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Hampshire's State of the VCSE Sector

March 2023

Contents

Acknowledgements	Page 3
Executive Summary	Page 4
Methodology	Page 5
Introduction	Page 6
Wider Context: The Cost of Living Crisis	Page 7
Hampshire's VCSE Sector	Page 8
Impact on Financial Sustainability	Page 11
Impact on Organisational Governance	Page 14
Impact on Volunteering	Page 16
Impact on Service Delivery	Page 20
Spotlight: Warm Hubs	Page 23
Recommendations	Page 25
Next Steps	Page 26
Bibliography	Page 27



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The Hampshire CVS Network is comprised of eight councils for voluntary services within Hampshire: Action Hampshire – Basingstoke Voluntary Action – Community First – Hart Voluntary Action – Gosport Voluntary Action – One Community – Rushmoor Voluntary Services – Unity. The Network provides support and guidance to VCSE organisations, training and events, runs volunteer centres and community transport services.

Executive Summary



Every two years since 2009, Action Hampshire has undertaken the State of the Sector research, on behalf of the Hampshire CVS Network. The purpose of this research project is to develop an overall picture of the sector and to increase understanding of areas in which organisations are thriving and where they may require more support. Understanding such information allows VCSE organisations' voices to be heard, ensuring the Hampshire CVS Network and wider stakeholders can provide more targeted support.

This year the research focused on the cost of living crisis, as this is a widely recognised situation within UK society that has had significant socio-economic effects. The research highlights that this crisis is certainly having an impact on Hampshire's VCSE sector, particularly finances, volunteer capacity, and service delivery. However, the extent of its impact is yet to be realised as the situation appears to still be unfolding, with some organisations reporting no changes within their organisation and others implying the effects of the crisis are yet to come. Importantly, a number of organisations stated they were still recovering from the pandemic and now the cost of living crisis has brought on extra pressures, a situation also felt by local communities which has resulted in an increased need for VCSE sector support.

Some issues uncovered in our 2021 State of the Sector report appear to be continuing, such as difficulties concerning volunteer recruitment which is only getting worse due to the cost of living crisis impacting on volunteer availability. Yet Hampshire's VCSE sector also has some key strengths that must be celebrated, like its overall successful paid staff and volunteer retention. Overall, there are some key findings relating to finances and volunteers that ring

true for many of the organisations consulted but as expected in a diverse sector, the state of the VCSE sector in Hampshire is not homogenous and it is hoped these complexities are reflected throughout. However, the quote below from a participating organisation summarises the experiences of many across the sector and sets the scene for the following report:

“Increased costs for Buildings, energy and utilities, Increased demand for services, Pay inflation at a time when there is a stagnant employment market we have had to review pay and increase salaries to retain staff but we are tied into 3-5 year funding with no uplift, pressure on wider systems e.g. social care, education, health etc. has meant that we have greater complexity of need and reduced resources, this [compounds] the staffing issue and extremely high safeguarding so we have needed to invest in greater support for staff with training, supervision and external supervision increasing core costs. Our insurance, activity costs (everything is more expensive and we are supplying more food during our sessions than ever before) and software [licenses] have all significantly increased. our core costs are more 20% but the market or what we've historically costed for is 15% so we are chasing this gap. We've also seen fewer volunteers with people needing paid employment.”



Methodology

The 2023 edition of the research aimed to answer the following research questions:

- What is the current state of the VCSE sector in Hampshire?
- What does the VCSE sector in Hampshire look like in comparison to previous years?
- How has the cost of living crisis impacted the VCSE sector in Hampshire?

In addition to these main three research questions, we proposed a series of sub-questions that addressed five VCSE related themes: financial sustainability; organisational governance; volunteering; service delivery; and infrastructure. Most of these questions are stated throughout the report, providing a point of reference that the report aims to speak to.

Multiple research methods were used to collect both primary and secondary data to answer the proposed questions. These were:

1. Registration data review

In November/December 2022, data from the Charity Commission was reviewed to understand the number and type of organisations opened and closed since October 2021. Data provided by Girlguiding South West England and Scouts Hampshire online data was reviewed to confirm the number of units in the Hampshire area.



2. Literature review

A brief literature review was conducted in November/December 2022, to provide a deeper understanding of both the national and regional VCSE sector. In addition to this, both quantitative and qualitative sources were drawn upon to increase awareness of the current social and political landscape, to ensure the findings could be understood contextually.



3. Survey

From early December 2022 to mid January 2023, VCSE organisations were asked to complete the State of the Sector survey, which had both quantitative and qualitative questions that addressed the five research themes. The data was cleaned (i.e. any duplicate organisations and those whose organisation could not be verified were removed) to reveal 197 overall responses. However, due to survey routing amongst other reasons, the sample size for each question was different, which is noted in the footnotes.



4. Focus groups & Interviews

At the end of the survey, organisations were asked to express their interest in participating in a focus group. From this, organisations were then contacted and nine confirmed their involvement. Due to timing and scheduling difficulties, three of these organisations participated in an individual interview instead but answered all the same questions and topics. All focus groups and interviews were held online (Zoom/MS Teams) in January 2023, and each lasted one hour, following a semi-structured interview guide that asked organisations to reflect on their experiences of the five research themes.



5. Review Session

At the end of the survey, organisations were also asked to express their interest in participating in a review session. Once the survey and focus group data had been analysed, those who had expressed interest were invited to attend one of two online (Zoom) review sessions on 31st January 2023. Overall, 13 organisations participated (six in one session and seven in the other) in a one-hour session where they were asked to comment on the initial findings in relation to their own experiences and discuss what recommendations the research should offer. All participating organisations were offered a £25 honorarium for their time. The data from these sessions was used to confirm the findings reflect organisations' experiences and create the report recommendations.



Important considerations:

- Throughout the report, comparisons have been made to previous iterations of this research, however, these must be used with caution due to the differences in methodology and response rate.
- The terminology used in this report may not be reflective of that which is used by every organisation in Hampshire's VCSE sector, due to the diverse range of language applied by different organisations.

Introduction

This report is the most recent in our series of 'State of the Sector' research projects that began in 2009, with the overall aim of:

- Developing a clear picture of where Hampshire's VCSE sector is at, and what organisations need in order to better deliver services
- Ensuring VCSE organisations in Hampshire feel heard and see their experiences reflected
- Working in partnership with VCSE organisations to support Hampshire communities to thrive

As stated in the methodology, to address these aims, three main research questions and multiple sub-questions (based on five themes)

were posed. Each section of the following report addresses an individual theme, with the purpose of answering the research sub-questions. The only theme not individually addressed in the report is 'Infrastructure' which focused on organisations' feedback on the Hampshire CVS Network. Data related to this theme was analysed and embedded across all themes to highlight the various ways the network should continue to support or adapt their support for organisations in the various aspects of their work.

This year the research particularly focused on the cost of living crisis, due to its significant impact nationally, and this is to where our attention first turns.



