FRENCH ASSOCIATIONS: A MAJOR FOOTPRINT, BOTH ECONOMIC AND SOCIETAL

Economic Study

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ASTERÈS

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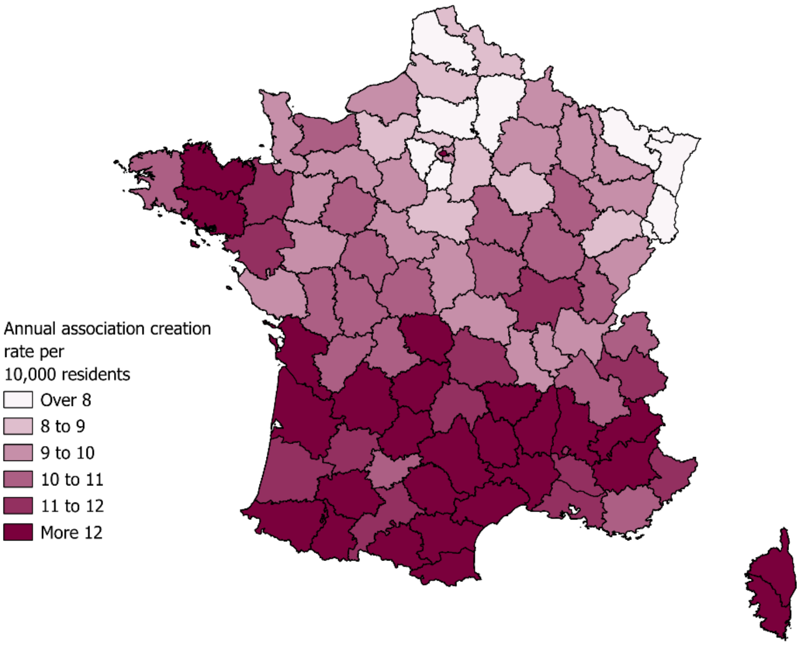
EXECUTIVE SUMMARY

While associations play a structural role in social and territorial cohesion, they also have a major societal and economic footprint. Asterès, focusing exclusively on the latter aspects, estimates the total economic contribution of associations at 6% of French GDP and 2.8 million direct and indirect jobs, across all regions.

DEMOGRAPHY: STRONG DYNAMISM, PARTICULARLY DRIVEN BY SOCIAL TIES AND LEISURE

With over 1.2 million active structures recorded in 2024, the French associative sector demonstrates remarkable vitality. This dynamism is driven by a steady flow of 70,000 new organizations created each year, ensuring a 1% growth rate per decade. A vast majority (65%) are dedicated to leisure activities and fostering social cohesion. Furthermore, the commitment of 13 million volunteers—representing 20 million individual actions—is primarily focused on sports, social impact, and solidarity.

This dynamism is not uniform and highlights territorial disparities: it is particularly pronounced in Brittany and Southern France, where local challenges foster complementarity between volunteering and paid employment. This disparity is also reflected in the use of salaried staff: in rural areas, the weight of employment within this vital sector is generally higher than in urban areas. This is explained by the fact that, in rural zones, civil society organizations fill the gap where the for-profit sector is absent for essential services such as healthcare or elderly care.



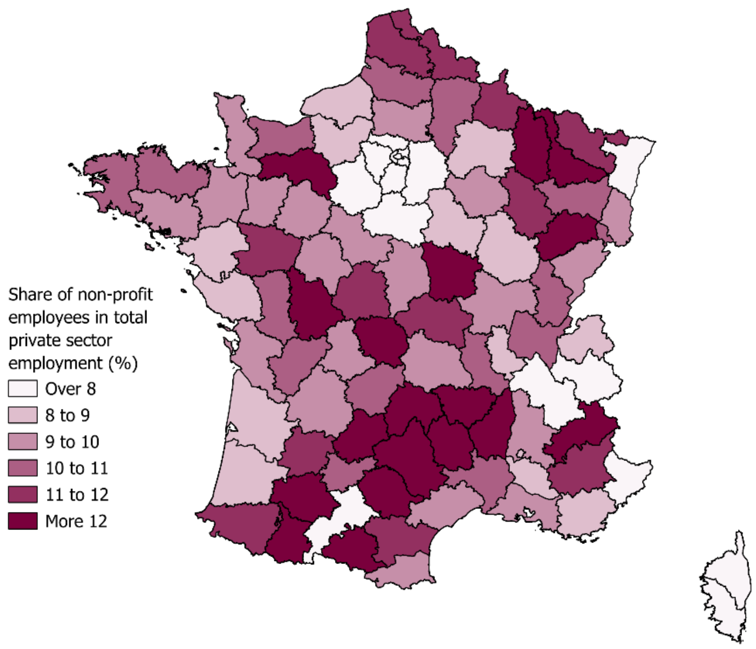
NON-PROFIT BUDGETS: GROWING FINANCIAL STRAIN AMIDST DECLINING STATE FUNDING AND RISING COSTS

With a total budget of €118.7 billion in 2023, the associative sector mobilizes €53 billion in public funding, combining grants (17%) and public service-related income (28%), with the remainder covered by private resources (memberships, donations, and sales of services). This funding is primarily driven by Departments (€16 billion) and municipal authorities (€7 billion), which stand as the leading local contributors to the sector. Municipal interventions are mostly focused on sports, culture, and socio-cultural activities, while Departments prioritize their social mandates (nursing home fees, APA, PCH), which account for nearly 90% of their spending on civil society organizations.

Following growth of 5% in 2024 and 7% in 2025, State funding for associations will undergo a 19% contraction in 2026—a reduction of €2.2 billion—creating a "scissors effect" for the sector. Simultaneously, organizations have faced growing strain on their operating costs for several years, a trend set to continue in 2026. Within a sample of the 15 largest French associations, wages rose by 7% and social security contributions by 4% between 2023 and 2024, while public generosity declined by 5%, weakening their financial stability. More generally, this structural imbalance persists through 2025 and 2026: labor costs are expected to rise by 1.9% in 2026 (following a 1.8% increase in 2025), while rents and service purchases are projected to grow by 1.6% each in 2026 (after a 2.3% increase in 2025).

French associations as an economic sector: 1.9 million employees

In terms of employment, while only 11% of civil society organizations use salaried staff, they nevertheless employ 1.9 million people, with a total payroll of €46.9 billion. The impact of this vital sector on local employment varies significantly across territories: while the share of non-profit employment reaches a peak of 31% in Lozère, it falls to 4% in Hauts-de-Seine. This heterogeneity is also reflected in departmental budgets, with the total payroll ranging from €80 million in Creuse to €4.7 billion in Paris.



Indirect socio-economic contribution : nearly 1 million jobs generated in the rest of the economy by association spending

When considering the spillover effects of associations on the rest of the economy, in addition to their direct footprint, the total contribution of the sector reaches 2.8 million jobs, €219 billion in economic activity and value added equivalent to 6% of GDP. The overall contribution is therefore macroeconomic in scale, with total activity reaching a level comparable to the construction sector in France (€220 billion). These spillover effects are estimated using the Asterès Impact Model (MIA). More specifically, spending on suppliers and wages paid generate demand for the rest of the French economy, producing total spillover effects estimated at 1 million jobs, €166 billion in economic activity and 3% of GDP.

FOREWORD

MALCOLM FLEMING
PRESIDENT
ASSOCIATION OF CHARITY LOTTERIES IN EUROPE (ACLEU)

Associations play an essential role in France, whether in the fields of youth, sports, culture, women's rights, the fight against poverty, environmental protection, health, or animal welfare.

Across France, millions of people contribute to this ecosystem in different ways — as volunteers, employees, organisers and community leaders. They are the football coaches training young players after work, the caregivers supporting vulnerable people in care homes, the volunteers running food banks, the organisers of local festivals, and the environmental groups restoring natural spaces. Together, they sustain community life, foster solidarity and underpin social cohesion.

Yet this vital sector is under growing strain. Demand for services continues to rise, which available funding struggles to keep pace. This structural imbalance is placing increasing pressure on associations and, over time, risks undermining both their sustainability.

To better understand these challenges, the Association of Charity Lotteries in Europe, (ACLEU), commissioned Asterès to conduct a dedicated study of France's associative sector.

