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# Economic Impact of Eurovision Song Contest in Liverpool

Final Report




Liverpool City Region Combined Authority

# Economic Impact of Eurovision Song Contest in Liverpool

Final Report

October 2023

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This document including appendices contains 64 pages

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# Executive Summary

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## Executive Summary

### i. Overview

AMION Consulting were commissioned by the Department for Digital, Culture, Media, and Sport (DCMS), the BBC, the Arts and Humanities Research Council (AHRC), Liverpool City Council (LCC), and Liverpool City Region Combined Authority (LCRCA) to analyse the impacts of the Eurovision Song Contest (Eurovision 2023) on the local and regional economy. From the 5<sup>th</sup> to the 13<sup>th</sup> of May 2023, Liverpool hosted the Eurovision Song Contest, featuring semi-finals on the 9<sup>th</sup> and 11<sup>th</sup> of May, and the grand final on the 13<sup>th</sup> of May. The event was broadcast live on BBC One and BBC Radio 2, reaching an audience of 162 million viewers across Europe and around the world.

This report comprises the first of a two-part series, with each report addressing distinct periods:

- this document focuses on the short-term impacts, analysing the immediate effects of hosting the event in terms of visitors, expenditure, jobs and Gross Value Added (GVA) at the Liverpool, Liverpool City Region (LCR) and North West regional levels;
- the second report, due in 2024, will present a longer-term assessment of the economic impacts of Eurovision 2023, one year after the event.

### ii. Approach

To comprehensively assess the impact of Eurovision 2023, a combination of quantitative and qualitative research methods were employed. Primary data collection involved surveys, interviews, and on-site observations, gathering insights on spending patterns from event attendees, visitors, and local residents. The study amassed over 3,500 surveys and primary research inputs.

Complementing this, secondary data sources, including ticketing data, official reports, and economic indicators, were utilised to validate and inform the analysis. The study drew from various sources, including official European Broadcasting Union Eurovision Song Contest data, the BBC, LCC, LCRCA, national government reports, tourism statistics, and industry association reports, as well as footfall and Mastercard spending data provided by Liverpool Business Improvement District (BID), and Liverpool ONE. Mobile phone data supplied by LCRCA also contributed to the insights.

### iii. Visitors to Eurovision 2023

Eurovision 2023 drew a total of **473,000 attendees to Eurovision-related events** in Liverpool city centre. Considering factors like attendees visiting multiple events and those whose primary reason for visiting Liverpool was Eurovision but who did not attend an event, it is estimated that **306,000 individuals visited Liverpool city centre due to Eurovision**.

This global event attracted visitors from across the country and various parts of the world (10% of visitors were international) which significantly increased footfall in the city centre. Notably, over 100,000 UK residents from outside the LCR travelled to Liverpool city centre for Eurovision. The visitor survey undertaken by Spirul as part of the primary research for this impact assessment

demonstrated an overwhelmingly positive experience felt by visitors as well as the beneficial impacts for Liverpool relating to image, inclusivity, and tourism. The Visitor survey identified that:

- 65% of overall respondents would definitely visit Liverpool again;
- 54% of overall respondents reported a positive change in their perception of Liverpool;
- 26% of overall respondents were first time ever visitors to Liverpool; and
- 68% of first time ever visitors would definitely visit Liverpool again.

*[“Every single person if they haven't been to Liverpool already, has said that they'd love to come back, bring the family and spend at least a weekend here. So, it has been a fantastic first impression”](#)*  
 Eurovision Visitor May 2023 (click on the link to listen to the whole quote)

*[“I tell you what it's a fantastic atmosphere I love, love it... and it's changed my perception of Liverpool”](#)*  
 Eurovision Visitor May 2023 (click on the link to listen to the whole quote)

#### iv. Economic Impacts

The estimated total spend by visitors to Liverpool city centre for Eurovision is £75.6m. However, this includes travel to the country and spend outside the target areas<sup>1</sup>, which needs to be excluded as leakage from the assessment of local impacts. The gross local spend in Liverpool is estimated to be £54.9m by visitors. After allowing for deadweight (activity that would have happened anyway) and displacement (reductions in activity elsewhere in the target area due to the event), **the net additional visitor spend in Liverpool is estimated to have amounted to £42.3m**. The main sectors benefitting from this spend were food and drink (35%) and accommodation (31%).

As can be seen in Table ES1, the gross local spend at the LCR level is estimated to amount to £57.8m and at the North West level to £63.2m. These figures are greater than the Liverpool gross spend, as visitors spent on travel to Liverpool from these areas and accommodation within a wider catchment – leading to lower leakage rates. However, after removing displacement across these wider areas, **the net additional spend for LCR totalled £43.0m and the North West totalled £45.3m** – which are only marginally above Liverpool.

	Liverpool	LCR	North West
Gross local visitor spend	54,905,230	57,756,422	63,203,251
Net additional local visitor spend	42,342,062	43,031,456	45,327,797

**The net additional organiser spend at a Liverpool level is estimated to have totalled to £10.9m.** Around £6.4m (59%) was spent on the production of Eurovision 2023 including services such as the construction of stages, creative artists, and branding. Some £4.1m (38%) was incurred on

<sup>1</sup> Three target areas were identified for the assessment: Liverpool local authority area, Liverpool City Region, and the North West region



hospitality such as accommodation for the production and event staff, further boosting the local hospitality sector in addition to the visitor spending, or retail stalls within Eurovision Village.

Organisers also procured businesses from the wider region due to the specialised requirements to deliver Eurovision 2023. **At the LCR level the net additional organiser spend totalled to £11.7m and at the North West level it totalled to £15.9m.**

**Table ES2: Net additional organiser spend by category**

Sector	Liverpool	LCR	North West
Production	6,445,161	6,920,503	9,766,658
Hospitality	4,146,420	4,352,435	5,638,280
Additional staff costs	315,565	455,595	497,307
<b>Total net additional spend</b>	<b>10,925,146</b>	<b>11,728,533</b>	<b>15,903,244</b>

The employment effects from this expenditure have been quantified using visitor spend to full time equivalent (FTE) job ratios for the area and/or the average wage per employee (plus overheads) per sector. **The total organiser and visitor spend is estimated to have generated employment equivalent to 589 one-year FTE jobs in Liverpool, 611 in the LCR, and 698 in the North West.**

The GVA impacts have been calculated using the latest GVA per FTE job figures by sector for each area from Experian. **Eurovision 2023 is projected to have resulted in a net additional one-off GVA impact of £23.5m in Liverpool in 2023, £24.4m in LCR, and £29.4m in the North West.**

**Table ES3: Net additional impacts from Eurovision 2023 for Liverpool, LCR, and North West**

	Liverpool	LCR	North West
Total expenditure	£53,267,208	£54,759,989	£61,231,041
1-year FTE employment	589	611	698
One-off GVA	£23,502,779	£24,445,621	£29,361,730

Note: Total expenditure is the net additional visitor expenditure (ES1) plus net additional organiser expenditure (ES2).

## v. Wider impacts

The impact of Eurovision 2023 extends beyond the immediate economic gains, encompassing intangible benefits. The broadcast exposure and positive associations serve as valuable assets for Liverpool's economy. The event's influence not only reached a widespread geographical area but also across various communities, engaging a diverse audience including school children, older individuals, and ethnic minority communities.

The Eurovision 2023 volunteering programme, led by Liverpool City Council with support from the Department for Work and Pensions (DWP) and the NHS, offered 475 individuals a unique opportunity to contribute to the event. Volunteering not only supports personal development and skill acquisition but also enhances wellbeing and self-esteem.

Employment initiatives were undertaken involving the collaboration of key organisations in the LCR, such as Job Centre Plus, DWP, Growth Platform, Culture Liverpool, LCRCA, and LCC, aimed at providing access to the job opportunities created by Eurovision 2023 to contribute to broader economic recovery efforts. These initiatives engaged 3,287 jobseekers, 173 employers, and 52



skills support providers. Over 6,000 job openings were advertised during the events, resulting in 394 jobs offered on the day, and 3,216 individuals advancing towards employment opportunities.

There are various lessons that can be learned from Eurovision 2023 for those involved in delivering major events. The report identifies a set of considerations relating to the legacy of Eurovision in the LCR, which will be subject to further examination in the year-on report.

# Section 1

## Introduction

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# 1 Introduction

## 1.1 Purpose of the report

AMION Consulting ('AMION') was appointed in April 2023 by Liverpool City Region Combined Authority (LCRCA) to evaluate the impacts of Eurovision 2023<sup>2</sup> held in Liverpool in May. AMION worked with Spirul, a leading primary data research company, to undertake this assessment.

This report forms part of a suite of evaluations commissioned by Liverpool City Council (LCC) and its partners examining the cultural, social and wellbeing impacts of Eurovision 2023.

**This report comprises the first of a two-part series focusing upon the economic impacts**, with each report addressing distinct time-periods:

- this document focuses on short-term impacts, analysing the immediate effects of hosting the event;
- the second report, due in 2024, will present a longer-term assessment of the economic impacts of Eurovision 2023, one year after the event.

This report's analysis of the immediate impacts of Eurovision 2023 on the local and regional economy is focused on **visitor numbers, expenditure, jobs, and Gross Value Added (GVA)**<sup>3</sup>.

The study quantifies the economic impacts of this major international event at the Liverpool<sup>4</sup>, Liverpool City Region (LCR), and the North West<sup>5</sup> regional levels. It considers the impacts of all Eurovision 2023 related events from the opening of the Eurovision Village at Pier Head on 5<sup>th</sup> May to the Grand Final Live Show on 13<sup>th</sup> May at the M&S Arena. The key economic impacts assessed within the report include:

- **economic impacts generated from Eurovision 2023 spending, including operating and capital expenditure in the delivery of the events** – an assessment of spending, GVA, and jobs has been based on monitoring and survey data;
- **economic impacts associated with Eurovision 2023 visitors' and attendees' spending at the events** – an assessment of visitors/attendees, spending, GVA, and jobs has been based on monitoring data and the survey responses;
- **economic impact of Eurovision 2023 for the creative industries and event sectors** – an immediate assessment on expenditure has been made but this assessment will be strengthened at the next stage when other secondary data sources with a lag in availability are accessible; and
- **the impact of Eurovision 2023 volunteering programme and skills/training interventions on post Eurovision employment** – an immediate qualitative assessment on the volunteering programme has been made based on case studies and survey responses, but

<sup>2</sup> Within this report, 'Eurovision 2023' refers to the Eurovision event in Liverpool this year being evaluated by this study

<sup>3</sup> It is defined by the Office for National Statistics (ONS) as "... the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used up in production."

<sup>4</sup> Defined as the Liverpool local authority district

<sup>5</sup> As defined by former Government Office Regions; broadly; Merseyside, Lancashire, Cumbria, Greater Manchester, and Cheshire

this assessment (especially skills/training interventions) will be strengthened at the next stage when other secondary data sources with a lag in availability are accessible.

The second report will be produced in May 2024 to assess the longer-term and enduring impacts of Eurovision 2023. As well as the long-lasting sectoral, volunteers, and skills/training impacts, the next stage of work will consider the economic impacts associated with increased levels of tourism, and trade and investment post Eurovision 2023.

A series of additional analyses will inform this second report including:

- **econometric approaches such as the Travel Cost Method to add additional analysis to the economic benefits;**
- we will continue **business surveys** to gain a more in-depth insight into the direct ongoing impact of Eurovision on local businesses;
- **a legacy survey** with visitors and other groups to capture valuable feedback regarding the enduring impact of the event, including any lasting changes in perceptions, sustained engagement, and ongoing benefits;
- we also plan to engage in **follow-up interviews or surveys with the volunteers** who actively contributed to the Eurovision event;
- further **follow up cohort studies with job seekers** that were seeking employment prior to Eurovision and those who secured jobs during the event's planning and execution;
- we will conduct focused **follow-up discussions with key stakeholders**, including hoteliers and cultural organisations; and
- collaborating closely with the LCRCA and LCC, we will actively **share the lessons learned** from the research.

## 1.2 Context of the report

Being one of the most prominent and widely watched international music competitions, the Eurovision Song Contest<sup>6</sup> serves as a platform that unites participants from both Europe and beyond, with Eurovision 2023 attracting a global audience of 162 million<sup>7</sup> viewers. Beyond its cultural significance, the Eurovision Song Contest stands as a significant occasion, and such large-scale events can generate substantial benefits for the host country, host city, participating artists, local businesses, and the overall local economy. These benefits can include the wellbeing they bring to both attendees and those who engage with them through various media channels, as well as the additional local expenditure and economic activity. This report focuses on assessing the latter.

This report is intended for a wide range of audiences including those involved in the planning, delivery and impact monitoring of Eurovision 2023 in Liverpool, future host cities and countries, as well as policymakers, local authorities, businesses, and the general public with an interest in understanding the economic consequences of hosting major international events. The findings of

<sup>6</sup> Within this report, 'the Eurovision Song Contest' refers to Eurovision as an event in general over many years

<sup>7</sup> BBC also stated that it was also the most watched grand final since modern records began.

this comprehensive study can help to inform future decision-making processes, as well as shaping effective policy formulation, and strategic planning.

This study also sits within a broader programme of Eurovision 2023 evaluation and impact assessment activities which focus upon health and wellbeing, cultural diplomacy, night-life behaviour, and brand impact. This package of evidence will provide a multifaceted analysis of the impacts of Eurovision 2023.