The Wider Context: The Cost of Living Crisis



Hourston (2023) defines the ‘cost of living crisis’ as the decrease in disposable income (the remaining amount of money after taxes and bills), which has been occurring in the UK since late 2021. Inflation, the average change in cost of everyday products and services, has been noted as the cause of the issue as it has been rising faster and higher than household income (Hourston, 2023). In October 2022, consumer prices were 11.1% higher than the previous year, the highest ever recorded rate of inflation (Francis-Devine et al, 2022). Moreover, the Office for Budget Responsibility (2022) predicts that ‘real’ post-tax household income will see the biggest fall since records began, declining by 4.3% in 2022-23.

The rise in inflation has been caused by several issues. Firstly, the Covid-19 pandemic created a high global demand for everyday goods, a problem which was then exacerbated by connected supply chain disruption (Francis-Devine et al, 2022). Russia’s invasion of Ukraine during February 2022 resulted in fuel price increases and in October 2022 domestic gas prices had increased by 129% (Francis-Devine et al, 2022). Critics of the government draw attention to the increase in National Insurance and removal of the £20 uplift to

welfare benefits as additional contributors to the fall in ‘real’ disposable income, alongside the exponential rise in inflation (Pickard-Whitehead, 2022).

As this crisis is ongoing, so is the research into its effects on the public. However, the large-scale strikes regarding rate of pay, amongst other issues, across multiple industries/sectors in the UK (BBC, 2023), highlights how people are struggling to cope with rising energy and food bills. High levels of anxiety continue amongst the public, as 54% of PWC’s (2022) research respondents were very concerned about their living costs, compared to only 38% in 2021. In 2020/21, 1 in 5 people in the UK were in poverty, with the Joseph Rowntree Foundation (2023) reporting that this will most likely get worse due to the effects of the cost of living crisis, in addition to a fall in the value of unemployment benefits. Research from the charity also found that across the poorest fifth of families, over 7 in 10 are going without essentials and over half are in arrears (Joseph Rowntree Foundation, 2023). Campaigns started by trade unions and community organisations, such as ‘Enough is Enough’, aim to address the issues caused by the cost of living crisis, by demanding a real pay rise, decreases in energy bills and an end to food poverty in addition to other things (Enough is Enough, no date.). Clearly this is a dire situation which the VCSE sector will not only be facing itself, but also supporting individuals and families affected by it too, making it an important focus of this year’s State of the Sector research.



Hampshire's VCSE Sector

As of November 2022, Hampshire's VCSE Sector is made up of:

- 2,709 registered charities (346 CIOs, 302 charitable companies, 270 trusts, 93 previously excepted organisations, and 1698 others) based and operating in Hampshire County and 471 in Portsmouth and Southampton
- 710 Girlguiding groups (plus 44 on the Isle of Wight)
- 467 community halls and buildings
- 236 Scout groups
- 199 community active sports clubs
- 256 registered CICs
- 40 Army Cadet troops
- 5,127 estimated 'below the radar' community groups and organisations in Hampshire county and 1,672 in Portsmouth and Southampton. These are estimated figures based on conservative methods for approximating the number of unregistered 'below-the-radar' community organisations (Mohan et al, 2010) and could be much higher¹.

From this information we estimate there are 12,005 VCSE organisations in Hampshire: 9,862 across the county and a further 2,143 in Portsmouth and Southampton. However, some of these organisations may be captured twice, once as a registered charity and again within another category, making it difficult to determine an exact number. In addition to this number, there were 1,699 registered charities based outside of Hampshire who state they serve the Hampshire

population in their Charity Commission profile.

Between the beginning of August 2021 and the end of November 2022, 65 new charities were registered, a similar level to the amount reported in 2019-2020 and an increase on last years' number of new charities. According to the Charity Commission data, 201 charities were removed between the beginning of August 2021 and the end of November 2022. Of this number only 34 recorded their last financial year within this time period, suggesting the remaining 167 charities may have closed earlier than this 2021/2022 time period but have only legally been removed recently. In addition, it was found that some of these charities' work continued but under another charity name, or they had been absorbed into another charity, trust, organisation, or changed the type of charity organisation they were registered as. This perhaps highlights that some charities are struggling to survive on their own and are deciding to merge assets in order to continue their services (in some form).

The Charity Commission data reveals that most registered charities in Hampshire are micro-sized, with 44% reporting an annual income of under £10,000. Adding this to the total number of organisations reporting £10K-£100K annual income (34%) reveals that the majority of Hampshire based VCSE organisations can be categorised as 'small', and the remaining 22% of organisations are medium or large.



¹ Hampshire population according to the 2021 census data: 1,400,899. Portsmouth and Southampton population according to the 2021 census data: 456,914. These numbers were used when calculating 3.66 below the radar organisations per 1000 people.

Chart 1: Size of VCSE Organisations in Hampshire

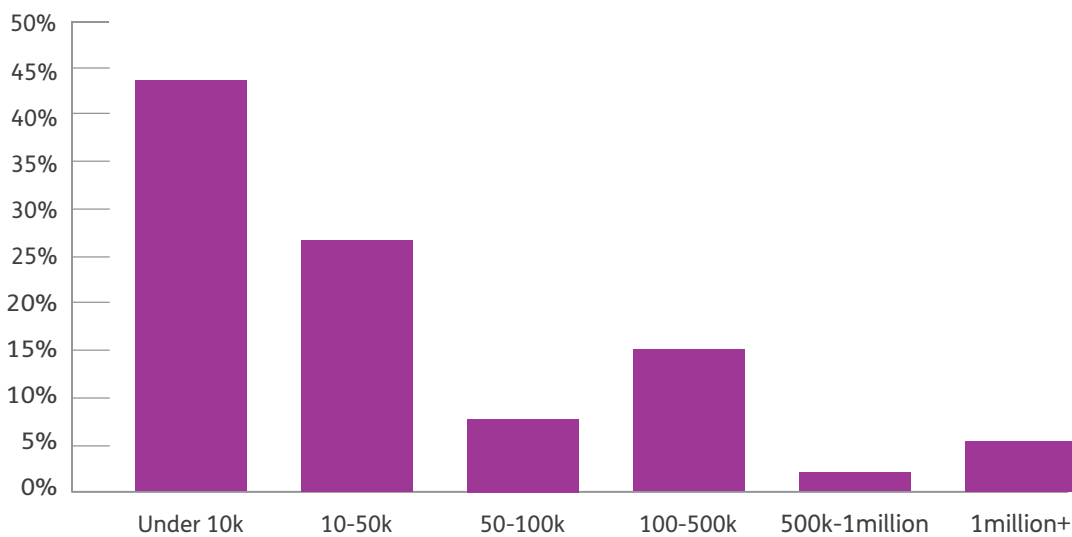


Chart 1: chart showing the size of VCSE organisations in Hampshire, scaling up to 50% on the left and in cost from under 10K to over 1 million along the bottom.

Although our survey only captured 7% of the registered charities' voices, the size of the responding organisations mirrored that of Hampshire's VCSE sector overall.