While previous European research[1] highlighted that civil society across Europe faces growing funding constraints, this study takes a closer look at how these pressures are playing out in the French context. It highlights a clear and pressing trend: a dynamic and committed sector taking on growing responsibilities while operating with constrained resources. Without appropriate responses, this imbalance could weaken associations' ability to support communities at the heart of their territories.

The primary objective of this study is to provide a rigorous economic assessment of the sector, measuring its contribution in term of employment, economic activity and overall value. In doing so, it complements existing analyses of the social impact of associations and situates France within the broader European landscape.

ABOUT ACLEU

The Association of Charity Lotteries in Europe (ACLEU) is an international not-for profit organisation, established in 2007 to promote the charity lottery model and represent its stakeholders in European discussions on games of chance and charity fundraising.

ACLEU considers charity lotteries to be a practical and proven way to strengthen the financial resilience of civil society organizations. By supporting sustainable and diversified funding mechanisms, they enable associations to continue carrying out their essential missions.

ACLEU members, who support thousands of organizations of all sizes across Europe, share a common goal: to enable non-profit organizations to raise funds through charity lotteries. Together, they promote

[1] 2025 report "*Supporting Civil Society Under Pressure*", conducted in partnership with Civil Society Europe-

this effective funding model across Europe by raising awareness among politicians, policymakers, regulators, and charitable organizations.

PREAMBLE

The consulting firm Asterès was commissioned by the ACLEU to provide an economic overview of associations in France.

Asterès economists conducted this study with full independence. The views expressed here are solely those of the consulting firm Asterès. This study was written by Maëva Robart, Economist, and Charles-Antoine Schwerer, Partner at Asterès.

1. Method & Philosophy: Understanding the Economic Contribution of Associations

1.1 OBJECTIVE AND SCOPE: QUANTIFYING THE SOCIO-ECONOMIC WEIGHT OF THE ASSOCIATIVE SECTOR IN FRANCE

This study aims to estimate the economic contribution of the French associative sector. The analysis focuses on associations active in the National Register of Associations (RNA), and the data cover the years 2023, 2024 and 2025, depending on the topics examined. Asterès collects data on the direct economic contribution of associations (employment, volunteering, activity and budgets) as well as on their indirect contribution, through spending and wages paid (i.e. the spillover effects of associations expenditures on the rest of the French economy). The economic contribution of associations also includes the impact of their actions and services. However, this study was not able to quantify this dimension.

1.2 SOURCES: PUBLIC DATABASES, REPORTS AND ACADEMIC PUBLICATIONS

Asterès draws on various sources to cross-reference the demographic, financial, and territorial dimensions of the French associative sector. Data regarding civil society organizations are presented as orders of magnitude, since organizations that do not receive public funding are not required to provide detailed accounts to the State. Similarly, volunteer engagement is based on statistical estimates, as only the declaration of salaried employees is an administrative requirement.

- The census of organizations is established using data from the National Register of Associations (RNA).
- The economic assessment of financial resources is primarily based on the 'Review of Public Spending on Associations' conducted by the Inspectorate General of Finance (IGF) and the Inspectorate General of Education, Sport, and Research (IGESR). The figures in this report have been supplemented and consolidated by other documents to include self-generated resources (donations, memberships, and sales).
- Territorial and departmental dynamics are informed by the 'Regional Indicators on Community Life' produced by the organization Recherches et Solidarités, as well as by work from the National Institute for Youth and Popular Education (INJEP).

1.3 METHOD : DEMOGRAPHY, BUDGETS AND MACROECONOMIC SPILLOVER EFFECTS

Asterès adopts demographic, budgetary and economic perspectives in order to assess the economic contribution of associations. The analysis relies on several key stages that are detailed throughout the study: a demographic description, budgetary estimates and a modelling of spillover effects :

- **The demography of associations, both national and departmental, is described in as much detail as possible.** The number of associations, new creations, volunteering, the number of employees and sector-specific characteristics (sport, culture, leisure, etc.) are collected and presented by Asterès.
- **Association budget estimates are conducted at the departmental level, with recent trends then factored in.** First, since the public spending figures identified in various reports are national in scope, Asterès estimated specific budgets for each department. Ten categories of departmental spending (encompassing payments to both associations and private companies) were identified[2] using accounts from the Observatory of Local Finance and Public Management (OFGL) and DREES data. These categories were then used to estimate associative budgets within each department. Secondly, as data regarding budget trends for 2024, 2025, and 2026 is currently lacking, Asterès combined two methods: an estimate of central government spending based on finance acts (finance acts), and an estimate of association revenue and expenditure based on the published budgets of the 15 largest associations in France.
- **The modeling of the ripple effects (or multiplier effects) of association spending is conducted using the Asterès Impact Model (MIA).** All ripple effects from salaries paid by associations and expenditures with French-based suppliers are estimated using this model, which is derived from Insee's Input-Output Tables, also known as 'Leontief Tables.' The results are presented in terms of turnover (activity), value added, and employment, at both the national and departmental levels.

[2] Nursing home fees, residential and service fees for adults with disabilities, **ASE** (Child Social Assistance), **APA** (Personalized Autonomy Allowance), **PCH** (Disability Compensation Benefit), Culture, Sport, Economic Sector, Operating Grants, and Other.

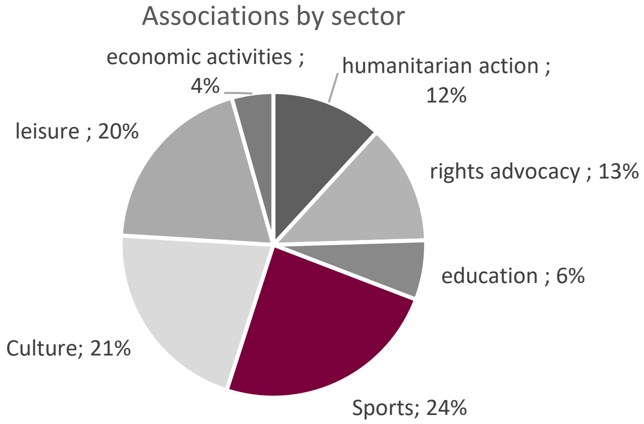
2. Demography: strong dynamism, particularly driven by social ties and leisure

The French associative sector demonstrates remarkable vitality, with over 1.2 million active structures recorded in 2024. Driven by a steady flow of 70,000 new organizations created each year, the sector maintains a growth rate of 1% per decade. While a vast majority (65%) are dedicated to leisure activities and social cohesion, the commitment of 13 million volunteers within civil society organizations—representing a total of 20 million volunteer actions—is primarily focused on sports, social impact, and solidarity. This dynamism is not uniform and reveals territorial disparities: it is particularly sustained in Brittany and Southern France, reflecting specific local challenges where volunteering and salaried employment complement each other.

2.1 NATIONAL DEMOGRAPHY: A MASSIVE AND DYNAMIC PHENOMENON ENCOMPASSING MANY CAUSES

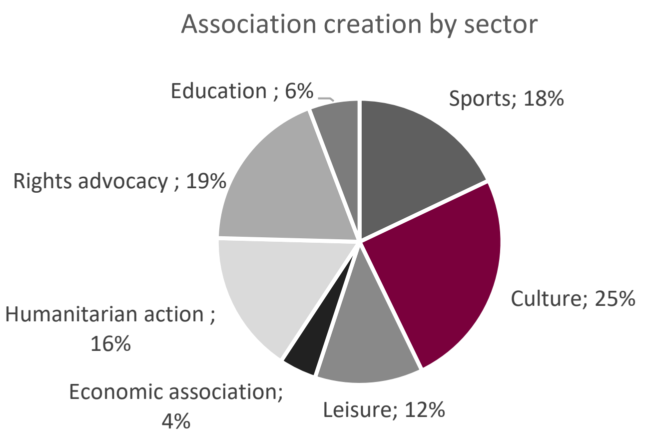
2.1.1 THE ASSOCIATIVE LANDSCAPE: 1.2 MILLION ASSOCIATIONS MAINLY CENTERED ON SOCIAL TIES AND LEISURE ACTIVITIES

The French associative sector is primarily focused on social cohesion and leisure activities, as 65% of organizations aim to bring people together around a shared passion. The leading sectors are sport (24%), culture (21%), and leisure (20%). Engagement within civil society organizations also extends to rights advocacy (13%) and humanitarian action (12%), which hold a significant place, followed by education (6%) and economic activities (4%). In 2024, 1,213,282 active associations were recorded in the National Register of Associations (RNA).