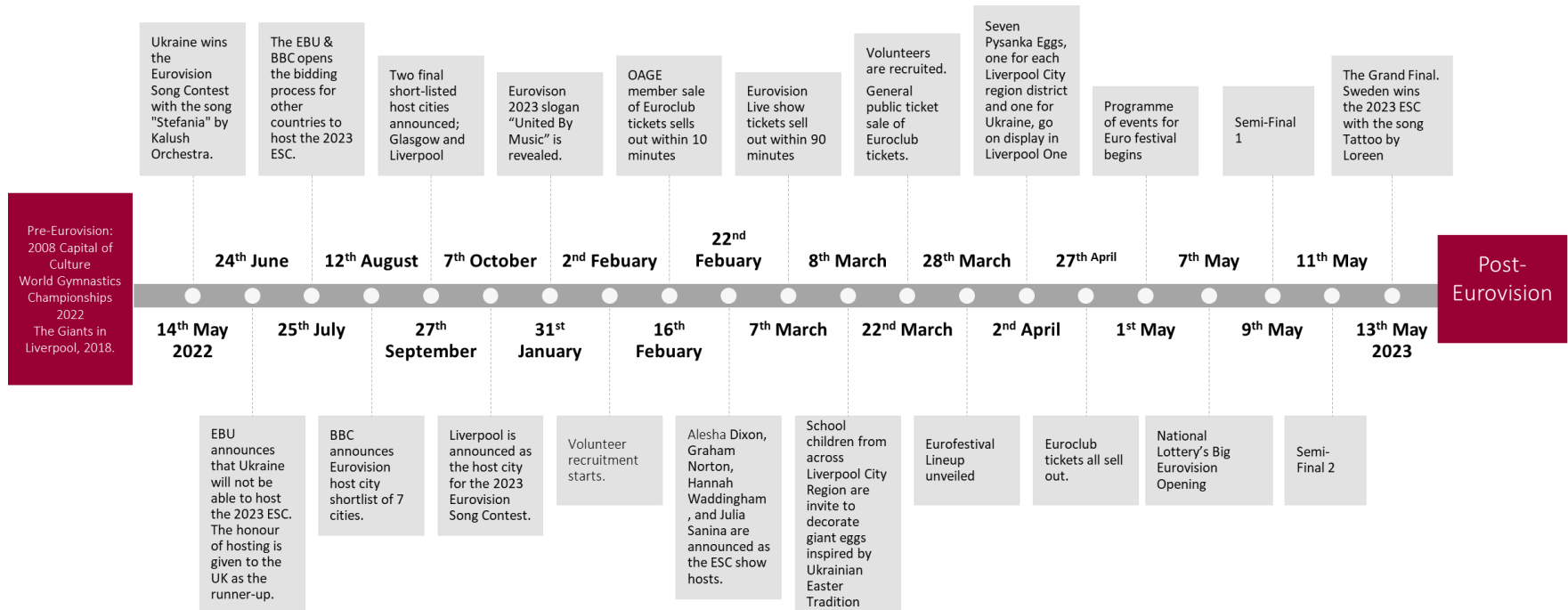
### 1.3 The selection of Liverpool as host city for Eurovision 2023

Liverpool's selection as the host city for the 67th Eurovision Song Contest in 2023 was the result of a shortlisting process. Liverpool's bid stood out among seven other UK cities due to its strong musical heritage, lively cultural scene, and excellent capacity and connections for big events. The decision to move the contest to the UK and Liverpool was prompted by the ongoing war in Ukraine, which prevented the defending champions from hosting the event. Consequently, the European Broadcasting Union (EBU) made the strategic choice to ensure Ukraine's continued participation by relocating the competition to Liverpool.

The logistics involved in successfully executing an event of such scale are substantial and a concerted effort was made to ensure Eurovision's smooth operation, showcasing the collective dedication and resourcefulness of those involved. Interviewees observed that the Eurovision Song Contest stood as a remarkable feat from a technical standpoint – one noting, “As a technical event, it is astonishing”. The technical requirements and pressure of presenting a new song live every four minutes are substantial. As the premier global singing competition, Eurovision commands an unparalleled viewership, making it the largest live TV singing contest. BBC has stated that the Eurovision 2023 grand final Live Show was also the most watched final since modern records began.

In the case of Liverpool, the time available to prepare for the event was shorter than for other host cities. **Figure 1.1** provides a summary of key developments and milestones. Liverpool was announced as the host city in October 2022 and Eurovision took place in May 2023.

**Figure 1.1: Eurovision 2023 Timeline with selected key developments**



Source: BBC, EBU and Liverpool City Council

## 1.4 Approach

The approach to the economic impact assessment comprised the use of both primary and secondary data.

The **secondary data** collection and analysis provided a baseline and trend trajectory, which informed the construction of a counterfactual position and the assessment of the net additional impact of Eurovision 2023. The following sources were used to establish the baseline and trend trajectory:

- Official statistics and national datasets on tourism, trade, and investment in the region;
- Great Britain Day Visitor Survey data for Liverpool and the City Region;
- Great Britain Tourism Survey data for Liverpool and the City Region;
- STEAM data for Liverpool and the City Region;
- Hotel occupancy and achieved rates data for Liverpool and the City Region;
- Associated Eurovision components such as “Eurolearn” and others;
- Broadcaster (for example, the BBC) collated data;
- Labour market information including job posting data;
- Footfall counters from Liverpool ONE;
- Bespoke datasets from The Liverpool ACC Group;
- Mobile phone data from Place Informatics (commissioned by LCRCA); and
- Transport data including vehicle counts, and arrivals at Liverpool Airport and Liverpool Lime Street.

To explore the economic impact during and immediately after Eurovision 2023 in Liverpool monitoring information provided by Eurovision 2023 delivery partners, which included operating costs, ticket sales, and local supplier expenditure, was also assembled and analysed.

In addition, **our methodology relied heavily on primary data collection**. Our approach allows for significant primary data collection at three different time periods; during the event, immediately after the event and up to 12 months after the event. We have also provided for primary data collection from a wide variety of individuals and groups likely to be impacted by Eurovision 2023. A summary of the data collection approach is shown in **Table 1.1**.



**Table 1.1: Data collection summary**

Event Type	Target Audience	Date/s	Location	Methodology
Live Shows	Live Show Attendees	8 May – 13 May	Liverpool Arena	Face-to-face Survey/Promoted online survey
EuroFestival Events	Visitors to Liverpool/Attendees of Live Shows	1 May – 14 May	Various	Face-to-face Survey/Promoted online survey
Eurovision Village	Visitors to Liverpool/Attendees of Live Shows	5 May – 13 May	Pier Head	Face-to-face Survey/Promoted online survey
National Lottery Big Eurovision Welcome	Visitors to Liverpool/Attendees of Live Shows	7 May	Outside St George's Hall	Face-to-face Survey/Promoted online survey
General City-Wide Activities	Visitors to Liverpool/Attendees of Live Shows	5 May – 13 May	City Centre and venues hosting Eurovision activities	Face-to-face survey/promoted online survey
EuroLearn	Teachers	Round 1 - Throughout programme, Round 2 - Nov 2023, Round 3 - Apr 2024	Various schools	Online survey.  Qualitative interviews via MSTEams/Zoom
EuroStreet	Community Group organisers/Community Group Event Participants	Round 1 - Throughout programme, Round 2 - Nov 2023, Round 3 Apr 2024	Various community groups	Online survey.  Qualitative interviews via MS Teams/Zoom
All	Volunteers	Round 1 - Throughout programme, Round 2 - Nov 2023, Round 3 Apr 2024	Various	Online survey at 3 points (i) During the event (ii) 6 months post event and (iii) 1 year post event  Qualitative interviews via Zoom

**Table 1.1: Data collection summary**

Event Type	Target Audience	Date/s	Location	Methodology
	Businesses	Round 1 - May 2023  Round 2 Apr/May 2024	Throughout Liverpool	A mixed methodology of telephone and face at 2 points (I) immediately post Eurovision 2023 and (ii) 9 months to 1 year post event
	Crew and Performers	May 2023		Online survey

Spirul, who undertook this primary research data collection, has a membership of the Social Research Association and the Market Research Society. All the work undertaken **adhered to the codes of conduct set out by the Market Research Society.**

Of key importance to this report are the face-to-face surveys with visitors to Liverpool/attendees of Live Shows. We achieved 1,808 face-to-face interviews with visitors to Liverpool city centre during Eurovision. The interviews were conducted in several locations:

- 78% at Eurovision Village;
- 2% at St George’s Hall; and
- 20% Elsewhere in Liverpool.

Based on the estimated visitors in the city centre (see **Section 4**); a sample of this size achieves a confidence interval (margin of error) of +/-2.3% at a 95% confidence level. These interviews were supported by over 1,300 online survey participants from ticket holders. This robust evidence base formed a critical part of our analysis of visitors and their spending patterns.

AMION used the preceding stages to carry out an assessment of the economic impacts of Eurovision upon Liverpool, LCR, and the North West of England.

## 1.5 Report structure

The report has the following structure:

- **Section 2: Eurovision in Liverpool:** The context of Liverpool hosting Eurovision 2023 has been set out;
- **Section 3: Economic Impact Assessment Methodology:** The approaches used as part of the visitor number calculations and the impact assessment have been clearly presented;
- **Section 4: Visitors to Liverpool:** The analysis of the visitors to Liverpool for Eurovision 2023, including details of numbers, characteristics, and experience;
- **Section 5: Economic Impact:** A core assessment of expenditure, employment, GVA, and funding impacts of hosting Eurovision 2023 on the local economy and cultural sector;
- **Section 6: Wider Socio-Economic Impact:** An evaluation of wider impacts arising from the hosting of Eurovision 2023 such as volunteering and community engagement;

- **Section 7: Conclusions:** A summary of the impacts and key findings as well as illustrating the next stages of the overall evaluation; and
- **Appendix A : Beyond the Data, Case Studies of Impact:** Five case studies are presented to showcase particular types of impacts such as strategic added value, as well as increased capacity and capability of local partnerships.

## Section 2

# The Eurovision in Liverpool

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## 2 Eurovision in Liverpool

### 2.1 Introduction

This Section sets out details of Eurovision 2023 and the event programme. It also provides information about the delivery partners and venues, as well as the role of events and culture in reinvigorating Liverpool City Centre.

### 2.2 Hosting Eurovision in Liverpool and the UK

The Eurovision Song Contest dates back to 1956 and has emerged as a highly anticipated and widely viewed annual event of global significance. This cultural and TV event has captured the attention of massive audiences and has become an integral part of the international entertainment landscape with viewing and social media engagement figures comparable to the world cup and Olympics. The EBU identified that Eurovision 2023 reached 162 million people over three live shows across 38 public service markets and that videos on social media were watched nearly 540 million times worldwide during the weeks of the event.

The United Kingdom's involvement in the Eurovision Song Contest goes back to 1957 and the UK has participated every year since 1959. Noteworthy among its contributions is the UK's record of hosting the contest, which has occurred on nine occasions. In addition to the 2023 contest in Liverpool, London has been host city on four occasions, in 1960, 1963, 1968, and 1977. Other urban areas have also held it including Edinburgh in 1972, Brighton in 1974, Harrogate in 1982, and Birmingham in 1998.

From the 5<sup>th</sup> to the 13<sup>th</sup> of May 2023, Liverpool hosted the Eurovision Song Contest. Eurovision 2023 events in Liverpool started with the opening of Eurovision Village on 5<sup>th</sup> May. The opening ceremony took place on 7<sup>th</sup> May, before the semi-final Live Shows were held on the 9<sup>th</sup> and 11<sup>th</sup> of May and the Grand Final Live Show on 13<sup>th</sup> May at the M&S Arena.

The event was broadcast live on BBC One and BBC Radio 2 with Eurovision 2023 content on BBC Television in the week leading up to the final reaching 27 million people. The theme of Eurovision 2023 was "Building Bridges." This reflected the context of Liverpool hosting on behalf of Ukraine, Liverpool's history as a place of immigration and diversity, and Eurovision Song Contest's role as a platform for bringing people together from all over Europe.

Liverpool hosting Eurovision 2023 builds upon its rich history of hosting major events. The visit of Giants to the city, saw more than million visitors line the streets of Liverpool and Wirral in 2018 and over 15 million visits were recorded at Liverpool's arts and events venues in 2008 during Liverpool's year as European Capital of Culture. The city has demonstrated its capacity to manage and facilitate large-scale gatherings, further solidifying its reputation as a capable and welcoming tourism destination. This capability was notably showcased during its tenure as the European Capital of Culture in 2008, which highlighted Liverpool's ability to curate diverse and engaging cultural experiences. Furthermore, the city's previous accomplishments include events like the Giants, which drew attention with street performances, and the celebrations surrounding

notable football successes shows that Liverpool possesses a distinctive character and a global outlook that resonates with audiences from around the world.

Moreover, Liverpool's strong association with music has been well-documented and celebrated. The city was officially designated a UNESCO City of Music in 2015 in recognition of its profound musical heritage and its ongoing contributions to the world of music.

The aftermath of Brexit brought to the forefront a sense of division and uncertainty across Europe. As the United Kingdom navigated its exit from the European Union, the intricacies of economic and political disentanglement came into play. Amidst these changes, Eurovision's role as a cultural and political bridge became particularly noteworthy.