Chart 2: Size of Responding VCSE Organisations

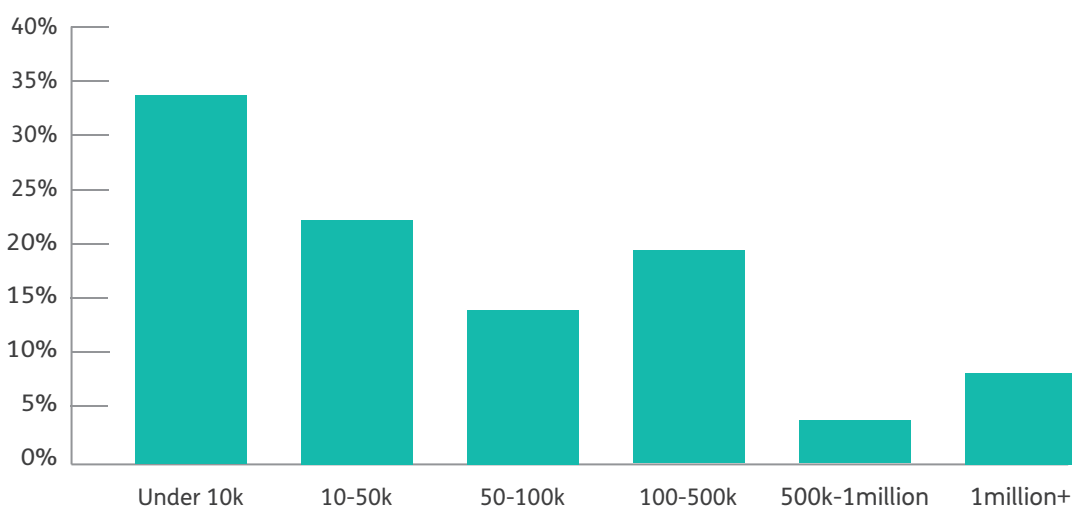


Chart 2: chart showing the size of VCSE organisations in Hampshire with a smaller percentage scale of up to 40% on the left and in cost from under 10K to over 1 million along the bottom.

Organisations were asked to state their focus or the kind of community they support. The responses varied greatly, evidencing the diversity of work being carried out in the sector. Of those that responded 'Other', some stated that they work on many of the causes listed and others provided more specific details on their work, examples include "Reduce consumption and waste, increase active travel" and "IT and Media support within VCSE".

Chart 3: Type of VCSE Organisation

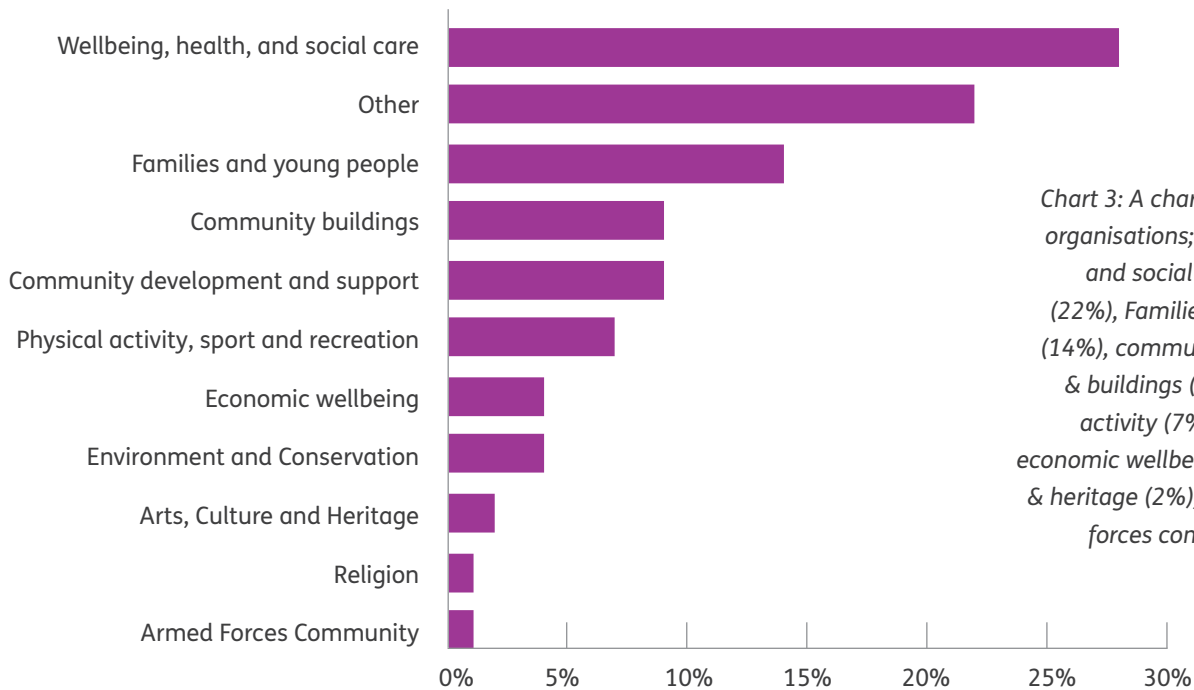
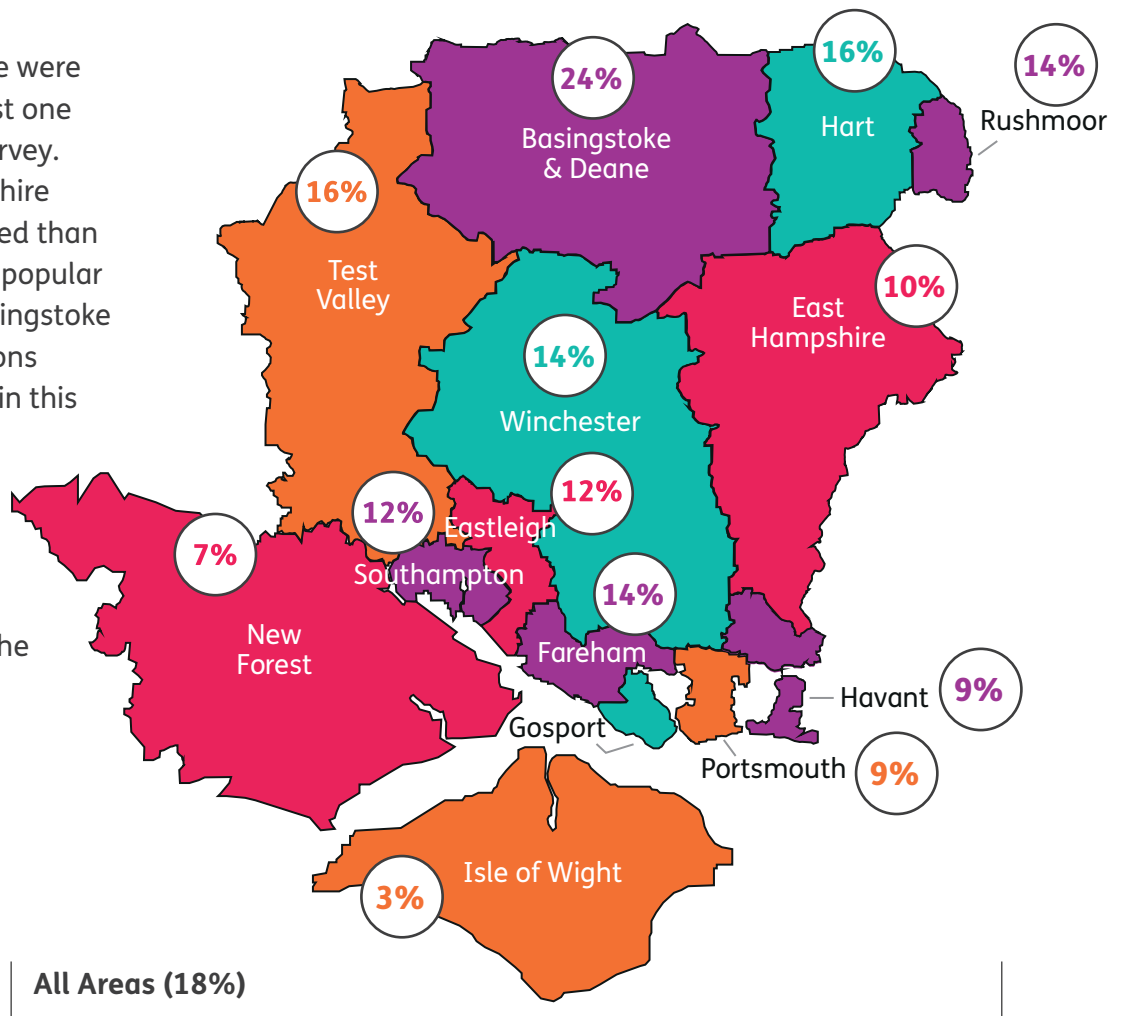


