Policy&Practice Third Sector
Trends Briefing Papers

Structure and dynamics of the Third Sector in England and Wales:

Technical paper on working definitions and baseline data analysis

Second revision June 2022

Policy&Practice
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Policy&Practice Third Sector Briefing Papers

This series of briefing papers draws on data from a range of sources including the Charity Commission Register, NCVO Civil Society Almanac and the Third Sector Trends study. It has been established to make further use of Third Sector Trends data prior to the 6th iteration of the major study to be undertaken in 2022.

Third Sector Trends Study

The Third Sector Trends study was conceived and originally commissioned by Northern Rock Foundation with research conducted by the Universities of Southampton, Teesside and Durham. The Community Foundation Tyne & Wear and Northumberland was a co-founder of the research and is now responsible for its legacy.

The Community Foundation is now collaborating with partners including St Chad's College at the University of Durham, Power to Change, Garfield Weston Foundation and IPPR North to expand and continue the research.

All publications from the Third Sector Trends study are available free to download at this address:

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

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Revised June 2022 with new core data from registers to be used to underpin Third Sector Trends analysis of evidence being collected from June to October 2022.

Community Foundation Tyne & Wear and Northumberland   Durham University   Policy&Practice St Chad's College Durham University

The structure of the Third Sector

The aim of this methodological study, which began in 2020 was to get a clearer understanding of sector size, structure, dynamics, purpose and impact. This preparatory work was undertaken to underpin the development of the sixth iteration of the Third Sector Trends study in 2022

The Third Sector Trends Study is focused on civil society in localities (including regions and areas with shared characteristics such as rurality, deprivation or local governance). Without comparative analysis, it is not possible to know whether the situation in any given area is extraordinary or typical.

This working paper draws upon data from the Third Sector Trends Study, the Charity Commission Register, NCVO Civil Society Almanac and National Survey of Third Sector Organisations to produce workable estimates on sector structure which can be used to scale up Third Sector Trends 2010-2020 data in area-focused analysis.

Purpose of this paper

This paper aims to develop a set of baseline benchmarks and multipliers on sector size, structure and dynamics for use in subsequent analysis of the local third sector. The paper has four substantive sections.

- **Definitions and data sources**: the first section of the paper presents a series of working definitions of the third sector, organisational types and structures.
- **The population of registered TSOs**: this section presents analysis on sector structure by size and income. Benchmarks are produced on sector characteristics for use in area-based analysis.
- **Spatial distribution of TSOs**: this section presents estimates on sector size and structure on several dimensions.
    - **Regional location:** to compare the structure of the third sector in Wales and English regions.
    - **Area of operation:** to assess the spatial range of activity of organisations of different sizes.
    - **Spatial characteristics:** to compare sector structure in areas with specific spatial characteristics including rural and urban areas and by localities' social and economic wellbeing.
- **Employment and volunteering**: this section produces estimates on levels of employment and regular volunteering by size of organisations and spatial location. Estimates of the actual financial cost of employees and proxy-values for the financial contribution of volunteers are also presented.

This is the third revision of the working document which will be updated again on an occasional basis as analysis proceeds. Definitions are not, therefore, set in stone. Comments on the paper are welcome and will be acknowledged in subsequent editions. I would like to thank Karl Wilding and Veronique Jochum, NCVO; David Kane, 360Giving, Rachel Rank, The Catalyst and Anoushka Kenley, Pro Bono Economics for helpful observations, insights and leads on other sources of data in an earlier draft of this paper. I would also like to thank Rob Williamson, Mark Pierce and Adam Lopardo for their comments and continual support for the Third Sector Trends Study at Community Foundation serving Tyne and Wear and Northumberland.

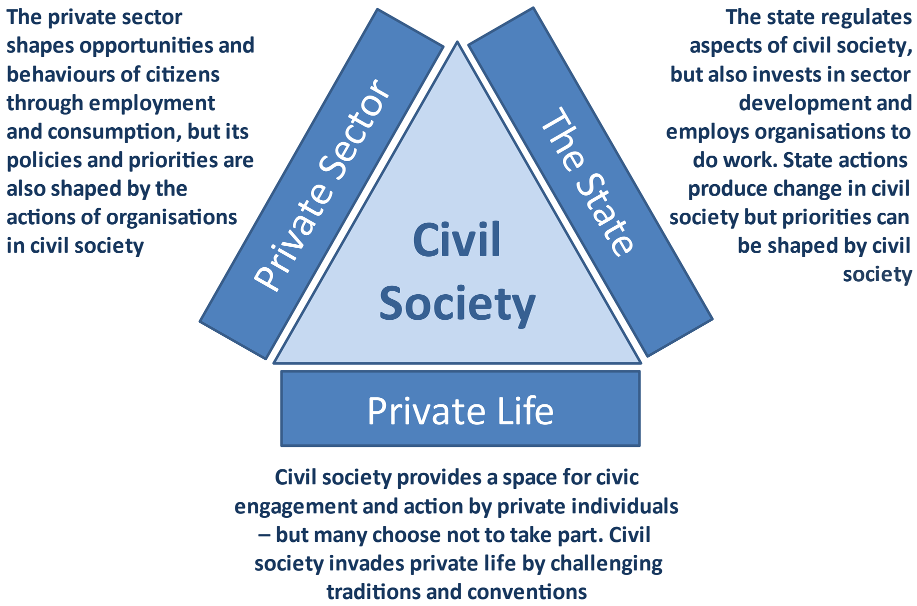
1 Definitions and data sources

Defining the Third Sector

The terms 'Third Sector' and 'Third Sector Organisation' (TSO) are widely recognised internationally by academics and policy makers and are adopted in this study. But the term 'Third Sector' is not always well known, recognised or understood by people who work or volunteer within civil society (or what is more often called the voluntary and community sector).

Civil society is a pluralistic domain where organisations tackle a wide range of social, economic, cultural and environmental issues. [1] Civil society operates independently from other sectors in society – but there is much interaction between civil society and the state, private sector and private life (see Figure 1)

Figure.1 **Civil society as 'the space in between'**[2]



Definitions of civil society are contested because it has 'fuzzy' boundaries.[3] From the perspective of TSOs, it is often easier to define *what civil society is not* rather than *what it is*:

- TSOs differentiate themselves from private-sector companies because they are not driven primarily by financial profitability – instead they prioritise the creation of social, cultural or environmental value.
- TSOs distinguish themselves from private individuals because they have come together with a shared interest to achieve a mission which transcends notions of personal self-interest.
- TSOs position themselves as independent entities which are separate from the state – often claiming that they exist to remedy problems that have gone unrecognised, been ignored or even caused by government.

[1] The definition of civil society has been the subject of academic debate for many years. Consensus on an exact definition of civil society is elusive, but most commentators agree that civil society is different from the state and necessarily must be separate. As an entity, civil society is sustained through the existence of relationships which are built on trust and reciprocity rather than formal or legal constraints. It provides informal mechanisms for conflict resolution, problem solving and co-operation. In sum, civil society provides the arena within which voluntary action flourishes, often to the benefit of society as a whole but also to the benefit of individuals and interest groups which both gain and can inject social capital into civil society through their association.

[2] This model of civil society is developed from work by Evers, A. and Laville, J. L. (2004) 'Defining the Third Sector in Europe' in A. Evers and J.L. Laville (eds.) *The Third Sector in Europe*, Cheltenham: Edward Elgar Press. A more recent and potentially influential contribution defines civil society as a 'third pillar' alongside the state and private sector. This analysis is less convincing as it pays insufficient attention to the blurred boundaries between sectors and over-stresses the extent of homogeneity of the 'third pillar'. See Rajan, R. (2019) *The Third Pillar: the revival of community in a polarised world*, London: William Collins.

[3] This section is a shortened version of a recently published report on the role of charitable trusts and foundations which support TSOs. See Chapman, T. (2020) *The strength of weak ties: how charitable trusts and foundations collectively contribute to civil society in North East England*, Newcastle upon Tyne: Community Foundation serving Tyne & Wear and Northumberland: https://www.communityfoundation.org.uk/knowledge-and-leadership/third-sector-trends-research/

Civil society has the capacity to *advance, ameliorate or resist* changes brought about by the market, state or private individuals – it also *produces* change by challenging the status quo. But civil society is not structured systematically – its component parts do not fit together like a jig-saw.

Civil society is full of imaginative, creative, committed, ambitious and determined people who want to get things done about an issue which is important to them. Competition to win influence and resources is therefore intense. All organisations and groups make 'claims' about the value of their work and believe that the cause they champion is as or more important than those pursued by other TSOs. This makes it virtually impossible for civil society as a whole to agree on priorities apart from sustaining their right to organise and act as they choose within the realm of civil society.

Some organisations and groups vigorously defend their autonomy and refuse to get involved in partnership, collaboration or co-production, but many TSOs enthusiastically embrace the idea of working with other organisations in complementary or more formal ways - sometimes this is driven by principle and sometimes by contingency.

However civil society and its component parts are defined, and no matter how it attempts to distinguish its role from other sectors – the fact remains that nothing stands still socially, politically, culturally or economically. This in turn shapes the way that policy makers think about civil society and take actions which impact on its activities.

Defining Third Sector organisations (TSOs)

The Charity Commission states that there are over 167,000 charities on their register.[4] However, the Third Sector is generally taken to include a wider range of organisations than registered charities.

The National Audit Office (NAO) defines the Third Sector as follows:

> ***'The Third Sector is the term used to describe the range of organisations which are neither state nor the private sector. Third sector organisations (TSOs) include small local community organisations, and large, established, national and international voluntary or charitable organisations. Some rely solely on the efforts of volunteers; others employ paid professional staff and have management structures and processes similar to those of businesses, large or small; many are registered charities whilst others operate as co-operatives, "social enterprises" or companies limited by guarantee... All share some common characteristics in the social, environmental or cultural objectives they pursue; their independence from government; and the reinvestment of surpluses for those same objectives.'*** [5]

As the above quotation indicates, there are several categories of TSO. The following categories are usefully distinguished by the National Audit Office.

- ***Voluntary and community sector***

  Includes registered charities, as well as non-charitable non-profit organisations, associations, self-help groups and community groups. Most involve some aspect of voluntary activity, though many are also professional organisations with paid staff. 'Community organisations' tend to be focused on localities or groups within the community; many are dependent entirely or almost entirely on voluntary activity.

- ***General charities***

[4] A basic search of all registered charities on the register search facility indicates that there are 184,615 matches.

[5] Bourne, J. (2005) Working with the Third Sector, London, National Audit Office. https://www.nao.org.uk/report/working-with-the-third-sector/

Charities registered with the Charity Commission except those considered part of the government apparatus, such as universities, and those financial institutions considered part of the corporate sector.[6]

- ***Social enterprises*** *(and community businesses[7])*

  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.

- ***Mutuals and co-operatives***

  Membership-based organisations run on a democratic basis for the benefit of their members. Members may be their employees or their consumers or be drawn from the wider community. Some employee co-operatives may be essentially private businesses but many mutuals and co-operatives consider themselves part of the social enterprise sector.[8]

The terms 'third sector' and 'TSO' are contested, consequently, arguments often erupt on which organisations should be included and which should not. The situation is made more complicated because there are several registers of organisations (with a variety of legal forms) that might be drawn upon to construct a model of the sector as is discussed in the next section.

Registered Third Sector organisations

Determining precisely how many TSOs there are in England and Wales is not easy to do because within and between each category of legal form, contention can arise. Given the purpose of this paper, it is important not to be unduly distracted by technicality because the aim is to gain a general picture of the structure, size and dynamics of the sector in order to assess its contribution to civil society at the local level.

Producing broad estimates on the size of the sector as a whole in England and Wales demands that a range of TSO legal forms and registrations are included. These are detailed below with estimates of the number of organisations in each category.

In this third revision of the paper, adjustments are made to estimates on the updated and of further exploration of the registers in early 2022.

In the overall data set, 187,270 cases of active TSOs has been collated. This has been achieved by using several registers – all of which required cleaning to removed non-active or non-relevant organisations.

Registered charities constitute the majority of organisations within civil society. In the Charity Commission Register dataset that has been collated by Policy&Practice (total 187,270 cases) the population of charities are enumerates as follows

- **Charitable Company**: 30,947
- **Charitable Incorporated Organisations**: 19,300
- **Trust**: 20,244
- **Previously excepted** 3,327

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[6] While not discussed in detail by the NAO, this may include charities which are: required to register with an income below the reporting threshold; and exempted charities (such as Scouts groups) see: https://www.gov.uk/government/publications/excepted-charities.

[7] In recent years, the term 'community business' has gained favour in many circles. Community Businesses derive income primarily from trading within a locality and also seek to make a positive contribution to their community and in many cases be accountable to local people. For more detailed discussion from a Third Sector Trends perspective, see: Chapman, T. and Gray, T. *(2018) How do community businesses differ from other Third Sector organisations in the North: evidence from Third Sector Trends.* Durham, Policy&Practice: . https://www.stchads.ac.uk/research/research-news/how-do-community-businesses-compare-with-other-voluntary-and-community-organisations/.

[8] Definitions and registration criteria have changed since the NAO published its definitions, see: https://communityshares.org.uk/about-cooperative-and-community-benefit-societies.

- **Other general charities**: 76,557

Other types of TSOs need to be included in sector-wide estimates.

- **Community Interest Companies (CICs)**: 22,122 are registered in England and Wales. CICs are fully registered and annual reports are produced on the size of the sub-sector which is broken down by UK nations and English regions.[9]
- **Cooperatives and Societies:** a register is available which lists 30,735 organisations – however a minority are active. 20,955 are recorded as 'de-registered'. Others are listed as under a 'cancellation notice' 'dissolving', 'in administration', 'in liquidation' 'in receivership', 'transferred engagements' or 'winding up'. Collectively they total 424 organisations on the register.[10]

  Currently there are 8,651 active organisations in the TSTS dataset taken from the register (excluding amalgamated' organisations). A number of societies cannot all be included as Third Sector organisations because they are established to serve the financial interests of their members. These include 'benevolent societies', 'building societies', friendly societies', 'loan societies', 'superannuation societies' and 'working men's clubs'.

  Those which remain of interest on the register include.

  - **Community Benefit Societies**: 1,126 registrations.
  - **Cooperative Societies**: 424 registrations.
  - **Credit Unions**: 181 registrations.
  - **Registered Societies**: 5,962 registrations.

  The register lists the names and addresses of organisations, but these data are not itemised by nation or English region. Determining how many Cooperative Societies, Credit Unions and Registered Societies should be included as TSOs in generalised sector statistics is open to question. But it would not seem to be unreasonable to assume that between 750 – 1,000 organisations in addition to Community Benefit Societies (CBSs) could meet that criteria (i.e. they have not been established purely for the personal benefit of society members).
- **Companies Limited by Guarantee (CLGs):** many TSOs are both registered charities and CLGs. In the Third Sector Trends data set, 28.6% of registered charities are also registered as CLGs; but only 12% of CLGs are not registered as charities.[11] The majority of these organisations are quite large (more than 50% have income above £250,000). Fewer than 5% of micro or small organisations are registered as CLGs. It is estimated that non-Charity Commission registered CLGs will be between 3-4% of the whole sector.[12]
- **Faith groups:** there are no reliable data sources to determine how many charities (or other legal forms) are faith-based or faith-led. Similarly, it is not known how many faith groups which are closely associated with or integrated into faith organisations which are active, but are unregistered, which contribute to civil society. In the Third Sector Trends benchmarking exercise undertaken by Southampton University, an attempt was made to map these organisations. They constituted 4.3% of active TSOs in North East England.[13]

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[9] See Regulator of Community Interest Companies (2020) *Annual Report 2018-2019,* Cardiff: Office of the Regulator of Community Interest Companies.