Historically known as a major port city with deep international connections, Liverpool's identity as a melting pot of cultures and ideas resonates strongly with the ideals of unity and diversity that Eurovision stands for. The city's rich musical heritage and its ability to embrace various genres and cultures made it a fitting host for an event that celebrates the harmonious blending of artistic expressions from different corners of Europe.

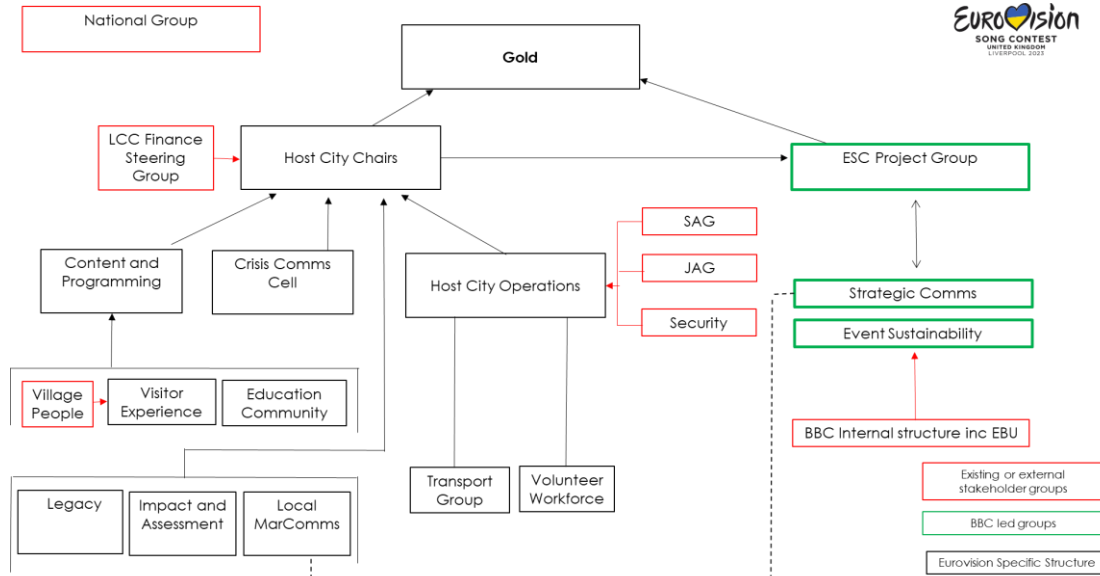
## 2.3 Eurovision 2023 programme

### 2.3.1 *Delivery partners*

Eurovision 2023 was hosted by the BBC on behalf of Ukraine. Culture Liverpool (part of LCC) was the lead local partner for the event and was set up to deliver events of this scale. This 25-person event production team was created from the core team who delivered European Capital of Culture in 2008 to manage the major event and cultural programme in Liverpool as well as facilitating major events with partners. ACC Liverpool Group, the management company that run the M&S Bank Arena on the Council's behalf, were another key delivery partner for Eurovision 2023.

The organisational structure and key roles in the delivery of Eurovision 2023 are set out in **Figure 2.1**.

**Figure 2.1: Eurovision 2023 Host Structure and Delivery Team**



Source: ACC, BBC, Liverpool City Council, DCMS and Liverpool City Region Combined Authority 2023.

The Host City’s Governance consisted of representatives from the following organisations:

- **Safety Advisory Group (SAG):** All relevant city partners who meet on a fortnightly basis to discuss major event activity within the city
- **Joint Agency Group (JAG):** All emergency services from the city whose nominated representatives are the official ‘sign off’ for major event activity within the city including Merseyside Police.
- **Merseytravel:** The strategic and delivery arm for transport of the LCRCA, including responsibility for public transport.
- **Liverpool Visitor Economy Network (LVEN):** All attractions and organisations related to tourism.
- **Liverpool Music Board:** Independent board representing the music sector.
- **Public Health Team** responsible for the city’s health and wellbeing services.
- **Liverpool City Region Combined Authority** supporting strategic delivery, communications and impact.
- **Ukrainian Groups:** A representative from the Association of Ukrainians in GB based in Liverpool to engage the local and refugee community.
- **Liverpool Arts Regeneration Consortium (LARC):** The 10 largest cultural organisations in the city including Tate, Liverpool Philharmonic, National Museums Liverpool.
- **Creative Organisations Of Liverpool (COOL):** Over 60 medium and small cultural and community arts organisations.



- **Liverpool Hospitality Association (LHA):** The body which represents hotels, restaurants and the entire city hospitality sector
- **Liverpool BID:** City Centre Business Improvement organisation
- **Liverpool ONE:** City centre retail area owned by Grosvenor.
- **City of Children Schools Team A** team within the local authority dedicated to creating engagement opportunities and tangible legacy projects for schools from major event activity.
- Transport bodies including **Department for Transport and Network Rail.**

### 2.3.2 *Events and key locations*

The ACC Liverpool Group’s campus is on the Liverpool waterfront. Situated on a secure island site the purpose built and interconnected arena, convention centre and exhibition centre have worked in partnership to host numerous high profile live events since their launch for the European Capital of Culture in 2008 including: the MTV Awards, MOBO Awards, BBC Sports Personality of the Year, Labour Party Conference, and the Vitality Netball World Cup 2019.

The phased approach of the availability of different parts of the venue enabled The ACC Liverpool Group to retain many of its existing contracted business events delivering significant hotel bed nights and economic impact to the City whilst at the same time allowing Eurovision 2023 to scale up its delivery activities; maximising the incremental benefits of the event.

**The M&S Bank Arena was the main event zone for the Live Shows**, consisting of two Semi-Finals and a Final. Each Live Show also had two rehearsals. Therefore, there were nine ticketed events at the M&S Arena between 9<sup>th</sup> and 13<sup>th</sup> May.

**The Eurovision Village was located on the Pier Head** – a 10,000 capacity space outside the three Graces on the Liverpool Waterfront. The Eurovision Village was delivered as a co-production between Liverpool BID and Culture Liverpool. The Eurovision Village was open for 10 days from 5<sup>th</sup> May to 13<sup>th</sup> May across the Eurovision 2023 programme, including ticketed events for the Eurovision Opening Party and the Grand Final Party.

**The Big Eurovision Welcome was held at St George’s Hall** – an iconic city centre venue. Live performances and several cultural commissions supported the unique nature of the event. This event was an opportunity to showcase the ambitions of Eurovision 2023 in Liverpool as well as mark their relationship with Ukraine.

**Camp & Furnace (C&F) hosted the official Euro Fan Club.** The importance of having a great nightclub at the heart of the offer for fans was strongly identified as a key success factor in the consultation with Eurovision fan groups prior to the hosting of Eurovision 2023. This club is located in the Baltic Triangle, which is a 5-minute walk from the main arena and 20 minute walk from Eurovision Village.

A number of other events were held across the city such as exhibitions, watch parties, and cabarets. **EuroStreet** was specially curated in collaboration with many partners across the LCR to provide a unique opportunity for communities across the region to get involved, take part, deliver

events, and celebrate all things Eurovision. Aimed at Early Years, Primary, Secondary and Special Education settings, **EuroLearn** offered a varied programme for schools to engage with and educational resources that were flexible enough also to be used in holiday activity and after-school clubs.

A summary of Eurovision 2023 events and locations are provided in **Table 2.1**.

<b>Table 2.1: Eurovision 2023 Programme of Events</b>			
<b>Event Type</b>	<b>Date/s</b>	<b>Location</b>	<b>Delivery partner</b>
Live Shows	9 – 13 May	Liverpool Arena	ACC Liverpool
Eurovision Village	5 – 13 May	Pier Head	Liverpool BID and Culture Liverpool
National Lottery Big Eurovision Welcome	7 May	St George’s Hall	National Lottery / Culture Liverpool
EuroFestival Events	1 – 14 May	Various inc. Tate Liverpool, Liverpool Cathedral, National Museums Liverpool, Blue and Yellow Submarine Parade	Culture Liverpool and Liverpool Arts Community
EuroLearn	5 – 13 May	Various schools	Culture Liverpool
EuroStreet	5 – 13 May	Various community groups	Culture Liverpool
General City-Wide Activities	5 – 13 May	City Centre and venues hosting Eurovision activities	Various including Liverpool Arts Community

### *2.3.3 Enhancing accessibility and inclusivity*

The Eurovision Song Contest took active measures to create an environment that was more accessible and inclusive, catering for a diverse range of visitor and resident groups. This commitment was particularly evident in the extended grants to community groups and organisations. These funds were allocated to support the development of projects that not only celebrated the essence of Eurovision but also embraced its underlying values.

Additionally, The ACC Liverpool Group made every effort to provide a safe and enjoyable experience for all customers attending any event at their campus venues. The venues have been designed with accessibility a priority consideration both back and front of house with regard to accessing facilities and services. They have previously received recognition of their venue, commitment and support for deaf and disabled music fans, from leading charity Attitude is Everything, by being awarded the Silver level of their Charter of Best Practice.

## 2.4 Eurovision 2023 against a wider context and shifts in urban and cultural life

### Changes to urban centres

Eurovision was hosted on Liverpool’s waterfront which is part of Liverpool City Centre. All urban centres throughout the UK, including Liverpool, have been undergoing a notable and transformative evolution. Liverpool’s city centre and waterfront have seen significant development over recent decades. However, the conventional urban centre landscape and resident interactions within them have continued to change due to urban planning, evolving consumer preferences, and the growth of online shopping. Other factors shaping urban centres include:

*“Eurovision came at the time when we’re in recovery from the pandemic and subsequent economic instability”*

Bill Addy, Liverpool Business Improvement District June 2023

- **the global pandemic:** COVID-19 brought about unprecedented challenges for the events and the hospitality sector worldwide. Despite the disruptions caused by the pandemic, there is evidence of a gradual recovery; and
- **present economic and global uncertainties:** high inflation and the cost of living crisis caused by factors such as the ongoing war in Ukraine pose challenges for urban centres but also key contributing sectors, including events and hospitality.

These combined factors have given rise to strategies to entice people back into the city centres. These often involve a strong emphasis on cultural attractions, entertainment hubs, and unique events.

### The Visitor Economy in Liverpool

Liverpool's visitor economy is not an isolated sector. It functions as an integral part of the city's economic ecosystem and serves as a powerful driver of prosperity, generating employment opportunities, fostering cultural exchange, and infusing vibrancy into the city's social fabric. Before the COVID-19 pandemic, Liverpool stood as the 5th most visited city in the United Kingdom, drawing a substantial number of overseas visitors.

Without Eurovision, Liverpool City Centre would have been busy with visitors. However, the COVID-19 pandemic had profound impacts on Liverpool's footfall and vibrancy. The pandemic disrupted everyone’s lives significantly and this study (and others) helps to understand the ongoing recovery and future direction for Liverpool.

### **Liverpool's ongoing revitalisation**

The ongoing economic revitalisation of Liverpool is complemented by its consistent hosting of significant events. While Eurovision undoubtedly stands as a major event, it is acknowledged that events like Eurovision cannot be a panacea for all of Liverpool's socio-economic challenges. However, there was a unanimous consensus among stakeholders that Eurovision serves as another important part of the process of reinvigorating Liverpool's economic landscape. It also reinforces Liverpool's reputation as a vibrant hub for events and culture.

*“Eurovision is a very important chance for us to show we can do things fantastically well”*

Michael Parkinson, Heseltine Institute, University of Liverpool. June 2023

### **Eurovision as an economic driver**

The EBU has seen a shift in attitudes towards hosting Eurovision with previous economic impact and research work collated by the EBU showing that Eurovision is more than its live shows. In the previous edition of Eurovision in 2022, over 8,000 individuals were employed in various capacities, underlining its significance in terms of generating short-term employment opportunities. Previous research for host cities has also shown that it can help them to become hubs of cultural activity, featuring a wide array of events, concerts, shops, and catering services that attract a diverse audience including domestic and international visitors. Eurovision can also raise the profile of cities and countries on the global stage, increasing their visibility and desirability as prime travel destinations.

# Section 3

## Impact Assessment Methodology

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## 3 Impact Assessment Methodology

### 3.1 Overview

This study utilises a combination of quantitative and qualitative research methods. Primary data on spending patterns, viewpoints, and insights was gathered through surveys, interviews, and on-site observations, capturing expenditure data from event attendees, visitors and residents. Over 3,500 surveys and primary research inputs have been gathered so far. We have also used secondary data sources to provide a comprehensive assessment.

Secondary data sources, including ticketing data, official reports and economic indicators, have been used to validate and enhance the analysis. The study draws on data from official EBU Eurovision Song Contest data, the BBC, Liverpool City Council and LCRCA and national government reports, tourism statistics, industry association reports, and other sources including footfall and Mastercard spending data (provided by Liverpool BID and Liverpool ONE). It has also made use of mobile phone data provided by LCRCA.

This includes data on:

- Spend;
- Events;
- Tickets;
- Footfall;
- Mobile phones;
- Transport movements; and,
- Tourism.

The analysis is based on AMION’s bespoke impact modelling and focuses on analysing the direct, indirect, and induced effects of hosting Eurovision in Liverpool.

### 3.2 Visitors

To calculate the total attendance to Eurovision events and the total individual visitors, a range of secondary sources were utilised and reviewed.

