



YOUNG VOICES

ECONOMIC IMPACT & SOCIAL VALUE ASSESSMENT

Presented by Sound Diplomacy and RealWorth for Young Voices, July 2023

FOREWORD

BY YOUNG VOICES

Over the course of 27 years, Young Voices has continuously made a profound impact on those involved and their wider community.

However, explaining this impact to those who have never experienced a Young Voices concert has always been a challenging task. That's why we enlisted the expertise of Sound Diplomacy and RealWorth to conduct a comprehensive study and produce this insightful report.

While it is easy to comprehend the economic impact of Young Voices concerts, with sold-out arenas around the world, quantifying the social impact on children, schools, and the community has always been more difficult. The intangible benefits such as soft skills development and overall well-being that this project provides are evident to anyone who has witnessed it, but translating these into concrete facts and figures is a complex endeavour.

Every parent invests in their child's future, whether it is through education, extracurricular activities, or arts and sports clubs, with the aim of enriching their lives and fostering skills like confidence, teamwork, resilience, and a sense of achievement. This report demonstrates that Young Voices provides an exceptional return in terms of social impact when compared to the level of investment.

By showcasing the value of Young Voices to potential partners, we hope to expand our reach and make the project even more accessible to children from all backgrounds. It is our aspiration that this report will also contribute to the wider discussion about how to demonstrate the value of the social impact of music education.

Ben Lewis
CEO, Young Voices

INTRODUCTION

Across 27 performances in January and February 2023, 138,767 children participated, 186,435 audience members attended, and 19,837 teachers took part in Young Voices.

As the largest school choir in the world, Young Voices has developed a reputation and position amongst educators and venues that sees repeat and increased participation year on year. In-school opportunities that link skill and educational development to the power of music translate to professionally produced and transformative performances in some of the world's most famous arenas located in England.

This project set out to:

- Understand the economic impact and social value of Young Voices on the five host cities' local economy
- Provide the data for Young Voices to use for marketing, partnership attraction and programme expansion
- Showcase the legacy of the Young Voices programme

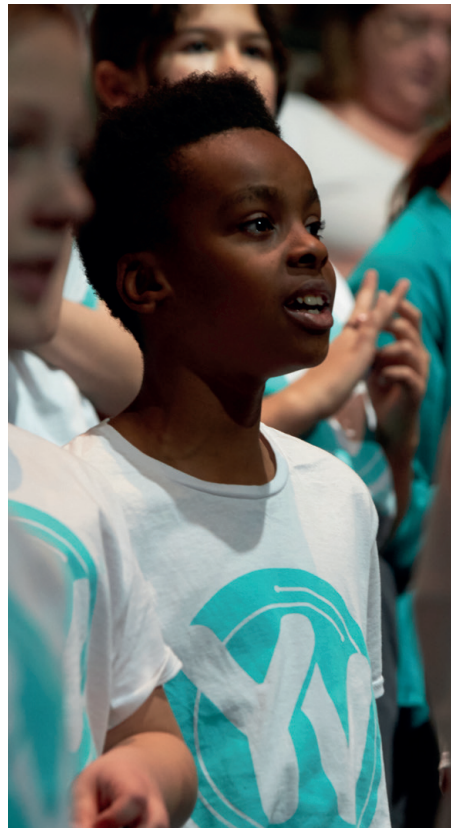
Understanding the economic impact and social value of Young Voices provides the organisation with a compelling narrative based on robust research. By commissioning this work, Young Voices is demonstrating its forward thinking approach to strengthening and expanding its programme, positioning itself as an organisation that is ahead of the curve in the way it measures and monitors its success.



METHODOLOGY

The research process saw an assessment of 27 performances organised by Young Voices between January and February 2023 in the following locations:

- London – The O2 Arena** (7 concerts)
- Birmingham – Resorts World Arena** (8 concerts)
- Sheffield – Utilita Arena Sheffield** (7 concerts)
- Manchester – Manchester AO Arena** (3 concerts)
- Wembley London – The OVO Arena** (2 concerts)



Economic Impact Assessment

The calculations of the economic impact are based on the Direct, Indirect and Induced impacts within the value chain, and of spending by non-local attendees:

Economic impact refers to the effects and consequences of an economic activity or event on various aspects of an economy. It measures changes in key economic indicators, such as turnover, Gross Value Added (GVA), and employment, resulting from a specific activity or event. The economic impact analysis assesses three types of effects: direct effects, which are immediately generated by the production of the event in the local economy; indirect effects, which occur through ripple effects in the supply chains of the event's value chain; and induced effects, which result from changes produced by the workers across the value chain in the local economy. Additionally, it includes the consumer spending patterns by event attendees in the local economy. By quantifying the economic impact, policymakers, businesses, and stakeholders can gain a better understanding of the influence of specific activities on the overall health and development of an economy, including the derived effects of consumer spending by event attendees.

