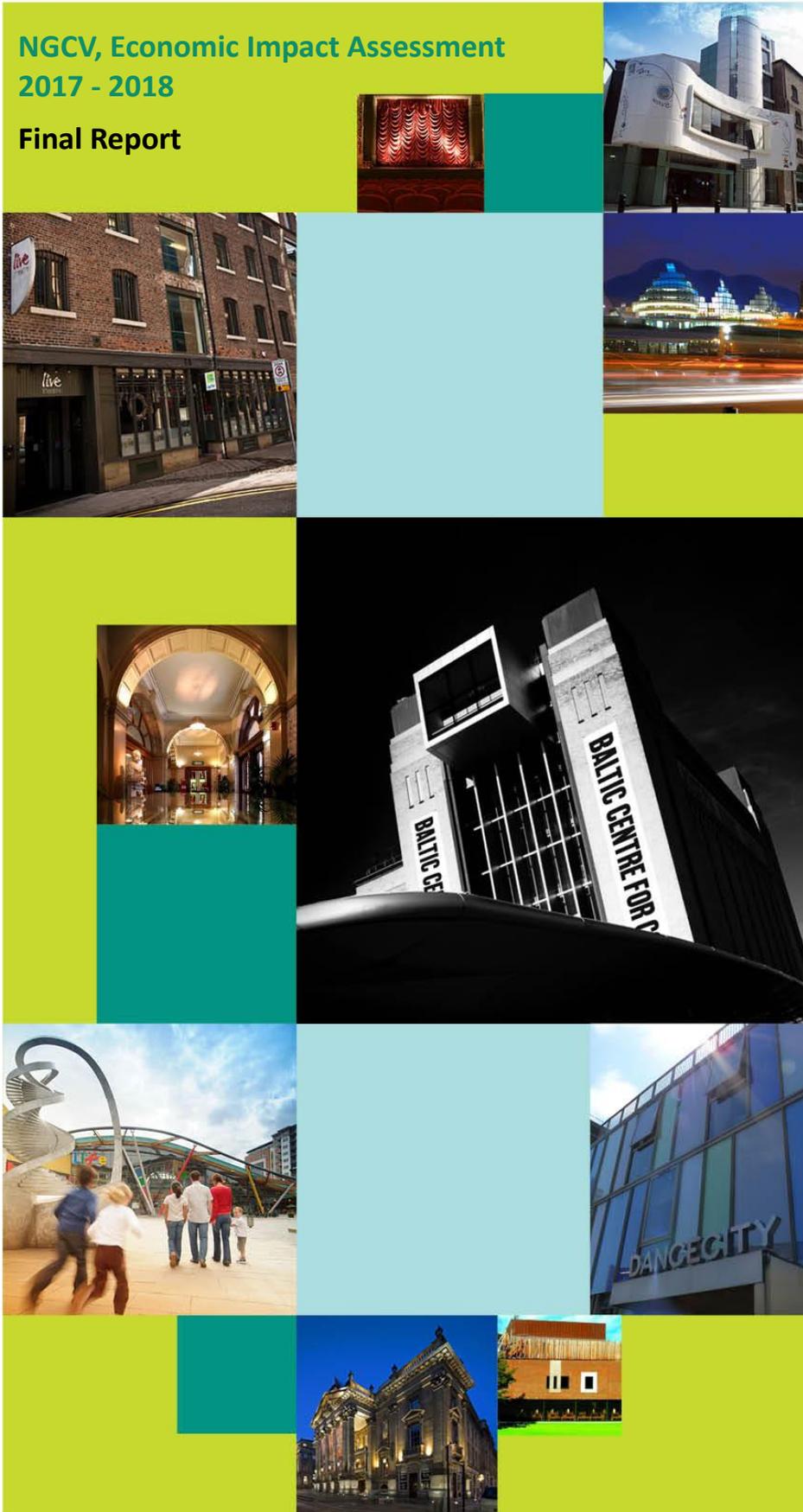


**NGCV, Economic Impact Assessment
2017 - 2018
Final Report**



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1. INTRODUCTION

- 1.1 This is [Newcastle-Gateshead Cultural Venues'](#) (NGCV) tenth independent Economic Impact Assessment. It is produced to demonstrate the combined contribution of the 10 partner organisations to the economy of the local area and the region as a whole¹.
- 1.2 This annual, independent assessment and report enables NGCV to gain a better understanding of the partnership's collective impact and to track changes over time. It also demonstrates to partners, stakeholders and the public the collective economic contribution made by these organisations. It is one of a range of ways in which NGCV assesses and analyses impact. NGCV has a culture of sharing information, producing joint studies and reviewing ways of becoming more efficient and effective by working together and pooling experience, knowledge and resources².