**Table 3.1** provides details of this review. A red, amber, and green (RAG) rating has been provided to each data category based on their robustness for use within the attendee and visitor calculations.

<b>Table 3.1: Secondary data collection</b>			
<b>Data</b>	<b>Commentary</b>	<b>Potential issues</b>	<b>RAG Status</b>
Eurovision Live Show	Ticket data from BBC and Ticketmaster	<ul style="list-style-type: none"> <li>Individuals attending multiple Live Shows</li> </ul>	Known attendees
The Opening and Grand Final Party at Eurovision Village	Tickets data	<ul style="list-style-type: none"> <li>Individuals attending Live Shows and Village on multiple occasions</li> </ul>	Known attendees
Eurovision Village on other days	Estimates based on crowds and capacity of the Village	<ul style="list-style-type: none"> <li>Individual attending Live Shows and Village on multiple occasions</li> </ul>	Known attendees
Other Eurovision events <sup>8</sup>	Engagements from Liverpool Arts Community and Eurostreet/Eurolearn	<ul style="list-style-type: none"> <li>Individuals attending Live Shows, Village, and events on multiple occasions</li> </ul>	Known attendees
Mobile phone data	Footfall and visitor data from Place Informatics	<ul style="list-style-type: none"> <li>Purpose of visit</li> <li>Visitors without mobile phones</li> </ul>	Known total visitors
Liverpool BID footfall	Footfall counters from Liverpool BID	<ul style="list-style-type: none"> <li>Purpose of visit</li> <li>Double counting at same counter</li> <li>Double counting at other counters</li> </ul>	Counts of footfall
Liverpool ONE footfall	Footfall counters from Liverpool ONE	<ul style="list-style-type: none"> <li>Purpose of visit</li> <li>Double counting at same counter</li> <li>Double counting at other counters</li> </ul>	Counts of footfall
STEAM data	Analysis of the tourism sector in Liverpool	<ul style="list-style-type: none"> <li>Purpose of visit</li> <li>Availability of data</li> </ul>	Counts of people
Hotel occupancy	Hotel occupancy and achieved rates data for Liverpool and the City	<ul style="list-style-type: none"> <li>Purpose of visit</li> <li>Length of stays</li> </ul>	Counts of nights stayed
Car Park data	Occupancy rates of car parks across the city	<ul style="list-style-type: none"> <li>Purpose of visit</li> <li>Cars to people ratio</li> </ul>	Counts of vehicles
Airport passengers	Liverpool John Lennon Airport and Manchester Airport data	<ul style="list-style-type: none"> <li>Purpose of visit</li> <li>End destination of visit</li> </ul>	Counts of arrivals
Train arrivals	Arrivals data in Liverpool's main train stations from Mersey Rail	<ul style="list-style-type: none"> <li>Purpose of visit</li> <li>Repeat visits on same day (i.e. double counting)</li> </ul>	Counts of additional journeys
Visitor estimations	Estimates of total visitors to inform planning and capacity	<ul style="list-style-type: none"> <li>Basis for estimation</li> <li>Risk of overestimation</li> </ul>	Estimates of visitors

Source: AMION 2023 (Colours denote a RAG Rating to demonstrate quality of data to estimate attendees and individual visitors)

<sup>8</sup> Other Eurovision events relate to the programme of Eurofestival (as provided by Liverpool Arts Community and Culture Liverpool), Eurostreet and Eurolearn events.



Using the top four sources above, rated as ‘Green’ within our data review, the attendances at Eurovision 2023 events can be totalled as set out in Figure 3.1. The mobile phone data, together with the visitor survey response, can then be used to understand visitors who did not attend events but did visit Liverpool city centre for Eurovision.

**Figure 3.1: Total attendances of Eurovision events**



The primary data collection from the city centre-wide visitor survey<sup>9</sup> was used to mitigate the following potential issues in calculating the total individual visitors to Liverpool City Centre for Eurovision:

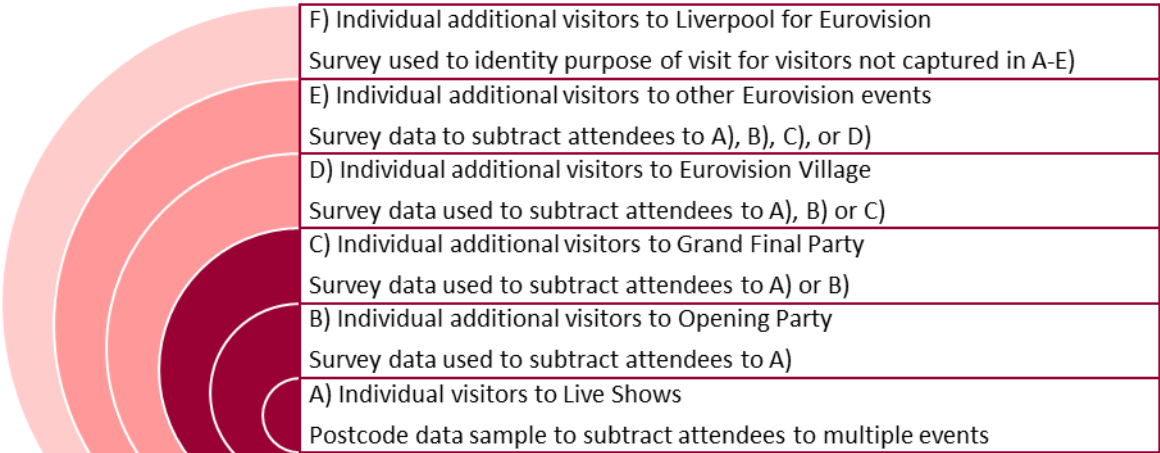
- **Double counting:** The postcode data for the Live Shows was analysed to identify where individuals attended multiple Live Shows. The surveys identified where attendees at Eurovision Opening Party, Grand Final Party, Village (not at a specific event), or other Eurovision events attended another event;
- **Purpose of visit:** For the additional visitors to Liverpool city centre for Eurovision 2023 but did not attend an event<sup>10</sup>, it is necessary to identify the purpose of their visit to ensure the true impact is captured instead of other potential reasons for being in Liverpool city centre (for example, other events in Liverpool, or working/shopping). The survey responses were used to adjust for this, using the responses from individuals who did not attend any events. As interviews at Eurovision Village or the M&S Arena are likely to skew the results, they have been excluded from this process. Sampling the surveys in this way introduces a higher margin of error however, this method is deemed more appropriate than using the purpose of visit from visitors who attended events.

The methodology set out in **Figure 3.2** has, therefore, been used to calculate the total individual visitors to the city for Eurovision. This reflects best practice in relation to a micro (or ‘bottom up’) economic impact assessment. The most certain data points are used as the starting point and the additional visitors to other events are added onto this at each stage.

<sup>9</sup> Conducted at the Eurovision Village, along Pier Head outside the Eurovision Village, Eurocamp at Liverpool ONE, the National Lottery Big Eurovision Welcome (St George’s Hall) and along the route of the Yellow and Blue Submarine Parade

<sup>10</sup> It should also be noted that people are drawn to cities for big events but do not necessarily attend the events. This has been found in several impact studies and impact work for Capital of Culture in 2008.

**Figure 3.2: Total individual visitors to Liverpool city centre for Eurovision**



**Key:**  
 Ticketed data ■  
 Host partner data ■  
 Mobile phone data ■

The calculation for individual visitors to Liverpool city centre for Eurovision was sense-checked against the other secondary data sources to ensure consistency. The calculation was also sense-checked against a ‘top-down’ approach whereby the overall proportion of visits for Eurovision from the surveys are applied to the total visitors in the city.

### 3.3 Visitor spending

The visitor survey collected a variety of data about spending, which provides the basis for our assessment of the additional expenditure at different spatial levels, including:

- cost of travel to Liverpool;
- cost of accommodation;
- location of accommodation;
- spend in Liverpool by category;
- spend in other locations excluding accommodation;
- usual spend on a typical leisure trip; and
- location of typical leisure trips.

Of key importance in assessing the impact of Eurovision on the local economy is the extent to which new activity is truly additional, in other words, it does not simply displace existing activity. Furthermore, it is important to understand who is likely to benefit from the impacts generated and the degree to which further demand and investment is stimulated. To assess the net additional impact of the proposals and overall additionality of Eurovision, the following factors have been considered as part of the spending calculations using the above survey data:

- **Leakage** – the proportion of outputs that benefit those outside of the event’s target area or group. The assessment has analysed expenditure at the three target areas – Liverpool, Liverpool City Region, and the North West. For the net additional visitor spending calculation, leakage has included expenditure on transport outside the target area, expenditure on accommodation outside the target area, and expenditure on other categories outside the target area.
- **Displacement** – the proportion of outputs accounted for by reduced outputs elsewhere in the target area. Displacement could include visitors not spending time or money at other attractions in the North West or across the city during the period. For the net additional visitor spending calculation, displacement has included the usual spend on a typical leisure trip by each individual visitor<sup>11</sup>.
- **Multiplier effects** – further economic activity associated with additional local income and local supplier purchases. Multiplier effects have been excluded from the core analysis to isolate the specific direct visitor effects from hosting Eurovision. In line with LCR STEAM 2022 data, a ratio of direct to indirect and induced effects has been applied thereafter for the assessment of total expenditure, employment and GVA; and
- **Deadweight (the Reference Case)** – outputs which would have occurred without the project. In this instance, deadweight represents the usual number of visitors to Liverpool city centre in this period. The typical number of visitors to Liverpool has been captured through our visitor calculations, as our methodology isolates the individual visitors to Liverpool city centre specifically for Eurovision and therefore, deadweight is captured in this way. This calculation has been supported by mobile phone data to ensure the additional visitors only are captured. For the visitor expenditure calculations, the spending of the visitors who were likely to have attended any events at the M&S Bank Arena which were cancelled due to Eurovision 2023 has been captured. It is estimated that 11,500 visitors were likely to attend the events in the counterfactual or reference case. The breakdown of the visitors by type (local, national, and international) as well as the spend for each category has been based on benchmarks provided by the Music by Numbers 2020 report and the Visit Britain surveys for Liverpool. This spend has been subtracted from the Live Shows expenditure as deadweight.

The results of the visitor spending calculations have been sense-checked against secondary data sources, such as STEAM tourism data.

<sup>11</sup> The survey asked all respondents what their typical leisure trip spend is at varying geographical levels relating to our target areas (Liverpool, LCR, and NW). The analysis has enabled bespoke displacement rates to be applied to each target area.

### 3.4 Organiser spend and other impacts

The assessment of organiser spend has utilised information from lead local partner LCC, additional inputs from BBC and LCRCA, and other funding sources<sup>12</sup>.

The information provided enables an assessment of spend by category to be undertaken, as presented in **Section 5**. The assessment of organiser spend has the following assumptions:

- the spend by LCC, LCRCA, the BBC, and funding partners was considered to be additional as this investment would not have taken place without Liverpool hosting Eurovision 2023;
- any additional policing costs not financed by the LCC, LCRCA, or funding partners has been excluded based on current information;
- any additional transport costs not financed by the LCC, LCRCA, or funding partners has been excluded based on current information; and
- any additional costs from local cultural bodies has been considered to be deadweight and displacement as their budgets are likely to have supported other events.

### 3.5 Potential adverse effects of Eurovision

The calculations have had to consider various detrimental effects stemming from the hosting of Eurovision 2023. These encompass a range of factors, such as the necessity for event hosts to either reserve or designate venues and resources specifically for Eurovision, which, in turn, has had an impact on other concurrent events.

Event hosts are often required to set aside or allocate valuable space and resources exclusively for the Eurovision Song Contest, which can significantly disrupt or affect other concurrent events taking place in the same vicinity. This has resulted in the unfortunate consequence of the cancellation or rescheduling of planned activities, adding to the complexities of accommodating the Eurovision Song Context within the host city's schedule. Similarly, it is likely that the focus of activities in a single location, combined with parking restrictions and road closures to manage traffic, will have resulted in loss of trade for some businesses in other areas.

The block booking of hotels by Eurovision partners created challenges in terms of available accommodation for other travellers or tourists during the contest period. This phenomenon can lead to limited options for those who had made prior travel arrangements unrelated to the contest, causing inconvenience and potential additional costs. Eurovision 2023 may also have acted as a deterrent for some potential visitors who may prefer to avoid the influx of crowds (or other aspects associated with such a high-profile international event).

The above analysis incorporates these elements through the calculations for deadweight and displacement, using best available information from the variety of secondary resources and the survey data. The deadweight calculation is based on the expected number of visitors (11,500) to events at the M&S Bank Arena which could not be re-arranged following discussions with partners and stakeholders. The displaced spending effects from elsewhere in the region has been informed

<sup>12</sup> Other funding sources include DCMS, Arts Council England, Heritage Lottery Fund, Shared Prosperity Fund, BID, Spirit of 2012, British Council, Coronation Spend, and Arts Humanities Research Council. This information was provided by lead local partner Liverpool City Council.

by the primary survey data, which enabled a bespoke calculation through the gathering of respondents' typical leisure spend at each geographical level.

The analysis does not consider certain disbenefits, such as the amount of carbon emissions associated with the delivery of Eurovision 2023, as these effects are outside of the scope of this economic impact assessment.