[10] The Mutuals Public Register is available here: [Mutuals Public Register (fca.org.uk)](https://mutuals.fca.org.uk).

[11] The mapping exercise undertaken by Kane, D. and Mohan, J. (2010) *Mapping Registered Third Sector Organisations in the North East*, Newcastle-upon-Tyne, Northern Rock Foundation: https://www.nr-foundation.org.uk/downloads/Mapping-TSOs-in-NE.pdf indicated that 10% of TSOs were CLGs that were not also registered charities.

[12] Some TSOs are registered as Companies Limited by Shares but they are currently few in number.

[13] Defining the range of faith-based organisations and how they are registered or regulated is beyond the scope of this study. Having access to such data would be invaluable, but undoubtedly difficult to classify as the range of faith organisations is substantial, see for example: https://en.wikipedia.org/wiki/List_of_religious_organizations. For a useful report on Christian faith

- **Community Amateur Sport Clubs (CASCs):** current estimates suggest that there are 6,122 Community Amateur Sport Clubs in England and Wales.[14] CASCs can claim to be defined as TSOs because qualifying conditions include, amongst other things, a requirement to be open to the whole community and be organised on an amateur basis with its main purpose being 'the provision of facilities for, and the promotion of participation in, one or more eligible sports'. Under the Charities Act 2011, CASCs cannot also register as a charity, but can deregister as a CASC if it wishes to do so.

Third Sector Trends does not include several types of organisations which may be considered to be members of the Third Sector or Civil Society by other analysts.

Exclusions include ***trade unions, political parties*** and ***trade associations*** because these organisations are more likely to serve 'sectional interests' rather than civil society as a whole.

While many businesses have social objectives, most pursue financial profit as a principal objective if they are to survive and thrive. Consequently, all ***private sector businesses*** (including or 'for-profit' worker cooperatives/ partnerships) are excluded.

Housing Associations and other large-scale Registered Social Landlords provide a vital social purpose but they are excluded because their scale and purpose would skew assessments of sector activity disproportionately. ***Private schools*** are also excluded because they exist primarily to serve private individuals' interests rather than public interest.

NHS hospital trusts and ***universities*** can make a significant contribution to economy and society but they are excluded from the analysis (although these organisations are retained in the CCR database for future analysis). Semi-autonomous Non-Departmental Public Bodies (NDPBs) which are state-funded entities such as ***research councils*** and the ***Care Quality Commission*** are also excluded.[15]

All of the excluded organisations can undoubtedly contribute to the work of civil society directly or indirectly. The reasons for their exclusions as given could be contested because the boundaries between civil society, the state, the private sector and private life are fuzzy (see Figure 1 above). On the basis that this is a study of the structure, dynamics, purpose and impact 'local third sector' however, exclusion is justified.

As shown in Table 1, it is likely that there are around 200,000 registered TSOs in England and Wales. No claim is made that this is an entirely accurate estimate for the reasons provided above and the number of registered organisations may be between 5-10% over or under-estimated. These estimates will be used in future briefing papers as the basis for scaling up findings to sector-wide levels.

Due to missing, incorrect or incomplete post codes, the number of registered TSOs for the regional analysis is slightly smaller at 186,587. As shown in Table 1(b), there are some regional variations in the composition of the sector by legal form. In the northern regions, the West Midlands and Wales, there tend to be larger numbers of societies and CICs than is the case elsewhere. The larger number of societies registrations are likely to be related to historical associations between the labour movement and municipality in major industrial

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organisations' activity in this field, see *Church in action: a national survey of Church-based social action* (2018) Church Urban Fund/Church of England. Church In Action: A National Survey Of Church-Based Social Action - CUF

[14] The most recent available estimates derive from a 2016 report. http://www.cascinfo.co.uk/cascregistrationfigures/201612december/ (accessed 30th September 2020). HMRC definitions, qualifying conditions and taxation rules of CASCs can be observed here: https://www.gov.uk/government/publications/community-amateur-sports-clubs-detailed-guidance-notes/community-amateur-sports-clubs-detailed-guidance-notes#become-a-community-amateur-sports-club

[15] The Cabinet Office defines a non-departmental public body (NDPB) as a "body which has a role in the processes of national government, but is not a government department or part of one, and which accordingly operates to a greater or lesser extent at arm's length from ministers". See: https://www.gov.uk/guidance/public-bodies-reform#:~:text=A%20non%2Ddepartmental%20public%20body,at%20arm%27s%20length%20from%20ministers%E2%80%9D. A more substantive discussion of such bodies can be downloaded here: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/663615/PublicBodies2017.pdf. Producing a definitive list of NDPBs or similar organisations has become increasingly complex as several such bodies have been redefined as charitable organisations such as British Waterways which in England is now known as the Canal and River Trust (see: https://www.gov.uk/government/news/over-1-billion-investment-secures-future-of-new-waterways-charity).

areas.

Table 1(a) Working estimates on the population of TSOs in England and Wales

Legal form of organisations	Estimated number of organisations	Percentage of the whole population of TSOs
Charity Commission Register[16]	150,375	75.2
Community Interest Companies	22,122	11.1
Cooperatives and Societies Register	8,651	4.3
Community Amateur Sport Clubs	6,122	3.1
Total registered organisations in data set	**187,270**	
Estimate of Companies Limited by Guarantee (but not registered charities)	12,730	6.4
Estimate of Faith groups (which are not also registered as charities)		
Estimate of others not elsewhere classified (e.g., Companies Limited by Shares)		
Estimated total population of TSOs	200,000	100.0

Table 1(b) Wales and English regional distribution of charities by legal form (new analysis June 2022)

English region and Wales	Charities	CIOs	CICs	Societies	CASCs	N=
North East England	60.3	10.8	17.2	8.0	3.7	6,458
North West England	66.1	9.8	15.4	5.1	3.6	18,747
Yorkshire and Humber	67.8	11.0	11.0	6.3	3.9	13,591
West Midlands	67.9	8.8	14.9	5.2	3.2	15,628
East Midlands	72.3	9.7	10.1	4.3	3.6	13,519
East of England	75.4	9.0	8.5	3.6	3.5	20,161
London	70.6	12.0	12.7	3.4	1.3	35,904
South East England	72.5	10.2	9.4	3.9	4.0	31,116
South West England	70.0	8.7	12.4	4.9	3.9	22,095
Wales	67.1	13.7	9.8	6.1	3.4	9,368
England and Wales	70.1	10.3	11.8	4.6	3.2	186,587

[16] In its annual report 2020, the Charity Commission states that it registered 168,000 charities.https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/901690/Charity_Commission_Annual_Report_and_Accounts_2019_to_2020.pdf However, in the data set of 151,000 charities collated for this study, 1.7% of registered organisations (n=2,562) have an address outside of England and Wales. As noted later in this document, NCVO excludes private schools and universities from its analysis further justifying a reduction in the tally of registered charities in England and Wales. The estimate of 160,000 registered charities may, therefore, be over generous.

Unregistered organisations

It is not possible to state with any certainty how many organisations and groups sit 'below the radar' in England and Wales. Many local infrastructure organisations (such as Councils for Voluntary Service), for example, hold listings of local members or associates which enumerate many more groups than can be identified on registers.

Academic study on the characteristics, purpose and social value produced by such societies, organisations or groups has been undertaken,[17] but firm empirical evidence to affirm how many informal organisations exist remains patchy.

The Third Sector Trends Study commissioned the most detailed study to date to estimate the proportion of VCSE organisations which operated below the radar in 46 local authorities in Cumbria, Yorkshire and Humber and North East England. From this work it was determined that there was an average of 3.66 below the radar groups per 1,000 population.[18] This roughly equates to 1.29 below the radar groups for every registered organisation.[19]

More recent research for Local Trust by NCVO and 360Giving has drawn a distinction between more structured unregistered organisations which are in a position, for example, to apply for grants, and less formal groups. The evidence suggests that a proportion of unregistered groups could be considered as sufficiently similar to many small charities and CIOs that they could be included in 'formal' sector estimates. Local Trust estimate that there are between 200,000 - 300,000 below the radar groups. Around 13,000 of which received grants between 2016-19.[20]

Such estimates are plausible, but their use remains contentious as it is not known whether their activities are fully comparable with those of registered organisations which serve civil society interests. During the Covid-19 pandemic, however, there have been indications that mutual aid groups have been effective in tackling a wide range of issues such as social isolation and homelessness.

Mutual aid groups have been defined as:

> ***A mutual aid group is a volunteer led initiative where groups of people in a particular area join together to support one another, meeting vital community needs without relying on official bodies. They do so in a way that prioritises those who are most vulnerable or otherwise unable to access help through regular channels.***[21]

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[17] See, for example, McCabe, A. and Phillimore, J. (2009) Exploring below the radar: issues of theme and focus, Birmingham, *Third Sector Research Centre Working Paper no. 8*: https://www.birmingham.ac.uk/Documents/college-social-sciences/social-policy/tsrc/working-papers/working-paper-8.pdf. A second collection of observations related to this study was published with critical commentary on what defined such informal groups. Qualitative analysis had much to say about the experience, purpose and potential social benefit produced by such groups but avoided speculation on their number. See: McCabe, A. (2018) Ten years below the radar: reflections on voluntary and community action 2008-2018, Birmingham, *Third Sector Research Centre Working Paper no. 143*. https://www.birmingham.ac.uk/Documents/college-social-sciences/social-policy/tsrc/working-papers/10-years-below-the-radar-final.pdf

[18] Mohan, J., Kane, D., Wilding, K., Branson, J. and Owles, F. (2010) *Beyond 'flat earth' maps of the third sector*, Newcastle-upon-Tyne: Northern Rock Foundation: https://www.communityfoundation.org.uk/wordpress/wp-content/uploads/2017/09/NRF-TST-Report-Beyond-Flat-Earth.pdf. The summation of area statistics was undertaken using all three Third Sector Trends Mapping reports for Cumbria, Yorkshire and Humber and North East England which listed 23,526 registered organisations in an area with a population of 8.3m people.

[19] In Third Sector Trends surveys, all organisations and groups are welcome to join the study by invitation from the researchers (using registered listings), funding bodies (such as trusts and foundations), public bodies (such as local authorities and NHS Trusts) and local infrastructure organisations (at regional or local authority/district level) which hold listings.

[20] See: 360Giving and NCVO (2020) *Below the Radar: exploring grants data for grassroots organisations*, London: Local Trust: https://localtrust.org.uk/wp-content/uploads/2020/08/Below-the-Radar-Report-HR.pdf.

[21] See, for example, Power, A. and Benton, E. (2021) *Where next for Britain's 4,300 mutual aid groups?*, London: London School of Economics: https://blogs.lse.ac.uk/covid19/2021/05/06/where-next-for-britains-4300-mutual-aid-groups/. The full academic article by the same authors 'Community responses to the Coronavirus pandemic: how mutual aid can help', is available here: https://ppr.lse.ac.uk/articles/10.31389/lseppr.21/. https://covidmutualaid.org/ is the coordinating body, although not all mutual aid groups are registered here.

It has been estimated that there are around 4,300 mutual aid groups in the UK which marshal the efforts of up to 3 million volunteers who provide support for local communities. Early indications from research suggest that many of these groups and volunteers will continue to inject energy into their communities once the pandemic subsides – though not necessarily on the same issues.

Register data

Data from registers were downloaded from in January 2022.[22] Once collated into a single file, data were cleaned to remove duplicates (using charity registration numbers) and identify charities on the register which were not based in England and Wales. The data set, fully compiled, has complete data records for 187,270 TSOs in England and Wales. This provides a substantive evidence base to make sense of the structure of the Third Sector on several dimensions.

No claim is made that this represents a completely accurate record of each register.[23] However, it is large enough to undertake detailed analysis which can be used to scale up findings from other major studies such as the longitudinal Third Sector Trends Study.

Only a limited range of the available data were accessed. Decisions on inclusion were based on three principles: (1) project purpose as detailed above, (2) avoid replication of existing studies such as the NCVO Civil Society Almanac, and (3) concerns about data quality and useability.[24]

The intention of this project is to create a datafile which represents the position of the sector at a specific 'point in time' which can be repeated in future for comparative purposes. Consequently, the data are not directly comparable with, for example, NCVO Civil Society Almanac data which cover discrete financial years.

Provision of detail about organisations is very limited for CICs, CASCs and on the Register of Societies which means that core CCR data have to be used to build standardised multipliers based on charity size, income and expenditure.

Additional data sources

The data which have been collected from the Charity Commission Register provide a substantive resource for analysis on its own. However, the principal purpose of this exercise was to complement these findings with insights gained from other sources of evidence.

The principal sources of additional evidence include:

[22] Data were downloaded in batches using a range of advanced search categories. Only registered charities were included in the data base. Searches were undertaken primarily through the use of discrete income categories. Secondary searches were undertaken for local authority areas and at higher level of area ranges. The search facility does not draw down data for all charities operating in individual local authorities, nor in higher level area categorisations (such as 'Throughout London'). A search of all organisations which operated 'outside England and Wales' was also undertaken to isolate those charities which operated at a wider geographical level (including the UK home nations, Channel Isles and abroad.

[23] The Charity Commission generally states that it registers around 167,000 charities. However, searching the database reveals a range of population numbers. For example, a simple search of 'registered charities' produces records for nearly 185,000 charities. The register is very large, so it is not surprising that there are some problems associated with maintaining the integrity of the data. The way Charity Commission data are collected and collated is currently under review.

[24] The option of exploring full dataset, once downloaded, set was considered closely. It is apparent that the approach to data configuration is complex and obscure, perhaps reflecting the organic processes through which it has developed over time. Much of the content of the dataset is of little interest to the present project and so investment in the configuration and cleaning of these data was unjustified. Furthermore, a close reading of data definitions and experimentation with downloaded files revealed why some elements of the searchable data set have low levels of data quality and reliability. This is led to some extent by the approach to data recording and manipulation. But it is predominantly due to the quality of data provided by charities themselves. The widespread use of blanket categories for the purpose of expenditure, for example, such as 'charitable activities' is more or less meaningless. Similarly, use of data on charity purpose, beneficiaries and activities is unproductive due to the proliferation of responses given – especially by larger charities. Detailed financial evidence is more reliable, though difficult to manage in bulk, but in any case, these data are already scrutinised intensively and successfully by NCVO on an annual basis.