The direct impact on turnover is estimated by identifying the percentage of the budget for the production of performances spent on local suppliers.

The indirect and induced impacts on turnover, gross value added, and employment are calculated with regional multipliers developed by Sound Diplomacy using FLQ-Location quotients¹.

The direct economic impact of non-local attendee spend (turnover) is the result of the expenditure made by non-local attendees to the performance.

Data was collected from economic and social participant surveys, as well as organisation data provided by Young Voices.

A total of 1,884 survey responses were obtained, broken down by location:

- London – The O2 Arena:** 612 responses
- Birmingham – Resorts World Arena:** 509 responses
- Sheffield – Utilita Arena Sheffield:** 338 responses
- Manchester – Manchester AO Arena:** 319 responses
- Wembley London – The OVO Arena:** 106 responses

Social Value Assessment

Social value is the relative importance that people and society place on changes to lives that are affected by the social, economic, and environmental influences of projects, policies and programmes.

The social value of the Young Voices programme is determined by analysing the potential impact across eleven factors, as seen in the below figure:²

In total, 889 survey responses were used:

- Child participants:** 203 responses
- Teachers and school staff:** 470 responses
- Parents or carers:** 216 responses



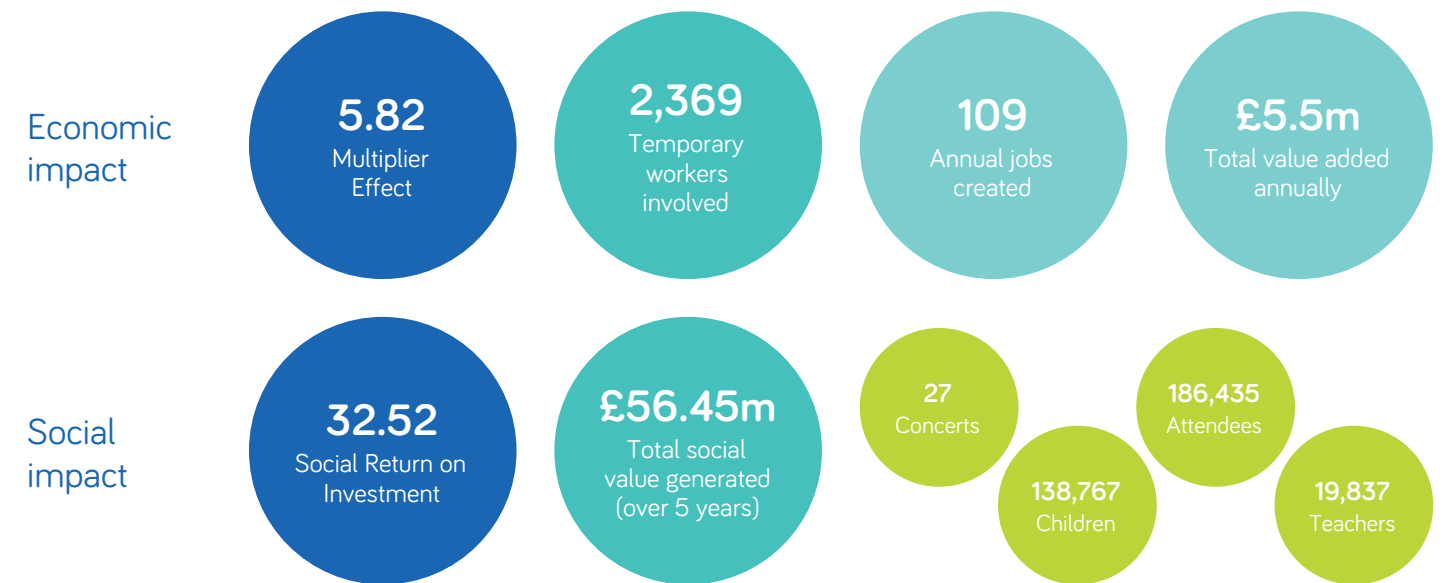
The calculations of Social Value are based on the degree to which change has occurred (whether positive or negative) both in terms of the significance of the change, and the numbers of people that experienced the change. The approach used allows the social value of an intervention to be made explicit through evidence, and then monetised to show the value relative to the amount of investment. This provides an overall social value and a return on investment (ratio) which can be used by decision-makers in a variety of ways to make better and more informed decisions. These decisions take into consideration impacts that are not normally considered in the traditional market-based approach to financial return on investment.