### 3.6 Geographic distribution of impacts

Geographic nuances in the impact of Eurovision are apparent in the research as some areas of Liverpool city centre were deemed to be less busy than usual due to concentrations of activity. Similarly, economic activity by some measures dissipated or was not evidenced across the wider LCR.

Business and stakeholder consultations highlighted how some parts of the city centre were noticeably quieter than usual during Eurovision 2023. This was due to the fact that many people were concentrated in certain areas, such as Eurovision Village and the M&S Bank Arena. This affects how the impact was felt by individuals and businesses in the city centre.

The impact of Eurovision was also not limited to Liverpool. Economic benefits were recorded in some parts of the wider Liverpool City Region although some economic indicators showed a reduction in activity.

The geographic dispersion of impacts confirms that the benefits (and disbenefits) of major events are not evenly distributed across the host region. The challenge for policy makers is to be aware of these nuances when planning and managing events, so that the benefits can be shared as widely as possible. It is clear that several activities and approaches sought to widen impact but geographic nuances in the impact of Eurovision are influenced by a range of factors, (e.g. location of the event, physical boundaries, or event financing) which are challenging to respond to fully.

The analysis considers the distribution of impact at three spatial levels: Liverpool, LCR, and North West. However, it remains at an aggregate level and is difficult to identify fully due to complex 'hyperlocal' considerations around displacement and leakage. Additionally, the calculation of visitor expenditure at each geographical level is, to some degree, reliant on the perceptions and/or knowledge of the geography of the survey respondents. For example, respondents may not know the local authority boundaries and therefore, whether they have spent within Liverpool or another local authority within the LCR. This effect could mean that the spending within Liverpool is enhanced, and the difference between Liverpool and the LCR is slightly less than indicated. It is unlikely that these effects are material and therefore, the results below demonstrate the impacts of Eurovision 2023 at each spatial level based on a robust evidence base.

# Section 4

## Visitors to Liverpool

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## 4 Visitors to Liverpool

### 4.1 Visitor numbers

Overall, it is estimated that there was a total of **473,000 attendees at Eurovision events**. Based on the method above, accounting for people attending more than one event and the inclusion of visitors who did not attend an event (but whose main purpose of their visit to Liverpool was Eurovision), a total of **306,000 individuals visited Liverpool city centre due to Eurovision**.

A breakdown of these attendances and visitors to Liverpool city centre is provided in **Table 4.1**.

Event	Total attendances to Eurovision 2023 events	Double Counting (multiple events)	Individual visitors to city centre due to Eurovision
Eurovision Live Shows	58,837	5%	55,637
Eurovision Village – Opening Party	26,250	38%	16,288
Eurovision Village – Grand Final Party	15,200	56%	6,689
Eurovision Village – other days	208,550	41%	122,816
Other events – outside of the Village <sup>13</sup>	164,651	76%	38,779
Additional visitors due to Eurovision	-	-	65,652
<b>Total</b>	<b>473,488</b>		<b>305,861</b>

To put the figures on attendees in context, this equivalent to:

- Liverpool’s resident population in 2021 (484,500),
- the number of fans who went to the 2023 British Grand Prix over the weekend (480,000);
- nearly double the estimated fan attendance (260,000) at the 2023 Open Championship at the Royal Liverpool Golf Course; and
- over double the number of attendees at Glastonbury 2023 over the weekend (210,000).

### 4.2 Visitor characteristics

Eurovision attracted visitors from across the world to Liverpool. Additionally, a huge number of local residents were attracted by Eurovision 2023, creating a substantial uplift in footfall in the city centre. The residence of individual visitors to Liverpool city centre due to Eurovision is presented below.

Over 100,000 UK residents outside of the LCR visited Liverpool due to Eurovision – this is supported by the mobile phone data which indicated an additional 107,000 visitors in Liverpool over the period were residents from over 21 miles away. Around 10% of visitors to Liverpool for Eurovision were international as set out in **Table 4.2**. This proportion aligns with the postcode

<sup>13</sup> This includes EuroFestival activities, performances and events.

analysis for the Live Shows with 13% of attendees residing internationally, which is to be expected as they are more likely to visit Liverpool specifically for a Live Show. There were visitors from 49 countries to the Live Shows.

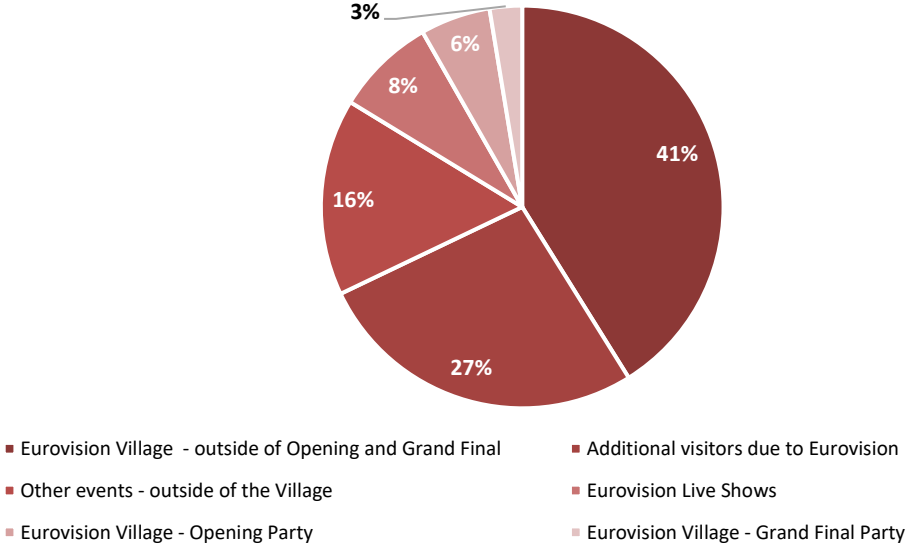
**Table 4.2: Visitors to Liverpool city centre for Eurovision 2023 by residence**

Residence	Proportion of visitors	Number of visitors to Liverpool due to Eurovision
Liverpool	37%	112,005
Rest of LCR	14%	43,245
Greater Manchester	9%	26,510
Rest of North West	5%	14,084
Rest of UK	23%	71,246
International	10%	30,984
Not specified	3%	7,787
<b>Total</b>	<b>100%</b>	<b>305,861</b>

Note: Residence excludes the location in the row above.

The visitors from Liverpool attended a variety of events, as shown below in **Figure 4.1**. The majority of residents were attracted into the city centre for the Village or due to the additional ‘buzz’ in the area (additional footfall in the city centre due to Eurovision 2023). However, around of a third of the Liverpool-based visitors attended an event of some form – either a Live Show, Opening or Grand Final Party, or another Eurovision 2023 themed event.

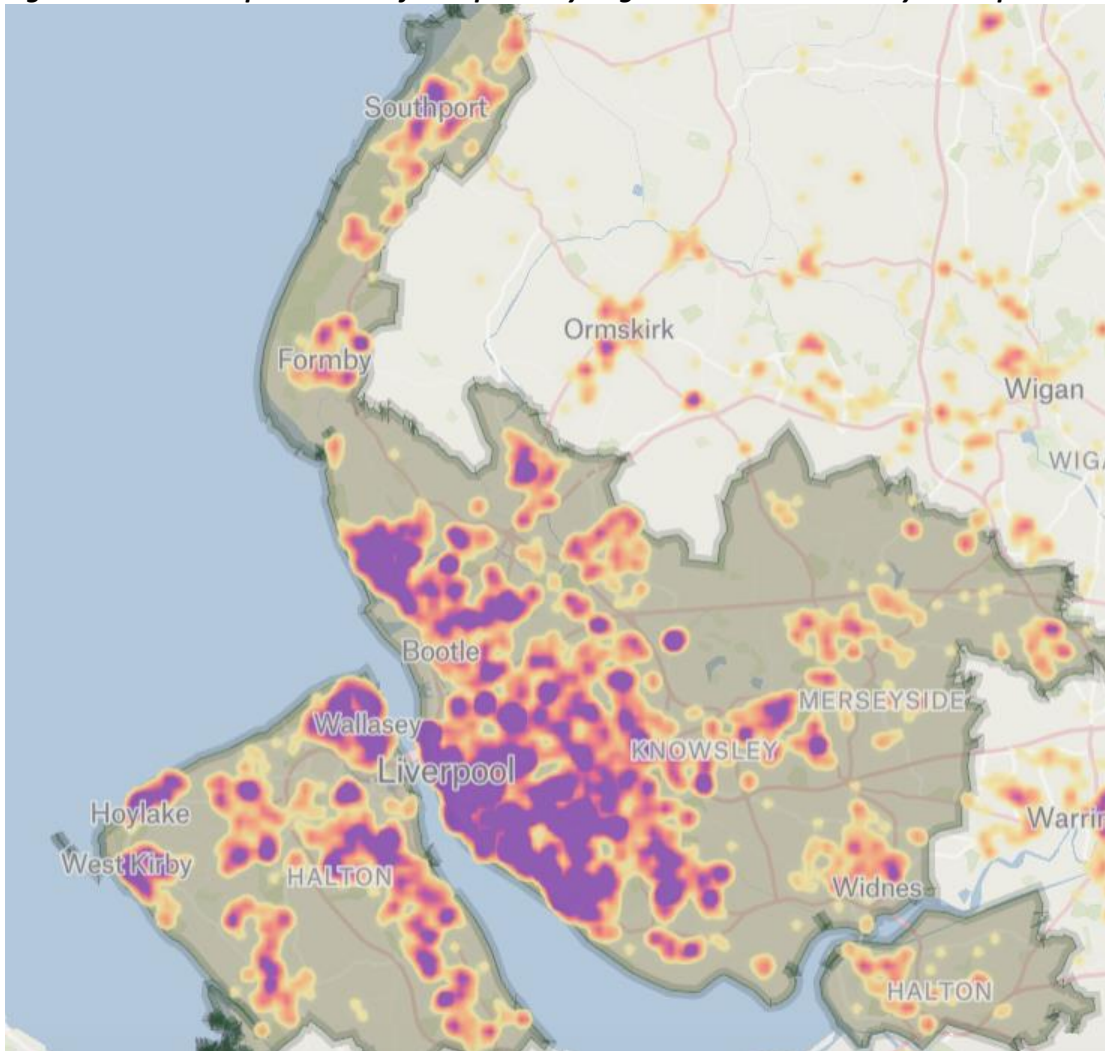
**Figure 4.1: Liverpool based visitors by type of visit**



The location of the LCR based visitors to the Live Shows are presented in **Figure 4.2**. As can be seen, the wider city region engaged with Eurovision 2023 with residents from all areas attending Live Shows.



**Figure 4.2: 'Heatmap' Location of Liverpool City Region based attendees by home postcode**



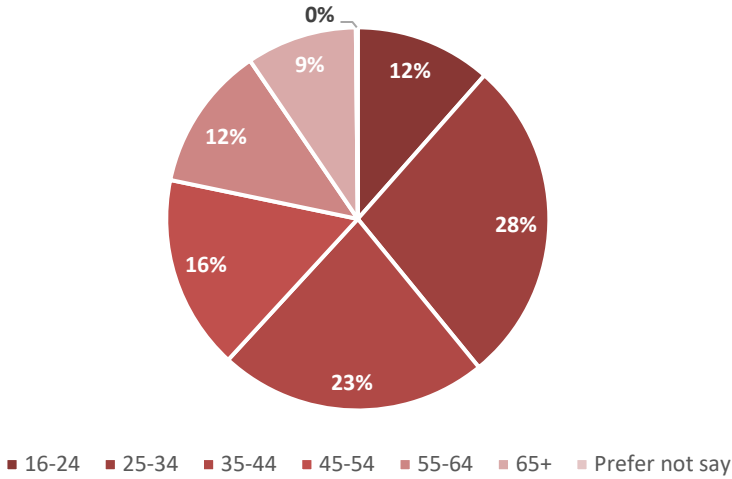
Source: Eurovision Survey 2023; AMION analysis using Felt Maps 2023 (Grey background denotes LCR)

Eurovision 2023 attracted a balanced audience in terms of gender, as 50% of survey respondents were female, 48% were male, 1% was non-binary, and nearly 1% would prefer to either self-describe or not say. Eurovision 2023 was hugely popular amongst the lesbian, gay, bisexual, queer, or asexual (LGBTQIA+) community. Around 25% of survey respondents were LGBTQIA+. The delivery of a welcoming and accessible event was a key objective for Liverpool. The case studies highlight that a key theme was members of specific vulnerable communities feeling safe and welcome such as those from the LGBTQIA+ community.