2.1.2 ASSOCIATION CREATION : ORGANIZATIONS WITH GROWING COMMITMENT

The number of associations increases regularly, a sign of the vitality of the sector. With a steady flow of 70,000 creations per year, the sector maintains growth of 1% over the last decade, despite a slight slowdown during the 2020 health crisis. Cultural associations are the most dynamic category (25% of creations for 21% of existing associations), followed by associations defending rights and causes (19% of creations for 13% of existing associations), a sign of a growing investment of civil society in certain political issues, and humanitarian, social and health action (16% of creations for 12% of existing associations).

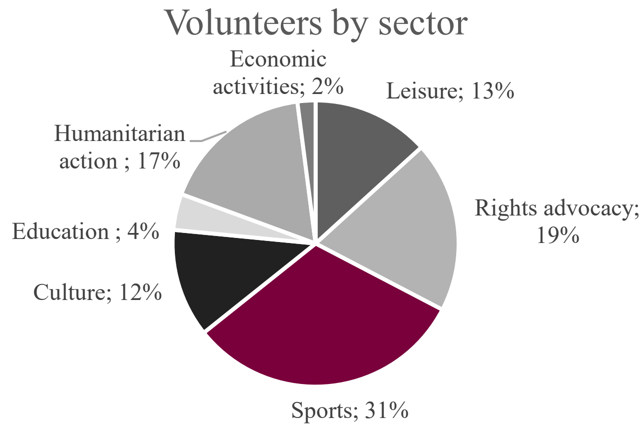


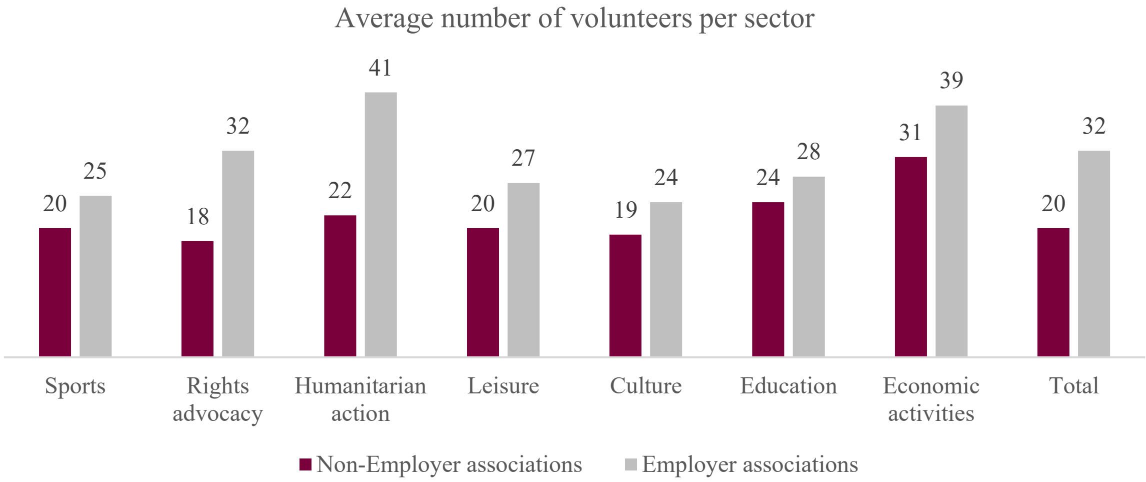
2.1.3 VOLUNTEER ENGAGEMENT : A CONSIDERABLE INVESTMENT FROM THE FRENCH POPULATION

A total of 13 million people in France volunteer their time within the associative sector, representing 20 million individual volunteer actions. Thus, 22% of French people over the age of 15 volunteer for an organization every year. These 13 million volunteers do not follow the same distribution as the number of organizations by category, revealing a gap between the number of structures and human engagement. Volunteering often combines with salaried employment, embodying the duality of the associative world: both a selfless societal activity and a sector with a significant economic contribution.

- **The time invested by volunteers is centered on sports, social impact, and solidarity rather than purely leisure activities.** Volunteer work is primarily driven by sports (31%), followed by a marked commitment to social causes through advocacy (19%) and humanitarian action (17%). Leisure and culture account for 13% and 12% of volunteers respectively, followed by education (4%) and economic activities (2%).

- **Volunteering does not stand in opposition to salaried employment within the sector; on the contrary, they are mutually reinforcing.** The concentration of volunteers is actually increased by the presence of employees within an organization. The average number of volunteers is 32 for an association with employees, compared to 20 for those without. This interplay with salaried staff is most significant in the humanitarian, health, and social sectors, where professional management allows the average volunteer workforce to nearly double, rising from 22 to 41. A similar trend is observed in rights advocacy, where the average number of volunteers increases from 18 to 32. Leisure-based sectors are less impacted by the presence of salaried employment: in sports, the average rises from 20 to 25 volunteers, in culture from 19 to 24, and in leisure activities from 20 to 27.