¹ For a detailed derivation and methodology of FLQ-Multipliers, see Flegg & Webber (1997) "On the appropriate use of location quotients in generating regional input-output tables: reply."

² RealWorth's Eleven Factors of Social Value, based on the OECD Dimensions of Wellbeing

ECONOMIC IMPACT AND SOCIAL VALUE ASSESSMENT

Economic and social impact of Young Voices concerts in the five locations studied



Overview of total economic impact of Young Voices concerts: value chain and non-local attendee spend

Total values <i>Direct, indirect & induced</i>	Total in 5 locations (5 Arenas)	London (The O2 Arena)	Birmingham (Resorts World Arena)	Sheffield (Utilita Arena Sheffield)	Manchester (Manchester AO Arena)	Wembley London (The OVO Arena)
Total Turnover	£10.0M 31% value chain 69% attendee spend	£4.4M 32% value chain 68% attendee spend	£2.3M 32% value chain 68% attendee spend	£1.5M 32% value chain 68% attendee spend	£1.2M 24% value chain 76% attendee spend	£0.6M 36% value chain 64% attendee spend
Temporary workers in the Arenas	2,369	915	400	174	580	300
Annual employment	109 22% value chain 78% attendee spend	46 23% value chain 77% attendee spend	26 23% value chain 77% attendee spend	17 24% value chain 76% attendee spend	14 16% value chain 84% attendee spend	6 27% value chain 73% attendee spend
Total Value Added	£5.5M 31% value chain 69% attendee spend	£2.4M 32% value chain 68% attendee spend	£1.3M 32% value chain 68% attendee spend	£0.8M 32% value chain 68% attendee spend	£0.7M 24% value chain 76% attendee spend	£0.3M 36% value chain 64% attendee spend
Total Multiplier Effect (TME)	£1 → £4.82	£1 → £5.19	£1 → £4.31	£1 → £4.13	£1 → £5.85	£1 → £4.48

THE ECONOMIC IMPACT OF YOUNG VOICES

The overall economic impact of Young Voices concerts in 2023 was:

- For every £1 invested in the production of the concerts, £4.82 was created in the host cities
- £10.0 million was generated as total turnover (direct, indirect, and induced) in the host cities: The majority of the impact was derived from the non-local attendee spend (69%),³ whilst the remaining 31% was generated within the value chain.⁴ The average turnover per concert was £371,026 in the local economy
- The GVA generated across the host cities reached £5.5 million: The average value added per concert was £204,222 in the local economy
- An average of 72% of attendees at each concert were residents of a different city (non-locals)
- The majority of non-local spending took place outside of the arenas (£2.33million): This was on food and drink (31%), shopping (18%), local transport (7%), accommodation (5%) and 7% on miscellaneous items. 33% of spending was made inside the arenas
- Since the O2 opened in 2007, there have been 73 concerts organised by Young Voices: These have generated a cumulative economic impact of £25,079,515 in added value and £45,871,740 in turnover
- Young Voices concerts at the O2 Arena created the highest economic impact in turnover (£4.4 million), GVA (£2.4 million), temporary workers involved in the events (915 local workers), and the equivalent on annual employment (46 jobs) in the city: This is almost double that of the Birmingham concerts, which had the second highest economic impact on their local city.
- Manchester concerts generated the highest multiplier in the local economy – for every £1 invested in the production, an additional £5.85 was added to the local economy: These concerts also attracted the highest number of non-local attendees (6,698), also corresponding to the greatest proportion of non-local attendees per concert (86%).
- When looking at the average impact per concert in each location, the O2 Arena had the highest turnover (£628,380) and GVA (£343,555): However, on this occasion, Manchester follows with a turnover of £414,478, and GVA of £227,825, per concert.



³ Non-local attendees' spend impact: effect of the expenditure of attendees to performances in other industries (i.e., accommodation, food & drinks, transport, retail, others). This includes direct, indirect and induced effects of those expenditures in the economy.