Chart 3: A chart of types of VCSE organisations; wellbeing, health and social care (28%), other (22%), Families & young people (14%), community development & buildings (tied 9%), physical activity (7%), environment & economic wellbeing (tied 4%), arts & heritage (2%), religion & armed forces community (tied 1%)

Chart 4: Map of Hampshire VCSE Organisation Representation

All areas of Hampshire were represented by at least one organisation in our survey. Some areas of Hampshire were better represented than others, with the most popular area served being Basingstoke (as 24% of organisations stated they work within this area). However, 18% of organisations shared they work within 'All of Hampshire', providing a good scope across the whole of the county.



Impact on Financial Sustainability



Sub-questions:

1. What is the financial health of the VCSE sector in Hampshire?
2. What financial support do VCSE organisations in Hampshire need to continue?
3. What has been the impact of the cost of living crisis on funding and reserves? How does this vary by organisation size/type?
4. How likely is it that that organisations will survive/maintain financial security for the duration of the cost of living crisis?
5. What support do organisations need in regards to funding?

Key Findings:

- The financial health of Hampshire's VCSE Sector is a mixed picture, with some financially struggling more than others.
- The cost of living crisis has had an impact on most organisations' financial sustainability. This is primarily due to the increasing cost of utilities bills and need to increase staff wages. However, others have suggested they have not seen it have an impact yet and their finances have instead remained stable.
- Reduced income was one of the top three challenges organisations stated they expect to face within the next two years.

The diversity of Hampshire's VCSE sector has, of course, resulted in a mixed picture financially. 39% of survey respondents said their annual income had decreased a little/a lot, yet 36% said this had

increased a little/a lot, with the remaining number of organisations (25%) indicating no change at all². When looking at this by organisation size, it appears that smaller organisations have been the most affected, with those in the £50K to £100K bracket having the biggest percentage reporting their annual income had decreased either a little/a lot (48%).³ Although those in the under £10K bracket had the smallest percentage reporting increases in annual income, 40% of this type of respondent said their income had not changed, suggesting that micro-sized organisations' financial situation has remained fairly stable. Moreover, 67% of the under £10K organisation respondents said the cost of living crisis had not impacted their organisation's financial sustainability, further supporting the suggestion that the majority of this category's finances have remained stable. Insight from the focus groups suggests this could be because many micro-sized organisations do not have staffing costs as they are fully run by volunteers, resulting in little expenditure. It also appears that for some, they are funded by membership fees, so do not experience the issues that come with finding new grants to support their work. Moreover, some have benefitted from recent freezes in utilities costs, although this could become an issue in the future as these are now coming to an end.

One issue potentially facing some organisations that rely on grants is the way funding is currently distributed. Some organisations suggested that funding opportunities were mostly going to those who deliver frontline services, such as foodbanks, to address the cost of living crisis, resulting in less funding going to other types of organisations;

²N = 157

³N = 156

which could explain the reduced annual income for some. However, on the other side of this, a number of organisations delivering these frontline services highlighted how funding opportunities had become more competitive, as many organisations had been encouraged to address the issues brought on by the cost of living crisis by delivering services such as ‘warm hubs’.

This mixed financial picture continues when looking at organisations’ reserves. Worryingly, 37% of organisations have said their financial reserves have decreased either a little or a lot⁴. This appears to be affecting smaller and larger organisations more so than mid-sized organisations, who had the largest percentages reporting increases in their reserves. 45% of those surveyed in our 2021 State of the Sector research reported a decrease or negative impact to their reserves⁵. Although this is only a slightly higher percentage than the current research, this could be a positive indication that organisations are beginning to financially recover from the pandemic or financial sustainability is improving for some. It must be noted, the 2021 State of the Sector research received a significantly higher number of responses, so we cannot make any definitive conclusions about whether less organisations are using their reserves to stay afloat.

Despite only 39% of respondents reporting their annual income had decreased in some capacity, 61% said the cost of living crisis has had an impact on their organisation’s financial sustainability, indicating the financial health of Hampshire’s VCSE sector could be in decline as the duration of this current crisis is unknown. Some focus group participants indicated they are in a stable financial position now but the cost of living crisis has brought uncertainty with it, and they could not predict how it might impact them financially in the future. However, a significant proportion of organisations emphasised the increasing cost of utility bills were currently causing financial burden, a consistent theme within the survey too.

Despite only 39% of respondents reporting their annual income had decreased in some capacity, 61% said the cost of living crisis has had an impact on their organisation’s financial sustainability, indicating the financial health of Hampshire’s VCSE sector could be in decline as the duration of this current crisis is unknown⁶. Some focus group participants indicated they are in a stable financial position now but the cost of living crisis has brought uncertainty with it, and they could not predict how it might impact them financially in the future. However, a significant proportion of organisations emphasised the increasing cost of utility bills were currently causing financial burden, a consistent theme within the survey too.

“It has negatively impacted it as all materials have increased in value but our income has remained the same and our outputs have also remained the same, so we are forced to dip into reserves.”

Again, reduced income was cited as a current challenge, with this set to only get worse as it was one of the most common answers when respondents were asked what top three challenges they expect to face within the next two years. Reduced income coupled with rising utilities costs and, for some, an increase in demand for their services (as discussed further on), indicates that maintaining financial sustainability may be difficult for many organisations.