Based on the survey responses, which did not allow under-16-year-olds to be interviewed, Eurovision 2023 attracted visitors of all ages, but there was a focus on a youthful audience around Liverpool with 62% of visitors under the age of 45. The ability to draw in visitors of all ages through different experiences created a vibrant atmosphere in the city centre. The TV breakdown by age shows that the contest is hugely popular with younger audiences. The viewing share of the Grand Final for 15–24-year-olds was 53.5% which is almost 40% higher than the broadcast channels

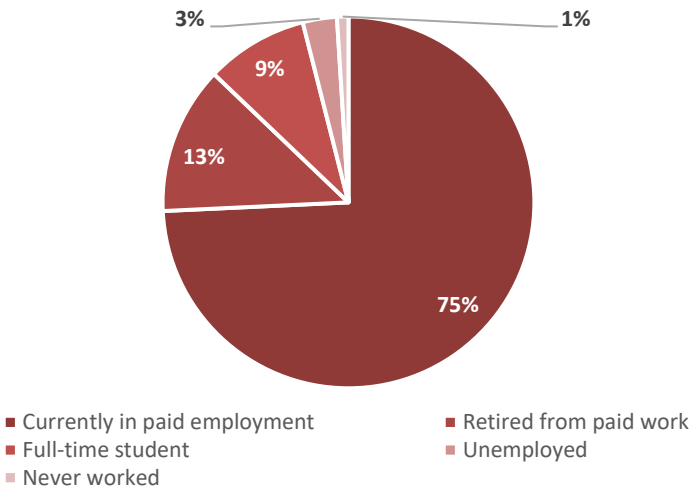
average share for this age group. The breakdown of visitors to Liverpool City Centre by age is shown in Figure 4.3.

**Figure 4.3: Breakdown of visitors by age**



The breakdown of visitors by employment status is presented in Figure 4.4. The visitors were largely representative of local and regional averages for employment status. For example, the employment rate in Liverpool (for 16-64s) was 70% in 2022, whilst 75% of respondents were in paid employment. This slight increase is to be expected given the level of expenditure associated with many of the events at Eurovision 2023. Around 3% of respondents were unemployed, most of which had been in paid employment in the last 12 months of some form. This proportion aligns with the unemployment rate for Liverpool which was 2.7% in 2022.

**Figure 4.4: Breakdown of visitors by employment status**



## 4.3 Visitor experience

### 4.3.1 Visitor survey

**Net promoter score (NPS)** is a market research measure that is based on a survey question asking respondents to rate the likelihood that they would “recommend” aspects of a host city or the event they attended. The NPS metric can help quantify the event's effects on visitor satisfaction, destination branding, and economic outcomes. Survey respondents that gave a score of 6 or below out of 10 are called Detractors, those who give a score of 7 or 8 are called Passives, and those who gave a 9 or 10 are Promoters.<sup>14</sup> The aggregate percentage of detractors is then deducted from the aggregate percentage of promoters to provide the NPS.

NPS also provides a **useful baseline for strategic planning, investment decisions, and marketing** when looking at the legacy and long-term economic benefits for the city.

**Table 4.3** presents the NPS from the visitor survey. These results demonstrate the overwhelmingly positive experience felt by visitors as well as the beneficial impacts for Liverpool relating to image, inclusivity, and tourism. The below table presents the overall NPS from the visitor survey (1,800 respondents) to provide an overview of visitors to Liverpool for Eurovision.

Question	Net Promoter Scores
Liverpool produced a safe Eurovision experience	89%
Liverpool produced an Inclusive Eurovision experience	88%
Liverpool as a Host City	81%
Liverpool as a Tourist Destination	76%

Note: more detailed insights by residence, age, and attendance at shows is available within the data appendix workbook.

The visitor survey also captured other key insights into the experience of Eurovision 2023, as well as the type of visitors. The below figures indicate that the perceptions of Liverpool as a place to visit have enhanced due to the hosting of Eurovision 2023, which may lead to tourism improving over the long-term due to increased return visitors. Key insights include:

- 65% of overall respondents would definitely visit Liverpool again;
- 54% of overall respondents reported a positive change in their perception of Liverpool;
- 26% of overall respondents were first time ever visitors to Liverpool; and
- 68% of first time ever visitors would definitely visit Liverpool again.

<sup>14</sup> Detractor: A detractor is a term used to describe a respondent who gives a low score on the NPS scale, typically a score of 0 to 6. These individuals are generally dissatisfied with their experience and are unlikely to recommend it to others.

Passive: A passive respondent gives a score of 7 or 8 on the NPS scale. While they are not highly critical, they are also not enthusiastic promoters. Passives are somewhat satisfied but may not actively endorse their experience.

Promoter: A promoter is someone who provides a high score, typically a 9 or 10, on the NPS scale. Promoters are highly satisfied with the experience and are likely to recommend it to others.

### 4.3.2 Eurovision fan survey

A global survey designed for Organisation Générale des Amateurs de l'Eurovision (OGAE) members provides valuable insights into their Eurovision experience in Liverpool. OGAE, is a non-governmental and non-profit international organisation, consisting of 42 Eurovision Song Contest fan clubs from across Europe and beyond. As of July 25<sup>th</sup> 2023, there were 1,282 respondents to the survey.

The survey underscored the global appeal of Eurovision, with 22% travelling from Europe, and smaller yet notable percentages from Australasia, North America, and Asia. Key Eurovision attractions saw substantial engagement, with 83% visiting Eurovision Village and 91% expressing high satisfaction with the experience. The Euroclub, a significant feature, saw an attendance rate of 60%, with 87% of attendees deeming it to be good value.

The overwhelmingly positive sentiment for Eurovision from OGAE members was captured with over 97% of respondents believing that Liverpool made substantial efforts to ensure fan satisfaction, 80% expressed their intention to revisit the region for tourism, and an impressive 99% felt warmly welcomed by the city.

The OGAE survey also sheds light on the economic impact from Eurovision fan clubs (which includes several “superfans”), with participants spending an average of 5 nights in Liverpool. Their spend on different aspects of the event, included around £640 for Eurovision 2023 tickets, £730 for accommodation, £63 for transportation when in Liverpool and £266 for food and drinks, further highlighting the event's positive contribution to the local economy. This superfan spending totals to £1,699 per person.

By comparison, the average gross local spend<sup>15</sup> figures from Eurovision 2023 survey by Spirul, which were used in the impact assessment, are as follows:

- Live Show visitors spent £494 in Liverpool and £519 in LCR per person;
- Opening Party Eurovision Village visitors spent £178 in Liverpool and £184 in LCR per person;
- Grand Final Party Eurovision Village visitors spent was £218 in Liverpool and £269 in LCR per person; and
- Visitors to Eurovision Village on other days spent £144 in Liverpool and £148 in LCR per person.

*[“It's just all sorts of things for people who are hardcore fans like us, but also the people who were just coming to see what it's like, they're really welcome to it's been an amazing time.”](#)*

Eurovision Visitor May 2023 (click on the link to listen to the whole quote)

<sup>15</sup> Accounting for leakage but not deadweight or displacement to ensure the figures are comparable with those quoted in the OGAE survey

# Section 5

## Economic Impact

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## 5 Economic Impact

### 5.1 Introduction

This section presents an analysis of the economic impacts of Eurovision 2023 at the Liverpool, LCR, and the North West regional levels. The assessment considers impacts relating to visitor expenditure, organisational expenditure, employment, and GVA. Wider impacts on specific sectors as well as intangible economic impacts are also assessed.

### 5.2 Visitor expenditure

#### 5.2.1 Overall expenditure

The assessment has applied the per visitor spending figures from the Spirul survey for each category to the number of unique visitors in each category. Additionality assumptions have subsequently been applied using the leakage and displacement rates from the survey, as well as deadweight calculations informed by stakeholders and industry benchmarks.

The assessment of additionality has been informed by the survey of visitors, as set out in the approach in Section 3. These calculations are based on the individual visitors to Liverpool due to Eurovision 2023, and therefore, deadweight is captured in this way as the methodology isolates additional visitors against the typical baseline for Liverpool using mobile phone data. The overall leakage rate (28%) corresponds to a medium-low rate from the Additionality Guide<sup>16</sup>, and is based on the expenditure on travel, accommodation, and other spending outside of Liverpool during their visit. The displacement rate (20%) is based on the typical expenditure in Liverpool by visitors on a normal leisure trip and represents a low rate from the Additionality Guide. This spending is also likely to have multiplier impacts across the city and the region, relating to supply chain and income-expenditure effects (these are discussed in **Section 6.4** below).

These low leakage and displacement rates are expected as Eurovision 2023 attracted visitors who would not normally be attracted to Liverpool and Eurovision 2023 events generated more additional spending than usual through ticketed events, pop-up stalls, food and beverage (F&B), and merchandise.

As one would expect, the net expenditure per visitor is highest for the Live Shows as it attracted an international audience who are likely to stay longer in the city. Additionally, due to this, the leakage is heightened but the displacement effect is lessened. The reverse of this can be seen for the more local audience attracted to the Village, other events, or to experience the city.

Deadweight has been incorporated into the Live Shows calculations based on the expected number of visitors (11,500) to events at the M&S Bank Arena which could not be re-arranged<sup>17</sup>. In order to calculate the typical profile of attendees and spend by visitors to M&S Bank Arena within this deadweight scenario, benchmarks from the Music by Numbers 2020 report have been

<sup>16</sup> Homes and Communities Agency, Additionality Guide, Fourth Edition, 2014

<sup>17</sup> This figure is estimated following discussion with stakeholders.

used for visitors to major UK concerts. It is estimated that 63% of typical visitors to the Arena were local, 35% were from elsewhere in the UK, and 2% were international. The Music by Numbers 2020 report indicated that usual local visitors to UK concerts have a spend of £43, the national visitors of £183, and the international visitors of £899 (2019 prices, uplifted to 2023). Displacement has been applied to the deadweight spend, before being subtracted from the net local spend figures.

The total spend by visitors to Liverpool City Centre for Eurovision is £75.6m<sup>18</sup>. However, this includes travel to the country and spend outside the target areas, which is excluded as leakage from the assessment. The gross local spend in Liverpool is £54.9m by visitors. As shown in **Table 5.1, the net additional visitor spend in Liverpool totalled to £42.3m.**

Event	Gross Local Spend (accounting for leakage)	Net Local Spend (accounting for leakage and displacement)	Net Additional Local Spend (accounting for leakage, displacement, and deadweight)
Eurovision Live Shows <sup>19</sup>	26,110,892	25,219,781	23,814,390
Eurovision Village – Opening Party	2,667,800	2,111,071	2,111,071
Eurovision Village – Grand Final Party	1,347,403	1,198,240	1,198,240
Eurovision Village – other days	11,970,640	7,655,872	7,655,872
Other events – outside of the Village	4,756,251	2,808,222	2,808,222
Additional visitors due to Eurovision	8,052,243	4,754,267	4,754,267
<b>Total</b>	<b>54,905,230</b>	<b>43,747,453</b>	<b>42,342,062</b>

**Table 5.2** presents the net additional visitor spend by each target area: Liverpool, LCR, and the North West.

As can be seen, **the gross local spend at the LCR level totals to £57.8m and North West level totals to £63.2m.** These figures are comfortably greater than Liverpool gross spend, as visitors spent on travel to Liverpool and accommodation within a wider catchment due to increased demand – leading to lower leakage rates (24% for LCR and 17% for North West)<sup>20</sup>.

However, due to the assessment of displacement across these wider areas, **the net additional spend for LCR totalled to £43.0m and North West totalled to £45.3m** – which are only marginally above Liverpool. For example, the displacement rates for LCR (23%) and North West (26%) are higher than the Liverpool analysis<sup>21</sup>, as expected, as Eurovision attracted visitors who usually would typically spend their income on leisure activities in other towns within the region.

<sup>18</sup> This gross spend figure includes travel to the country by overseas visitors, travel into Liverpool from outside the North West, and accommodation outside the North West. This figure is provided as context to the assessment however, the core assessment focusses on gross local spend and more importantly, net additional local spend. The leakage rate includes this expenditure, using the comprehensive visitor survey, to ensure only the spend in each target area is assessed.

<sup>19</sup> In the same way as the visitor calculations, we have followed a 'bottom up' approach and therefore, the spending from visitor to the 'Eurovision Village Opening Party' excludes any individuals who attended the Live Shows and so forth, although an individual who attended both will have spent at both.

<sup>20</sup> The leakage rate decreasing as the area of influence increases aligns with the evidence presented in the HCA Additionality Guide

<sup>21</sup> The displacement rate increasing as the area of influence increases aligns with the evidence presented in the HCA Additionality Guide.



**Table 5.2: Total net additional visitor spending within each target area**

Area	Gross Local Spend (accounting for leakage)	Net Local Spend (accounting for leakage and displacement)	Net Additional Local Spend (accounting for leakage, displacement, and deadweight)
Liverpool	54,905,230	43,747,453	42,342,062
LCR	57,756,422	44,436,847	43,031,456
North West	63,203,251	46,733,188	45,327,797

Latest STEAM LCR tourism data for 2022<sup>22</sup> has identified a visitor expenditure multiplier of 1.35 based on the ratio between expenditure and total (direct, indirect, and induced)<sup>23</sup> expenditure. Using previous STEAM data for the Liverpool local authority area<sup>24</sup>, a visitor expenditure multiplier of 1.30 has been identified to capture indirect and induced effects. Based on this scale, a multiplier of 1.40 is deemed appropriate for the North West.

Applying these multiplier effects, the total expenditure for each area is shown below:

- the total net additional visitor expenditure within the Liverpool economy could rise to £55.0m;
- the total net additional visitor expenditure within the LCR economy could rise to £58.1m; and
- the total net additional visitor expenditure within the North West economy could rise to £63.4m.

**5.2.2 By sector**

This sectoral analysis presents the immediate impact assessment based on the visitor numbers and visitor surveys. The second stage report will provide greater insight into the impacts on creative industries and event sectors, using the Round 2 of the business survey in April/March 2024 and secondary data sources which have a lag before availability.