⁴ Young Voices value chain: correspond to the suppliers of Young Voices in the local economies (venues, security staff, catering, sound engineers, musicians, etc).

Overview of total economic impact of Young Voices concerts, per concert: value chain and non-local attendee spend

Total values <i>Direct, indirect and induced</i>	Total in 5 locations (5 Arenas)	London (The O2 Arena)	Birmingham (Resorts World Arena)	Sheffield (Utilita Arena Sheffield)	Manchester (Manchester AO Arena)	Wembley London (The OVO Arena)
Total Turnover Average per concert	£371,026 31% value chain 69% attendee spend	£628,380 32% value chain 68% attendee spend	£292,667 32% value chain 68% attendee spend	£208,573 32% value chain 68% attendee spend	£414,478 24% value chain 76% attendee spend	£287,133 36% value chain 64% attendee spend
Total Value Added Average per concert	£204,222 31% value chain 69% attendee spend	£343,555 32% value chain 68% attendee spend	£161,776 32% value chain 68% attendee spend	£116,554 32% value chain 68% attendee spend	£227,825 24% value chain 76% attendee spend	£157,779 36% value chain 64% attendee spend
Number of concerts	27	7	8	7	3	2
Attendees Average per concert (and non-local)	6,905 (4,944 non-local - 72%)	9,669 (5,695 non-local - 59%)	6,193 (5,209 non-local - 84%)	5,146 (3,666 non-local - 71%)	7,819 (6,698 non-local - 86%)	4,868 (3,098 non-local - 64%)

Developed by: Sound Diplomacy

- Every child generated an average turnover of £72.19 in the local economy due to their participation at a Young Voices concert: In addition, the average GVA per child was £39.74 in the local economy.
- 1.34 audience members attended on average per child
- Young Voices concerts at the O2 Arena created the highest economic impact in turnover (£92.95), and GVA (£50.82) per child within the local economy: In contrast, Sheffield showed the lowest economic impact in turnover (£56.80), and GVA (£31.74) per child.



Overview of total economic impact of Young Voices concerts, per child

Total values <i>Direct, indirect and induced</i>	Total in 5 locations (5 Arenas)	London (The O2 Arena)	Birmingham (Resorts World Arena)	Sheffield (Utilita Arena Sheffield)	Manchester (Manchester AO Arena)	Wembley London (The OVO Arena)
Total Turnover <i>Per child</i>	£ 72.19 £22: value chain £50: attendee spend	£ 92.95 £30: value chain £63: attendee spend	£ 60.36 £19: value chain £41: attendee spend	£ 56.80 £18: value chain £39: attendee spend	£ 64.23 £15: value chain £49: attendee spend	£ 75.64 £27: value chain £48: attendee spend
Total Value Added <i>Per child</i>	£ 39.74 £12: value chain £27: attendee spend	£ 50.82 £16: value chain £35: attendee spend	£ 33.36 £11: value chain £23: attendee spend	£ 31.74 £10: value chain £22: attendee spend	£ 35.31 £9: value chain £27: attendee spend	£ 41.56 £15: value chain £27: attendee spend
Total attendees <i>Per child</i>	1.34	1.43	1.28	1.40	1.21	1.28
Non-local attendees <i>Per child</i>	0.96	0.84	1.07	1.00	1.04	0.82

Developed by: Sound Diplomacy

- **The direct impact of the concerts equalled a turnover of £1.72 million in the value chain, and £3.45 million from non-local attendee spending:** In turn it created a GVA of £927,214 in the value chain, and £1.85 million from non-local attendee spending in the host cities
- **Approximately 2,369 local temporary workers (i.e. operational production, logistics, technical, management and executive staff from the arenas) were directly involved in the production of the concerts:**⁵ Additionally, local spending by Young Voices and non-local attendees supported the creation of the equivalent of 109 annual jobs