This reflects the challenges currently



⁴N = 155

⁵N = 620

⁶N = 157

experienced nationally. As highlighted by the Centre for Progressive Policy (2022a) the exponential rise in energy bills has left some organisations casting doubt over their ability to financially survive, unless support is provided by the government. Even though the financial health of some of Hampshire's VCSE sector is looking precarious, overall organisations were positive they would still be operating in two years time. Of those who responded, 69% said they are very likely and 19% said quite likely to be operating at the same point in two years time⁷. Moreover, to address the looming prospect of a reduction in annual income, some organisations shared the ways in which they diversified their activities in order to maintain financial sustainability.

Such activity reflects the resilience and tenacity of the sector to continue supporting their communities, despite facing a second crisis shortly after the pandemic. Yet although this is the case for some organisations, there was a small percentage of organisations who stated they were unlikely to be or unsure if they would be operating in two years time, indicating the need for swift action to ensure enough support is in place to sustain their work. Regarding the type of support needed, organisations requested more information about grant opportunities and also suggested the Hampshire CVS Network undertake more advocacy work, to stress the needs and capacity of the VCSE sector to funders.

“We now however, have seen people and now there's less private hires. But what we have been able to do, and you know, and [...] it's a problem, is that there's only so much of this to go around is that we've managed to get the NHS to use the facility [...] Last year we had 20 blood donation sessions in.”



⁷N = 141

Impact on Organisational Governance



Sub-questions:

1. What is the state of staffing and governance in Hampshire's VCSE sector?
2. What further support is needed to recruit and retain paid staff in Hampshire's VCSE sector?
3. How has the cost of living crisis impacted:
 - Staff morale
 - Staff recruitment
 - Staff retention/turnover
4. What trustee/governance issues are organisations facing and are these due to the cost of living crisis?
5. What do organisations need to be able to support staff and strengthen governance?

Note: The perspective of those organisations who employ paid staff was limited, as only 55% of respondents said they have paid staff⁸. Due to this small number of respondents, comparisons have not been made across organisation size or type.

Key Findings:

- Staff recruitment continues to be an issue, but retainment seems to be a strength of many organisations, with some taking new actions to cement this.
- Issues with recruitment and staff morale appear to be linked to the cost of living crisis, as staff are needing wages to rise in line with inflation
- Organisations need support regarding funding and more advocacy work is needed in this area too.

Of the organisations who responded, 45% indicated they struggle to recruit paid staff⁹, making this a potential area of concern for Hampshire's VCSE sector. However, only 34% of organisations reported recruiting paid staff had become a little/a lot harder since October 2021, compared to 71.43% in our 2021 report (when reflecting on before the pandemic); which suggests although recruiting paid staff can be difficult, many feel the situation has not been declining further. The reasons for this difficulty now however, seem to be related to the cost of living crisis. Data from open responses and focus groups suggests that organisations are struggling to offer competitive wages, meaning people are either leaving for better paid jobs or remaining in their current roles to maintain financial security. This reflects the worries of the general population, as research from CV Library (2022) found that three quarters of UK professionals are considering a new job because of the rising costs they are facing due to the cost of living crisis, with 69% stating salary is their main driver when contemplating a new role. Although these issues are important to highlight, most organisations who employ paid staff have not found the cost of living crisis to have impacted their ability to recruit and/or retain paid staff (71%)¹⁰.

A larger percentage of organisations reported they struggle recruiting paid staff compared to the percentage that reported they struggle with retainment, which was only 17%¹¹. The majority of respondents suggested this ability to retain paid staff had not changed since October 2021 (78%), with some organisations sharing important changes they have made to ensure they retain their valued staff members:

⁸ N = 156

⁹ N = 87

¹⁰ N = 86

¹¹ N = 86

“Retaining staff took considered actions to improve wellbeing and salaries; recruiting staff has been difficult. We wish to avoid accepting lower staff capabilities but this is proving increasingly difficult - as with any recession, people are choosing to remain with the “devil they know” rather than risking “jumping into the frying pan”. And you can’t blame them. This issue lies across paid staff, part time staff and volunteers.”

“Charity salary levels are not attractive enough. COVID [and] cost of living [translates] to people being reluctant to move, less workforce available, its been a candidate driven market for some time now especially in specialist roles such as clinical therapy and fundraising. We retain well thanks to our organisational culture, but we have had to review pay and support to staff twice in the last year.”

However, organisations’ ability to increase staff wages is dependent on their financial position, as many organisations stated the need to increase staff wages is how the cost of living crisis has impacted their financial sustainability. This finding implies there is a link between financial sustainability and staff recruitment/retention and more research should be conducted to explore this issue further. For now, it can be suggested that the support needed by organisations is again linked to signposting to relevant funding opportunities. Moreover, focus group participants highlighted the need for more advocacy work.

“Wages in the care sector are at an all time low, being a charity delivering services in the care sector is even more [challenging] as commissioners expect you to be able to do more for less”

In the survey, only a slightly higher percentage of respondents reported staff morale had either decreased a lot/a little (31%) compared to those who said it had increased a lot/a little (25%)¹²,

evidencing mixed feelings throughout the sector. Of those who have seen a decrease in staff morale, qualitative survey responses suggest this could be linked to the issue of low salaries that was evidenced above, as staff are themselves struggling with the cost of living crisis. To combat such issues, organisations have been implementing various measures, with 64% awarding a pay increase or support payment, 31% providing mental health support, and 14% adding new benefits¹³. In our 2021 State of the Sector report, organisations reflected on the impacts of the pandemic on staff wellbeing. Similar themes were not reported in this year’s data, despite national research detailing that the pandemic could have lasting effects, as three in four charity leaders (in organisations with managers and paid staff) are concerned about burnout within their team (Larkham, 2021).



¹² N = 86

¹³ Calculated based on N=86

Impact on Volunteering



Sub-questions:

1. What is the financial health of the VCSE sector? What is the state of volunteering in Hampshire's VCSE sector?
2. What further support is needed to encourage volunteerism in Hampshire's VCSE sector?
3. How many volunteers do organisations have (new and retained) and how has this changed during the ongoing cost of living crisis?
4. How has the cost of living crisis impacted volunteer morale?
5. What challenges to recruiting and retaining volunteers have organisations faced because of the cost of living crisis?
6. What do organisations need to be able to retain and recruit volunteers?

Key Findings:

- Volunteer recruitment continues to be a struggle for most organisations, with the cost of living crisis exacerbating this issue as volunteers appear to have less time to offer due to increased time constraints.
- Organisations worry that recruiting/retaining volunteers will be one of the most significant challenges within the next two years.
- Volunteer retention appears to be a strength for most of the sector.