- **NCVO Civil Society Almanac**: the almanac provides annual digests of data on the structure, purposes and finance of charities. As a long-standing statistical resource, it also produces detailed time-series analysis on charity finances and sector structure.[25]
- **Third Sector Trends Study (TSTS):** is a longitudinal study on sector structure, dynamics, purpose and impact which has collected evidence in large-scale surveys since 2010. The study has operated predominantly in the North of England but was extended to the whole of England and Wales in 2019.
- **National Survey of Third Sector Organisations (NSTSO):** this survey was undertaken by Ipsos Mori in 2010 and was commissioned by the Office of the Third Sector (renamed the Office for Civil Society by the current administration).[26] While evidence from this study is out of date, it was a large scale national survey (n=40,000 respondents) and the dataset can be used to assist with checking the reliability of findings from smaller studies such as Third Sector Trends Study in 2019 (n=4,000 responses).[27]
- **360 Giving**: collates evidence on the distribution of grant income from charitable trusts and foundations, community foundations and the National Lottery. While it does not collate evidence from all trusts and foundations, the proportion of contributors is increasing on an annual basis and includes data from most large-scale grant makers.[28]

[25] Data from the Civil Society Almanac can be viewed online and be downloaded in parcels of data Excel files. The address is: https://data.ncvo.org.uk/

[26] Further detail on the role of the Office for Civil Society can be found here: https://www.gov.uk/government/organisations/office-for-civil-society

[27] The NSTSO survey was renamed by the Office for Civil Society, as the *National Survey of Charities and Social Enterprises* but the original name has been retained in this paper because available documentation is searchable by its original name in the National Archives. A technical report on the methodology of the study is still available online. Access to the raw data and its detailed findings appears to be no longer possible (unless previously archived by research units, as is the case with Policy&Practice). http://doc.ukdataservice.ac.uk/doc/6381/mrdoc/pdf/6381userguide.pdf.

[28] The Grantnav search tool currently collates data from 153 funders which have distributed almost 400,000 grants to charitable institutions. https://grantnav.threesixtygiving.org/. The data source provides insights into the size of grants, geographical distribution and year of award. Searches can be made by individual grant maker, or by individual charities or can be collated and downloaded in spreadsheets using the full range or search criteria. Data have been collected since 1998. Making generalised comparisons between years can be unproductive as new grant making organisations continue to join the scheme. However, careful comparison between the same funders over time is useful (and especially so with major funders such as the National Lottery family of distributors (including, amongst other, Arts Councils England/Wales, National Lottery Heritage Fund, Community Fund and Sport England/Wales). https://www.lotterygoodcauses.org.uk/funding/distributors.

2. The population of TSOs

Distribution by of TSOs by size

Most studies of the Third Sector draw distinctions between the activities of TSOs by their size – which is generally defined by income levels.

The Third Sector Trends Study uses qualitative evidence to bolster understanding of the characteristics of TSOs gained from survey data. After ten years of study, the following categories have been defined. The use of these categories does not imply that they are completely separate and distinctive, but they are useful when making comparisons about organisational structure, functions, policy and practice preferences which inform analysis, interpretation, conclusions and recommendations.

- **Informal organisations**: 'micro TSOs' and 'small TSOs' (defined in the Third Sector Trends Survey as organisations with annual income below £50,000) rarely employ staff and therefore operate quite informally in terms of their policies and practices – they mainly operate at a local level, but not exclusively so. They are usually completely reliant on voluntarily given time to sustain their activity. Being small does not mean that these organisations lack complexity in terms of interpersonal relationships – this is largely due to the voluntaristic nature of participation in activity which requires the development of a negotiated order to define and tackle priorities.
- **Semi-formal organisations**: 'medium sized TSOs' (with income between £50,000 and £250,000) adopt semi-formal practices. They tend to employ people but there is little scope for a complex division of labour or occupational specialisation. Often, they are the 'embodiment' of their leaders' interest in cultural and value terms – but not always – some adopt more inclusive cooperative approaches. This can make personal interrelationships complex. While they are ambitious to achieve a great deal, they rely mainly on grants to keep going and most have limited or no interest in delivering public sector contracts.
- **Formal organisations**: 'larger TSOs' (which have income between £250,000 and £1million) are more formal in their structures and culture because their scale allows for specialisation and a more complex division of labour. There are formally embedded hierarchical aspects to organisational structure and some procedural practices are necessarily adopted. But they are not impersonal bodies in practice because of their small scale and limited number of employees and volunteers. These TSOs rely on a mixed finance diet where grants and self-generated trading tend to be amongst the most important income sources.
- **Formal hierarchical organisations**: 'big TSOs' (which have income between £1million - £25million). Due to scale they adopt more formalistic inter-personal relationships between strata of employees and social distance becomes more pronounced and separates domains of decision making and practice delivery – whilst not losing elements of organic change from across the formal hierarchy. Financially, these organisations rely on mixed sources: particularly grants, self-generated income and public contracts. They devote significant time to strategic planning and position themselves beneficially through effective public relations and networking.
- **Formal complex organisations**: Major TSOs (with income above £25million) resemble large businesses or smaller public sector bodies. With stronger reliance on employees than volunteers they adopt standardised structures and expect procedural conformity. They rely heavily on public sector contracts, trading and to

a lesser extent grants. Very large organisations also depend upon self-generated fundraising. Consequently, they seek to develop a recognisable presence or 'brand' in the public domain. Such organisations tend to be effective at influencing policy stakeholders and/or formal engagement in visible campaigning.

Charity Commission data on charity size

Table 2 presents data on a wider range of income categories than is generally available. These data are based on 2020 analysis, not the newly configured dataset from 2022. Its purpose is to provide a clear understanding of how sector income is distributed. All registered charities in England and Wales are listed (including organisations which are usually removed from third sector analysis such as universities, private schools, NHS trusts, etc: these organisations have been retained in the database to allow for comparative analysis between charity types but are not included in analytical tables in subsequent sections of this report).

<table>
<tr><th colspan="6">Table 2 Population of registered organisations by income categories (2020 analysis)</th></tr>
<tr><th>Income range of registered organisations</th><th>Number of registered organisations</th><th>Percentage population in each income category</th><th>Third Sector Trends Study TSO categories</th><th>Number of TSOs in each category</th><th>Percentage population in each category</th></tr>
<tr><td>£10,000 or less</td><td>62,288</td><td>41.2</td><td>Informal, micro TSOs (£10,000 or below)</td><td>62,288</td><td>41.2</td></tr>
<tr><td>£10,001 to £25,000</td><td>28,321</td><td>18.7</td><td rowspan="2">Informal, small TSOs (£10,001 to £50,000)</td><td rowspan="2">38,475</td><td rowspan="2">25.5</td></tr>
<tr><td>£25,001 to £50,000</td><td>10,154</td><td>6.7</td></tr>
<tr><td>£50,001 to £100,000</td><td>14,731</td><td>9.8</td><td rowspan="2">Semi-formal, medium TSOs (£50,001 to £250,000)</td><td rowspan="2">30,648</td><td rowspan="2">20.3</td></tr>
<tr><td>£100,001 to £250,000</td><td>15,917</td><td>10.5</td></tr>
<tr><td>£250,001 to £500,000</td><td>7,540</td><td>5.0</td><td rowspan="2">Formal, larger TSOs (£250,001 to £1m)</td><td rowspan="2">12,108</td><td rowspan="2">8.0</td></tr>
<tr><td>£500,001 to £1m</td><td>4,568</td><td>3.0</td></tr>
<tr><td>£1,000,001 to £5,000,000</td><td>5,129</td><td>3.4</td><td>Formal hierarchical, big TSOs (£1,000,001 to £5m)</td><td>5,129</td><td>3.4</td></tr>
<tr><td>£5,000,001 to £25m</td><td>1,941</td><td>1.3</td><td>Formal complex, major TSOs (£5,000,001 to £25m)</td><td>1,941</td><td>1.3</td></tr>
<tr><td>£25,000,001 to £100m</td><td>381</td><td>0.3</td><td>Formal complex, super major TSOs (£25,000,001 or more)</td><td>474</td><td>0.3</td></tr>
<tr><td>£100,000,001 or more</td><td>93</td><td>0.1</td><td rowspan="2"></td><td colspan="2"></td></tr>
<tr><td>Total</td><td>151,063</td><td>100.0</td><td>151,063</td><td>100.0</td></tr>
</table>

Table 3 presents data on sector income as most recently reported by TSOs and recorded on the CCR website.[29] Smaller registered organisations constitute the majority of registered charities, but larger organisations have the biggest share of sector income.

[29] Reported income for all organisations in each category were collated. Average income was calculated by dividing total income by the number of registered charities in each category.

Average income calculations are listed because these will be used in subsequent analysis to estimate levels of income in specific localities or for registered organisations with different characteristics, practices or purposes.

Table 3	**Income levels of charities in England and Wales, September 2020**					
Size of charity by most recently reported income	**Number of charities in each category**	**Percentage of all charities in each category**	**Total most recently reported income (£millions)**	**Percentage of sector income by each category**	**Average income in each category**	**Percentage of sector income by each category***
£10,000 or under	62,288	41.2	£188	0.2	£3,023	0.4
£10,001 - £25,000	28,321	18.7	£467	0.6	£16,489	1.1
£25,001 - £50,000	10,154	6.7	£346	0.4	£34,123	0.8
£50,001 - £100,000	14,731	9.8	£1,064	1.3	£72,203	2.5
£100,101 - £250,000	15,917	10.5	£2,529	3.1	£158,874	5.9
£250,001 - £500,000	7,540	5.0	£2,661	3.3	£352,947	6.3
£500,001 - £1m	4,568	3.0	£3,231	4.0	£707,241	7.6
£1,000,001 - £5m	5,129	3.4	£11,253	13.8	£2,194,090	26.5
£5,000,001 - £25m	1,941	1.3	£20,792	25.6	£10,711,751	48.9
£25,000,001 - £100m	381	0.3	£16,634	20.5	**Total income of TSOs with income up to £25m =£42,531m**	
£100,000,001 or more	93	0.1	£22,120	27.2		
Total charity income	151,063	100.0	£81,286	100.0		

*excludes TSOs with income above £25million.

Table 4(a) collapses TSOs into a smaller set of five categories which were devised to be used extensively in subsequent analysis. The largest TSOs are excluded as this is primarily a study of the local third sector. By default, it also removes major charitable bodies such as universities and private schools due to their high levels of revenue.

Subsequent analysis, in 2022 to produce regional statistics for England and Wales led to a revision of the approach. Two problems arose with using standardised multipliers on average income.

Firstly, there was a dampening effect in regions where there was a much larger proportion of big or major charities (most especially in London) where income levels were considerably higher. To compensate for this problem, the distribution average income by charities in each region were applied. In the largest category of charities, income was limited to £1m - £25m as the inclusion of larger charities skewed average income estimates.

Secondly, it was also necessary to use separate estimates on the distribution of TSOs by size in each region to compensate for the fact that, for example, there is a larger proportion of smaller TSOs in some areas – such as Wales than in other regions. These revised estimates are now shown in Table 7. The crude income averages for each category represent the average of each of the 9 regional averages in England and Wales.

Table 4(a) Charity Commission Register data sorted by TSTS 5 category income scaled up to total sector (Revised June 2022)

Size of charity by most recently reported income	Number of TSOs in each category	Percentage of TSOs in each category	Total most recently reported income (£millions)	Crude average income in each category	Percentage of sector income in each category
Micro (under £10,000)	84,063	42.0	£266.3	£3,142	0.4
Small (£10,000 - £50,000)	50,336	25.2	£1,103.6	£21.556.7	1.9
Medium (£50,000 - £250,000)	41.525	20.8	£4,818,4	£116,278	8.4
Large (£250,000 - £1m)	16,932	8.5	£7,547.1	£480,118.0	13.9
Big (£1m-£25m)	7,144	3.6	£34,404.0	£4,441,195.2	75.3
Totals	200,000	100.0	£48,139.6		100.0

For comparative purposes, Table 4(b) presents data using the categorical approach adopted by NCVO in its Civil Society Almanac.[30] This table uses data available in 2020 and is no longer valid in analytical terms but provides a useful comparator. It is notable that charities with income above £1m absorb over 80% of sector income even though they only constitute 7% of all charities.

Table 4(b) NCVO/CCR data using NCVO income categories[31] (2020)

	Number of charities in each category published by NCVO 2020	Percentage of all charities in each category	Total most recently reported income using CCR estimates (£millions)	Average income in each category (CCR averages)	Percentage of sector income in each category
Micro (under £10,000)	77,601	46.6	£234.59	£3,023	0.4
Small (£10,000 - £100,000)	57,956	34.8	£2,044.57	£35,278	3.6
Medium (£100,000 - £1m)	24,820	14.9	£7,457.69	£300,471	13.2
Large (£1m - £10m)	5,464	3.3	£16,651.56	£3,047,504	29.5
Major (£10m-£100m)	695	0.4	£16,787.22	£24,154,280	29.8
Super major (£100m plus)	56	0.0	£13,178.16	£235,324,275	23.4
Totals	166,592	100	£56,353.80		100.00

Figure 2 compares the categorisations adopted by NCVO in the Civil Society Almanac with those of the Third Sector Trends Study. The approach differs because the two studies are addressing complementary but separate purposes.

[30] The number of charities with income above £1m are those reported by NCVO in their Annual Almanac 2020 (which excludes private schools, universities and NHS trusts of private hospitals). The total most recently reported income in each category are estimates based on average income in each category drawn from CCR analysis published in this report, not by NCVO. Consequently, the estimate for 'super major' charities may be exaggerated. That stated, the top 20 charities (including major funding foundations) have a collective income of over £10bn and an average income of over £521m.

[31] NCVO Civil Society Almanac. Data refer to 2017/18 financial year [Fast facts - Profile | UK Civil Society Almanac 2020 | NCVO] (downloaded 3rd December 2020).

The Third Sector Trends Study is, essentially, a longitudinal study of the 'local third sector' where the role of small and medium sized organisations is pivotal to its success (hence the more narrowly defined categories) rather than a longitudinal national study as the case with the NCVO Civil Society Almanac. As such TSTS works across a wide range of areas in order to produce reliable comparative evidence on how the local third sector operates.

While there is a proliferation of local studies in specific areas, these studies tend to use their own approach to surveying which means that comparison is rarely possible. Furthermore, locally-based studies tend to be done on a small scale and have relatively few respondents. Consequently, data sets are too small to undertake more detailed analysis that can be achieved by combining data from areas with similar characteristics.

While it is possible to scale up Third Sector Trends Study data to a national level using multipliers based on the analysis presented in the report, it does so to make sense of what is going on in localities with certain characteristics rather than make robust sector-wide assessments which are already convincingly assessed by NCVO (to include the activities of very large TSOs).

As shown below, TSTS uses more finely-tuned categories of smaller organisations because the local third sector tends to be dominated by organisations which run on very low levels of income.