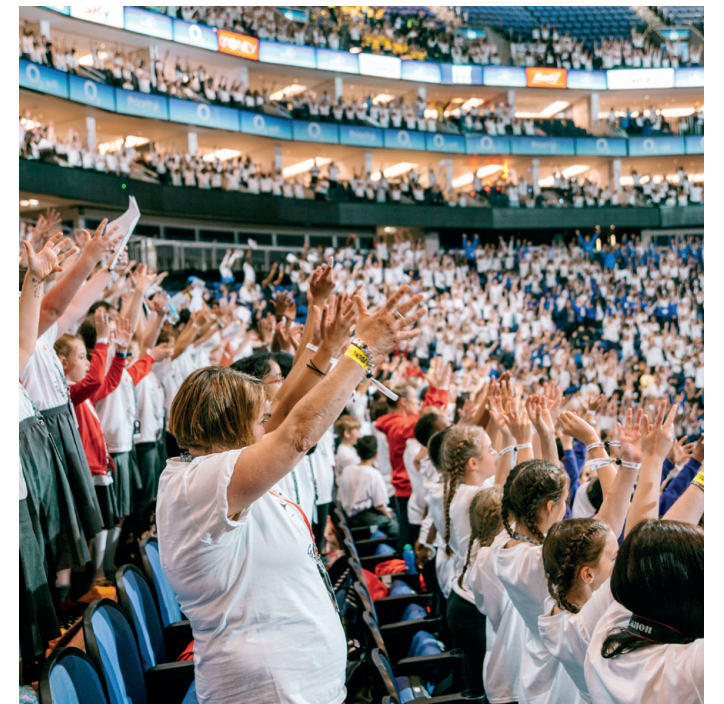


⁵ It is estimated that a total 915 local workers were involved throughout the Young Voices concerts at the O2 Arena in London, 400 in Birmingham Resorts World Arena, 174 in Utilita Arena Sheffield, 580 in Manchester AO Arena, and 300 in Wembley London OVO Arena.

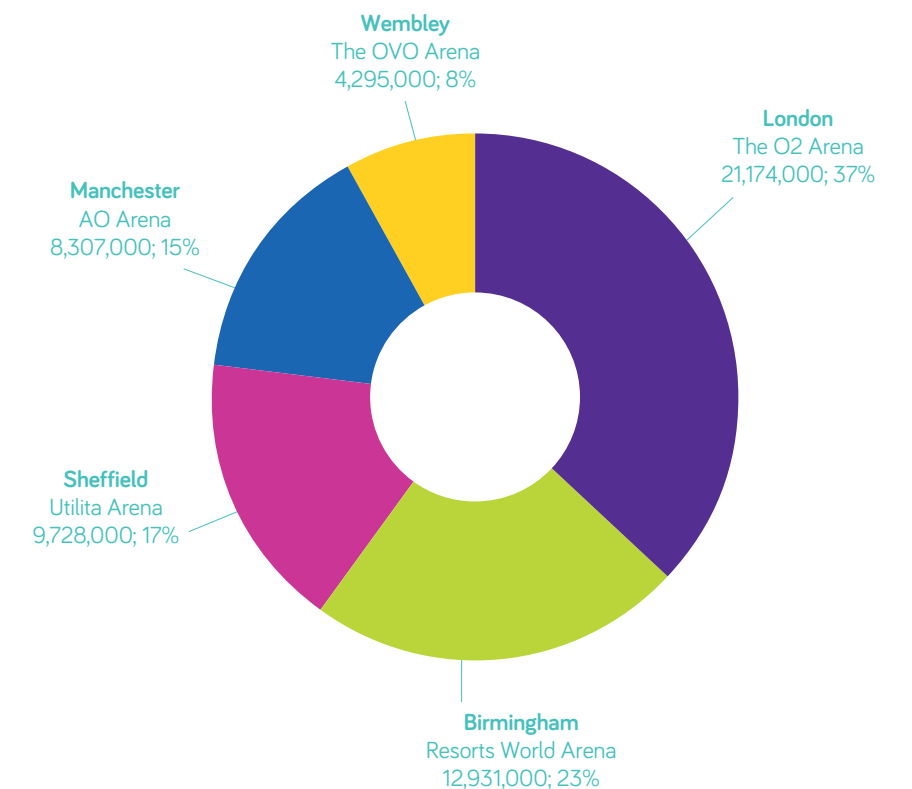
THE SOCIAL VALUE OF YOUNG VOICES

The overall social impact of Young Voices concerts in 2023 in the five locations was:

- **For every £1 invested in the production of the concerts, £32.52 of social value is created.**
- **The total social value generated by Young Voices concerts in 2023 was £56,436,000 for the stakeholders that participated**
- **Participating children received the most of the total social value (76%):** This is followed by parents and carers (16%) and teachers and school staff (8%)
- **The biggest impact was on stakeholders' education and skills (£27,380,000):** This includes the value of learning new skills, better attitudes towards attending school, and better educational outcomes
- **Reported improvements to stakeholders' subjective wellbeing, civic engagement, and social connections also created a large amount of social value**
- **Young Voices concerts at the O2 Arena created the highest social impact, with a total of £21.2 million:** This is almost double that of the Birmingham concerts, which had the second highest impact on their local city.