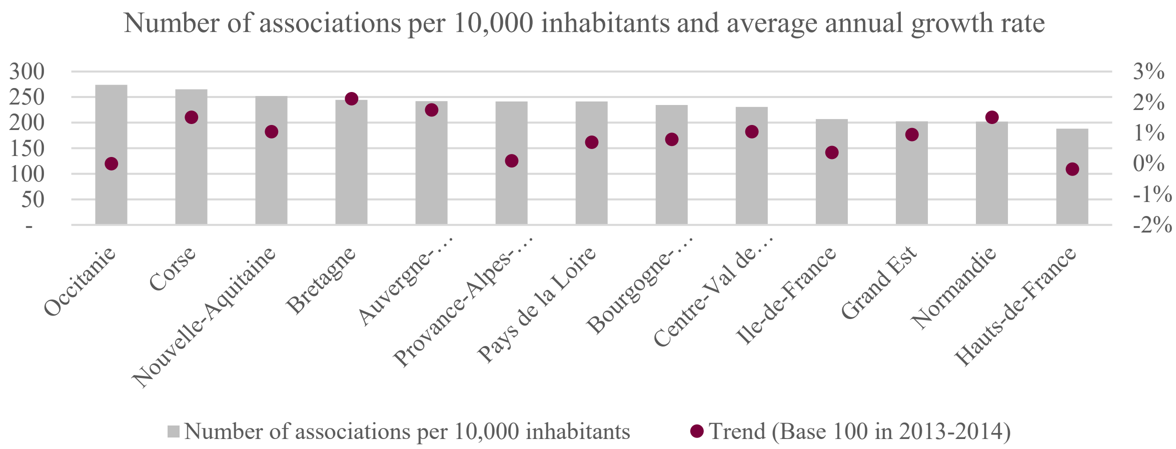


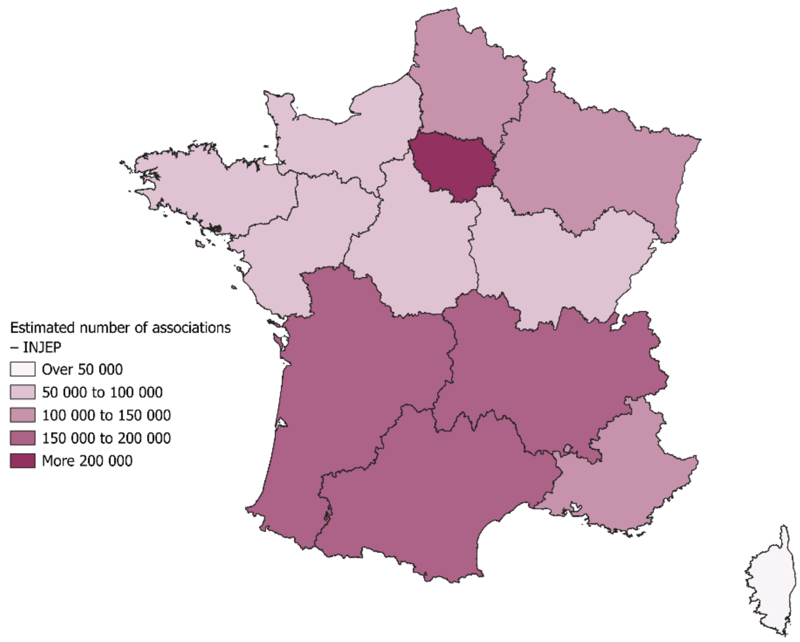


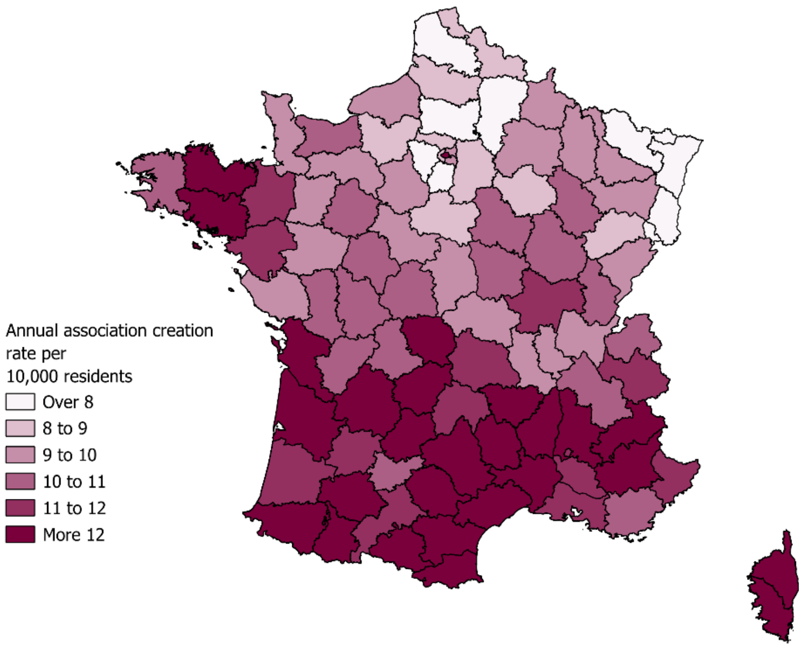
2.2 LOCAL DEMOGRAPHY: ASSOCIATIVE DYNAMISM MAINLY CONCENTRATED IN WESTERN AND SOUTHERN FRANCE

Associative dynamism, in terms of creation, is particularly marked in Brittany and in the South of France. In Brittany, this vitality relies on the deep historical anchoring of the Social and Solidarity Economy (SSE), whose share in salaried employment significantly exceeds the national average (14% compared with 10%). In the South, the strong creation of organizations is driven by sustained demographic growth and a large population of active retirees. In addition, the tourism-based economies common to these coastal areas encourage the emergence of numerous associations dedicated to local activities and outdoor sports. Two regions have experienced a slight decline in their associative fabric since 2013: Occitanie and Hauts-de-France. Île-de-France records very limited growth of 0.4%, far behind Corsica and Normandy, which grow by slightly more than 1%.

In terms of the number of associations per inhabitant, rather than creations, disparities are less pronounced but a similar pattern emerges, with the West and the South in strong positions, while Île-de-France, Grand Est, Normandy and Hauts-de-France have less dense associative networks. A north-east / south-west divide thus clearly appears both at the regional and departmental levels.


Number of associations per 10,000 inhabitants and average annual growth rate
300
250
200
150
100
50
-
3%
2%
1%
0%
-1%
-2%
Occitanie
Corse
Nouvelle-Aquitaine
Bretagne
Auvergne-…
Provance-Alpes-…
Pays de la Loire
Bourgogne-…
Centre-Val de…
Ile-de-France
Grand Est
Normandie
Hauts-de-France
Number of associations per 10,000 inhabitants
Trend (Base 100 in 2013-2014)


Estimated number of associations – INJEP
Over 50 000
50 000 to 100 000
100 000 to 150 000
150 000 to 200 000
More 200 000


Annual association creation rate per 10,000 residents
Over 8
8 to 9
9 to 10
10 to 11
11 to 12
More 12

3. French associations as an economic sector: 1.9 million employees for a €120 billion budget

The French associative sector represents a major economic weight with a budget of €118.7 billion, financed at 60% by the sale of services. Despite growth in State funding (representing 10% of the total budget of associations) of 5% in 2024 and 7% in 2025, the 2026 financial year marks a break with an expected contraction of 19%, or €2.2 billion. This decrease occurs in a context of overall stability in public budgets (-0.1%), reflecting a reduction in the share specifically allocated to the associative sector within each mission. From a budgetary perspective, the 15 largest French associations show a disconnect between the strong increase in their expenses (2021–2023) and the volatility of their public revenues. In terms of employment, although only 11% of associations are employers, they employ 1.9 million workers with a wage bill of €46.9 billion. The impact on local employment varies strongly across territories: while the share of associative employment reaches 31% in Lozère, it falls to 4% in Hauts-de-Seine. This heterogeneity is also reflected in departmental budgets, with a wage bill ranging from €80 million in Creuse to €4.7 billion in Paris.

3.1 ASSOCIATION BUDGETS: €120 BILLION IN TOTAL, EQUIVALENT TO A MAJOR SECTOR OF THE FRENCH ECONOMY

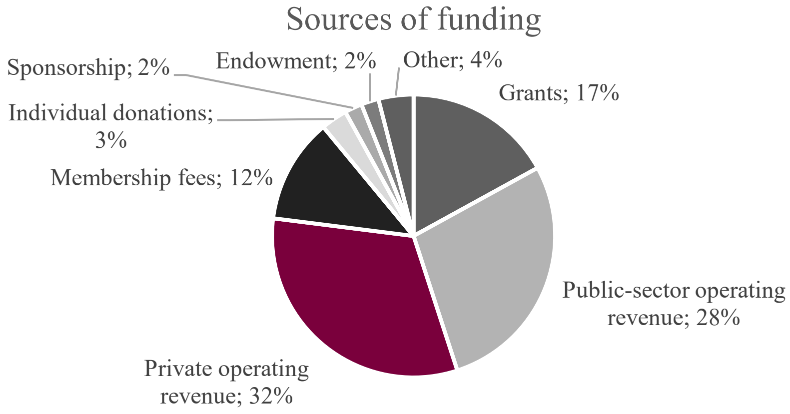
3.1.1 BUDGET: €120 BILLION, BALANCED BETWEEN PUBLIC AND PRIVATE SOURCES AND MAINLY LINKED TO THE SALE OF SERVICES

The total budget[3] of associations is estimated at €118.7 billion in 2023, coming mainly from the sale of services (60%). From a strictly economic perspective, associations represent a weight equivalent to the entire hotel and restaurant sector in France (€116 billion in turnover), which is one of the most important contributors to the national economy. The historical model of associations, based on donations, membership fees and subsidies, is gradually being replaced by a logic of services, whether these services are billed to public authorities or to users. The economic model of associations therefore combines donations and subsidies (public or private), membership fees and services, creating a unique balance within the French economy that reflects the specific characteristics of the sector. This macroeconomic model differs significantly depending on the categories and types of associations. Overall, private and public funding are relatively balanced, accounting respectively for 45% and 50% of the budget, with the remaining 5% coming from other resources. This budget has increased by nearly 2% per year since 2020[4].

- Public funding is derived from grants (17%) and public-sector operating revenue (28%). Associations in the social or medico-social housing sector rely on public funding for 69% of their budget, while those in healthcare depend on it for 55%, and those in the social action, humanitarian, and charitable sector for 54%.

[3] In the context of this study, the term "budget" refers to the total financial resources mobilized by associations. Due to the non-profit principle, the associative model is based on a structural equilibrium where the funding received corresponds to the full coverage of operating expenses.
[4] The French Associative Landscape – Measurements and Trends

- Private funding includes private operating revenue (32%), membership fees (12%), and public generosity (6%). The latter comprises individual donations (3%), corporate philanthropy or sponsorship (2%), and bequests or endowments (2%).