<table>
<tr><th colspan="2">Figure 2 NCVO Civil Society Almanac and Third Sector Trends Study TSO categories</th></tr>
<tr><th>NCVO Civil Society Almanac</th><th>Third Sector Trends Study</th></tr>
<tr><td>Micro (Up to £10,000, 77,601 TSOs)</td><td>Micro/informal (up to £10,000, ~87,000 TSOs)</td></tr>
<tr><td rowspan="2">Small (£10,000 to £100,000, 57,956 TSOs)</td><td>Small/informal (£10,000 - £50,000, ~50,000 TSOs)</td></tr>
<tr><td rowspan="2">Medium/semi-formal (£50,000- £250,000, ~40,000 TSOs)</td></tr>
<tr><td rowspan="2">Medium (£100,000 - £1m, 24,820 TSOs)</td></tr>
<tr><td>Larger/formal (£250,000 - £1m, 16,000 TSOs)</td></tr>
<tr><td>Large (£1m - £10m, 5,464 TSOs)</td><td rowspan="2">Big/formal hierarchical (£1m - £25m, ~7,000 TSOs)</td></tr>
<tr><td rowspan="2">Major (£10m - £100m, 695 TSOs)</td></tr>
<tr><td>Major/formal complex (£25m - £100m, ~400 TSOs excluded from analysis)</td></tr>
<tr><td>Super major (£100m plus, 56 TSOs)</td><td>Super major/formal complex (£100m plus, ~90 TSOs excluded from analysis)</td></tr>
</table>

Whole-sector estimates

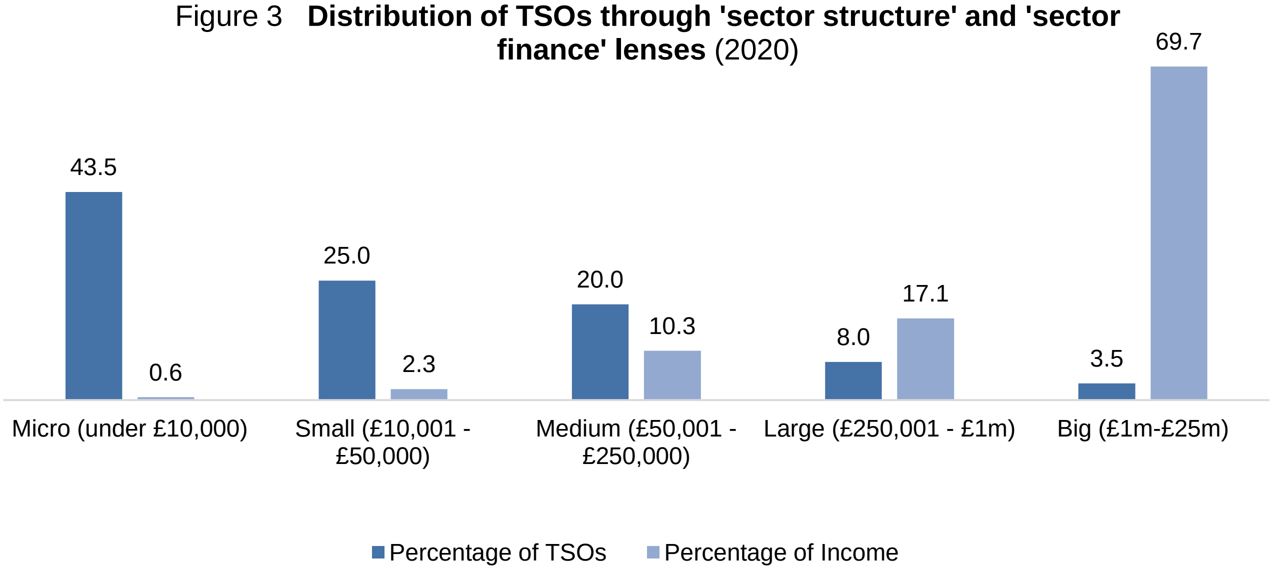
Table 4 presents estimates on average levels of income in 2022 which are used for regional analysis in 2022/23 Third Sector Trends reports. The same estimates must be used across local authorities across regions otherwise standardised average income by size in each region is thrown out of kilter..

Table 5 **Working average income estimates on the size of the Third Sector in England and Wales** (Revised June 2022)

	Micro (under £10,000)	Small (£10,000 - £50,000)	Medium (£50,000 - £250,000)	Large (£250,000 - £1m)	Big (£1m-£25m)
North East England	3,127	21,466	118,427	478,481	4,010,713
North West England	3,196	21,552	115,948	486,545	4,322,395
Yorkshire & Humber	3,104	21,583	116,911	478,955	4,223,434
English West Midlands	3,132	21,311	114,222	477,276	4,578,958
English East Midlands	3,146	21,054	115,106	477,183	4,020,841
East of England	3,071	21,094	115,421	477,801	5,021,248
London	3,134	23,121	121,309	500,667	4,463,349
South East England	3,159	21,769	116,285	475,927	5,020,438
South West England	3,162	21,209	115,502	476,311	4,325,963
Wales	3,192	21,410	113,657	472,734	4,124,614

Figure 3 compares findings through ***'sector structure'*** or ***'sector finance'*** lenses. Micro and small TSOs dominate the sector by number: comprising nearly 69%. By income, however, large TSOs absorb 70% of sector income.

Figure 3 **Distribution of TSOs through 'sector structure' and 'sector finance' lenses** (2020)



3 Spatial distribution of TSOs

In a project which is primarily interested in making sense of the dynamics and impact of the Third Sector within discrete localities, it is necessary to understand how TSOs are distributed in other places too. Otherwise, how would it be possible to know the difference between exceptional and commonplace experiences?

This section looks at the distribution of TSOs in spatial terms in four ways. First, by looking at regional variations. Secondly by looking at how TSOs in general work across spatial areas. Thirdly by considering the distribution TSO in rural and urban areas; and finally, across areas which are characterised by relative affluence or deprivation. In each of these sub-sections, the size of TSOs will also be taken into account.

This section merely provides an introduction to the study of structure and dynamics so deeper analysis is delayed until a later date, or when such analysis has already been done, reference will be made to the relevant publications.[32]

Distribution of TSOs across nations and regions

Table 6 presents analysis of register data on regional distribution of TSOs and working estimates on sector income for use in TSTS analysis in 2022/23.

Table 6 **Number of TSOs in England and Wales and English regions** (revised 2022)

	Number of registered organisations (with income up to £25million)	**Percent of TSOs in each region / nation**	**Estimated income June 2022** (£millions)
North East England	6,922	3.5	1,483.3
North West England	20,095	10.0	4,174.7
Yorkshire and Humber	14,568	7.3	2,708.8
English West Midlands	16,751	8.4	3,359.8
English East Midlands	14,491	7.2	2,146.2
East of England	21,610	10.8	3,871.7
London	38,485	19.2	17,084.5
South East England	33,353	16.7	7,793.4
South West England	23,683	11.8	3,921.8
Wales	10,041	5.0	1,595.5
England and Wales	200,000	100.0	48,139.6

[32] Future papers may look at additional spatial configurations such as local governance, political affiliation and private sector business density.

Table 7 shows the distribution of charities according to income bands in each English region. There is broad consistency in patterns of distribution, with the exceptions of London where there is a much higher proportion of large, big and major charities (highlighted in red). When undertaking analysis at lower levels (such as local authority areas) these standardised estimates are used – otherwise other estimates are thrown out of kilter.

Table 7 Wales and English regional distribution of charities by income of organisations (revised June 2022)

English region and Wales	**Micro** (£10,000 or less)	**Small** (£10,001-£50,000)	**Medium** (£50,001 - £250,000)	**Large** (£250,001 - £1m)	**Big** (£1m – £25m)	**Registered charities in each region**
North East England	41.5	24.4	21.1	9.6	3.4	4,085
North West England	42.5	24.5	21.5	8.4	3.1	12,760
Yorkshire and Humber	43.3	25.0	21.1	7.9	2.8	9,664
West Midlands	44.8	25.2	19.5	7.6	3.0	10,946
East Midlands	49.7	24.4	17.5	6.1	2.3	9,880
East of England	47.2	25.0	19.2	6.2	2.4	15,616
London	34.3	23.9	23.5	10.3	8.0	24,689
South East England	39.4	28.3	21.6	7.5	3.3	23,664
South West England	46.1	26.1	19.0	6.3	2.5	16,316
Wales	48.9	25.6	16.4	6.5	2.5	6,360
England and Wales	42.0	25.2	20.8	8.5	3.6	133,980

N.B. These data have now also been collated for each local authority area/London borough/county council district to create estimates on levels of employment, volunteering and income.

When scaling up data by region using TSTS attitudinal data, it is also necessary to account for regional variations by balance of TSO income and TSO location in areas of deprivation. For England the distribution is shown in Table 7(b).[33]

Table 7(a) Percentage of Charities in EIDs by size (revised 2022)

	Poorest EID 1-2	EID 3-4	**Middle** EID 5-6	EID 7-8	**Richest** EID 9-10	
Micro (£10,000 or less)	29.5	30.3	37.6	37.6	35.9	34.6
Small (£10,001- £50,000)	25.8	24.9	27.3	29.5	33.0	28.3
Medium (£50,001 - £250,000)	25.8	25.0	20.9	20.5	22.0	22.6
Large (£250,001 - £1m)	12.6	12.1	8.4	7.4	5.5	8.9
Big (£1m – £25m)	6.3	7.7	5.8	5.0	3.6	5.6
N=	23,647	23,089	29,033	30,269	28,601	134,639

[33] See Chapman, T. (2021) *Going the extra mile: how business contributes to social sector organisations*, London: Prob Bono Economics (forthcoming, May).

Table 8 presents estimates on the number of TSOs in each English region and of the number of TSOs per 1,000 population.

Table 8 **Number of TSOs per 1,000 population in Wales and English regions** (revised June 2022)				
	Estimated Number of all TSOS	**Percentage of TSOs in each region**	**Population in each region (millions)**	**TSOs per 1,000 population**
North East England[34]	6,922	3.5	2.7	2.6
North West England	20,095	10.0	7.3	2.7
Yorkshire and Humber	14,568	7.3	5.5	2.6
East Midlands	14,491	7.2	4.9	3.0
West Midlands	16,751	8.4	5.9	2.8
East of England	21,610	10.8	6.2	3.5
London	38,485	19.2	9.2	4.2
South East England	33,353	16.7	9.0	3.7
South West England	23,683	11.8	5.6	4.2
Wales	10,041	5.0	3.15	3.2
England and Wales	**200,000**	**100.0**	**59.4**	**3.4**

Sector income by region and size of organisations

Table 9 provides estimates of the total income of charities in each income category by region. It is clear that London is an exceptional region because there is a heavy concentration of income in ***Big*** and ***Major*** charities in the city. Table 10 provides income estimates for all TSOs.

These estimates will be updated prior to analysis of TSTS findings for 2022 using the most recent available income data.

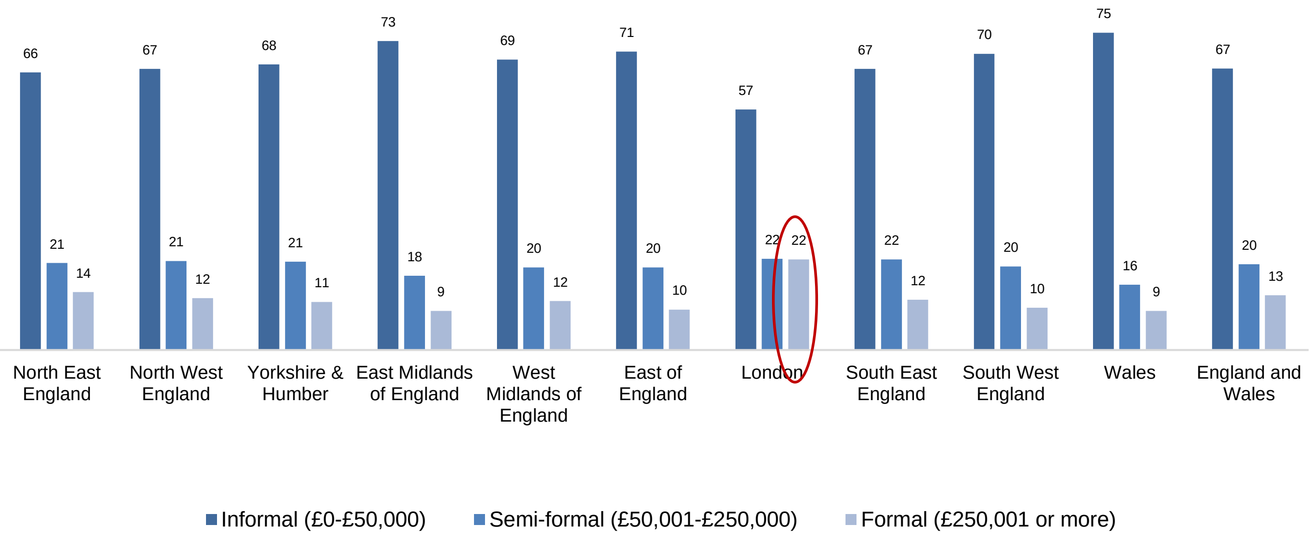
[34] It should be noted that the estimates for North East England are lower than those published by Third Sector Trends at 7,200. This estimate is built upon a census examination of the sector undertaken by Kane and Mohan (2010a) to include faith groups and a range of other organisations which were not included in formal sector categorisations. It could be the case, therefore, that the estimates presented in Table 8 are too low. That is not certain because a similar census exercise was also carried out by Kane and Mohan (2010b) in Yorkshire and Humber and the number of TSOs is quite similar to the CCR estimate. Without the advantage of census appraisals across other regions, these differences cannot be resolved so the North East England CCR estimate is used in this study – but for discrete regional reports, the published TSTS estimates will be retained.

Table 9 Estimated sector income by charity size and region (£millions, June 2022 estimates)

	Micro (£10,000 or less)	**Small** (£10,001-£50,000)	**Medium** (£50,001 - £250,000)	**Large** (£250,001 - £1m)	**Big** (£1m – £25m)	**Total estimated income per region**	**TSOs in each region**
North East	8.98	36.29	172.83	317.15	948.01	1,483.26	6,922
North West	27.29	106.29	500.28	817.01	2,723.82	4,174.69	20,095
Yorkshire & Humber	19.56	78.67	358.63	551.73	1,700.19	2,708.78	14,568
East Midlands	23.49	89.87	373.31	606.73	2,266.40	3,359.81	14,491
West Midlands	22.64	74.51	291.92	423.63	1,333.46	2,146.16	16,751
East of England	31.32	113.97	479.03	638.24	2,609.12	3,871.69	21,610
London	41.38	212.82	1,096.19	1,981.37	13,752.71	17,084.47	38,485
South East	41.46	205.20	838.21	1,186.96	5,521.53	7,793.35	33,353
South West	34.52	131.02	520.50	713.51	2,522.30	3,921.84	23,683
Wales	15.69	55.02	187.53	310.80	1,026.47	1,595.51	10,041
England and Wales	**266.33**	**1,103.65**	**4,818.43**	**7,547.13**	**34,404.01**	**48,139.56**	**200,000**

Figure 5 presents a simplified picture of sector structure, dividing TSOs into informal, semi-formal and formal organisational forms. The exercise is useful in that it demonstrates that the characteristics of the charity sector in structural terms remains fairly similar across all regions. Only in London is there a significant concentration of larger formal charities. That stated, the majority of TSOs in London (79%) are informal or semi-formal organisations (see appendix for more detailed breakdown by London boroughs).