Volunteering was a key theme in this year's State of the Sector research, as 95% of the organisations we consulted are supported by volunteers¹⁴. Most

organisations highlighted volunteer recruitment as a big challenge, with 65% stating this is something they struggle with¹⁵. No significant differences were noted between organisation sizes, which could suggest that successful volunteer recruitment is not reliant on financial capacity. Of those who struggle, 27% said this had not changed since October 2021, indicating it has been consistently difficult to recruit volunteers. For some this issue has only worsened, as 39% said it had become a little/a lot harder to recruit volunteers since October 2021¹⁶. A similar percentage of organisations reported increased difficulties in volunteer recruitment in our previous State of the Sector research (Campbell, 2021). Combining this data together therefore supports the suggestion that volunteer recruitment has been continuously hard and worsened every year for some organisations. However previously, the barriers to recruitment were specific to the constraints of the pandemic, such as recruiting virtually and ongoing uncertainties regarding Covid-19 regulations, and these appear to be changing.

Only 30% of respondents said the cost of living crisis is having an impact on their ability to retain/recruit volunteers¹⁷. Yet, the qualitative data implies the cost of living crisis is having an impact but specifically on volunteers' lives; most organisations' *ability* to recruit/retain has not been impacted, the impact is instead on those they are wishing to recruit. Having less time was cited as one of the impacts on volunteers, with 45% of organisations suggesting the number of people with time available had decreased a little/a lot¹⁸. Some of the reasons why included the need to prioritize paid work because of financial uncertainty and

¹⁴N = 156 ¹⁵N = 144 ¹⁶N = 145 ¹⁷N = 142 ¹⁸N = 145

increased caring responsibilities often mentioned too (which could also be financially driven but this was not explored). Similarly, research from the NCVO (2022) found that work/study commitments were one of the top three barriers to volunteering among non-volunteers. Although, in response to this, some organisations involved in the current research indicated it was potential volunteers' perceptions of time that sometimes prevented them from participating, suggesting people do not always have to commit lots of time but that is often the stereotype associated with volunteering.

“On average volunteers have less time to give requiring more volunteers to be recruited to deliver same level of service. Pressures due to family commitments e.g. child care or to do more paid work are part of reason given. Some volunteers concerned about expenses fully covering the cost of delivering the service e.g. for volunteer drivers using own cars. However it also encourages us to look for other ways of attracting new volunteers - e.g. younger people and re-engaging with employers and businesses. There's also been a continuing shift toward more task based volunteering and one off volunteering activities”

As also uncovered in previous iterations of this research, some organisations reported difficulties in attracting younger volunteers. As a result, they felt there was a skills gap in their organisations, as they perceived younger people to be more proficient in using social media for marketing purposes. Other research also supports the suggestion there is a lack of younger volunteers, as the NVCO (2022) found people aged 65-74 are most likely to volunteer. Future research on Hampshire's VCSE sector should consider the motivations of young volunteers, perhaps drawing on previous research such as Nordstrom et al's (2021) study that found when young people feel useful and obligated to help they are more likely to be inspired to participate in volunteering.

During the focus groups organisations indicated

there has been a big drive to recruit volunteers, including increased marketing/advertisement of their volunteering opportunities. The use of social media sites such as Facebook, as well as more traditional methods like newspaper advertisements were both recruitment methods cited by organisations. However, it was suggested the most effective way to recruit volunteers was through networking methods, using existing volunteers' connections with people who have the necessary skills or time required by an organisation. Developing these recruitment methods and focusing on the most effective will be important for organisation sustainability, as recruiting/retaining volunteers was the second most popular answer when organisations were asked to state their top three challenges over the next two years, which also indicates volunteer recruitment will be a longstanding challenge.

Even though the main theme highlighted in this section of the report is the struggle to recruit volunteers, it is important to note some organisations have instead found recruitment to be easier since October 2021. A couple of organisations shared that the cost of living crisis has had far reaching effects on communities, which has driven more people to want to help those who need support.



“We have more offers to volunteer as people can see the impact on their communities and want to help.”

“we are at the frontline of helping people with cost of living. Many people who want to volunteer want to help with this issue. Also we have changed our volunteering model to make less onerous at start of volunteering roles”

In addition to this, most organisations reported they have not struggled with volunteer retainment. Of those we surveyed, 67% said they do not struggle to retain volunteers¹⁹ and this appears to be a consistent strength of Hampshire’s VCSE sector, as 71% said their experience has not changed since October 2021²⁰. Organisations shared that maintaining good communication with volunteers and valuing the social aspect of volunteering were key factors to ensuring volunteers are happy, supported, and engaged, resulting in high retainment levels. The NCVO’s (2022) research found 38% of volunteers would appreciate thanks from those they have helped, reflecting the different motivations and therefore support needed by volunteers, to ensure they continue their involvement.

Our survey asked organisations for their number of volunteers, from which we calculated the average number per organisation to be 37; although, the range of volunteers reported by different organisations was vast, from 2 volunteers all the way up to 450 volunteers. The average amount of new volunteers was 8 and the average amount of existing volunteers was 28, reflecting the finding that retaining volunteers is a strength of Hampshire’s VCSE sector and recruiting is more difficult.

Again, it is necessary to highlight not all VCSE organisations’ experiences will be the same and 28% of respondents stated it was now a little/a lot harder to retain volunteers²¹. Again, the reasons why appear to be linked to time constraints and

commitments placed upon volunteers. In addition, some organisations noted the dedication of existing volunteers, implying those who already commit a lot of time tend to take on even more responsibilities. Sometimes this was due to perceived lack of motivation or capacity by other volunteers in their organisation, a lack of volunteers overall or other times this appeared to be due to their passion for their organisation’s mission/cause.

“If we had a [...] reasonable number of volunteers doing a small amount each, it makes a huge difference, whereas at the moment it seems to be primarily just a couple of people putting in many ways far too much time in.”

Volunteer morale is another mixed picture, as 19% of organisations reported morale was a little/a lot higher since October 2021 but 18% suggested it was a little/a lot lower, with the remaining percentage stating they had not seen a change²². As last year’s research did not collect data on volunteer morale, there was no baseline to reflect whether organisations’ perceptions of no change in volunteer morale was a positive or negative occurrence. Data from the NCVO (2022) shows recent volunteers stopped volunteering as they felt they had ‘done their bit’, indicating the importance of volunteer morale to retainment; a key consideration for future State of the Sector research.



¹⁹N = 145

²⁰N = 146

²¹N = 146

²²N = 143

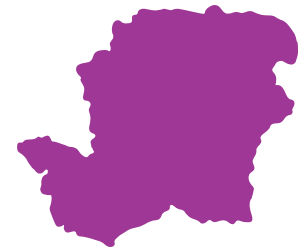
Similar trends can be seen with trustees, with most organisations reporting they struggle to recruit trustees but do not have the same issue with retaining them. Again, lack of available time was cited as one of the main reasons for this, but differently some organisations felt the high level of responsibility that comes with these positions and increased rules/regulations put potential trustees off applying. Of those that have been successful recruiting trustees, networking/word of mouth was again seen as an effective recruitment method, and also the use of mainstream Jobs Boards.

Within the focus groups it was suggested that more training, that was low cost and time efficient, needed to be offered by the Hampshire CVS Network. This would support organisations to address any skills gaps, as they could upskill

existing volunteers to undertake tasks rather than struggling to recruit more with the necessary skills. As stated above, the most noted skill gap was using social media for marketing purposes; other training topics mentioned were governance and customer service skills. Moreover, organisations suggested there should be a mechanism for them to pool their resources together with other VCSE organisations, so they are more able to fund training opportunities.