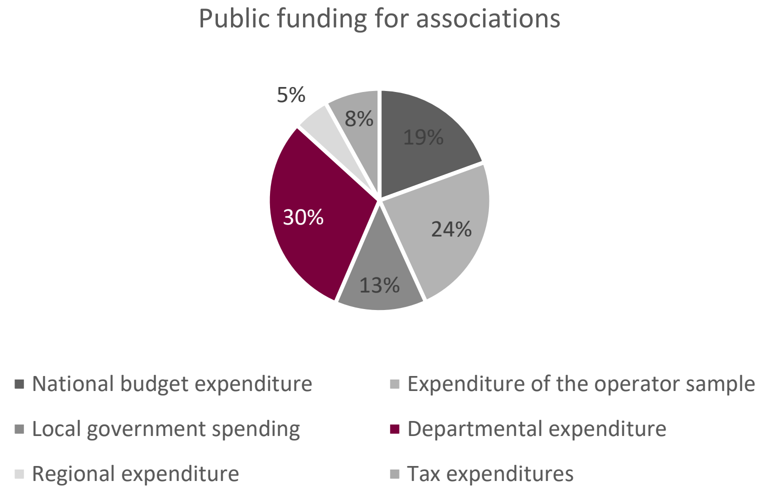
3.1.2 PUBLIC FUNDING: DEPARTMENTS ON THE FRONT LINE

Public funding for associations is mainly provided by departments, followed by State operators, and finally the central State itself. In total, this funding amounts to €53 billion for 2023. These funds are distributed across six sources: departments (€16 billion), State operators (€13 billion), the State (€10 billion), the municipal and inter-municipal level (€7 billion), tax expenditures (€4 billion), and regions (€3 billion).

- Departments are the primary local funders of associations, mainly because of the way their social responsibilities are implemented. Their participation in association budgets represents 30% of public spending directed toward associations. Departments are notably responsible for residential care costs in medico-social institutions, personalised autonomy allowances, and disability compensation benefits. These social responsibilities represent nearly 90% of departmental spending directed toward associations.

- State operators account for 24% of public spending directed toward associations. Their funding increased fivefold between 2019 and 2023. 90% of these funds are allocated to France Compétences (€11.4 billion), the public body responsible for financing, regulating and steering the system of vocational training and apprenticeships in France, notably through skills operators (OPCO).

- The municipal and inter-municipal level represents 13% of public spending directed toward associations. This support mainly concerns sport, culture and socio-cultural activities. In 2023, this level of government stands out as the largest funder in terms of volume, supporting a network of 252,300 associations



3.1.3 STATE FUNDING FROM 2024 ONWARDS: AN EXPECTED CONTRACTION IN 2026

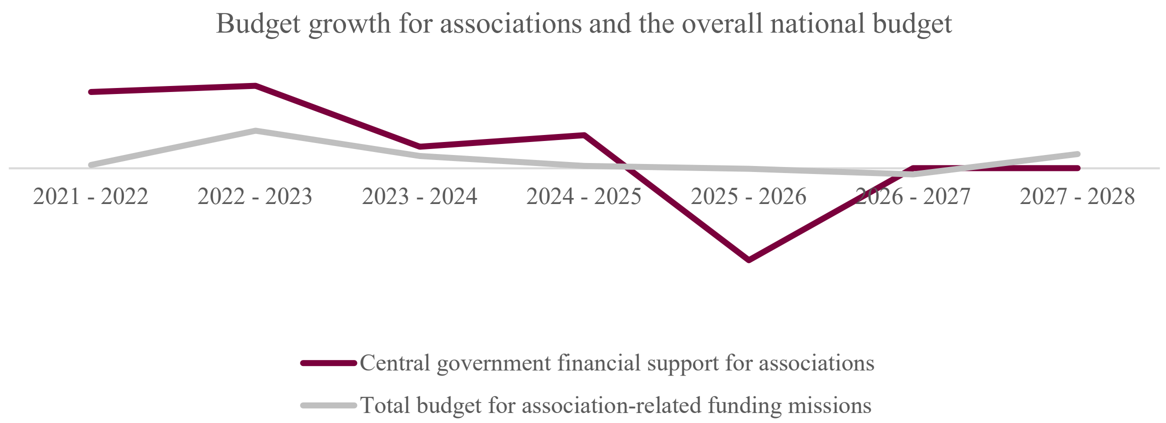
Following growth of 5% in 2024 and 7% in 2025, State funding for associations will undergo a 19% contraction in 2026—a reduction of €2.2 billion. This decrease occurs while the overall budget for government missions remains nearly stable (-0.1%), reflecting a decline in the share allocated to the associative sector within each budgetary envelope. At the same time, the dynamics of revenue and expenditure appear disconnected. The costs (wages, taxes, and social security contributions) of 15 of the leading French civil society organizations[5] rose sharply between 2021 and 2023, before decelerating in 2024. Between 2023 and 2024, wages increased by 7%, while taxes, related payments, and social security contributions rose by 4%. On the other hand, public funding (grants and operating subsidies) shows significant annual volatility. While this funding covers costs for half of the sample, this proportion varies depending on the economic model: some structures rely more on self-generated resources (sales of goods and services) or public generosity—the latter having experienced a 5% decrease between 2023 and 2024. The growing strain on associations will persist into 2026, as labor costs are expected to rise by 1.9%, rents by 1.6%, and service purchases by 1.6%, while energy prices remain highly uncertain in the current geopolitical context[6]. State funding is distributed by missions, some of which include specific credits dedicated to associations :

- **State funding shows growth of 4.5% in 2024 and 6.9% in 2025.** Out of 36 budgetary missions, 7 will see their funding contract in 2024 (Agriculture, Food, Forestry and Rural Affairs at -10%; State Advisory and Control at -87%; Culture at -5%; Economy at -38%; Health at -8%; Security at -12%; and Labor and Employment at -11%). In 2025, 6 missions will face a decline (Official Development Assistance at -29%; Air Traffic Control and Operations at -14%; Territorial Cohesion at -1%; Real Estate Asset Management at -50%; Immigration at -13%; and Territorial Policy at -8%). The share of funding allocated to associations within the total budgets of these missions remains relatively stable for 30 of them. However, four missions will see this share increase (Sports and Youth rising from 9% to 16%; Immigration and Integration from 37% to 43%; Agricultural Development from 39% to 42%; and Social

[5] Croix-Rouge française, Groupe SOS, Groupe AFP, Apprentis d'Auteuil, Association Aurore, Armée du Salut, Institut Pasteur, Secours Catholique, Médecins Sans Frontières, Action Contre la Faim, Secours Populaire Français, Unicancer, AFM Téléthon, UNAPEI, Handicap International.
[6] INSEE et Banque de France

Schemes from 2% to 6%). Conversely, two missions show a decrease (Territorial Cohesion falling from 11% to 9% and Official Development Assistance from 11% to 10%).

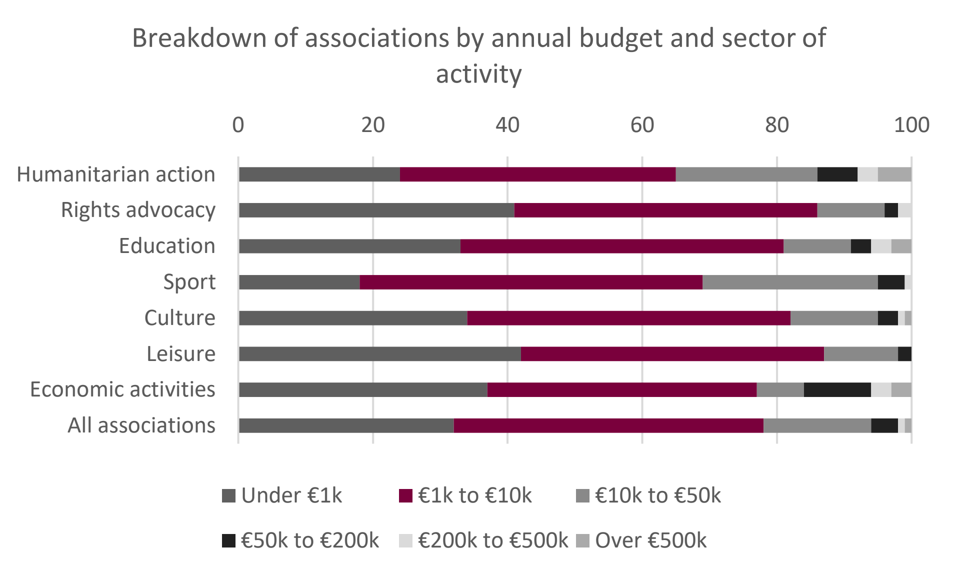
- **Data from the 2026 Finance Act forecast a 19% contraction in credits allocated to numerous associative sectors in 2026, representing a reduction of €2.2 billion.** Out of 36 budgetary missions, 20 will see their dedicated funding for associations decrease. Given that the overall budget for these missions remains stable in 2026 (-0.1%), the share specifically allocated to civil society organizations is declining within major sectors (Official Development Assistance falling from 10% to 4%; Agricultural Development from 42% to 30%; and Immigration from 43% to 18%). This trend extends a dynamic observed since 2024: the decline in public donations, coupled with rising costs (taxes, wages, and social security contributions), is durably weakening the structural imbalance and financial stability of the sector.