Figure 5 **Percentage distribution of TSOs by size across English regions and Wales** (2020 estimates)



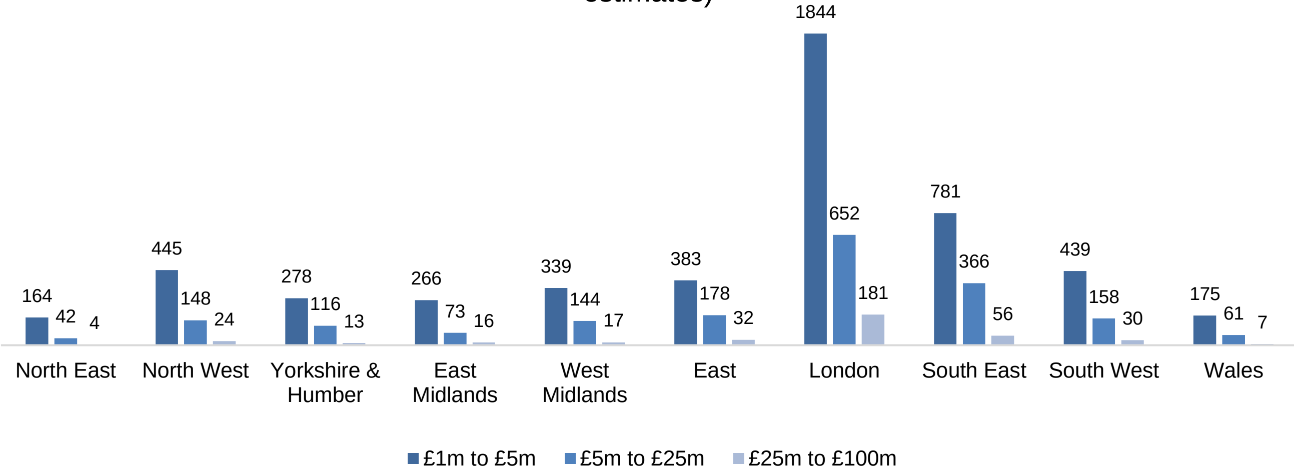
Amongst larger formal organisations regional variations are pronounced when income categories are delineated as shown in Table 11.

Table 11 **Percentage distribution of larger charities by region** (2020 estimates)

	£250,001 to £500,000	£500,001 to £1m	£1,000,001 to £5m	£5,000,001 to £25m	£25,000,001 to £100m	Number of registered charities
North East England	41.4	25.2	26.1	6.7	0.6	628
North West England	39.9	25.0	25.4	8.4	1.4	1,760
Yorkshire and Humber	43.9	22.9	22.7	9.5	1.1	1,226
English West Midlands	41.2	23.0	24.3	10.3	1.2	1,400
English East Midlands	40.4	24.6	26.3	7.2	1.6	1,015
East of England	40.4	23.4	23.4	10.9	2.0	1,649
London	34.1	23.7	29.1	10.3	2.9	6,394
South East England	39.6	21.2	25.4	11.9	1.8	3,083
South West England	40.5	23.4	25.3	9.1	1.7	1,742
Wales	42.2	22.8	25.1	8.8	1.0	703
England and Wales	**38.5**	**23.4**	**26.2**	**9.9**	**1.9**	**19,600**

These data are presented to better effect in Figure 6 which shows the number of registered charities with income above £1million in English regions and in Wales. Of the 7,432 registered charities with income above £1m in England and Wales, 36% (2,677) are based in London. The percentage distribution of larger formal charities differs to some extent from region to region. North East England has the lowest percentage of major charities (0.6%) whilst in southern England the average is around 1.9% (excluding London).

Figure 6 **Number of registered charities with income above £1million** (2020 estimates)



Spatial ranges of TSOs' work

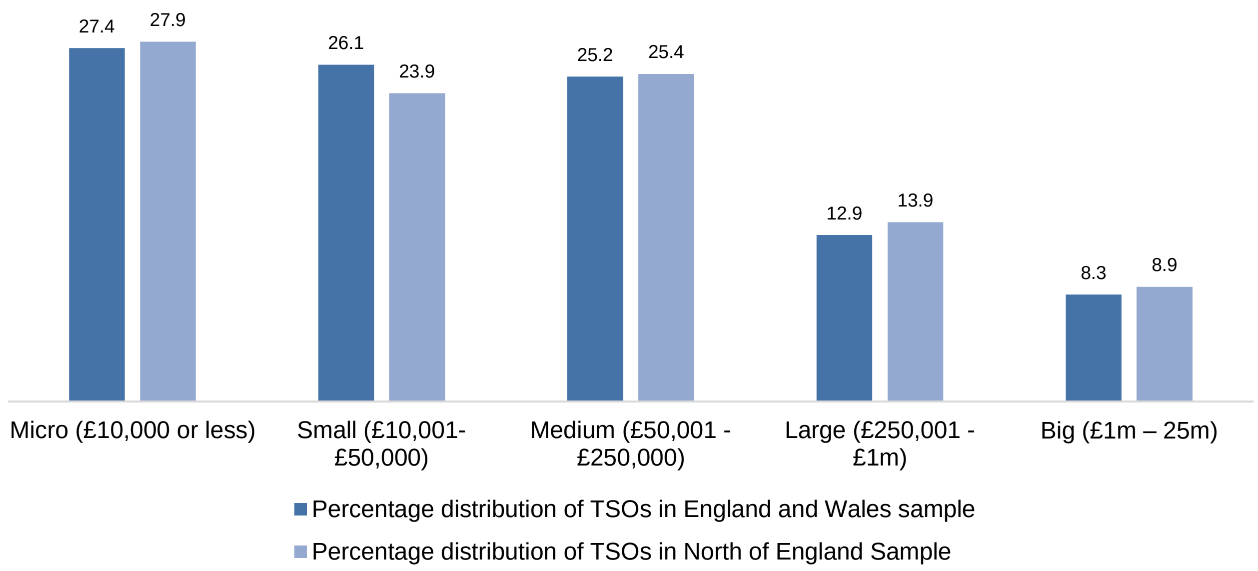
Analysis on regional distribution by size of TSOs is useful as it demonstrates that sector structure is remarkably similar across all regions and nations apart from London where there is a larger proportion of formal larger TSOs. Looking solely at where TSOs are located can be misleading because many TSOs work across a wide range of areas. It is necessary, therefore, to make robust estimates on variations in the spatial range of activity. To do this, TSTS data are used from a sample of over 4,000 TSOs across England and Wales in 2019 to determine the spatial range of work.

Table 12 **Range of activity of TSOs in England and Wales** (Third Sector Trends Study, 2019)

Highest level spatial range of TSO activity	**Micro** (£10,000 or less)	**Small** (£10,001- £50,000)	**Medium** (£50,001 - £250,000)	**Large** (£250,001 - £1m)	**Big** (£1m – 25m)	All TSOs
Work only at neighbourhood or village level	46.0	37.1	23.4	11.9	3.9	35.0
Work within the boundaries of one local authority (or County Council district)	24.8	33.3	38.8	40.9	25.6	31.1
Work within the boundaries of a single region	19.9	21.8	29.7	38.5	48.8	24.8
Work at a wider spatial level	9.3	7.8	8.2	8.7	21.7	9.1
N=	1,098	1,046	1,101	517	333	4,008

It should be noted that the TSTS samples in the North or England compared with the overall England and Wales sample are very similar, giving room for confidence in the data presented in Table 12 (see Figure 7 below)

Figure 7 **Comparing North of England and England and Wales TSTS samples** (2019)



Based on the TSTS data analysis presented above, it is possible to scale-up estimates drawing on CCR data on the number of TSOs operating within spatial limits by size of organisation in England and Wales as a whole. Table 13 presents estimates on the number of TSOs in each cell together with its percentage composition in relation to the whole sector.

Table 13 **Range of activity of TSOs in England and Wales** (numbers of TSOs scaled up from CCR estimates for England and Wales. 2019)

Highest level of spatial range TSO activity	**Micro** (£10,000 or less)	**Small** (£10,001-£50,000)	**Medium** (£50,001 - £250,000)	**Large** (£250,001 - £1m)	**Big** (£1m – 25m)	All TSOs
Work only at neighbourhood or village level	40,005 (20.0%)	18,543 (9.3%)	9,361 (4.7%)	1,906 (1.0%)	271 (0.1%)	70,085
Work within the boundaries of one local authority (or County Council district)	21,616 (10.8%)	16,667 (8.3%)	15,510 (7.8%)	6,551 (3.3%)	1,791 (0.9%)	62,134
Work within the boundaries of a single region	17,314 (8.7%)	10,895 (5.4%)	11,864 (5.9%)	6,154 (3.1%)	3,419 (1.7%)	49,645
Work at a wider spatial level	8,066 (4.0%)	3,896 (1.9%)	3,265 (1.6%)	1,390 (0.7%)	1,519 (0.8%)	18,136
All TSOs England and Wales	87,000	50,000	40,000	16,000	7,000	200,000

The financial cost of work undertaken by TSOs can be assessed by estimating sector income in each of the cells of Table 14. These data indicate that while many more TSOs operate primarily at the local level, it is clear that a very high proportion of sector income is received by organisations working at a wider level – and especially so at regional, rather than national or international level.

Table 14 **Income of TSOs working within spatial ranges** (scaled up from CCR estimates for all TSOs in England and Wales, £millions, 2019)

Highest level of spatial range TSO activity	**Micro** (£10,000 or less)	**Small** (£10,001-£50,000)	**Medium** (£50,001 - £250,000)	**Large** (£250,001 - £1m)	**Big** (£1m – 25m)	All TSOs
Work only at neighbourhood or village level	£121	£392	£1,097	**£927**	**£1,228**	£3,765
Work within the boundaries of one local authority (or County Council district)	£65	£352	£1,818	**£3,188**	**£8,118**	£13,541
Work within the boundaries of a single region	£52	£230	£1,391	£2,995	£15,497	£20,165
Work at a wider spatial level	£24	£82	£383	£676	£6,885	£8,050
All TSOs England and Wales	£262	£1,056	£4,689	£7,786	£31,728	£45,521

The data presented above relates to TSOs operating at their highest level of spatial activity. By definition, most organisations which work beyond the boundaries of neighbourhoods, local authorities or regions must operate their services at a localised level *somewhere* in the UK (unless they solely commit their energies to international activity). The implication being that most TSOs operating regionally or nationally work in a wide range of localities. While this is an obvious point, it is useful to record as it has implications for the analysis of sector impact on localities in subsequent papers.

As shown in Table 13, a significant number of large (n=8,457) and big (n=2,068) organisations operate 'only' at neighbourhood level or at local authority level.

Indeed, almost a third of total sector income is absorbed by these organisations (marked with a red circle).

To extend the analysis, it is possible to look at the situation of TSOs which operate at a range of levels rather than just focusing on their 'highest' level of spatial operation by drawing upon TSTS data. For example, amongst TSOs which work at a national level, 24% state that they also work in the local authority in the area where their principal office is based. Of those TSOs which work internationally, 26% state that they also work at the local authority level in the area where they are based.

As Table 15 indicates, a third of sector activity (when measured by the number of organisations operating in areas) takes place at the local and neighbourhood level and is delivered primarily by very small informal organisations. Only 9% of TSOs work beyond the regional level – but it should be noted that such activity is not limited to the work of larger formal organisations. Indeed, many formal organisations work only at neighbourhood level.

Table 15 **Distribution of sector activity by percentage of all TSOs in the Third Sector** (2019)

(The accumulated percentages in each cell represents the situation of the whole sector, i.e., 100% of TSOs)	**Informal** (income £0-£50,000)	**Semi-formal** (income £50,001-£250,000)	**Formal** (income £250,001 or more)
Work only at neighbourhood or village level *(35.1% of the whole population of TSOs)*	29.3	4.7	1.1
Work within the boundaries of one local authority or County Council district *(31.1% of the whole population of TSOs)*	19.1	7.8	4.2
Work within the boundaries of a single region *(24.8 of the whole population of TSOs)*	14.1	5.9	4.8
Work at a wider spatial level *(9.1% of the whole population of TSOs)*	6.0	1.6	1.5

TSOs working in areas of affluence or deprivation

The location of TSOs in areas of greater or lesser affluence (as defined by the English Indices of Deprivation) varies considerably across English regions as shown in Table 16.[35]

[35] In Wales a separate set of indices are used to measure relative levels of affluence or deprivation hence their exclusion from this table as they are not directly comparable: see: https://gov.wales/welsh-index-multiple-deprivation-full-index-update-ranks-2019

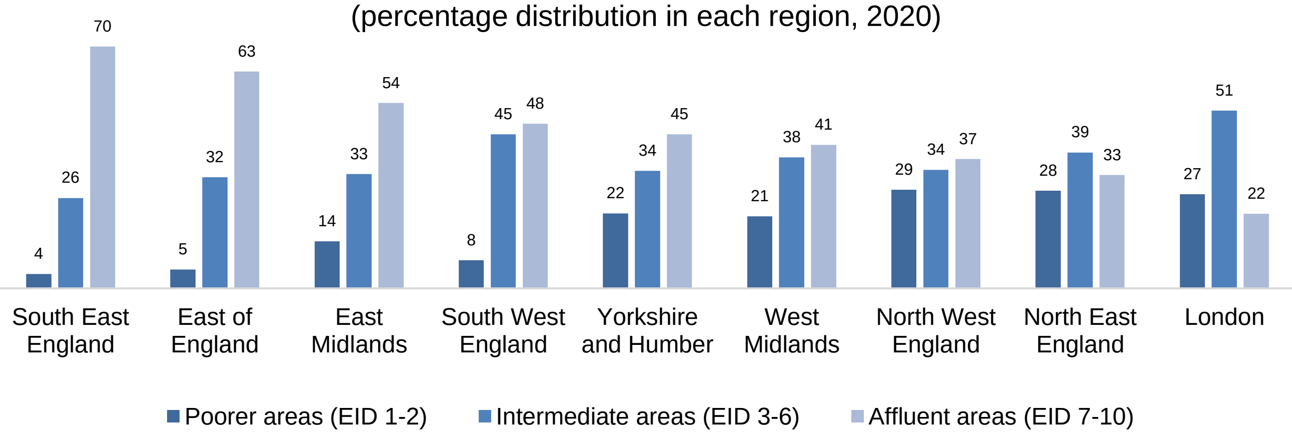
Table 16 **Regional variations in TSO location by English Indices of Deprivation** (revised 2022)

	Poorest EID 1-2	EID 3-4	**Middle** EID 5-6	EID 7-8	**Richest** EID 9-10	N=
North East England	25.9	22.0	19.4	16.4	16.3	6,458
North West England	27.3	18.0	18.8	18.2	17.6	18,740
Yorkshire and Humber	21.4	14.9	20.8	22.5	20.3	13,581
East Midlands	15.5	18.0	18.6	24.7	23.1	13,515
West Midlands	24.3	17.4	23.1	19.9	15.4	15,620
East of England	7.4	15.5	25.0	26.1	26.0	20,160
London	19.2	31.4	23.6	17.5	8.4	35,901
South East England	5.8	11.0	18.0	27.8	37.3	31,107
South West England	10.0	18.8	29.1	24.8	17.3	22,082
England	19.9	18.2	21.1	21.3	19.5	186,138

Setting London aside, and as would be expected given variations in socio-economic profiles of regions, it is clear that in northern England a higher proportion of TSOs are focused in the poorest areas (between 11-12% above the English average. In South East England, by far the largest proportion of TSOs are located in the wealthiest areas (21% above the English average).