Overall, the accommodation and food services sector in Liverpool received a net boost of nearly £28 million of direct spending due to Eurovision 2023. For reference, there was £385 million of direct expenditure in the accommodation sector and £985 million of expenditure in the food and drink sector in the LCR in 2022 according to STEAM.

Much of the leisure and entertainment spending will have been on the tickets to the Live Shows, Opening Party, and Grand Final Party however, creative artists within smaller events will also have been supported by this expenditure. Culture Liverpool, Liverpool City Council, LCRCA, and local arts organisations organised an extensive programme of activities to engage and entertain visitors. In addition to this, major cultural anchors and organisations such as the National Museum Liverpool, Liverpool’s Royal Court, and Royal Liverpool Philharmonic ran programmes of activity.

<sup>22</sup> Global Tourism Solutions Ltd; STEAM report for 2011-2022 – Final (Liverpool City Region)  
<sup>23</sup> Total effects include direct, indirect (tourism business spending within the supply chain), and induced (spending from increased wages)  
<sup>24</sup> Global Tourism Solutions Ltd; STEAM report for 2009-2014 – Final (Liverpool City Council)



Furthermore, entrepreneurs and residents actively participated in the celebrations, hosting events in pubs, libraries, and gardens, which added to the overall vibrancy.

Eurovision was seen as a catalyst for new opportunities reported by many cultural organisation and stakeholder interviews. The event inspired various projects and activities that aimed to continue the positive momentum within the sector.

Direct spending on the Liverpool transport network (train, bus, taxi) totalled to over £1.6 million due to the additional movement around the city. The additional visitors also supported nearly £8.0 million of direct shopping spend, with local businesses noting the significant spike in footfall<sup>25</sup>.

Vicky Gawith founder of Merseymade, a hub for local artists and makers, said “we had footfall of Christmas and Saturday was the busiest day ever.”

BBC News Interview May 16th

**Table 5.3** demonstrates the net additional visitor spending in Liverpool by sector<sup>26</sup>, including direct and indirect spending using the Liverpool STEAM multiplier of 1.30 as noted above.

Sector	Liverpool (direct)	Liverpool (indirect and induced)	Liverpool (total)	%
Eating and drinking	14,833,685	4,450,106	19,283,791	35%
Accommodation in Liverpool	13,015,075	3,904,523	16,919,598	31%
Shopping (non-food)	6,609,109	1,982,733	8,591,842	16%
Leisure and entertainment	4,744,413	1,423,324	6,167,737	11%
Shopping (food)	1,256,028	376,808	1,632,836	3%
Getting around i.e. taxi/bus etc	1,107,811	332,343	1,440,154	3%
Travel into Liverpool	523,852	157,156	681,008	1%
Other	252,090	75,627	327,717	1%
<b>Total</b>	<b>42,342,062</b>	<b>12,702,619</b>	<b>55,044,681</b>	<b>100%</b>

It was evident from the interviewees and wider qualitative data that Eurovision could help to develop entrepreneurial spirit across different sectors. Many interviewees suggested ideas for future events and projects (unrelated and linked to Eurovision). Interviewees talked about the potential to create adaptable resources for community events and even proposed exporting experiences and services to future Eurovision contests.

This element of the research will be developed in the one year after report, to provide a greater detail on sectoral impact and some of the trends. Several interviewees from different sectors highlighted an immediate impact but felt that the longer-term impact was likely to be more important to their organisation or sector.

<sup>25</sup> <https://www.bbc.co.uk/news/uk-england-merseyside-65599371>

<sup>26</sup> The visitor surveys gathered the average visitor spending by sector, with the sectors shown in Table 5.3. This spending is all considered ‘tourism’ based on STEAM’s definition and therefore, their sector specific multiplier is considered appropriate.

### 5.3 Organiser spend

**The net additional organiser spend at a Liverpool level totalled to £10.9m.** Around £6.4m (59%) was spent on the production of Eurovision 2023 including services such as the construction of stages, creative artists, and branding. Around £4.1m (38%) of this was spent on hospitality such as accommodation for the production and event staff, further boosting the local hospitality sector in addition to the visitor spending, or retail and catering within Eurovision Village. Contributions to the planning, coordination, and execution of Eurovision 2023 also encompassed the private sector, with £300,000 provided by Liverpool BID, along with additional contributions dedicated to underwriting specific events.

**At the LCR level the net additional organiser spend totalled to £11.7m.** The profile of the spend at a LCR level was very similar to the Liverpool expenditure. It is calculated that of LCC’s overall spend in the LCR as part of their procurement for the various Eurovision 2023 contracts, around 65% were with small and medium sized enterprises (SMEs).

**The net additional organiser spend at a North West level totalled to £15.9m.** Production represents 61% of this spend, with the overall organiser investment on this category totalling to £9.8m.

The net additional organiser spend by different categories<sup>27</sup> is presented in **Table 5.4**.

Sector	Liverpool	LCR	North West
Production	6,445,161	6,920,503	9,766,658
Hospitality	4,164,420	4,352,435	5,638,280
Additional staff costs	315,565	455,595	497,307
<b>Total</b>	<b>10,925,146</b>	<b>11,728,533</b>	<b>15,903,244</b>

**Source:** Funders including Liverpool City Council, Liverpool City Region Combined Authority, DCMS, BBC, Liverpool BID, SPF, ACE.

**Note 1:** Production includes a variety of expenditure across the city for Eurovision 2023 such as the Opening Ceremony, City Branding, Ukrainian Content Commissioning, Venue Hire Costs, community programmes, and BBC’s additional production costs

**Note 2:** Hospitality includes a variety of expenditure including accommodation, Eurovision Village, and associated travel hire costs

### 5.4 Employment and Gross Value Added

#### 5.4.1 Visitor expenditure

The visitor expenditure will support temporary employment and GVA in the Liverpool, LCR, and North West economies across the accommodation, food services, and recreation sectors.

The net additional visitor expenditure in Liverpool, LCR, and North West has been converted to one-year full time equivalent (FTE) jobs by employing the average visitor expenditure required to

<sup>27</sup> The organiser spend has utilised information from lead local partner Liverpool City Council, additional inputs from BBC and LCRC, and other funding sources. This data provided specific cost lines, which have been allocated into sectors based on their description. This spending is all considered ‘tourism’ based on STEAM’s definition.

support 1 FTE job (£96,781) according to the latest STEAM 2022 statistics for the LCR<sup>28</sup>. After inflating this figure to 2023 prices, it is estimated that visitors to Liverpool supported **425 one-year FTE jobs in the Liverpool economy, 432 one-year FTEs in the LCR, and 455 one-year FTEs in the North West as a whole** through their spending.

It should be noted that the employment impact has been presented as temporary one-year FTEs as this is best practice for an economic impact assessment for an event of this nature<sup>29</sup>. However, in reality, the figure would have been much higher but for a shorter period due to the Eurovision 2023 event itself being hosted over two weeks in May.

GVA is a measure of the economic value of goods and services produced in an area. Data provided by Experian<sup>30</sup> suggests that the GVA per FTE employee in the visitor economy<sup>31</sup> in Liverpool is £38,120 and in the North West is £37,871.

Based on these figures, the employment will generate a GVA impact of **£16.1m in Liverpool, £16.4m in the LCR and £17.2m in the North West in 2023**, as shown in **Table 5.5**.

**Table 5.5: Visitor expenditure related employment and GVA**

Spatial area	Net additional visitor expenditure	Employment (1-year temporary FTEs)	GVA (one-off GVA impact)
Liverpool	£42,342,062	425	£16,103,454
LCR	£43,031,456	432	£16,365,643
North West	£45,327,797	455	£17,238,983

Using the latest available STEAM data and analysis, the same multiplier effects as stated above for Liverpool (1.30), LCR (1.35), and North West (1.40) have been used to capture the indirect and induced employment effects arising from visitor expenditure<sup>32</sup>. Applying these multiplier effects, the total employment and GVA for each area is shown below:

- the total impact on the Liverpool economy from visitor expenditure could rise to 553 one-year FTE jobs and £20.9m one-off GVA;
- the total impact on the LCR economy from visitor expenditure could rise to 583 one-year FTE jobs and £22.1m one-off GVA; and
- the total impact on the North West economy from visitor expenditure could rise to 637 one-year FTE jobs and £24.1m one-off GVA.

<sup>28</sup> Global Tourism Solutions Ltd; STEAM report for 2011-2022 – Final (Liverpool City Region)

<sup>29</sup> The figures presented are net additional and therefore, relate to job opportunities taken up by those who are either unemployed or underemployed (including those undertaking additional overtime), particularly within the gig economy.

<sup>30</sup> Experian Regional Planning Service – based on ONS data. The figures from Experian for Liverpool and LCR align with the 2020 ONS Tourism Satellite Account found UK tourism had a GVA per FTE of £37,700.

<sup>31</sup> Defined as accommodation, food services, and recreation sectors

<sup>32</sup> The data from STEAM for the LCR demonstrated almost identical multiplier effect for expenditure and employment. The induced and indirect GVA impacts have been calculated using the GVA per FTE figures, applied to the total employment figures.

### 5.4.2 Organiser expenditure

The organiser spend will also support temporary employment and GVA within local businesses during the duration of the contracts which ran prior to, during, and after Eurovision 2023.

For any expenditure relating to the tourism sector, the visitor spend to FTE metric has been used to calculate the expected one-year FTE employment.

For the rest of the organiser spend which relates directly to staffing costs or contracts to local businesses, data on average wages within each sector is taken from the Annual Survey of Hours and Earnings. As robust sector-based earnings data is not available at local authority level, national data is used and then adjusted to local level, based on average workplace earnings for the Liverpool local authority area and region relative to average national earnings. An allowance for overheads, national insurance, and pensions, as well as an allowance for profit, has been added to the average wages to calculate the total cost per employee. This total average cost per employee by sector for Liverpool and the North West is then applied to the overall organiser expenditure (i.e. business turnover for local businesses) at each spatial level.

Based on this, it is estimated that the organiser spending on Eurovision 2023 supported **164 one-year FTE jobs in the Liverpool economy, 179 one-year FTE jobs in the LCR economy and 243 one-year FTE jobs in the North West as a whole**. These figures have been compared to the estimated peak employment on site where possible to ensure the robustness of the calculations.

The average GVA per FTE employee for the visitor economy stated above has been applied to the hospitality employment. An average GVA per FTE employee for rest of the organiser spend<sup>33</sup>, £47,366 in Liverpool and £52,972 in North West, has been applied to the remaining employment.

Based on these figures, the estimated employment will generate **a one-off GVA impact of £7.4m in Liverpool, £8.1m in LCR and £12.1m in the North West in 2023**. The full analysis is presented below in **Table 5.6**.

<b>Spatial area</b>	<b>Net additional organiser expenditure</b>	<b>Employment (1-year temporary FTEs)</b>	<b>GVA (1-year one-off GVA)</b>
Liverpool	£10,925,146	164	£7,399,325
LCR	£11,728,533	179	£8,098,975
North West	£15,903,244	252	£12,583,942

Using the same multipliers as above on the direct employment figures from organiser spend, the total effects (including direct, indirect, and induced) for each area are shown below:

- the total impact on the Liverpool economy from organiser expenditure could rise to 214 one-year FTE jobs and £9.6m one-off GVA impact;
- the total impact on the LCR economy from organiser expenditure could rise to 242 one-year FTE jobs and £10.9m one-off GVA impact; and

<sup>33</sup> Defined as media activities, administrative and support services, and public administration and defence

- the total impact on the North West economy from organiser expenditure could rise to 340 one-year FTE jobs and £17.0m GVA impact.

### 5.4.3 *Intangible economic impacts*

Eurovision acted as a unique advertisement for Liverpool, transmitting its images and appeal to audiences not only in Europe but also beyond. It is estimated that over 1,000 journalists from more than 50 countries came to Liverpool to cover the event and this produced over 150,000 print and online articles in May alone. This exposure can have both short-term and longer-term effects on people's travel decisions, influencing their choice to visit Liverpool.

There is an expectation of a significant boost in tourism. The captivating visuals and impressions of Liverpool presented during Eurovision could prompt an increase in interest among viewers who are inspired to experience the city for themselves. The following quotes shows that there is a view that individuals who, having been exposed to the images of Liverpool, will be motivated to plan a visit within the next few months:

<p><i><a href="#">“We'd like to come back again so we can see a bit more when there's a bit less people about and explore it a bit further.”</a></i></p> <p>Eurovision Visitor May 2023 (click on the link to listen to the whole quote)</p>	<p><i>“I have no doubt we will get a short-term boost over summer. There will be a lot of people who will have seen the images and decide that they want to come and visit in the next three or four months.”</i></p> <p>Chris Brown, Marketing Liverpool Director in The Guide Liverpool May 2023</p>
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Participants in many of the community events were passionate about the image of Liverpool as a result of hosting Eurovision 2023. Several felt it would dispel negative stereotypes associated with Liverpool and showcase the city's welcoming and tolerant nature. This picks up on similar themes in previous major events held in Liverpool which highlighted similar challenges to stereotypes and perceptions of the city and its residents.

