central or local government funding.

## Statutory funding

Any funding that comes from a government source. Defined in the Almanac to include funding from bodies such as the United Nations.

## Third sector

Used as a synonym for voluntary sector.

## Trading subsidiaries

A company, owned and controlled by one or more charities, set up in order to trade.

## Trustees

The group of (unpaid) people responsible for the control and management of a charity.

## Turnover

In this publication, turnover is usually used as a synonym for income, and represents the money received by an organisation from its normal business activities.

## Unincorporated organisation

An association of people which has no legal constitution, and is not regarded as an entity separate from its members. Also known as informal organisations.

## Unrestricted funds

Funds held for the general purposes of the charity, to be spent within the stated objects.

## Voluntary income

Donations or grants that do not provide any return to the donor other than the knowledge that someone will benefit from the donation.

## Voluntary sector

The group of registered charities that meet the general charities definition outlined above.

## Volunteering

Volunteering is an activity that involves spending time, unpaid, doing something that aims to benefit the environment or individuals or groups other than (or in addition to) close relatives.

# Acronyms and abbreviations

**BIS** Department for Business, Innovation and Skills

**BLF** Big Lottery Fund

**CAF** Charities Aid Foundation

**CASC** Community Amateur Sports Club

**CDDA** Centre for Data Digitisation and Analysis

**CIC** Community Interest Company

**CIF/COIF** Common Investment Funds

**CIO** Charitable Incorporated Organisation

**CLG** Companies Limited by Guarantee

**FTE** Full-time Equivalent

**GDP** Gross Domestic Product

**GVA** Gross Value Added

**HESA** Higher Education Statistics Agency

**HMRC HM** Revenue and Customs

**ICNPO** International Classification of Non-Profit Organisations

**IPS** Industrial and Provident Society

**IVR** Institute for Volunteering Research

**LFS** Labour Force Survey

**NCVO** National Council for Voluntary Organisations

**NESS** National Employers Skills Survey

**NGO** Non-governmental Organisation

**NHS** National Health Service

**NI** National Insurance

**NICVA** Northern Ireland Council for Voluntary Action

**NSCSE** National Survey of Charities and Social Enterprises (previously NSTSO)

**NSPCC** National Society for the Prevention of Cruelty to Children

**NPISH** Non profit institutions serving households

**OBR** Office for Budget Responsibility

**OCS** Office for Civil Society

**ONS** Office for National Statistics

**RNLI** Royal National Lifeboat Institution

**RPIX** Retail Prices Index, excluding mortgage interest payments

**RSPB** Royal Society for the Protection of Birds

**RSPCA** Royal Society for the Prevention of Cruelty to Animals

**SCVO** Scottish Council for Voluntary Organisations

**SME** Small and Medium-sized Enterprises

**SIC** Standard Industrial Classification

**SIC(92)** 1992 Standard Industrial Classification

**SORP** Statement of Recommended Practice

**TSRC** Third Sector Research Centre

**WCVA** Wales Council for Voluntary Action

**WRVS** Women's Royal Voluntary Service (now the Royal Voluntary Service)

**YHA** Youth Hostel Association

**UKCES** UK Commission for Employment and Skills

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NCVO's research aims to support the development of policy and practice in the voluntary and community sector. Further information on our work can be found at: [www.ncvo.org.uk/policy-and-research](http://www.ncvo.org.uk/policy-and-research)

## NCVO Membership

NCVO is the home to over 10,000 member organisations, all with access to our host of exclusive benefits and services. Members get high quality, relevant information; tailored advice and support and money saving opportunities with our preferred suppliers. Their collective voice helps NCVO lobby Government whilst enjoying being part of a community of like-minded voluntary organisations with similar challenges [www.ncvo.org.uk/about-us/join-ncvo](http://www.ncvo.org.uk/about-us/join-ncvo)

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# Fast facts

Civil society <sup>1</sup>		2011/12	
Number of organisations		900,000	
Total income		£181 billion	
Paid workforce (headcount)		2.3 million	
Voluntary organisations		2011/12	2010/11 <sup>2</sup>
Number of voluntary organisations		161,266	162,175
Total income		£39.2 billion	£39.9 billion
Voluntary income		£15.3 billion	£15.6 billion
Earned income – fundraising trading		£4.0 billion	£3.8 billion
Earned income – charitable activities		£17.2 billion	£17.9 billion
Investment income		£2.7 billion	£2.6 billion
Income from individuals		£17.4 billion	£16.9 billion
Income from statutory sources		£13.7 billion	£15.0 billion
Income from National Lottery distributors		£0.5 billion	£0.5 billion
Income from other sources		£7.7 billion	£7.6 billion
Total current spending		£38.0 billion	£38.5 billion
Spending on charitable activities (excluding grants)		£27.8 billion	£28.4 billion
Spending on grants		£5.0 billion	£4.8 billion
Spending on generating funds		£4.3 billion	£4.3 billion
Spending on governance		£1.0 billion	£1.0 billion
Net assets		£104.8 billion	£104.4 billion
Giving		2012	
Mean amount donated per person in last four weeks		£27	
Proportion giving to charity	Men	52%	
	Women	58%	
Workforce		2012	2011
UK voluntary sector paid workforce (headcount)		800,000	771,000
Employment status	Full-time	508,000 (64%)	478,000 (62%)
	Part-time	291,000 (36%)	293,000 (38%)
Gender	Female	526,000 (66%)	521,000 (68%)
	Male	275,000 (34%)	250,000 (32%)
Volunteering		2012/13	
Percentage of people formally volunteering	at least once a month	29%	
	at least once a year	44%	

<sup>1</sup> Due to changes in methodology and the availability of data the civil society results are not directly comparable year-on-year.

<sup>2</sup> Adjusted to April 2012 prices.

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# The UK Civil Society Almanac – 13th edition

First published in 1996 as the UK Voluntary Sector Statistical Almanac, the 2014 edition is the reference publication for anybody interested in the voluntary sector and its role in civil society. Widely cited by the media, government policy makers and sector leaders, the Almanac offers a definitive overview of the voluntary sector's scope and characteristics, enhanced by analysis of long-term trends. Our analysis draws upon our own unique historical dataset, developed in partnership with the Third Sector Research Centre, plus data and evidence from a range of government and industry research. All of the tables and charts in the Almanac, and the data behind them, can be downloaded at [data.ncvo.org.uk](http://data.ncvo.org.uk)

This latest edition provides a compelling overview of the voluntary sector and wider civil society in challenging times. Against a background of low growth in the UK economy and constrained public finances, our analysis illustrates a sector committed to public benefit and supporting users and beneficiaries. It also highlights causes for concern, not least of which is a reduction in the sector's capacity. Even so, we present evidence that the sector continues to make a positive contribution to employment and economic growth.

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