Figure 8 indicates graphically that in the South East and East of England (and to a lesser extent, East Midlands), a majority of TSOs are based in affluent areas – which should come as no surprise given that the south is generally more economically affluent than the north. But as noted earlier, this effect is compounded because there are also proportionately more charities based in the south than in the north.

Figure 8 **Location of TSOs by area affluence in English regions** (percentage distribution in each region, 2020)



Urban and rural variations in TSOs' location

It is also possible to compare the populations of TSOs in rural and urban areas as shown in Table 17.[36] Table 1 provides estimates on the size of the TSO population

[36] Given that there are relatively few TSOs in rural areas, ONS' eight categories have been collapsed into 5. For a full explanation of the construction of categories see: https://www.ons.gov.uk/methodology/geography/geographicalproducts/ruralurbanclassifications/2011ruralurbanclassification

by areas with spatial characteristics in each region. Table 18 provides the percentage breakdown of TSOs by region in each spatial area.

Table 17 **Estimated number of TSOs in areas with spatial characteristics** (English regions 2020)

	Villages and hamlets in sparsely populated areas	Market towns and fringe in sparsely populated rural areas	Villages and hamlets in less sparsely populated areas	Towns and urban fringe in less sparsely populated areas	Major urban areas	All TSOs
North East England	389	168	579	673	4,302	6,111
North West England	755	289	1,935	1,126	14,916	19,021
Yorkshire and Humber	499	290	2,230	1,601	9,706	14,326
English East Midlands	187	153	3,925	2,363	8,072	14,700
English West Midlands	384	147	3,306	1,234	11,056	16,127
East of England	368	237	6,525	3,199	12,422	22,751
London	0	0	50	18	39,246	39,314
South East England	0	0	8,388	3,811	22,244	34,443
South West England	820	421	6,864	3,383	11,667	23,155
England	**3,402**	**1,705**	**33,802**	**17,408**	**133,631**	**189,948**

Table 18 **Distribution of TSOs in spatial areas by English region** (row percentages, 2020)

	Villages and hamlets in sparsely populated areas	Market towns and fringe in sparsely populated rural areas	Villages and hamlets in less sparsely populated areas	Towns and urban fringe in less sparsely populated areas	Major urban areas	Number of TSOs
North East England	6.4	2.8	9.5	11.0	70.4	6,112
North West England	4.0	1.5	10.2	5.9	78.4	19,021
Yorkshire and Humber	3.5	2.0	15.6	11.2	67.7	14,327
English East Midlands	1.3	1.0	26.7	16.1	54.9	14,700
English West Midlands	2.4	0.9	20.5	7.6	68.6	16,126
East of England	1.6	1.0	28.7	14.1	54.6	22,750
London	0.0	0.0	0.1	0.0	99.8	39,314
South East England	0.0	0.0	24.4	11.1	64.6	34,443
South West England	3.5	1.8	29.6	14.6	50.4	23,155
England	**1.8**	**0.9**	**17.8**	**9.2**	**70.4**	**189,948**

The number of TSOs in income categories in each type of spatial area are presented in Table 19 and percentage distribution by TSO size (column percentages) is shown in Table 18. As may be expected, smaller TSOs tend to be more populous in rural areas while larger TSOs are more concentrated in urban areas.

Table 19 **Estimated number of TSOs in spatial areas size of organisation** (England, 2020)

	Micro (income £10,000 or less)	**Small** (income £10,001-£50,000)	**Medium** (income £50,001 - £250,000)	**Large** (income £250,001 - £1m)	**Big** (income £1m – £25m)	**Number of TSOs**
Villages and hamlets in sparsely populated areas	2,183	852	335	86	37	3,493
Market towns and fringe in sparsely populated rural areas	847	407	347	108	22	1,731
Villages and hamlets in less sparsely populated areas	18,641	9,266	4,442	1,240	713	34,302
Towns and urban fringe in less sparsely populated areas	8,248	5,158	3,335	662	212	17,615
Major urban areas	52,708	31,803	29,530	13,101	5,664	132,806
Number of TSOs	82,627	47,486	37,989	15,197	6,648	189,947

Table 20 **Distribution of TSOs by size across rural and urban areas in England** (2020)

Column percentages	**Micro** (income £10,000 or less)	**Small** (income £10,001-£50,000)	**Medium** (income £50,001 - £250,000)	**Large** (income £250,001 - £1m)	**Big** (income £1m – £25m)	**Number of TSOs**
Villages and hamlets in sparsely populated areas	2.6	1.8	0.9	0.6	0.6	1.8
Market towns and fringe in sparsely populated rural areas	1.0	0.9	0.9	0.7	0.3	0.9
Villages and hamlets in less sparsely populated areas	22.6	19.5	11.7	8.2	10.7	17.8
Towns and urban fringe in less sparsely populated areas	10.0	10.9	8.8	4.4	3.2	9.2
Major urban areas	63.8	67.0	77.7	86.2	85.2	70.3
Number of TSOs in England	82,628	47,487	37,990	15,196	6,648	189,949

Table 21 shows percentage distribution by area type (row percentages). As anticipated from Tables 19 and 20, there are relatively few TSOs in more rural areas – but not perhaps to the extent that may be expected. Even in villages and hamlets in sparsely populated areas, over 4% of TSOs are large or big.

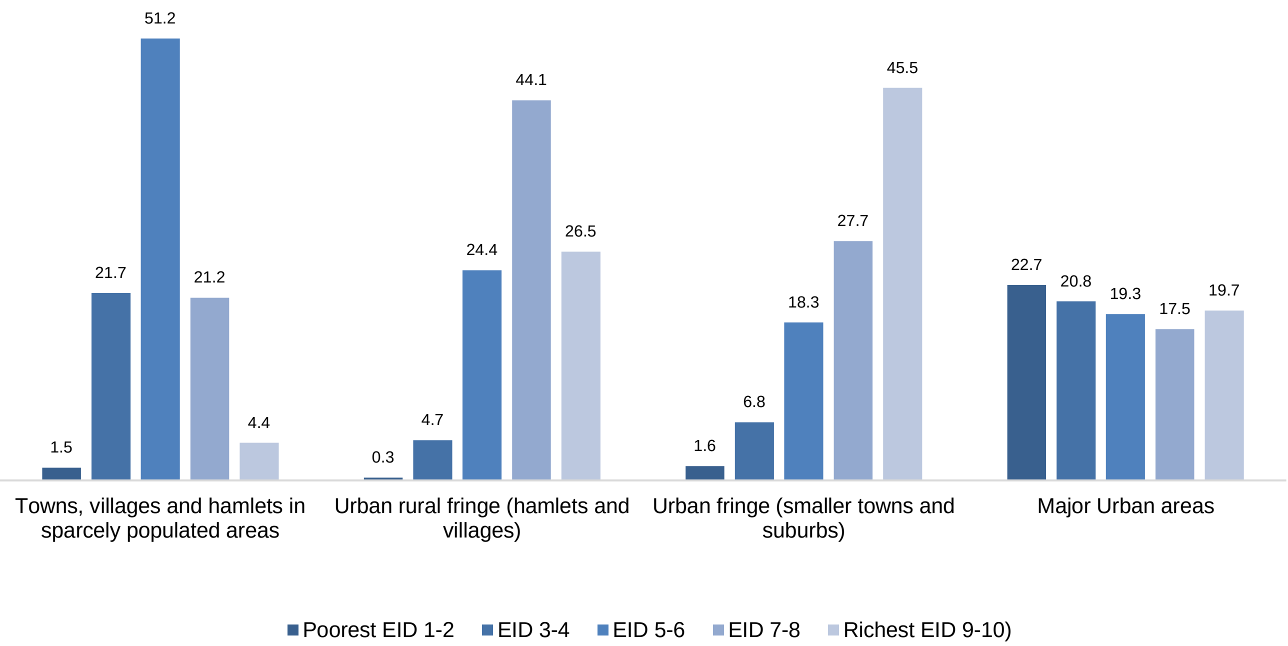
Table 21 **Distribution of TSOs in rural and urban areas by size of organisation in England** (2020)

Row percentages	**Micro** (income £10,000 or less)	**Small** (income £10,001-£50,000)	**Medium** (income £50,001 - £250,000)	**Large** (income £250,001 - £1m)	**Big** (income £1m – £25m)	**Number of TSOs**
Villages and hamlets in sparsely populated areas	60.3	25.6	10.1	2.6	1.5	3,493
Market towns and fringe in sparsely populated rural areas	46.6	24.4	20.8	6.4	1.8	1,731
Villages and hamlets in less sparsely populated areas	51.9	28.1	13.5	3.7	2.9	34,302
Towns and urban fringe in less sparsely populated areas	44.5	30.3	19.6	3.8	1.6	17,615
Major urban areas	37.2	24.4	22.7	9.9	5.7	132,806
All areas	41.0	25.6	20.5	8.1	4.7	189,947

Figure 9 presents summary data on the location of TSOs in areas of greater or lesser affluence in areas with specific spatial characteristics. In sparsely populated areas (first set of bars) the distribution of TSOs veers toward the middle categories with relatively few TSOs in very poor (2%) or very rich (4%) areas.

In the urban fringe of less sparce areas, the distribution of TSOs is focused in more affluent areas. In more densely populated urban areas distribution is relatively even by contrast.

Figure 9 **Socio-economic characteristics of spatial areas where TSOs are based** (English Indices of Deprivation, 2020)



4. Employment and volunteering

Providing estimates on the number of employees and regular volunteers in the Third Sector is useful for gauging the social and economic contribution of TSOs collectively to localities. Generating estimates is a complex process and relies on evidence from the Third Sector Trends Study (TSTS), the Charity Commission Register (CCR) and the National Survey of Third Sector Organisations (NSTSO) – together with useful benchmarks on the size of the employed and volunteer workforce from NCVO.

Methodology to create employee and volunteer estimates

The TSTS and NSTSO studies both asked respondents to state how many employees and regular volunteers currently worked for them. In both studies, banded responses were coded. Although these bands were constructed slightly differently, it is possible to accumulate direct or mid-point averages from each band to create an overall estimate for each size category of TSO.[37]

The findings from reanalysis of TSTS (4,000 cases) and NSTSO (44,000 cases) data produce reasonably consistent estimates. While these are not perfect, they are likely to be more reliable than those derived from smaller scale studies (see Table 22).

Two sets of estimates were sought:

- Employee and volunteer population estimates in each English region using NSTSO data (but not available for Wales) and TSTS/ CCR data (on TSO numbers in England and Wales).
- Multipliers on the average number of employees and volunteers by organisation size (making estimates from both NSTSO/CCR and TSTS/CCR datasets).

Regional employment estimates

While NSTSO data are somewhat out of date (2010), the size of the sample is such that evidence should be drawn upon for reanalysis to test the accuracy of TSTS findings.[38] Estimated full-time equivalent (FTE) employee numbers for each region were scaled up using current CCR data.

The TSTS dataset is much more recent (2019) but smaller at just over 4,000 cases and does not cover regions beyond the North of England in sufficient depth to make reliable regional estimates. Instead, the dataset is used to estimate average levels of employment by organisational size (together with the percentage of employee organisations in each band) it was then possible to scale up to a regional level using CCR estimates.

[37] In the case of NSTSO, respondents were asked to report the number of full-time equivalent employees. This was judged to be too complex a task in TSTS so respondents were asked to respond for both full-time and part-time employees. These were then combined using an assumption that on average, one full-time equivalent employee was made up of 2.5 part-time staff. At the upper end of the spectrum (where, for example, employees have more than 100 employees) that upper figure is used as the estimate as it is not possible to make a valid appraisal above this level – this could lead to an underestimation of regular volunteers. But that is unlikely because, as shown in Table 23, employee estimates were shown to be in proportion to overall income.

[38] NSTSO data had relatively low response rates to employee and regular volunteer questions (non-response rates for employee questions were 7%, and volunteers 6,7%. Income categories were also subject to relatively high non-response rates at 11.5%. All TSTS response rates were above 97.5% of the whole sample.

The resulting estimates from NSTSO/CCR and TSTS/CCR data are higher than those offered by NCVO which bases their estimates on Labour Force Survey data.[39]

The results from the analysis are presented in Table 22. It is clear that the percentage estimates for employer numbers and employees are broadly similar from NSTSO and TSTS studies within each region.[40]

Table 22 **Employment estimates using NSTSO, CCR and TSTS data** (2020)

Nation / English region	Estimated number of organ-isations (CCR based estimates)	Estimated percent employers NSTSO	Estimated percent employers TSTS	NSTSO Estimated number of employers	TSTS estimated number of employers	Number of employees NSTSO	Number of employees TSTS
North East	6,128	43.0	40.1	2,633	2,460	36,601	36,438
North West	18,977	38.2	39.4	7,248	7,479	116,199	104,212
Yorkshire & Humber	14,275	40.5	38.7	5,785	5,531	81,589	70,774
East Midlands	14,665	35.8	34.6	5,243	5,069	80,348	60,271
West Midlands	16,039	34.8	38.2	5,579	6,123	94,993	84,318
East of England	22,691	31.9	36.5	7,229	8,290	99,519	99,092
London	39,675	44.0	46.2	17,470	18,338	276,314	325,000
South East	34,366	35.1	40.3	12,055	13,856	186,232	195,435
South West	23,133	33.3	37.3	7,715	8,640	108,898	105,239
England	***189,949***		***39.9***		***75,771***	***1,080,692***	***1,080,778***
Wales	10,051		33.2		3,338		41,678
England & Wales	**200,000**		**39.6**		**79,108**		**1,122,456**

To determine whether these estimates are reasonably accurate, an appraisal of the full cost of employing staff has been undertaken. These costs are compared with

[39] As the NCVO Almanac notes 'The voluntary sector workforce is small compared to the public and private sectors. This means that changes in the voluntary sector workforce tend to have a bigger impact. While a thousand or so people leaving one subsector and joining another would likely not be noticed in the private sector figures, this would constitute a significant change for the voluntary sector. The difference in numbers between the sectors is also linked to the survey itself. As mentioned in the methodology section, 38,000 people are interviewed each quarter for the survey, but only about 1,000 report that they are from the voluntary sector. This makes the voluntary sector figures much more liable to variation.' Equally, it is likely that estimates of sector size are somewhat under-estimated. https://data.ncvo.org.uk/workforce/#notes-and-definitions

[40] The exception is London where initial TSTS estimates (which are based on CCR regional data) were too high and especially so in inner London boroughs. From more detailed appraisal of very large inner-London TSOs from the CCR it appeared that that in London, the numbers of employees in many large organisations were over-estimated firstly because many international charities employ staff overseas. Similarly, numbers of employees in larger organisations appeared to be exaggerated because charitable foundations (which are based primarily in London) employ very few staff relative to their income. In outer London boroughs, standardised multipliers worked much better and were nearer in line with regional estimates. On the basis of this additional analysis, the number of employees in London has been adjusted to 325,000 from an initial estimate of 409,924 when using local third sector multipliers.

total income of TSOs in English regions and Wales (see Table 23). The results indicate that the costs of employment as a proportion of total income is quite consistent across all English regions and Wales.