Impact on Service Delivery



Sub-questions:

1. How have the services offered by VCSE organisations in Hampshire changed during the last year?
2. What future support do VCSE organisations in Hampshire need to maintain effective service delivery?
3. What services have stopped because of the cost of living crisis? Will these services return in the future?
4. What new services have emerged because of the cost of living crisis?
5. What community needs are organisations unable to meet?
6. How has the cost of living crisis impacted demand (i.e. the size and nature of need)?
7. How have community needs changed as a result of the cost of living crisis?
8. How has the cost of living crisis impacted the ability of organisations to meet community needs (i.e. capacity)?

Key Findings:

- Most organisations have experienced increased demand for their services, linked to the cost of living crisis, the Covid-19 pandemic, and the decline in mental wellbeing.
- Type of demand has also changed for many organisations, again linked to worsening mental health.
- Income and volunteers appear to be essential aspects of organisations' capacity to deliver.

62% of organisations indicated that demand for their services has increased a little/a lot since October 2021²³, with insights from the focus groups and interviews supporting this trend too. Organisations suggested the overarching reason for this increase, is that people need more support and the data suggests there are three reasons as to why more support is needed. As perhaps expected, the cost of living crisis was the most cited reason why, as organisations shared many people needed support with personal and financial difficulties that have arisen from these circumstances. This reflects data in the wider context which shows people are highly worried about the effects of the cost of living crisis (Office for National Statistics, 2023), which is resulting in more people turning to the VCSE sector for support, as highlighted by The Trussell Trust (2022), who reported that in April-September 2022 they provided 50% more emergency food parcels than pre-pandemic levels.

Perhaps more surprisingly, organisations stated Covid-19 is another reason why people need more support, in turn resulting in increased demand. Some felt that members of the public now feel more comfortable or confident going out to access support/services and others drew attention to the impact of the pandemic on people's wellbeing which has resulted in them requiring more support from the VCSE sector. For example, multiple organisations pointed to the devastating impact of the pandemic on young people, particularly the decline in their mental health and ability to socialise, which organisations are now trying to address in addition to a second crisis (the cost of living):

²³N = 147

“We’re still meeting a lot of young people who are struggling with the after effects of the social isolation and going back out into society. And we hear stories of young people who even now still haven’t felt confident to leave the house since the pandemic was officially declared to be over.”

“We operate a young persons mental health charity offering free counselling to them and their [families], along with group work for them and their [families]. Demand for service during and post pandemic has not levelled off and continues to rise during COL crisis. Economic pressure and societal conditions, and the butterfly effect of this ripples to all areas of life / family and parental stress, affecting relationships and home life and emotional health and wellbeing”

Linked to this is the decline in the general population’s mental health, which is the third category responsible for the increase in service demand. Similarly, our 2021 State of the Sector research also found increasing numbers requiring mental health support, which at that time organisations reported was related to the impacts of the pandemic. Therefore, it could be suggested that the pandemic (the first category) and the cost of living crisis (the second category) are coming together to create this third category: a worsening mental health epidemic that is increasing VCSE sector service demand. Previously 41% of VCSE organisations had experienced an increased level of demand (State of the Sector 2021), a significantly lower percentage than those reporting an increase in demand this year²⁴, which can be used to support the suggestion that mental health is worsening as people are contending with a second crisis.

Moreover, 41% of organisations stated the type of demand for their services has changed since October 2021²⁵, which was mostly attributed to this decline in mental health. In addition to this,

organisations suggested people are facing more financial issues and there has been an increase in complex needs that organisations felt were most certainly linked to the pandemic and now cost of living crisis. A proportion of organisations also implied that people’s needs are not being met elsewhere, such as by statutory services, so many are turning to the VCSE sector for support. As a result, the demand for services is becoming so high for some, that they are unable to meet the needs of all the community members they support.

“Coming out of the pandemic, a lot of people have struggled with mental health, little support networks around them. Cost of living crisis the South is an expensive place to live in the UK and this is proving very difficult for those families who were already living on the breadline.”

“Parents cannot afford private services, there are no or very limited statutory services available to families with autistic children. Impact of pandemic is still being felt in the autism community.”



²⁴ It is important to note our previous research received more responses than the current research, which may impact the difference in results.

²⁵ N = 145

However, these issues are not new for some organisations. As well as in our 2021 report, the 2018 edition of this research also reported some of the same themes: clients presenting with more complex problems; increased referrals from statutory agencies; increased presentation of people experiencing poor mental health. As these themes are repeating year on year, our research indicates that these issues are ongoing and potentially worsening due to the various contextual issues. Therefore, it is fair to suggest that unless the VCSE sector is given the right support, including adequate funding, and their hard work is acknowledged, the situations of many communities within Hampshire, particularly mental health, will continue to decline.

“the fact that we have older vulnerable people as our clients where you know we have to, they [...] are worried some of them about still going out even after all this time”

When viewing level of demand alongside organisations’ reported capacity, it is a worrying picture for some but more positive for others. 28% of those who responded to the survey stated their capacity had decreased a little/a lot, explaining this was due to a decrease in funding and/or a lack of staffing, including volunteers²⁶. Of the 23% who said their capacity had increased a little/a lot²⁷, many cited the opposite, that their funding and staffing numbers had increased, which indicates how vital these two elements are to maintaining VCSE’s operations. The organisations reporting an increased capacity, could potentially be those delivering frontline services, because as indicated in the ‘Finances’ section, some respondents felt current funding grants are focused on supporting those struggling to cope with the cost of living crisis.

As stated in previous sections, it is important to consider not all organisations’ experiences are the same and some have instead faced a decrease in demand. This type of change was also attributed to the cost of living crisis and Covid-19 pandemic, however with different consequences. It was suggested that due to the current financial crisis, some members of the public were spending less on services, activities, or products offered by the VCSE sector, leading to a decrease in demand for delivery; a finding which reflects the picture nationally, as the Office for National Statistics’ (2023) found 69% of their respondents in the UK had decreased their spending on non-essential items in January-February 2023. Additionally, other organisations indicated the number of people accessing/using their services had not returned to pre-pandemic levels and for some, the Covid-19 pandemic was continuing to have an effect. In particular, it was highlighted some older people are still wary of meeting up with others or attending group meetings/activities, evidencing that despite there no longer being government restrictions the pandemic is still ongoing and in some cases limiting people’s interactions with VCSE organisations.

As a result of decreased capacity, a number of organisations have had to reduce their services and some have even had to stop groups altogether. The type of services affected appeared to be a wide range, from lunch clubs to social/befriending groups, so it is difficult to pinpoint the type of demands not being met by the sector. Moreover, some organisations have adapted their services or started providing new ones, which could potentially address any gaps in support. For example, one group suggested they have started a social group for disabled people and another organisation had begun a lunchtime group for families, suggesting other organisations are aware of where there is service need in communities. Many of the other new services reported appear to be in response to the cost of living crisis, such as warm hubs and community fridges, although this should not detract from the fact that overall, new services appear to be diverse in what they offer.