Social Value by Arena



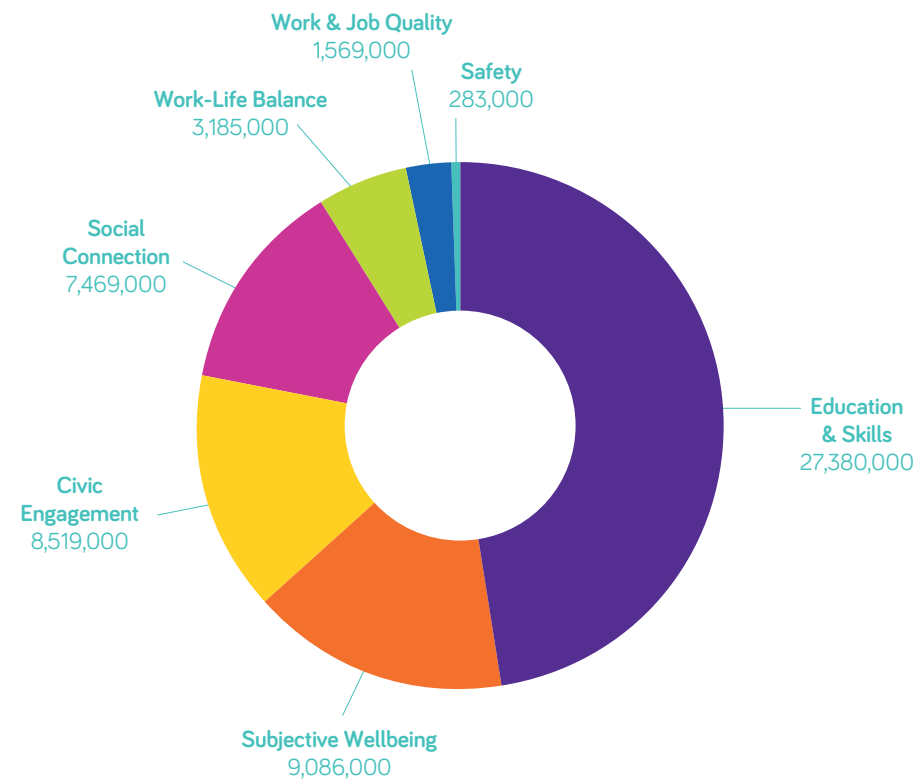


Education and skills were the greatest factors of social value.

For children, this is generated by learning a new skill through preparation for the event, improved school results, and a greater participation in classes. Some parents and carers reported that their children's activities had inspired them to take up new activities which develop their skills, creating further social value, whilst teachers also reported that they learned new skills through the training programme.

- **Positive changes in subjective wellbeing, civic engagement and social connections** were also reported because of the programme. The responses indicated that Young Voices had significantly changed how many children felt about themselves.
- Parents and carers, and teachers and school staff reported an **increase in volunteer hours** both in and outside of school activities.
- **All stakeholders showed an increase in social relations**, both with their own family and new friendships.