About NGCV

- 1.3 NGCV is a non-constituted partnership of 10 leading cultural organisations responsible for operating 20 venues across Tyne and Wear. NGCV is recognised nationally as one of the leading area-based collaborations in the cultural sector and regularly shares information and learning about their approach and activities with other city and regional consortia.
- 1.4 Since 2009, NGCV has demonstrated its effectiveness in creating and delivering successful strategic initiatives to benefit both its members, as well as the wider cultural sector.
- 1.5 The members of the partnership are:
- [BALTIC Centre for Contemporary Art](#) and BALTIC 39 (visual arts)
 - [Centre for Life](#) (science centre)
 - [Dance City](#) (national dance agency for North East)
 - [Live Theatre](#) (new writing theatre)
 - [Northern Stage](#) (producing theatre)
 - [Sage Gateshead](#) (music performance and learning)
 - [Seven Stories](#) (national centre for children's literature)
 - [Theatre Royal Trust](#) Theatre Royal and City Hall (receiving and touring theatres)
 - [Tyne & Wear Archives & Museums](#) (9 museums, galleries, area archives and heritage sites: Laing Art Gallery, Shipley Art Gallery, Discovery Museum, Great North Museum, Segedunum Roman Fort, Arbeia Roman Fort and Museum, Stephenson Railway Museum, South Shields Art Gallery and Museum, Hatton Gallery and Tyne and Wear Archives)
 - [Tyneside Cinema](#) (independent cinema)

¹ The economic impact of NGCV is only part of that created by the cultural sector in the North East, but as yet, there is no common approach to measuring this in the region.

² There is more information about NGCV and the work of the partnership on this website: <http://ngcv.tv/>

1.6 NGCV members share most of these characteristics:

- Responsible for significant public cultural buildings within the Newcastle/Gateshead local authority boundaries
- Not for profit cultural organisations based in Newcastle-Gateshead, sharing a commitment and a capacity to work collaboratively with the other NGCV partners to increase public engagement in our work and knowledge and understanding of the arts, sciences and culture, and collaborate to develop more resource-efficient ways of working
- In whom the public sector are significant stakeholders
- Responsible for significant, originally created education and community programmes
- Where all executive decision-making resides with the Chief Executive Officer (CEO) who comes to the NGCV CEO group monthly meetings

1.7 Mission statement:

We work together to maximise the artistic and economic potential of the cultural sector in the North East. We achieve this by developing strategic and creative initiatives, sharing practice and resources and by being a strong collective voice.

1.8 Shared aims:

- To offer world-class cultural experiences and to sustain the rich cultural fabric of the region
- To develop audiences and encourage participation in culture in the North East
- To attract visitors, artists and producers to come to the North East
- To ensure the strength of culture in Newcastle and Gateshead is recognised in the national and international conversation
- To support innovation and nurture the next generation of cultural producers
- To contribute to the social and economic well-being of the North East
- To pursue training and educational opportunities to ensure ongoing expertise and leadership in the sector
- To protect the current and future physical assets of each of the cultural forms
- To develop sustainable organisational and financial models across the membership of the consortium
- To share good practice and opportunities with the wider cultural sector
- To collaborate in the realisation of international partnerships

1.9 NGCV members have been working together in a formalised way since early 2009, following a decade of more informal networking and joint working. The partnership explored a range of ways to become more efficient and sustainable, as well as to develop audiences and improve their digital effectiveness, initially through an Arts Council England funded programme called Missions Models Money.

1.10 Having proved successful, by 2010, the partnership continued to work on these themes and was expanded to include other areas of interest, such as learning and participation, creative programming and talent development.

1.11 NGCV reviews its priorities annually and engages staff and external experts in developing and delivering collective aims and objectives. Its annual work programme is shaped around the priorities



that are jointly agreed and driven forward by thematic groups of staff, partners and some external experts, all supported by Chief Executive Champions.