Association size

Although small associations predominate, the sector is fragmented between areas with high labour intensity, such as the medico-social sector, and more volunteer-based sectors such as rights advocacy. Associations with a budget below €10,000 represent 78% of all associations. Associations with a budget above €200,000 represent only 2% of all associations.

The humanitarian, health and social sector stands out with the highest concentration of large structures, with 8% of its associations managing an annual budget above €200,000. This is notably explained by significant labour cost requirements. Conversely, in the sector of rights advocacy, causes and interests, 86% of associations have a budget below €10,000.



3.2 ASSOCIATIVE EMPLOYMENT: 1.9 MILLION EMPLOYEES IN FRANCE

3.2.1 NATIONAL EMPLOYMENT: MORE THAN 1.9 MILLION EMPLOYEES WITHIN ASSOCIATIONS IN FRANCE IN 2025

In France in 2025, 11% of associations employ 1,924,000 employees. The employment footprint is considerable, as it is comparable to the health sector or the retail sector, two of the largest providers of jobs in the French economy. Twelve years ago, the number of employees stood at 1.8 million, representing growth of 7.5% since 2013. The associations employing the largest number of workers are in the sport sector, followed by culture and humanitarian, social and health activities.

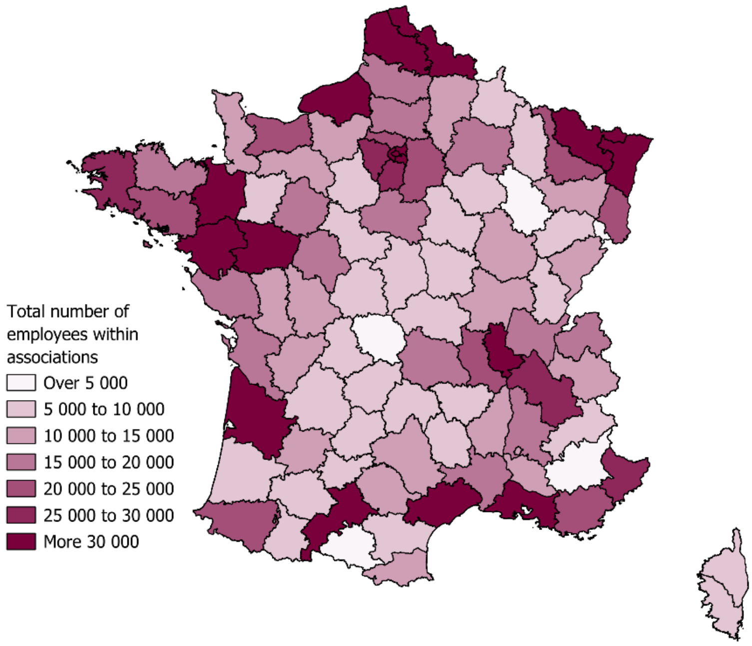
- Sectors where employees of associations are overrepresented are: sports associations, representing 25% of employing associations compared with 24% of all associations; humanitarian, social and health associations, representing 19% of employing associations compared with 11.8% of all associations; associations involved in education, training and integration, representing 9% of employing associations compared with 6% of all associations; and associations engaged in economic activities, representing 8% of employing associations compared with 4% of all associations.

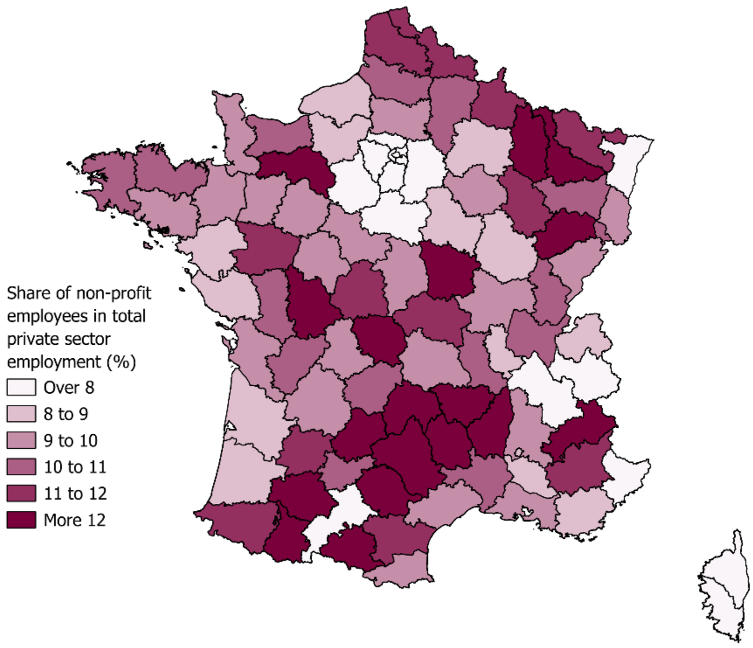
- Sectors where employees of associations are underrepresented are: associations defending rights and causes, representing 10% of employing associations compared with 13% of all associations; and leisure-related associations, representing 8% of employing associations compared with 20% of all associations.

- Associations in the culture sector are represented equally whether they are employing or non-employing associations, at a level of 21%.

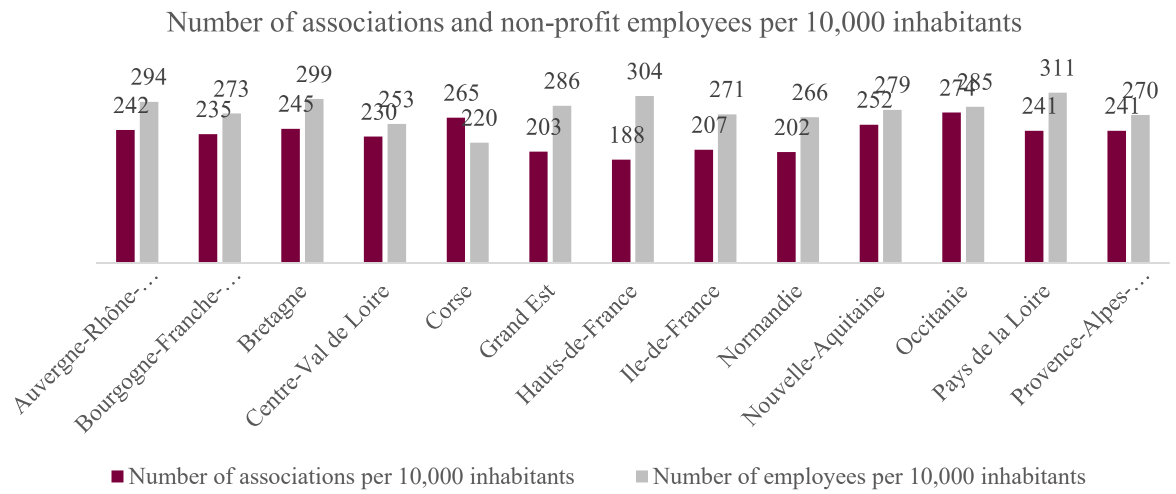
3.2.2 Local employment: associations account for 31% of private employment in Lozère