These data will be updated and published alongside TSTS findings in late 2022/ early 2023. This will use the new area model which will calculate estimates by region, sub/region or combined authority areas / Integrated Care Networks etc.

Table 23 **Costs associated with employing staff compared with total income of employing organisations by English regions and Wales** (June 2022)

Nation / English region	TSTS estimated number of FTE employees	Plain cost of salaries £m at 80% average regional wage[41]	Total sector income estimate (£millions)	Percent of sector income spent on direct employee costs
North East England	37,300	822.0	1,483.23	55.4
North West England	101,300	2,394.0	4,174.7	57.3
Yorkshire & Humber	66,900	1,542.4	2,708.8	56.9
English West Midlands	79,000	1,895.1	3,359.8	56.4
English East Midlands	56,600	1,287.0	2,146.2	60.0
East of England	88,800	2,192.1	3,871.7	56.6
London	365,000	11,597.7	17,084.5	67.9
South East England	169,500	4,450.0	7,793.4	57.1
South West England	97,700	2,273.3	3,921.8	58.0
Wales	41,300	942.6	1,595.5	59.1
England and Wales	**1,103,800**	**27,626.9**	**48,139.6**	**57.4**

Number of regular volunteers and proxy financial replacement values for their work

National estimates for the number of volunteers in the UK are published annually in NCVO's Civil Society Almanac.[42] It is reported that 19.4 million people volunteered at least once in the previous year with a group, club or organisation in the UK. About 11.9 million people volunteered at least once a month. These are impressive statistics which show that a culture of volunteering, in one capacity or another, is well established in the UK.

In studies of the Third Sector, it is necessary to be careful about extrapolating too much insight from these headline statistics, and especially so when considering the

[41] The plain cost of salaries is that paid to employees and therefore excludes employee NI and pension contributions which may amount to about 30% additional cost.

[42] NCVO *ibid:* Volunteering overview - Volunteering | UK Civil Society Almanac 2020 | NCVO (downloaded 3rd December 2020).

support volunteers regularly offer to TSOs. The Third Sector Trends Study is interested in levels of regular volunteering because they allow TSOs to be able to plan and practice their work with a clear idea in mind about the volunteering resources they can draw on (in addition to the work that might be done by paid employees when such staff exist).

To estimate the number of regular volunteers that TSOs can rely upon to provide support, an approach developed in the Third Sector Trends Study is used. Regular volunteers are defined as people who provide on average 72 hours of support to a TSO in one year (or an average of six hours per month).

The calculations exclude occasional or ephemeral (i.e. 'one-off') volunteering. Ephemeral or occasional volunteering may include people who help with a fundraising appeal, people who are allocated to volunteer through, for example, employee supported volunteer initiatives or by university student volunteer programmes.

As TSTS only has data from TSOs, several other kinds of volunteers cannot be included in the analysis:

- Volunteers giving time to public bodies such as local public libraries (unless they are community run entities) or the NHS (unless they are working directly for a TSO such as WRVS).
- Volunteering in schools as governors, as members of informal/unregistered parent teacher associations, supporting teachers in the classroom, school trips and sports days, or general school fundraising activities.
- Volunteering for other public bodies such as the police as special constables, the criminal justice system as magistrates and so on.
- Employee supported volunteers or the provision of pro-bono support by employees or professionals (unless it is facilitated via a TSO such as Pro-Bono Economics).
- Volunteers participating in national fundraising appeals (for example, BBC Children in Need, Comic Relief, Sport Relief, or for large national charities such as Save the Children and Oxfam[43] etc.)

It is not being insinuated that these forms of volunteering lack value or are of a lesser value that those working directly for local TSOs. It is simply a question of calculating the contributions volunteers make, via the local third sector to society.

With these caveats in mind, it is possible to calculate the amount of energy which is produced through voluntarism[44] in TSOs of different sizes by estimating the number of hours regularly 'given' by volunteers.

Proxy financial 'replacement values' of the work of volunteers can be calculated using two measures: the National Minimum Wage and 80% average regional hourly

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

[44] In this analysis, average numbers of 'regular volunteers' have been estimated from response data in each of the 5 standardised TSO income categories used in this report: micro TSOs=17.5, small TSOs=20, medium TSOs=25, large TSOs=35, big TSOs=55. Clearly the range of numbers vary considerably in individual organisations, but for a scaling-up exercise, averages must be adopted. Similarly, the hours worked by individual volunteers may vary widely, but in this study the average number of hours given by volunteers is estimated at 72 per annum or 6 per month. The emphasis is on regular volunteers. In micro and smaller TSOs only, this includes the contribution of trustees and committee members who tend to get more directly involved in day-to-day activities or, in very small TSO, the group may be entirely reliant upon them to do so. Hours worked are scaled up to FTE employees on the following basis: 7.5-hour days at 220 working days per year.

wage as financial benchmarks. Estimates were scaled up to regional level using CCR-based population data.

These estimates will be reconfigured in late 2022 using the most recent TSTS data on regular volunteering.

Table 24 **Estimated number and proxy replacement value of regular volunteers in TSOs** (Revised June 2022)

Nation / English region	**Number of regular volunteers**	**Estimated total hours worked (millions)**	**Value at National Living Wage** (£millions)	**Number of full-time equivalent regular volunteers**	**80% average regional wage**	**Value produced at 80% average regional** (£millions)
North East England	163,997	11.6	110.6	7,057	22,012	155.3
North West England	468,616	33.3	316.1	20,165	23,623	476.1
Yorkshire & Humber	335,044	23.8	226.0	14,417	23,046	332.3
English West Midlands	384,366	27.3	259.3	16,539	24,000	396.9
English East Midlands	321,682	22.8	217.0	13,842	22,733	314.7
East of England	484,562	34.4	326.8	20,851	24,694	514.9
London[45]	1,024,431	72.7	691.0	44,082	31,773	1400.9
South East England	777,450	55.2	524.4	33,454	26,248	879.3
South West England	531,867	37.8	358.7	22,886	23,264	532.4
Wales	224,229	15.9	151.2	9,649	22,805	220.0
England and Wales	4,716,244	334.9	3,181.1	202,941	25,028	5,223.6

*simple averages of listed average regional wages.

Table 25 disaggregates the headline data presented in Table 24 by size of organisation in each region: providing estimates of total hours of regular volunteering given and its value by National Minimum Wage and 80% of average regional wage.

[45] Estimates of the number of volunteers may be over or underestimated in London because many larger organisations, such as charitable foundations, tend not to have volunteers. Large international organisations by contrast may have very large numbers of volunteers but they may not provide support in England and Wales. As a study of the local third sector, these estimates feel 'about right' when compared with other.

Table 25 **Hours of work and proxy replacement value of regular volunteers by region and size of TSOs** (2020)						
	Micro (£10,000 or less)	**Small (£10,001-£50,000)**	**Medium (£50,001 - £250,000)**	**Large (£250,001 - £1m)**	**Big (£1m – £25m)**	**All TSOs**
Total hours worked (£millions)						
North East England	3.2	2.2	2.3	1.4	1.3	10.3
North West England	10.0	6.8	7.2	3.8	3.7	31.5
Yorkshire & Humber	7.5	5.3	5.4	2.7	2.5	23.4
English East Midlands	8.9	5.3	4.6	2.2	2.1	23.2
English West Midlands	8.6	6.1	5.7	3.0	3.0	26.4
East of England	12.7	8.7	8.0	3.5	3.5	36.4
London	18.5	11.6	15.6	12.4	15.6	73.7
South East England	16.2	14.5	13.3	6.3	7.1	57.5
South West England	12.3	9.4	8.3	3.7	3.7	37.4
Wales	6.4	3.6	2.8	1.5	1.5	15.8
England and Wales	**104.2**	**73.6**	**73.2**	**40.5**	**43.9**	**335.5**
Total value at minimum wage (£millions)						
North East England	27.8	19.0	19.8	12.2	11.2	89.9
North West England	87.0	59.7	62.9	33.3	32.2	275.0
Yorkshire & Humber	65.8	46.3	46.9	23.9	21.4	204.3
English East Midlands	77.5	46.6	40.5	19.2	18.4	202.2
English West Midlands	75.0	53.1	49.5	26.2	26.2	229.9
East of England	110.5	75.7	70.2	30.6	30.5	317.4
London	161.5	101.4	135.9	107.8	136.3	642.8
South East England	141.2	126.7	116.4	54.7	62.3	501.2
South West England	107.1	81.8	72.1	32.5	32.4	325.9
Wales	55.7	31.5	24.5	13.2	12.8	137.7
England and Wales	**909.0**	**641.8**	**638.6**	**353.3**	**383.2**	**2,925.9**
Total value at 80% average wages (£millions)						
North East England	42.6	29.1	30.4	18.7	17.1	138.0
North West England	139.8	95.9	101.2	53.5	51.7	442.1
Yorkshire & Humber	102.7	72.3	73.2	37.3	33.4	318.9
English East Midlands	122.5	73.6	64.1	30.4	29.1	319.7
English West Midlands	119.4	84.7	78.8	41.7	41.8	366.3
East of England	194.9	133.5	123.7	53.9	53.7	559.7
London	326.4	205.0	274.6	217.8	275.4	1,299.1
South East England	259.7	232.9	214.0	100.5	114.5	921.6
South West England	173.7	132.7	117.0	52.7	52.6	528.7
Wales	87.1	49.3	38.3	20.7	20.0	215.4
England and Wales	**1,568.8**	**1,109.0**	**1,115.3**	**627.2**	**689.3**	**5,109.5**

Summarising charts are presented below to capture key findings from the above tables. Figure 10 shows the proxy financial value of volunteering by size of organisation in England and Wales. Figure 11 shows the proxy value of volunteering produced by nation and English region.

Figure 10 **Proxy financial replacement value of regular volunteering by TSO size** (£millions, 2020)

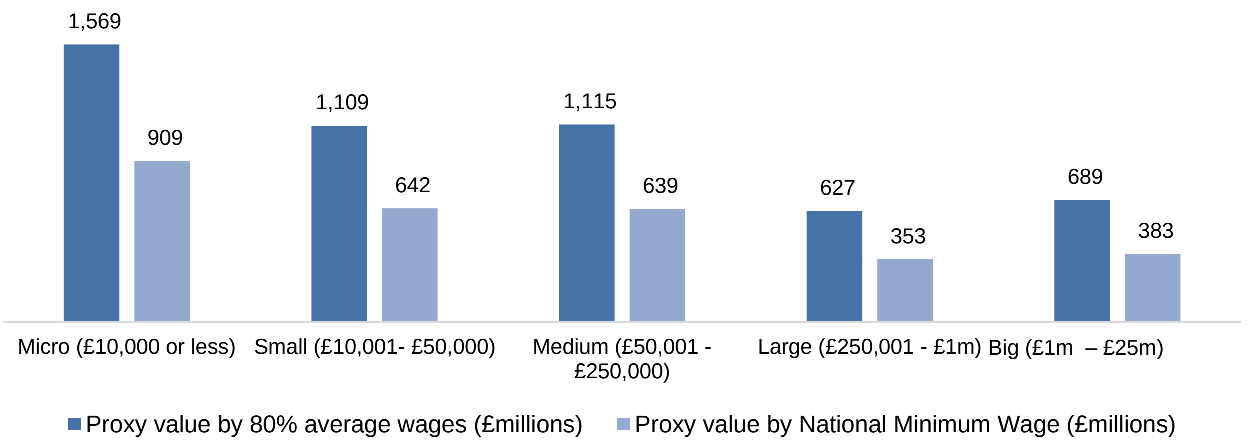
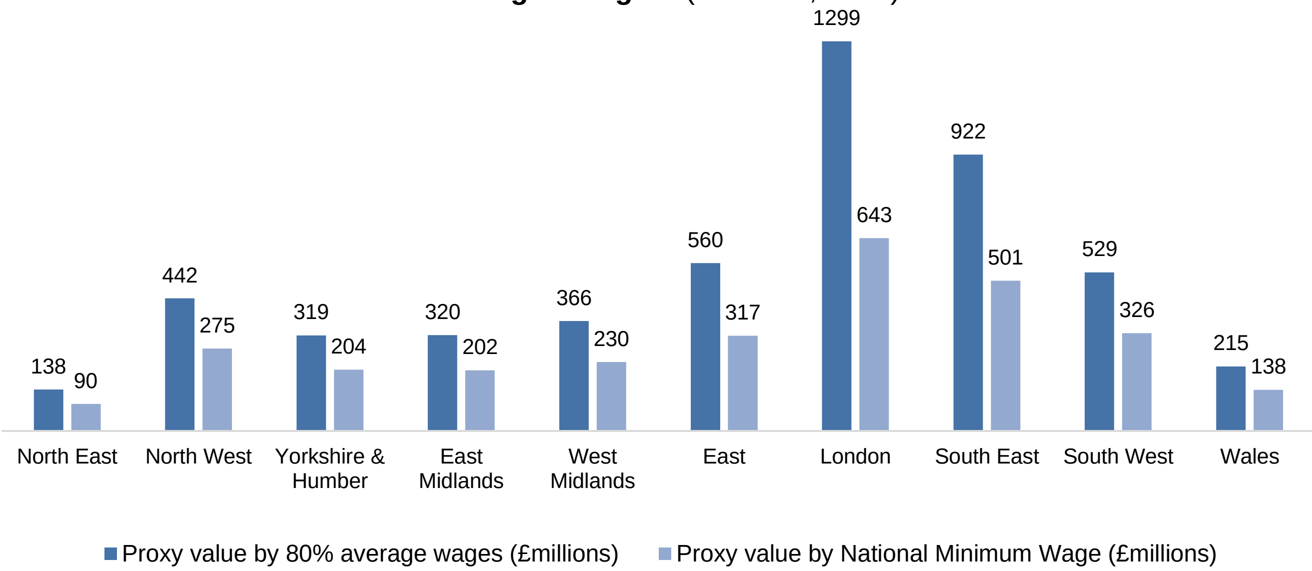


Figure 11 **Proxy financial replacement value of volunteering by nation and English region** (£millions, 2020)



In Figure 11, an impression may be given that in the south of England TSOs are somewhat more productive in their use of volunteers than is the case in the midlands and the north. That would be a misleading conclusion to draw. As shown in Figure 12, when the production of volunteer time by TSOs is compared as unit values (i.e. the average amount of proxy value produced by the average TSO in a region or nation) then, regional variations all but disappear.[46]

[46] Variations in the 80% average wage bars are produced to some extent by differentials in regional average wages which are incorporated into the data. The National Minimum Wage categories, by contrast, are consistent - so these provide the more reliable comparative indicator.

What Figure 11 demonstrates, therefore, is that there are a lot more TSOs in the south per capita than is the case in Wales, the midlands and the north (as shown in previous sections of this report). Why that might be the case and what the consequences may be will the subject of a separate briefing paper.

Figure 12 **'Added value' produced by regular volunteers per TSO in nations and English regions** (2020)

The analysis presented in Table 12 shows the volume of activity of volunteers and attributes two financial indicators for the replacement value of their work. As such it provides a crude estimate of the ‘added value’ that volunteers produce for individual TSOs.