Social Value by Factor

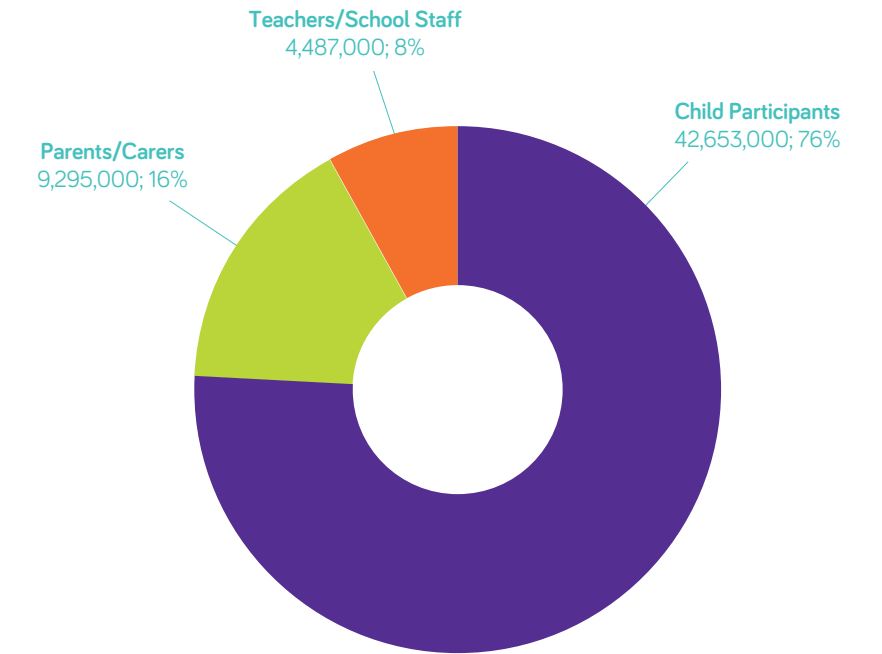


Just over three quarters of the total social value generated by the programme is attributed to child participants in the events. This was primarily through new skills learned, greater confidence and subjective wellbeing, and attitude towards attending school.

When looking into the overall impact of Young Voices concerts, per person the results show that:

- Schoolchildren benefited the most, with around **£307** per child generated.
- This was followed by teachers and school staff (**£223**), and parents and carers (**£50**).

Social Value by Stakeholder



KEY OUTCOMES FOR CHILDREN

Significant outcomes that were reported are:



“It was a wonderful experience. My child is autistic and to see the inclusion and him being able to do something like this has been a fantastic experience.”

Improvement areas that were reported are:



KEY OUTCOMES FOR PARENTS AND CARERS

Significant outcomes that were reported are:



Improvement areas that were reported are:



KEY OUTCOMES

FOR TEACHERS AND SCHOOL STAFF

Significant outcomes that were reported are:



“Young Voices has helped to promote singing in school it has also been great 'therapy' for me.”

Improvement areas that were reported are:



The Young Voices programme between January and February 2023 could be considered the social value equivalent of:

- Around 2.1 million people donating the average amount given to charity.
- Around 19,000 people achieving five good GCSE results.
- Around 81,000 people going from physically inactive to physically active.

School children are currently facing a raft of issues, from concerns about climate change to economic and employment challenges. Many of these issues are manifesting in problems such as school truancy, a deterioration in mental and physical health, difficulties in educational attainment, and temptation to get involved in crime and antisocial behaviour. The social value created by Young Voices can help support school children to cope with several of these issues.



RECOMMENDATIONS

- Capitalise on skills development
- Provide additional support for teachers
- Improve value for parents
- Further explore the impact of socio-economic backgrounds on social value

CONCLUSION

After decades of work, Young Voices now has the evidence base to share with potential partners, host cities and future participants.

With the power to generate an average turnover of £371,026 in the local economy per concert, and a multiplier of £4.82 created for every £1 invested in the production of these concerts the existing economic impact of Young Voices is significant.

Furthermore, it has been shown that for each participant, **£307** of social value is generated in the child, **£50** of social value in their parents or caregivers, and **£223** of social value in the teachers or school staff, while for every **£1** invested, **£32.52** of social value is generated in total.

These figures highlight that, should Young Voices expand to other cities and nations, it has the ability to act as a social and economic driver for areas, venues and all that participate in it.

Sound Diplomacy and RealWorth are proud to have undertaken this work, to prove the significance of Young Voices and the impact the concerts have on those who engage, be it children, teachers, parents, venues or cities. Findings have highlighted the role that these concerts play in attracting visitors to cities – many of whom reportedly wouldn't have visited if it wasn't for the motivation of attending a Young Voices event. This generated income, and boosted local economies through visitor spend, despite the social value survey revealing a negative outcome amongst parents/carers of participation being financially expensive.

The results highlight that the organisation's ethos of increasing skills, developing education, and building confidence through music for children and teachers alike is truly embedded in the work that is undertaken. Education and skills, subjective wellbeing, civic engagement and social connections stood out as valuable takeaways that participants noticed they benefited from through their time with Young Voices. In particular, the learning of new skills, improvements in how people felt about themselves having participated, and children's attitude towards attending school, have created strong impacts. As well as the children, the social value analysis demonstrated that teachers and school staff, and parents and carers who contributed to Young Voices also benefited significantly from the experience.

This harmony between Young Voices' objectives and participants' experience demonstrates the expertise and magnitude of what the team at Young Voices does.





YOUNG VOICES



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