²⁶N = 147

²⁷N = 147

Spotlight: Warm Hubs



The cost of living crisis has forced many people into different types of poverty, one of these being fuel poverty. Fuel poverty is where a household cannot afford to heat (or cool) their home to a liveable/sufficient temperature, one reason being the increased cost of energy bills (End Fuel Poverty Coalition, 2023). In the UK an estimated 7 million households are expected to experience fuel poverty from October 2022 (End Fuel Poverty Coalition, 2022). When looking at this issue locally, data from the Centre for Progressive Policy (2022b) highlights that almost 8% of households in Hampshire face fuel poverty. The impact of fuel poverty cannot be understated, as cold homes can worsen multiple physical health conditions, mental health problems, and put people at more risk of suffering from the worst effects of Covid-19 (Institute of Health Equity, 2022; End Fuel Poverty Coalition, 2023).

Although the government has provided some packages of support (GOV.UK, no date), in many cases this has not been enough and a lot of the responsibility to support those effected has fallen to the VCSE sector. One of the responses taken by organisations has been to open 'Warm Hubs' also known as 'Warm Welcome Spaces', a warm and welcoming space that members of the public can use for free. Often these spaces are pre-existing, such as a church or library, but have increased their opening times to ensure people can make use of them. Some offer refreshments, charging points, and opportunities to socialise with other members of the community.

The Warm Welcome Campaign is a national initiative that supports organisations to become warm spaces and signposts community members to warm spaces in their local area using their 'find a space' directory (see Find a Warm Welcome Space Today by clicking this link). There are 99 Warm Welcome Spaces within Hampshire registered on this site. Many more warm spaces

are available to use but not registered with this scheme, for example the 20 council-run libraries, making it difficult to pinpoint the exact amount that are running.

Organisations involved in the research stated that many local spaces are being encouraged to become warm hubs. Although, despite this high demand, insight from our focus groups and review sessions suggests some organisations cannot afford to meet this need. Organisations' capacity to run a warm hub is reduced by the increasing utilities costs, with many unable to cover the cost of heating their buildings for additional hours. Furthermore, other organisations shared that due to the high demand for these spaces, there has been an increase in those applying for funding grants, making the process even more competitive and reducing their chances of getting financial support. Issues with volunteer recruitment have also reduced organisations' capacity to provide a warm space, as they do not have enough people to run this service.

“Can't provide a warm hub for those in need as too expensive to do so”

“We wanted to offer a warm space facility but we cannot afford to”

“We've opened a community fridge and warm hub to meet the need. The increase in demand is 60% for the baby and clothing bank over the last 12 months”

However, those who have been able to open a space have provided a vital service to many communities who are increasingly in need of support. Insight provided separate to the research activities reveals feedback from community members attending warm hub session has allowed organisations to review their delivery of other

services and tailor them more to community needs. Additionally, it was noted the variety of spaces available has meant a diverse range of people have been able to access the warm hub services.

“Our first Warm Room afternoon has been a success! Hope to see you at the next one - lots of tea, cake, biscuits and hot soup! We have refreshed the space and will be offering warm refreshments and soup during the colder months. All are welcome to come along and join us to play games, chat or just sit in peace in the warm. Donations are welcome if people can afford it to help pay it forward for others.”



As reflected elsewhere in the report, ‘Income’ and ‘Volunteers’ were the top two most requested areas in which organisations need support to maintain their service delivery; corresponding to the data shared by organisations who have been able to increase their capacity to meet increasing demands for their services. Overall, the cost of living crisis has brought some difficult challenges to organisations and a number even highlighted its effects are still yet to be realized as the situation is ongoing. However, organisations were asked to reflect on the potential opportunities they will have over the next two years, with the most popular answer being the opportunity to reach new customers or service users. Therefore, organisations must be provided with enough support in the areas mentioned above so they are able to increase their capacity to seize such opportunities that will arise.



Recommendations

So, what are the implications of all of this data? As the report provides an in-depth insight into what Hampshire's VCSE sector is both struggling with and succeeding in, reflecting upon these experiences will allow the Hampshire CVS Network and wider stakeholders to provide more tailored support. Last year's report provided recommendations to various stakeholders. This year there were four consistent themes in the data regarding the areas of support required by VCSE organisations in Hampshire. These were: Funding, Networking, Volunteering, Advocacy. Therefore, this year's recommendations will speak to these four themes instead. Research participants were additionally asked to provide feedback on the Hampshire CVS Network, which has also been used to inform this section.

The Hampshire CVS Network should:

Funding



1. Continue to support VCSE organisations with funding and income generation by providing specific information on the criteria of funding opportunities, so VCSE organisations can quickly determine if an opportunity is relevant to them.
2. Raise awareness of platforms and services that enable VCSE organisations to filter funding opportunities, to reduce the amount of time resource required by organisations to identify relevant funding.

Networking



1. Facilitate regular networking events for organisations with similar goals/focusses. These sessions should be focussed on sharing best practice and overcoming obstacles.
2. Provide and monitor a platform for VCSE organisations to pool their resources and share information, which would allow the sector to better support itself and increase collaborative working.

Volunteering



1. Increase the amount and type of training offered to VCSE organisations, with particular focus on social media and governance. Training offered should be low cost and time effective so that it does not require organisations to use too many resources.
2. Provide more guidance on different volunteer recruitment routes to support VCSE organisations to find more volunteers or those with the relevant skills.
3. Support a campaign that aims to remove barriers to and change negative perceptions on volunteering for those who have not previously volunteered.



Advocacy

1. Use their position within the sector to better advocate for VCSE organisations needs. For example, highlighting the constraints of funding applications to grant makers/funders and the resources required to complete bids.
2. Encourage non-VCSE organisations to promote employee volunteering at local VCSE organisations and encourage them to provide and utilise employee volunteer schemes (where applicable).



General

1. Increase awareness and understanding of the role and remit of each member of the Hampshire CVS Network.
2. Improve signposting of relevant support, including a directory of relevant wider stakeholders.



Next Steps

To ensure the momentum of the research is not lost and the data is used to drive the sector forward, Action Hampshire, in partnership with the other Hampshire CVS Network organisations, will be forming working groups on the four themes identified in the recommendations. The purpose of these groups will be to ensure the network makes progress on these actions and to provide evidence of the work undertaken.

The next edition of this research will be conducted in 2024/25.



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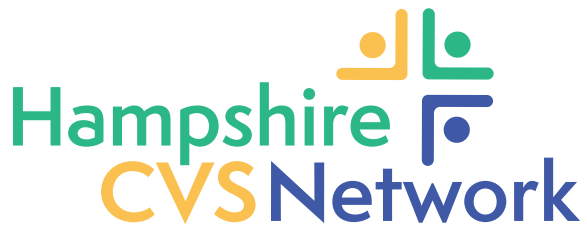
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