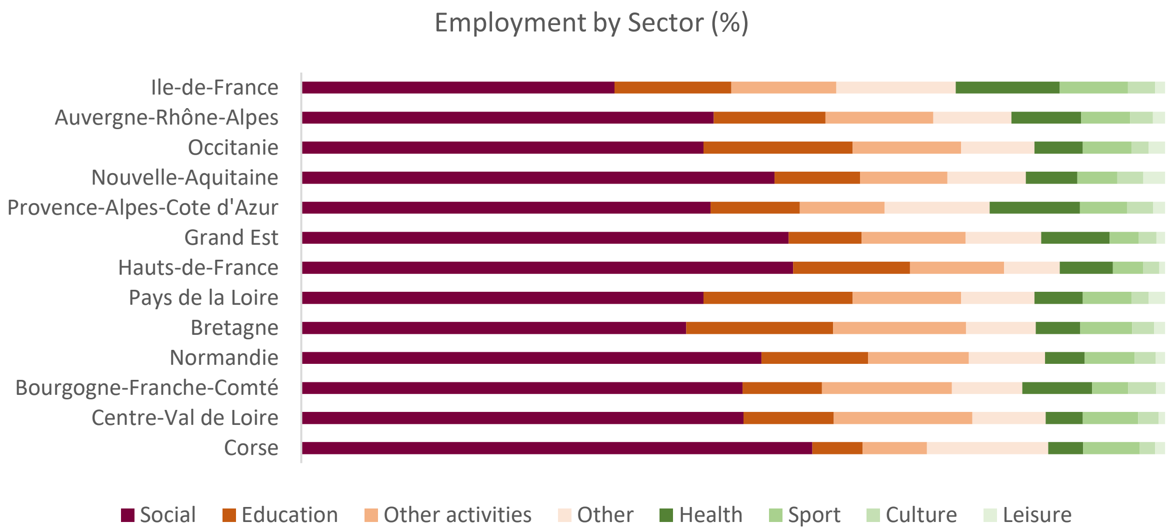
In 2025, the share of associative employment in the private sector ranges from 4% in Hauts-de-Seine to 31% in Lozère, with most departments lying between 6% and 18%. This contrast reveals a substitution effect: in rural areas, associations compensate for the absence of for-profit sectors in essential services (healthcare, dependency services), whereas in urban areas they are diluted by the density of corporate headquarters. In terms of volume, employment ranges from 3,290 positions in Creuse to 124,410 in Paris (average: 20,000). While Paris dominates due to the concentration of national federations, associations establish themselves as an economic driver in the least densely populated territories.





On average, the number of employees within associations follows associative density, with the exception of the Grand Est and Hauts-de-France regions. Pays de la Loire is the most employing region with 311 employees per 10,000 inhabitants, followed by Hauts-de-France with 304 employees per 10,000 inhabitants and Brittany with 299 employees per 10,000 inhabitants. The evolution of salaried employment since 2013 is broadly similar across all regions, ranging from an index of 102 for Bourgogne–Franche-Comté to 110 for Nouvelle-Aquitaine (base 100 in 2013). By sector, the social sector is the largest associative employer with an average share of 50% of employees, reaching 59% in Corsica, 57% in Hauts-de-France and 56% in Grand Est. Education represents the second employment pole with an average of 12% of employees, rising to 17% in Occitanie, Pays de la Loire and Brittany. The health sector ranks third among associative employers with an average of 7%, mainly driven by Île-de-France with 12% of its workforce, followed by the PACA region with 10%, and then Auvergne–Rhône-Alpes and Bourgogne–Franche-Comté with 8%.

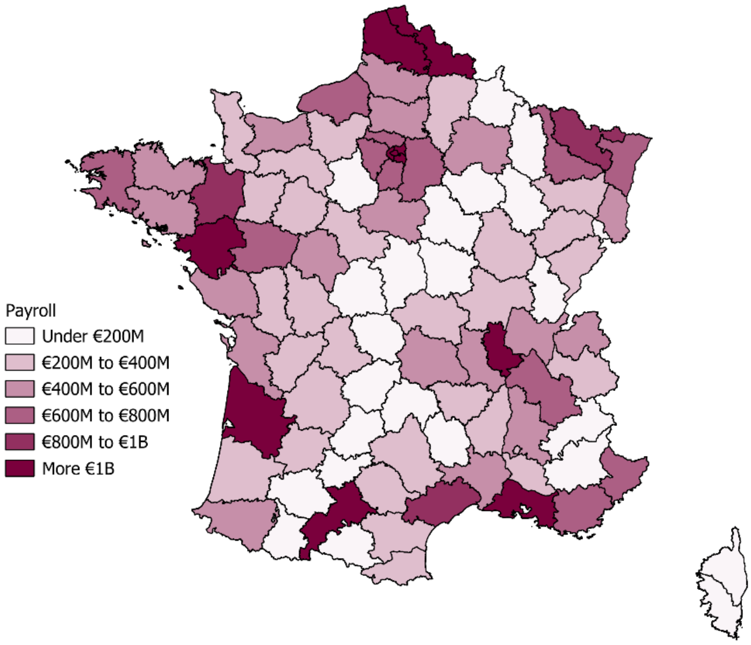




3.2.3 Associative wage bill: a driver of solidarity-based employment constrained by modest remuneration

The associative wage bill is concentrated in medico-social associations with more than 100 employees, with relatively modest remuneration levels. In 2023, this wage bill amounts to €46.9 billion, representing 7.4% of the private sector. Despite an overrepresentation of associations with more than 100 employees (56% of all associations), the level of remuneration remains modest, with an average salary per employee of €23,900, significantly below the €35,000 observed on average in the rest of the private sector.

In 2025, at the departmental level, the wage bill ranges from €80 million in Creuse to €4.7 billion in Paris. Per employee, the average wage bill is €25,000 per department, ranging from €22,266 in Meuse to €40,522 in Hauts-de-Seine. This disparity reflects the concentration of managerial functions and headquarters of major federations in Île-de-France, where the share of executives and the cost of living are higher. Conversely, in rural departments such as Meuse, the lower wage bill is explained by the predominance of operational jobs, notably in home care and local social services, sectors often characterised by low wages.



4. INDIRECT SOCIO-ECONOMIC CONTRIBUTION: NEARLY 1 MILLION JOBS GENERATED BY THE SPENDING OF ASSOCIATIONS

By integrating the spillover effects of associations on the rest of the economy, in addition to the direct footprint, the total contribution of the sector amounts to 2.8 million jobs, €219 billion in activity and value added equal to 6% of GDP. The overall contribution is therefore of a macroeconomic nature, with total activity reaching the same level as the construction sector in France (€220 billion). These spillover effects are estimated using the MIA model. More specifically, spending on suppliers and wages paid create demand for the rest of the French economy, generating total spillover effects estimated at 1 million jobs, €166 billion in activity and 3% of GDP. The sum of these spillover effects and the direct footprint of associations provides an overall view of their total contribution to the French economy.

4.1 METHOD: MODELLING THE SPILLOVER EFFECTS OF ALL ASSOCIATIONS IN FRANCE

4.1.1 PHILOSOPHY: A SECTOR ALSO DRIVES A NETWORK OF SUPPLIERS

The modelling of the total footprint of a sector is based on a general principle: economic actors are part of long chains of interdependencies and therefore generate value among their suppliers. Traditional accounting only considers what is directly linked to an economic actor, its "direct effect". However, associations also generate effects through their spending. Associations employ suppliers for the purchase of intermediate consumption; this is the "indirect effect". At the same time, associations pay wages to their employees, who consume goods and services and therefore generate activity for companies; this is the "induced effect". Then the indirect and induced effects themselves generate economic activity through orders placed with other companies and through wages paid; this is the "chain effect".

4.1.2 MODELLING: TRACKING THE ACTIVITY GENERATED BY ASSOCIATIONS AND TRANSLATING IT INTO VALUE ADDED AND EMPLOYMENT

The modelling of the footprint of associations in France is based on the flows of activity generated by sector, which are then translated into value added and employment. This monitoring of flows and their translation is based on public data, notably the input–output tables of INSEE and average sectoral data. The Asterès impact model (MIA) has been developed for several years to track these flows.