1.12 NGCV reports on strategic initiatives which it is involved in as part of its internal collective activity, as well as activities which are wider and engage external partners and stakeholders. Information about how they work together, their impact and all their areas of collective work is reported through their [website](#) and their e-newsletter, which anyone can [sign up for online here](#).

1.13 NGCV has been sharing learning with partners across the cultural sector as it has developed and is keen to learn from others who may have useful expertise and knowledge to share. In addition, the production of joint studies, reports and collective figures, is used in discussing with key partners and stakeholders, the opportunities for development and ways in which NGCV can support and help deliver strategic objectives and priorities.

2. CALCULATING NGCV SOCIO-ECONOMIC IMPACTS

Approach, method and outputs

- 2.1 This Impact Assessment follows the same methodology used since the 2010-2011 report. It is based on summary data for 30 questions supplied by each NGCV member organisation. These questions are reported as headline totals, with geographic breakdowns for *Newcastle-Gateshead*, *Rest of the North East*, *Rest of UK* and *Elsewhere*. This local data is combined with secondary data from several sources including ONS (Annual Business Survey, Business Register and Employment Survey, Living costs and food survey) and Visit England (a diagram explaining methodology is presented in Appendix 2). Multiplier effects (indirect and induced) have been estimated utilising NGCV supply chain and salary data and represent bespoke NGCV indirect and induced impacts as opposed to those that are estimated using benchmark 'ready-reckoners'. The methodology was updated in 2011-12 to include 'corporate events' data provided by venues.
- 2.2 The economic and social impacts of NGCV member organisations comprise:
- **Direct** benefits resulting from the operation of NGCV organisations
 - Supply chain linkages (**indirect**) and employee spending (**induced**) effects, stemming from the businesses supporting the NGCV organisations and employees' spending respectively;
 - Further spend generated by NGCV member organisations through the attraction of **visitors** to the impact area (and their associated spend in the local economy); and
 - Wider **social** impacts from learning and participation and volunteering.
- 2.3 The economic effects are expressed as **employment** and **GVA** and headline results are presented as well as a disaggregation of impacts for Newcastle-Gateshead and the North East Region.

Employment Impacts

Direct effects

- 2.4 NGCV member organisations directly employed 1,434 full-time and part-time employees during 2017–2018. Converting this to full-time equivalent jobs (FTEs) shows that NGCV organisations supported 529 direct jobs in the Newcastle-Gateshead area and a further 298 direct jobs in the wider North East economy, giving a regional total of 827 direct jobs during the financial year 2017-2018 (Table 2.1). There were also 26 FTE NGCV positions outside the region (accounting for 3.1% of the jobs total), resulting in an overall of 853 FTE jobs supported by NGCV venues throughout the UK.

2.5 In addition, the Centre for Life supports a further 500 FTE jobs not directly related to its operations but in facilities that it owns³. These jobs are within a variety of fields including creative sectors. The distribution of these jobs is not available between impact areas and therefore we use Travel-to-Work (Census 2011) data to attribute these workers to area of residence.

2.6 The total number of direct FTE jobs supported by NGCV member organisations was therefore 1,318 in the North East region and 1,354 in total.

Table 2.1: Direct Employment in NGCV Organisations					
Impact Area	NGCV FTEs	%	Centre for Life tenant businesses	% (TTW, Census 2011)	Total FTE jobs
Newcastle Gateshead	528.5	61.9%	279.8	56.0%	808.3
Rest of the North East region	298.4	34.9%	211.8	42.4%	510.2
Total North East region	826.8	96.8%	491.6	98.4%	1318.5
Rest of the UK/Elsewhere	27.2	3.1%	8.4	1.7%	35.6
Total	854.0	100%	500	100%	1,354.0
<i>Source: ERS Calculations from NGCV Constituent Data – 2018</i>					

Indirect and induced effects

NGCV procurement impacts

2.7 In addition to direct jobs generated by NGCV member organisations, the partnership also support employment in the wider economy through short-term contracts with artists, technicians, and freelancers and through their regular purchases of various supplies to run their business that amounted to £26.7m in the North East region (£52.5 million in total) during 2017-2018 (Table 2.2).