No attempt is made explicitly to take the analysis further at this stage to calculate the ‘social value’ produced by volunteers. Defining social value in general terms is a difficult thing to do because perceptions of what should be valued and what should not vary from person to person. Even if observers could agree on what constituted social value, it would be difficult to disentangle what led to such an outcome. Consequently, when such estimates are made, they tend to involve a ‘leap of faith’ rather than relying on evidence-based judgement. Collecting compelling evidence on this topic in 2022 will therefore be a priority.

It is, nevertheless, useful to consider if different organisational types produce different levels of value relative to the financial resources they command (see Table 26). It is clear from these data that informal organisations rely very heavily upon volunteers to do their work relative to their reliance on financial resources. Most of their work is produced, in other words, from voluntarism. As TSOs become larger and more formal in structure and practice, the less they tend to rely on volunteers.

As a theoretical exercise it helps to make a clear point about the importance of differentiating between organisations with different sizes and structures. And as shown in Figure 13 which uses TSTS data, it is abundantly clear that the larger TSOs become, they rely less heavily on volunteers to get their work done.

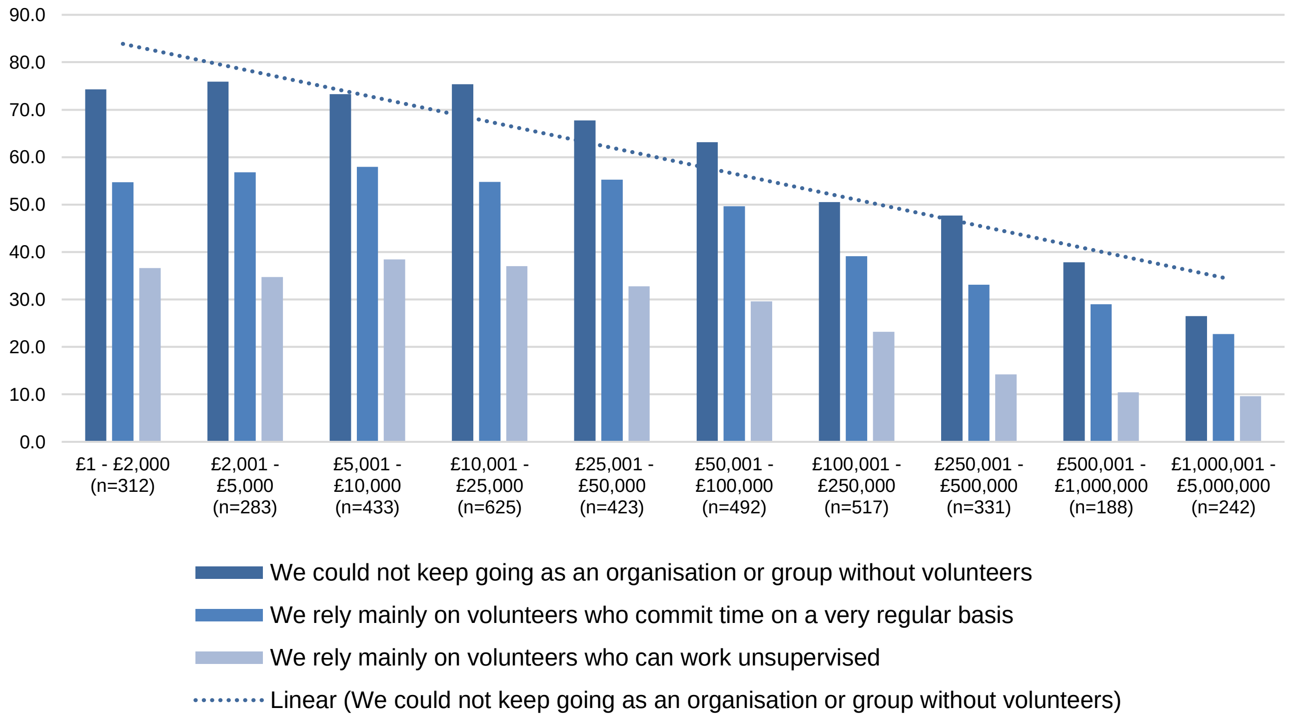
This point should not be taken too far. It is equally clear that even amongst the largest TSOs there is still substantive reliance on volunteers to deliver their work –

TSOs are clearly, in this respect, different from private sector businesses or public sector organisations which rely on employees.

Table 26 **Theoretical estimates of the 'added value' produced by regular volunteers in proportion of TSOs actual financial income** (by size of organisation, 2020)

	Informal organisations		*Semi-formal organisations*	*Formal organisations*	*Formal complex organisations*
	Micro (income £10,000 or less)	**Small** (income £10,001-£50,000)	**Medium** (income £50,001 - £250,000)	**Large** (income £250,001 - £1m)	**Big** (income £1m - £25m)
Average actual financial income of TSOs in England and Wales	£3,023	£21,143	£117,215	£486,612	£4,532,531
Average proxy value of work produced by regular volunteers (at 80% average regional wages)	£17,437	£21,423	£26,642	£36,847	£91,357
Sum of average financial income and proxy value of volunteer income	£20,460	£42,566	£143,857	£523,459	£4,623,888
Percentage 'added value' regular volunteers produce as a proportion of total financial and proxy income	85.2%	50.3%	18.5%	7.0%	2.0%
Percentage 'added value' regular volunteers produce as a percentage of average actual income	576.8%	101.3%	22.7%	7.6%	2.0%

Figure 13 **Percentage of TSOs which 'strongly agree' with statements about their reliance on volunteers** (Third Sector Trends Study: England and Wales 2019)



Summary and next steps

This working paper provides a basis for future analysis of existing data on the local third sector across England and Wales and prepares the ground for the sixth iteration of the Third Sector Trends Study in 2022.

- The analysis has produced working estimates on the population of TSOs across nations and English regions by size of organisations.
- By using robust income multipliers for TSOs of different sizes it has been possible to make reliable estimates on the distribution of sector income regionally, spatially and in areas of greater or lesser affluence.
- Estimates have been generated on the number of employees and volunteers in the sector together with actual and proxy financial values for the cost of work contributed.

Having established the above, it will now be possible to draw upon TSTS data on sector practices, objectives and interactions (with other TSOs or with the public and private sector) to create more detailed assessments of variations in sector dynamics and social impact in different localities.

In 2021 and 2022 opportunities arose to develop the approach further in studies based in Yorkshire and Humber and Cornwall. This analysis led to a consultation analysis to determine commonly accepted ways of calculating the tangible intangible social value produced by the Third Sector in relation to the energy it has available to do work.

The analysis will be summarised here at a later date. But a detailed explanation of the methodological development can be found here:

The difference the third sector makes - St Chad's College Durham (stchads.ac.uk) and The contribution of the VCSE sector to health and wellbeing in Humber, Coast and Vale - St Chad's College Durham (stchads.ac.uk)

Data have also been used in Cornwall and Isles of Scilly to assess the strengths of the VCSE sector to support the development of strategies to align sector activity with NHS England priorities for Integrated Care Systems. The first of a series of reports can be found here:

Voluntary sector dynamics in Cornwall and Isles of Scilly - St Chad's College Durham (stchads.ac.uk)

It has also been possible to do in-depth work on aspects of sector structure and activity which has previously been neglected. Including, for example, issues associated with diversity in sector leadership:

Diversity and inclusion in Third Sector leadership: why is it not happening? - St Chad's College Durham (stchads.ac.uk)

and how the VCSE sector works with the private sector:

Going the extra mile, how business supports charities - St Chad's College Durham (stchads.ac.uk)

Appendix: London is both typical and exceptional

London presents something of an anomaly. It is clear that while London is the focus for great wealth in the UK, charities tend to be more likely to be based in the poorest areas of the city, and relatively few are based in the richest areas. Table A1 shows the percentages of charities in richer and poorer areas in London boroughs. Boroughs are listed in rank order from the most affluent areas to the least. To understand these headline statistics, much work would need to be done on the location of charities taking into account, for example, property prices and business rents.

Table A1 Variations in the percentages of charities in richer or poorer London boroughs

*(Inner London Boroughs are shown in **bold** text)*	**Poorest** EID 1-2	EID 3-4	**Middle** EID 5-6	EID 7-8	**Richest** EID 9-10	**Number of registered charities**	**Mean score** (ranked from most to least affluent area)
Richmond upon Thames	0.0	3.0	7.9	35.1	54.0	672	8.8
Merton	1.0	21.2	19.2	14.3	44.4	496	7.6
Sutton	2.2	14.7	19.4	30.6	33.1	402	7.6
Bromley	5.1	14.1	23.5	19.1	38.1	722	7.4
Kingston on Thames	1.0	9.9	31.1	35.9	22.2	415	7.4
Harrow	1.0	23.6	32.7	21.8	20.9	698	6.8
Havering	7.8	19.9	22.8	33.1	16.4	408	6.6
Hillingdon	5.0	21.0	34.0	19.5	20.6	539	6.6
Bexley	9.3	22.8	25.5	21.6	20.8	408	6.4
City of London	0.0	2.6	85.3	0.0	12.1	1,290	6.4
Barnet	4.4	20.4	42.6	32.3	0.3	1,864	6.1
Wandsworth	6.9	27.8	33.7	24.3	7.4	713	6.0
Kensington & Chelsea	19.2	12.0	26.4	41.3	1.0	874	5.9
Westminster	6.0	31.6	30.2	32.2	0.0	2,912	5.8
Redbridge	11.9	28.0	33.3	20.8	6.0	615	5.6
Croydon	14.7	38.2	22.1	12.3	12.7	883	5.4
Hounslow	11.2	40.7	25.8	21.8	0.6	519	5.2
Ealing	19.5	29.8	31.6	15.8	3.4	766	5.1
Enfield	24.2	30.3	25.7	8.4	11.4	677	5.0
London average score	**27.2**	**28.0**	**23.3**	**14.6**	**6.9**	**28,968**	**4.9**
Camden	22.3	47.6	23.4	6.8	0.0	1,982	4.3
Hammersmith & Fulham	28.2	41.3	24.6	5.9	0.0	578	4.2
Brent	27.7	50.8	17.2	4.3	0.0	762	4.0
Southwark	42.0	41.3	9.0	6.5	1.1	1,270	3.7
Haringey	54.9	23.7	9.7	11.7	0.0	734	3.6
Greenwich	40.3	47.5	9.2	3.0	0.0	631	3.5
Lewisham	38.8	48.3	12.1	0.8	0.0	652	3.5
Waltham Forest	43.6	49.0	2.4	5.0	0.0	500	3.4
Islington	54.4	32.3	13.3	0.0	0.0	1,314	3.2
Barking & Dagenham	49.7	44.5	5.7	0.0	0.0	384	3.1
Lambeth	60.1	34.7	5.3	0.0	0.0	1,137	2.9
Tower Hamlets	74.3	12.0	11.1	2.6	0.0	938	2.8
Hackney	85.2	14.8	0.0	0.0	0.0	1483	2.3
Newham	89.6	10.4	0.0	0.0	0.0	719	2.2

Table A2 shows the distribution of charities by size across London. Boroughs are ranked according those with the largest to those with the smallest percentage of big charities (with income between £1m - £25m). The table shows that *Big* charities (and also *Major* charities) are concentrated primarily in the inner London boroughs.[47]

Table A2 Percentages of charities by size in London boroughs

*(Shown in rank order for Big charities. Inner London Boroughs are shown in **bold** text)*	**Micro** £10,000 or less	**Small** £10,001 - £50,000	**Medium** £50,001 - £250,000	**Large** £250,001 - £1m	**Big** £1,000,001 - £25m	**Major** £25m+	Number of registered charities
City of London	28.8	15.4	23.2	15.5	15.1	2.0	1,436
Islington	31.9	16.7	19.4	16.0	14.4	1.6	1,354
Westminster	34.9	14.1	19.1	16.0	14.1	1.8	2,967
Camden	32.7	15.6	19.9	16.6	13.9	1.3	2,028
Southwark	34.7	18.6	18.9	14.3	12.3	1.2	1,289
Hackney	27.5	14.5	25.1	20.9	11.6	0.4	1,540
Tower Hamlets	34.3	17.1	22.0	15.3	10.2	1.1	1,004
Hammersmith & Fulham	37.2	17.9	21.8	13.3	9.2	0.7	588
Kensington & Chelsea	36.1	19.2	22.3	12.8	9.1	0.6	882
Lambeth	34.3	19.5	21.8	14.2	9.0	1.1	1,168
London average score	**36.8**	**20.2**	**21.6**	**12.3**	**8.3**	**0.8**	**29,742**
Barnet	36.5	20.6	24.0	11.5	7.1	0.4	1,894
Richmond upon Thames	29.9	26.4	25.1	10.7	6.9	1.0	685
Wandsworth	37.7	22.9	20.0	12.8	6.1	0.4	734
Kingston on Thames	35.2	30.1	19.4	8.9	6.0	0.5	418
Ealing	38.7	24.6	21.5	9.8	5.3	0.0	775
Haringey	39.2	22.3	22.2	11.0	5.1	0.1	743
Brent	45.1	16.5	23.5	10.1	4.9	0.0	783
Hounslow	44.1	20.6	22.3	8.1	4.5	0.2	528
Greenwich	44.0	21.9	20.7	8.3	4.5	0.6	671
Merton	39.0	25.3	21.5	9.0	4.4	0.8	502
Newham	44.5	20.6	22.3	8.0	4.1	0.5	749
Harrow	41.1	25.9	20.6	8.2	3.8	0.4	718
Lewisham	40.8	22.5	25.8	7.1	3.6	0.2	662
Bexley	36.4	34.9	19.4	5.7	3.3	0.2	418
Redbridge	45.3	23.5	20.3	7.3	3.2	0.3	616
Croydon	41.4	26.3	21.2	7.8	3.2	0.1	897
Waltham Forest	49.6	19.6	20.2	7.3	3.2	0.0	504
Sutton	37.1	28.3	22.4	9.0	3.2	0.0	410
Bromley	39.1	26.7	23.7	7.2	3.2	0.3	727
Hillingdon	44.3	22.8	22.6	7.4	2.9	0.0	544
Barking and Dagenham	41.9	29.5	20.3	5.7	2.5	0.0	403
Havering	37.1	31.3	21.5	7.7	2.4	0.0	418
Enfield	43.4	23.5	23.6	7.4	2.0	0.0	686

[47] Definition of inner London boroughs as provided by London Councils. https://www.londoncouncils.gov.uk/node/1938

Policy&Practice

St Chad’s College, Durham University

Policy&Practice is a multidisciplinary research group based at St Chad’s College, Durham University. Our staff, research associates and fellows are committed to the promotion of social justice in the United Kingdom and beyond.

Policy&Practice is the banner under which this work is communicated to a wider community of interest. The College is committed to undertaking research, policy analysis and evaluation that makes a difference to the way policy makers and practitioners carry out their work, aimed ultimately at increasing the benefit gained by the people for whom they work. We do this through applied research and evaluation for a wide range of private sector organisations, independent charitable foundations, national and local government, charities and other non-profit organisations.

Our work is heavily embedded in the North of England, but we do not confine our work to this area. Several national and international studies have been undertaken over the years in continental Europe, the United States, South Africa and Japan. What we hope to do is to use our learning to help increase our scope for understanding complex social, economic and political issues and our ability to help people tackle challenges in a positive, pragmatic and effective way in new contexts.

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