- **The modelling of the footprint of associations in France relies on activity flows evaluated by sector.** The indirect effect models the activity generated among first-tier suppliers, directly linked to investments and intermediate consumption of organizations with French suppliers. The induced effect models the activity generated among first-tier companies that benefit from the consumption of employees and self-employed workers, after deducting taxes and savings. The indirect and induced effects then generate activity among second-, third- and fourth-tier suppliers, creating chain effects. At each round, part of the initial impulse leaves the model due to imports, social and tax contributions, and savings.

- **Economic activity flows are then converted into value added, employment, and taxation based on sector averages.** For each volume of activity per sector, Asterès developed value-added and employment ratios using Insee sectoral data. The indirect, induced, and supply-chain activity modeled at each stage by sector is thus translated into value added and employment.

4.1.3 DATA: ESTIMATING ASSOCIATION SPENDING USING PUBLIC SOURCES

The modelling relies on data relating to association spending. Wages are publicly sourced, while operating expenditures are estimated by Asterès.

- **The data at the origin of the induced effect correspond to the wages of association employees.** Data on wage bills by department come from the regional indicators on associative life produced by INJEP and the organization Recherches & Solidarités.

- **The data at the origin of the indirect effect correspond to the operating expenditures of associations with suppliers located in France.** Using the data available in the "Review of public spending directed toward associations" carried out by the IGF and the IGESR, Asterès estimated the expenditures of associations in five sectors of the French economy: administrative and support service activities; education; residential social and medico-social care and social work without accommodation ; arts, entertainment and recreation; and other service activities. Using the input–output tables of INSEE, Asterès then distributed the expenditures of these sectors across the 37 main sectors identified within the French economy. These expenditures are the ones integrated into the MIA model developed by Asterès.

Sectors	Share of expenditures
Administrative and support service activities	17%
Accommodation and food service activities	11%
Legal, accounting, management, architectural, engineering, technical testing and analysis activities	10%
Manufacture of food products, beverages and tobacco products	6%
Real estate activities	6%
Construction	5%
Other manufacturing industries; repair and installation of machinery and equipment	4%
Transportation and storage	4%
Electricity, gas, steam and air conditioning supply	4%
Other professional, scientific and technical activities	4%
Financial and insurance activities	3%
Wood processing, paper industries and printing	3%
Publishing, audiovisual and broadcasting activities	2%
Water supply; sewerage, waste management and remediation activities	2%
Arts, entertainment and recreation	2%
Education	2%
Manufacture of computer, electronic and optical products	2%

Wholesale and retail trade; repair of motor vehicles and motorcycles	1%
Manufacture of machinery and equipment n.e.c.	1%
Coke and refined petroleum products	1%
Computer programming and information service activities	1%
Manufacture of textiles, wearing apparel, leather and footwear	1%
Telecommunications	1%
Health sector activities	1%
Pharmaceutical industry	1%
Metallurgy and manufacture of metal products, except machinery and equipment	1%
Manufacture of rubber and plastic products and other non-metallic mineral products	1%
Manufacture of transport equipment	1%
Chemical industry	1%
Other service activities	1%
Manufacture of electrical equipment	0%
Agriculture, forestry and fishing	0%
Mining and quarrying	0%
Scientific research and development	0%
Public administration and defence; compulsory social security	0%
Residential social and medico-social care and social work activities without accommodation	0%

4.2 RESULTS: €166 BILLION IN ACTIVITY, 3% OF GDP AND 1 MILLION JOBS GENERATED BY SPILLOVER EFFECTS

4.2.1 TURNOVER: A SPILLOVER EFFECT OF €166 BILLION IN ACTIVITY IN THE REST OF THE FRENCH ECONOMY

The expenditures generated by the activities of associations in France create €166 billion in activity per year. Given the direct activity of associations in France (€53 billion), the multiplier coefficient reaches 3.1. For €1 of activity generated by associations in France, €3.1 of activity is generated in the rest of the national economy through their spending. The chain effect represents 59% of the total spillover effect (€98 billion), ahead of the indirect effect (30%, €50 billion) and the induced effect (11%, €18 billion).

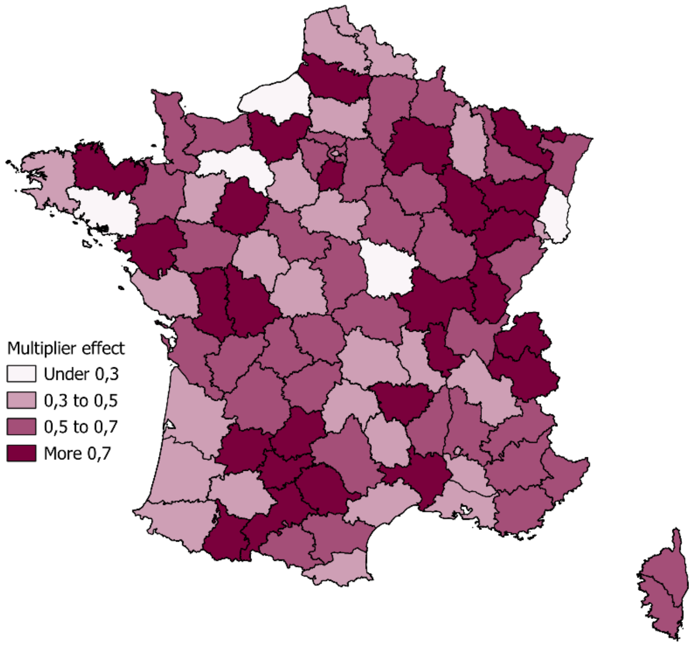
4.2.2 VALUE ADDED: A SPILLOVER EFFECT IN THE REST OF THE ECONOMY REACHING 3% OF GDP

The spillover effects of association activities in France amount to €134 billion in value added. This spillover effect represents 3% of French GDP. The direct value added generated by associations amounts to €53 billion, resulting in a multiplier of 2.5. For €1 of value added produced by associations, €2.5 of value added is generated in the rest of the economy. The indirect effect represents 31% of the total spillover effect (€25 billion), the induced effect 12% (€10 billion) and the chain effect 56% (€45 billion).

4.2.3 EMPLOYMENT: 1 MILLION JOBS IN FRANCE GENERATED BY THE SPILLOVER EFFECTS OF ASSOCIATIONS

The spillover effects of association activities in France represent 962,000 full-time equivalent jobs. With nearly 2 million direct jobs in France, the multiplier is 0.5: two direct jobs generate one additional job in the rest of the economy. The indirect effect represents 34% of the total spillover effect with 331,000 FTE jobs, the induced effect 11% with 103,000 FTE jobs and the chain effect 55% with 527,000 FTE jobs.

Ten departments have multipliers greater than 1, meaning that one job within an association generates more than one job in the rest of the economy: Territoire-de-Belfort, Gers, Eure-et-Loir, Yonne, Lozère, Haute-Loire, Hautes-Alpes, Haute-Marne, Tarn-et-Garonne and Saône-et-Loire. Departments with the largest number of direct jobs have the lowest multipliers, notably Paris (0.2), Nord (0.2), Seine-Saint-Denis (0.3), Moselle (0.3) and Hauts-de-Seine (0.3).


Multiplier effect
Under 0,3
0,3 to 0,5
0,5 to 0,7
More 0,7

5. ANNEXES

Distribution of associations according to the number of volunteers and the sector of activity in 2020 (as a percentage of associations with volunteers)

Field of activity	1 to 4 volunteers	5 to 9 volunteers	10 to 19 volunteers	20 to 49 volunteers	50 to 99 volunteers	100 volunteers and more
Associations without employees	14	25	34	20	4	2
Humanitarian, health, social	10	21	39	22	7	1
Defence of rights, causes and interests	14	24	39	17	4	1
Education, training and integration	14	21	38	18	4	5
Sports	18	24	31	21	4	2
Culture	15	28	32	21	3	2
Leisure	13	25	35	21	5	1
Economic activities	11	21	30	25	6	8
Associations with employees	12	19	28	25	9	7
Humanitarian, health, social	8	15	27	26	12	12
Defence of rights, causes and interests	6	16	36	26	10	6
Education, training and integration	12	26	26	24	5	7
Sport	14	24	29	21	7	4
Culture	17	20	29	23	8	3
Leisure	16	13	22	38	9	2
Economic activities	10	12	29	29	7	12