Table 2.2: NGCV Organisations Procurement Expenditure		
Location	Value	%
Newcastle/Gateshead	£16.1m	30.6%
Rest of North East	£10.7m	20.3%
Region Total	£26.7m	51.0%
Rest of UK/ International	£24.9m	49.0%
Total	£52.5m	100%
<i>Source: ERS Calculations based on NGCV Expenditure Data – 2018</i>		

2.8 In total this expenditure supported an estimated 207 indirect FTE jobs in the North East region. The indirect multiplier is 1.25, i.e. for every 10 direct FTE jobs generated by NGCV organisations 2.5 FTE

³ Note that in the absence of updated information detailing jobs supported in Centre for Life facilities the same figures were used as previous reports.

jobs were created in the regional economy in their supply chain. For Newcastle-Gateshead this equated to 125 indirect FTE jobs and an indirect multiplier of 1.24.

- 2.9 In addition, 5.7 FTE jobs were generated by the capital expenditure of £1.5 million in the North East. For Newcastle-Gateshead these figures were 3.5 FTE jobs from spending of £0.9 million.

Induced impacts

- 2.10 The wage bill for direct employment by NGCV organisations was £22.8 million in 2017-18. Almost all these wages (£22.3m) are paid to workers in the North East and almost two thirds (£13.5m) are paid to workers living in Newcastle and Gateshead (Table 2.3).

Table 2.3: NGCV Organisations Salary Expenditure		
Location	Value	%
Newcastle/Gateshead	£13.5m	59.5%
Rest of North East	£8.7m	38.3%
Region Total	£22.3m	97.8%
Rest of UK/ International	£0.5m	2.2%
Total	£22.8m	100%
<i>Source: ERS Calculations based on NGCV Salary Data – 2018</i>		

- 2.11 Spending by employees of NGCV organisations and by workers indirectly employed in the NGCV supply chain resulted in a further estimated 156 induced FTE jobs supported in the North East economy (including 94 in Newcastle and Gateshead), representing an induced multiplier of 1.15.

Centre for Life tenant businesses

- 2.12 No information on procurement expenditure was provided for the tenant businesses at the Centre for Life premises. Therefore, to estimate indirect and induced impacts a generic composite multiplier of 1.44 for the North East region and 1.29 for Newcastle-Gateshead has been applied⁴. This results in estimates of indirect and induced FTE jobs supported by Centre for Life businesses of 216 regional and 81 in Newcastle-Gateshead.

Summary of all gross employment impacts

- 2.13 In total (combining direct, indirect and induced jobs), NGCV member organisations supported 1,898 gross FTE jobs in the North East region and 1,109 jobs in Newcastle-Gateshead during 2017-18.

⁴ [HCA Additionality Guide \(2014\)](#)

2.14 The total composite multiplier (indirect and induced multipliers combined) was 1.44, meaning that for every 10 direct FTE jobs at NGCV member organisations an additional 4.4 indirect and induced FTE jobs were created in the regional economy.

Additionality – calculating net economic impacts

2.15 In order to assess the net additionality of the employment impacts estimated above they must be adjusted for displacement effects and deadweight⁵. Deadweight represents what would have happened in the economy if NGCV organisations ceased to exist. Displacement accounts for the trading activities of NGCV organisations competing with other businesses and capturing a share of this income.

2.16 Estimates of both deadweight and displacement should be relatively low, with the rationale that they are chiefly involved with supplying public goods that would otherwise not be provided by the market. Activity such as on-site cafes does provide more direct competition, but catering and retail income was only 10% of total income. In terms of displacement, it is therefore unlikely that these venues take a significant proportion of market share, labour, or capital from private sector businesses. The deadweight rate, or what would have happened in the absence of NGCV organisations, is also unlikely to take a significant proportion of market share, labour, or capital from private sector businesses.

2.17 The displacement rate is assumed at 20%, which is at the lower end of a range of possibilities according to the English Partnerships Additionality Guide⁶. The deadweight rate, or what would have happened if NGCV organisations ceased to exist, is also assumed to be low at 19%⁷ based on the EP Additionality Guide.

2.18 Consequently, the estimated net additional employment impact of NGCV organisations in 2017-2018 was 1,229 FTE jobs for the North East. The corresponding value for Newcastle-Gateshead was 741 FTE jobs.

Gross Value Added (GVA) Impacts

2.19 The calculation of Gross Value Added (GVA) follows the same method as for employment, with the same constituent elements, with a summary shown in Table 2.4.

2.20 Direct operational impacts of the trading of NGCV organisations resulted in £31.6m GVA, while Centre for Life tenant businesses generated a further £26.0m GVA, for a combined direct impact of £57.6m GVA within the North East economy.

⁵ The estimated numbers of FTE jobs stated in the preceding paragraphs has already been adjusted for leakage, i.e. jobs 'leaked' outside the region and taken by those residing outside the region.

⁶ EP Additionality Guide recommends a low displacement rate of 25% and presents displacement rates used to assess impacts of Neighbourhood Renewable Fund projects, which are as low as 15%. [English Partnerships Additionality Guide 2008](#).

⁷ Deadweight for 'Community and Social' projects of the City Challenge Programme. [English Partnerships Additionality Guide 2008](#)

- 2.21 Indirect impacts relating to purchases made in the region contributed a further £15.1m GVA. Induced impacts, resulting from staff spending in the locality generated £8.3m. Combined indirect and induced impacts for the Centre for Life are £11.3m. Taking all these impacts into consideration there is a GVA multiplier of 1.44 for the North East region, resulting in total gross benefits of £92.4m GVA.
- 2.22 Applying the displacement and deadweight estimates described above net additional GVA is estimated at £63.5 million.

Table 2.4: NGCV Summary of GVA impacts		
	North East Region impacts	Local impacts (Newcastle - Gateshead)
Direct NGCV Operational impacts	£31.6m	£20.2m
Centre for Life business impacts	£26.0m	£14.8m
Total Direct impacts	£57.6m	£35.0m
Indirect impacts	£15.1m	£9.1m
Induced impacts	£8.3m	£5.0m
CfL indirect and induced effects	£11.3m	£4.3m
Total Gross impacts	£92.4m	£53.4m
Total net impacts	£63.5m	£37.7m
<i>Source: ERS Calculations based on NGCV Expenditure Data - 2018</i>		

Catalytic Impacts

- 2.23 Visitors to NGCV organisations, including those who attended various conferences and events, also made contributions to the economy through their spending in the local area and other parts of the North East region. This includes purchasing food and drinks, shopping, accommodation, transport costs, other entertainment.
- 2.24 NGCV organisations welcomed **4.1m visitors during 2017-2018, with a further 33,700 attending corporate events, 20,900 attending one-day events and 18,000 attending multi-day conferences and events.**
- 2.25 Table 2.5 shows the breakdown of leisure visits, as compared with numbers relating to events. The majority of visitors (79%) and conference delegates (95%) are from the North East.

Location	Visitors	Corp. events	One day events	2+ day events
Newcastle/Gateshead	1,738,074	25,502	10,504	14,346
Rest of North East	1,470,211	6,354	7,656	74
Region Total	3,208,285	31,856	18,160	14,420
Rest of UK/ International	863,328	1,815	2,737	3,607
Total	4,071,613	33,671	20,897	18,027

Source: ERS Calculations based on Visitor Attendance data - 2018

- 2.26 Additionality is accounted for by considering that only visitors from outside the geographical area are spending additional money in that area. Visitors from the North East are therefore classified as non-additional and not included in the analysis of North East impacts. Similarly, visitors from Newcastle-Gateshead are non-additional for the Newcastle-Gateshead impacts, although they are additional for the North East and included in North East impacts.
- 2.27 A further aspect of additionality is intentionality, with only those visits where the trip to a NGCV member was the main purpose qualifying as additional. For visitors from outside the North East it was assumed that 25% would purposefully dedicate their day visits to NGCV venues. This only applies to members of the public, with conference delegates assumed to be fully additional.
- 2.28 Estimates of visitor spending are derived from two surveys by Visit England⁸ which use both estimates of day and overnight stays, assuming that a certain number of conference and events attendees had to stay overnight, in particular, those attending multi-day events. On site spending in NGCV organisations was also deducted⁹. These assumptions therefore enable an estimate to be calculated relating to additional expenditure in the regional economy attributed to NGCV visitors.
- 2.29 The resulting estimated additional visitor expenditure in the North East attributable to NGCV venues was £8.5 million in 2017-2018 (£19.6 million in the local economy of Newcastle and Gateshead). This expenditure directly supported 126 FTE jobs in the region. Accounting for indirect and induced effects¹⁰ results in a total of 220 FTE jobs generating £7.4 million of GVA in the region.

Total economic impacts and Return on Investment

- **Overall 2,118 gross FTE jobs were generated by NGCV organisations in the North East region in 2017-2018 financial year resulting in £99.7 million of GVA.**

⁸ [Great Britain Day Visitors Survey](#) (2018) and [Great Britain Tourism Survey](#) (2018)

⁹ Some purchases of food and drink are already accounted for by spending with NGCV organisations on-site. An estimated £7.50 per visitor. This is deducted from average visitor spending, since it is already counted as earned income.

¹⁰ Using a composite average multiplier of 1.75 for Distribution, Hotels and Restaurants, and Transport sectors from Scottish Input-Output Tables

- **The total net additional impact (further adjusted for displacement and deadweight) was 1,372 FTE jobs and £68.3 million of GVA.**

- 2.30** NGCV organisations as a whole receive £19.3m in core subsidies from the Arts Council, Local Authorities and other sources. As a whole for NGCV, for every £1 of public subsidy **£5.16 of GVA** is generated in the North East region. Two organisations receive no public subsidy and are fully self-sustaining (Centre for Life and Theatre Royal). Of the eight organisations in receipt of public subsidies, their combined GVA is £48.7m, giving a ratio of £1 of subsidy creating £2.52 of GVA. After accounting for deadweight and displacement, the ROI remains an impressive **£3.53 of GVA** for every £1 of public subsidy for NGCV as a whole, and £1.61 of GVA for the eight members in receipt of public subsidy. The level of ROI varies across these eight members, from £0.38 to £13.85 for every £1 public subsidy.
- 2.31** Since 2009-10, the level of public subsidy collectively across the partnership has reduced from 41% in 2009-10 to 28% in 2017-18. Earned income generated from cultural activity (e.g. tickets and contracts) has increased to 47% of all income and ancillary activities (e.g. events, retail, catering and parking) has increased to 18%, with a total of £44.6m from these sources combined in 2017-18.

Wider social impacts

- 2.32** In principle, social impact can be measured in terms of influence on education and lifelong learning, social inclusion, aspirations, motivation and empowerment, recreation and quality of life, opportunities for volunteering, and transferable skills to other sectors. The NGCV member organisations provide a significant contribution towards these impact areas. However, there are a range of monitoring and evaluation tools and techniques in place across the different NGCV partners, but as yet, little that can be brought together to demonstrate the combined social impact. The following figures around learning and impact and volunteering, serve merely to demonstrate the scale of engagement and involvement, rather than the actual outcomes and impact.

Learning and Participation

- 2.33** NGCV partners provide a significant amount of learning and participation within Newcastle and Gateshead, the Tyne and Wear conurbation and beyond to the wider North East region and Cumbria. Formal and informal education and participation opportunities are an integral part of provision and are offered for young people and adults by every NGCV member organisation. Table 2.5 sets out the learning and participation activities of NGCV partners with children and young people (aged 0-19) and adults. **In 2017-2018 NGCV facilitated 928,717 formal and informal learning and participation engagements, with 574,095 children and young people and 354,622 adults.**

Table 2.6: Learning and Participation Engagement 2017-18

Organisation	Children & Young people	Adults	Total
BALTIC	48,410	48,718	97,128
Centre for Life	161,682	110,360	272,042
Dance City	42,652	53,343	95,995
Live Theatre	5,001	481	5,482
Northern Stage	7,052	2,115	7,052
Seven Stories	28,394	1,428	29,822
Sage Gateshead	85,906	55,975	141,881
Theatre Royal	26,301	21,386	47,687
Tyne & Wear Archives & Museums	161,898	55,099	216,997
Tyneside Cinema	6,799	7,832	14,631
TOTAL	574,095	354,622	928,717

Source: ERS Calculations based on NGCV Data - 2018

Volunteering

- 2.34 The importance of volunteering to NGCV member organisations is evidenced by the fact that collectively **1,346 volunteers** supported the organisations, equating to an estimated **35,673 voluntary hours of support during 2017-18**. The equivalent number of jobs of this voluntary contribution to NGCV organisations was 21.6 FTE jobs. These hours were equivalent to an estimated **£600,000 of wages**¹¹.

Other impacts

- 2.35 Health and well-being impacts of arts and culture stemming from recreation activities associated with them cannot be easily measured or quantified but, notwithstanding, have a value that is additional to the above estimated employment and GVA impacts. An incredible 4.1 million visitors enjoyed attending NGCV venues during 2017-18 year and had positive and life-enhancing experiences. Health and well-being directly affect productivity in the workplace¹² and, therefore a small percentage of GVA generated by these visitors at their workplaces can be linked to having a positive recreation with NGCV member organisations.

¹¹ ONS (2013) [Valuing Voluntary Activity in the UK](#) Table A2 Clerical and professional staff, figure adjusted for inflation.

¹² In 2010 there were 190 million working days lost due to health related absence, which cost employers £17bn (CBI, 2011)

3. SUMMARY OF NGCV SOCIO-ECONOMIC IMPACTS

- 3.1 The total gross (direct, indirect and induced) economic contribution of NGCV to the North East region was estimated at £99.7 million of GVA during 2017-18, supporting up to around 2,118 FTE jobs. This figure was estimated from the following analysis:

Direct impacts

- Direct Full Time Equivalent employment of **827 FTE jobs** within the North East or **1,318 FTE jobs** when the employment of tenant businesses at the Centre for Life is included
- Corresponding figures for estimates of Gross Value Added are **£31.6m GVA** for NGCV organisations and **£57.6m GVA** including tenant businesses at the Centre for Life.

NGCV procurement impacts

- Total spend (procurement) by NGCV organisations of **£26.7m** to the regional economy
- Total **207 indirect FTE jobs** were supported as a result of this procurement

Total operational impacts

- Total estimated gross direct, indirect and induced employment of **1,898 FTE jobs** within the region
- Gross direct, indirect and induced GVA equivalent of employment levels equates to estimations of **£92.4m** to the regional economy

Visitor Spend

- Total additional visitor spend (business and leisure) to the regional economy estimated as **£8.5m** generating **220 FTE jobs**

Total economic impacts

- The total gross economic contribution of NGCV to the North East region was estimated at **£99.7 million of GVA during 2017-18, supporting up to 2,118 FTE jobs**

Voluntary Contributions

- They were supported by **1,346** volunteers providing **35,673**, representing **21.6 FTE jobs (or an equivalent of £600,000 in wages)** that represented a further contribution by NGCV.

Investment Return

- NGCV organisations as a whole receive £19.3m in core subsidies from the Arts Council, Local Authorities and other sources. For every £1 of public subsidy estimated **£5.16 of GVA** is generated by NGCV organisations in the North East region. After accounting for deadweight and displacement, the ROI remains an impressive **£3.53 of GVA for every £1** of public subsidy.

3.2 Table 3.1 summarises all quantified impacts of NGCV organisations within the North East region and separately within the local economy of Newcastle-Gateshead. It should be noted that visitor expenditure within the local area of impact is higher because spending by visitors from the rest of the North East region is considered additional to the local area. When analysing the impact of visitor expenditure at the regional level spending by visitors from the rest of the North East region is not additional and therefore only expenditure by visitors from the rest of the UK and from overseas is considered additional (thereby reducing the impact).

Table 3.1 Summary NGCV impacts on regional and local economy during 2017-18				
Economic impacts	North East Region impacts		Local impacts (Newcastle - Gateshead)	
	FTE jobs	GVA, £	FTE jobs	GVA, £
NGCV operational impacts				
Direct	1,318	£57.6m	808	£35.0m
Indirect (<i>supply chain linkages</i>)	207	£15.1m	125	£9.1m
Induced (<i>staff spending</i>)	156	£8.3m	94	£5.0m
Centre for Life tenant businesses (<i>indirect and induced</i>)	216	£11.3m	81	£4.3m
Total gross operational impacts	1,898	£92.3m	1,109	£53.4m
Total net additional impacts	1,229	£63.5m	741	£37.7m
Visitor expenditure impacts				
Total net additional visitor spend	£8.5m		£19.6m	
Direct	126	£4.2m	292	£9.7m
Indirect and induced	94	£3.1m	218	£7.3m
Total gross visitor impacts	220	£7.4m	510	£17.0m
Total net additional impacts	143	£4.8m	331	£11.0m
TOTAL GROSS IMPACTS	2,118	£99.7m	1,619	£70.5m
TOTAL NET ADD. IMPACTS	1,372	£68.3m	1,072	£48.7m
Wider impacts	Children and Young People	Adults	Total	FTE jobs
Learning & participation engagement	533,109	305,226	838,335	
Volunteering – equivalent FTE jobs				21.6

Source: ERS Calculations based on NGCV Data - 2018

4. APPENDIX ONE

Impact Assessment methodology for estimating economic impacts of NGCV organisations