The impact of events may also be felt in the long term. The exposure and positive associations created by the broadcast serve as intangible assets for Liverpool's economy. As viewers from various parts of the world witnessed the city's vibrant culture, attractions, and atmosphere, it contributes to shaping their perception of the city as a destination for travellers and investment. Over time, this can influence decisions and create a lasting impression that lingers in their minds. The images and impressions showcased during the broadcast have become part of the narrative, highlighting its unique character and drawing attention to what the city has to offer. This extended exposure has the potential to influence travel decisions not just in the immediate aftermath of the event, but in the longer term

# Section 6

## Wider economic impact

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## 6 Wider economic impact

### 6.1 Overview

The wider impact of an event like Eurovision is important to people’s health, wellbeing and opportunity, neighbourhoods and places, businesses, and the environment. Although the other separate research commissions explore many of these impacts in more detail, the economic analysis has identified a series of socio-economic impact areas.

### 6.2 Connecting Eurovision to Communities

A wide range of more local Eurovision 2023 related events were also held throughout Liverpool. These events, numbering an estimated 750, comprised a vibrant tapestry of official and unofficial Eurovision-inspired gatherings. The diverse activities catered to the eclectic tastes of Eurovision enthusiasts, interested visitors, and residents.

These activities fostered a sense of camaraderie and cultural celebration. Liverpool hosted a series of events in the lead-up to and during Eurovision, including the EuroFestival with diverse cultural performances, EuroClub featuring renowned DJs, Eurovision Village offering live music and activities, a Liverpool Welcome Party, and Eurovision viewing parties for fans to celebrate and enjoy the contest together. There were also many other celebratory events which ranged from Ukrainian themed food and merchandise pop-up markets to a Eurovision-themed chess tournament and Eurovision-themed knitting circles.

The hosting of Eurovision in Liverpool invoked feelings of pride and a sense of achievement among stakeholders and participants. Events like Brasilica, Africa Oye, and Sound City were highlighted as examples of Liverpool’s prowess in hosting city-wide celebrations.

The events and community engagement extended beyond the impacts geographically (beyond the live shows by the waterfront) and also across communities (to those not always engaged by major events; school children, older people, ethnic minority communities, etc). The EuroGrant, EuroStreet, and EuroLearn programme of activities provided platforms for ideas, knowledge exchange, and developmental initiatives. The EuroGrant initiative presented an opportunity for aspiring artists and creative minds to acquire valuable funding (up to £2,000) and support for their ventures, reinforcing Liverpool's dedication to nurturing talent and innovation. As part of the Eurogrant, the EuroStreets community programme was curated to encourage people and communities across Liverpool to celebrate Eurovision themed projects and events.

The EuroLearn activities offered informative sessions and interactive workshops, encouraging participants to delve into the multifaceted world of Eurovision, its historical significance, and its influence on the global music landscape.

*“It was great to be part of the musical legacy in Liverpool. I moved from Ukraine because of the war and studying music in Liverpool was the best place for me and the music spirit and the live music scene. People are able to do the things they love and cherish and its amazing.”*

Performing artist from Ukraine that received support from Eurogrant, June 2023



As preparations for Eurovision 2023 continued, Liverpool's cultural landscape was further enriched through the collaborative efforts of EuroStreet and EuroLearn programmes. Drawing the active participation of 367 organisations, these initiatives garnered a significant response with the involvement of 36,026 participants. This inclusive ethos extended to encompass 14,792 engaged audience members, and the enthusiastic participation of 17,746 school children.

The internal evaluation<sup>34</sup> of the EuroStreet and EuroLearn programmes shows that the city embraced its pivotal role as the host of Eurovision, qualitative feedback (shown in **Figure 6.1**) highlighted the many successes and community spirit that these complementary undertakings provided. This evidence shows that Eurovision moved beyond its central focus, to deliver wider community benefits.

**Figure 6.1: Qualitative feedback from EuroStreet and Eurovision programmes**



Source: Data collected by Liverpool City Council 2023

<sup>34</sup> Conducted by LCC 2023 which also supported the health and wellbeing insights from the University of Liverpool.



### 6.3 Volunteers benefitting Eurovision and gaining benefit from Eurovision

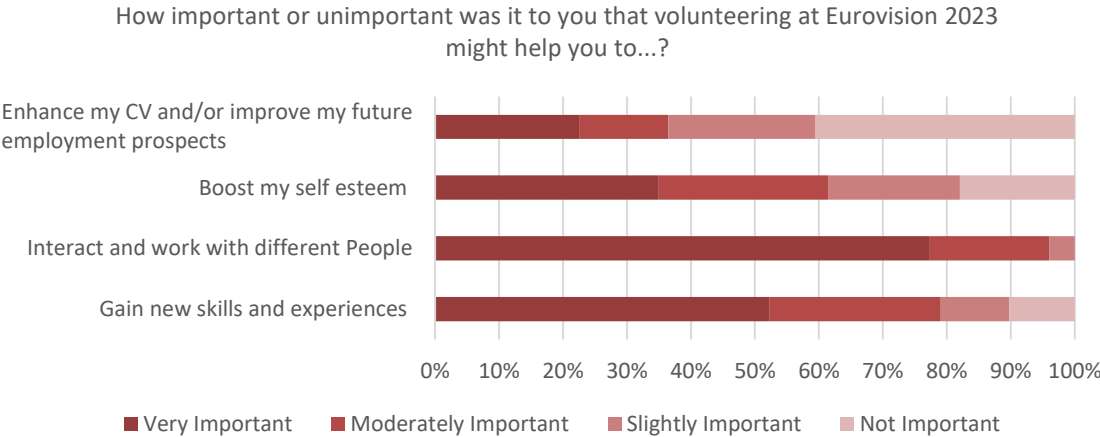
Volunteers play a pivotal role in major events such as Eurovision, providing essential support and diverse skills that significantly enhance operational efficiency and the visitor experience. Their varied perspectives contribute to a positive event atmosphere, creating a lasting impact on participants. Furthermore, volunteers act as valuable event ambassadors, significantly expanding the event's reach and contributing to its overall success and reputation.

The Eurovision 2023 volunteering programme organised and led by LCC with support from the DWP and the NHS offered 475 individuals a unique opportunity to be at the core of this iconic event, contributing to the legacy of the event and reflecting the city's welcoming tradition. Volunteering provides a chance to forge new connections, acquire valuable skills, and create cherished memories. Being part of a team and contributing to an event that will be remembered for years to come can be a rewarding experience, enhancing wellbeing.

#### 6.3.1 Developing skills through Volunteering

Volunteering supports personal development. It is viewed not only as an important social activity (Figure 6.2) but also as a means to develop new skills, as indicated by over 50% of the volunteers surveyed. Additionally, 35% of the volunteers recognised that it boosted their self-esteem.

**Figure 6.2: Survey responses regarding the social value of volunteering at Eurovision 2023**



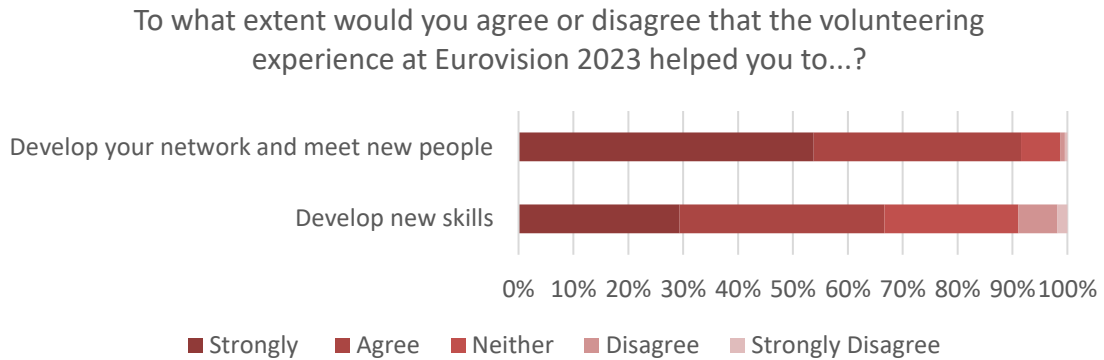
Source: Eurovision 2023 Volunteer Survey

An overwhelming 91.6% of volunteers noted that the experience had expanded their network and facilitated connections with new people (see Figure 6.3). These figures suggest the experience of volunteering at Eurovision 2023 can bring real wellbeing benefits to individuals, as they gain a sense of place within their local area and develop a social network in the community for years to come.

*"[I can't tell you) [how friendly the whole atmosphere has been, really friendly, volunteers been amazing and just really cool!](#)"*

Eurovision Visitor May 2023 (click on the link to listen to the whole quote)

**Figure 6.3: Survey responses regarding their experience of volunteering at Eurovision 2023**



Source: Eurovision 2023 Volunteer Survey

While volunteer programmes are of great significance, the programmes can be challenging to sustain due to the diverse but ad-hoc nature of cultural, sporting and city based events requiring various levels of volunteer involvement. However, the overwhelmingly positive experience of volunteering for Eurovision has left a lasting impression, with 67.7% of volunteers expressing that they were extremely likely (scoring 9 or 10 on a Likert scale) to volunteer again in the future. This commitment reflects the lasting impact and value of volunteering for events like Eurovision.

## 6.4 Linking jobs to Eurovision

With the pandemic as the context and an ongoing shortage of workers in the hospitality industry, Eurovision 2023 presented an opportunity to strengthen Liverpool City Region's hospitality sector, promoting long-term growth and recovery from the setbacks caused by COVID-19 and Brexit. Eurovision presented an opportunity in Liverpool to change perceptions of the hospitality sector, establishing it as a destination career choice and ensuring a sustainable legacy.

The impact of Eurovision extended to both long-term and short-term employment opportunities. The event's activities led to an influx of people coming to work in the LCR for Eurovision 2023 creating employment opportunities in Liverpool. This increase in workforce demand resulted in the expansion of various employers that were responsible for the management and coordination of the event.

While major events like Eurovision 2023 often receive criticism for offering primarily short-term job prospects, with less focus on utilising such events as catalysts for longer-term employment opportunities, this was not the case for Liverpool. Several key organisations in LCR, including Job Centre Plus, DWP, Growth Platform, Culture Liverpool, LCRCA, and LCC, collaborated on a comprehensive employment initiative for Eurovision 2023. This initiative aimed to enhance residents' access to job opportunities created by Eurovision, thus contributing to the broader economic recovery efforts.

*“I’ve been in and out of work and I had a meeting with my work coach and he referred me to a jobs fair at the Hard Day’s Night. I headed down there and it was the first person I spoke to. The guy welcomed me over and it went from there... He said they had other major events. It’s all positive stuff. I can’t wait”*

Individual who successfully secured employment with supplier to Eurovision.

In addition to creating immediate employment, the collaboration between the key organisations has led to positive examples of individuals retaining employment beyond the event’s duration, with individuals being supported by partners (or their employer) into other events or roles. This illustrates the potential for sustained economic benefits from major events when proactive measures are taken. This multifaceted approach underscores the importance of aligning short-term employment gains with long-term economic strategies, creating a more resilient and impactful outcome for the local community.

Commencing on 1<sup>st</sup> March 2023 with a significant event at ACC Liverpool, a series of Eurovision Jobs Fairs were held, resulting in an impressive turnout of participants. Over the course of these events 3,287 jobseekers, 173 employers, and 52 skills support providers were actively engaged.

During these events, an impressive number of over 6,000 job openings were advertised, leading to 394 jobs being offered on-the-day, and 3,216 second round interviews. Additionally, a select group of volunteers made use of the job centre support facility available at the volunteer hub, further reinforcing the positive impact of these job fairs in connecting individuals with employment.

There exist various factors that could potentially explain the increased interest from both employers and jobseekers in Eurovision 2023 job fairs. These elements will be focused upon in follow up research with attendees, which will contribute to the ‘1 year on’ report. However, it is noteworthy that the messages disseminated by partner organisations seemed to strike a chord with an audience that is not always reached through traditional communication channels. The very nature of Eurovision 2023 jobs fairs has underscored the enduring significance of in-person recruitment interactions. This approach offers individuals opportunities beyond the confines of CVs or application forms, which is particularly pertinent in a time when online and digital avenues are gaining prominence.

It is too soon to understand the legacy impact of Eurovision 2023 for job seekers and those in employment, although there has been a further positive recruitment event, namely the Visitor Economy Jobs and Skills Festival held at ACC in August. The early stage evidence and positive headline figures in terms of attendees and interviews offered, and jobs secured will be followed up within a further report in 2024 to explore the longer term impacts. This will provide further insight into Eurovision’s legacy and linkages to well-paying jobs, clear development paths, and training opportunities.

# Section 7

## Conclusions

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## 7 Conclusion

### 7.1 Immediate economic impact

Eurovision 2023 is calculated to have attracted **473,000 attendees to Eurovision events in Liverpool**. Accounting for people attending more than one event and the inclusion of visitors who did not attend an event but the main purpose of their visit to Liverpool was Eurovision, **a total of some 306,000 individuals visited Liverpool city centre due to Eurovision**.

The **net additional visitor expenditure at the Liverpool level totalled to £42.3m**, supporting **425 one-year FTE jobs** and generating **£16.1m in GVA** in 2023.

Including the organiser spend effects, the **net additional expenditure at a Liverpool level totalled to £53.2m**, supporting **589 one-year FTE jobs** and **GVA of £23.5m** in 2023.

The net additional impacts quantified as part of the economic impact assessment are presented in **Table 7.1** at each spatial level.

	<b>Liverpool</b>	<b>LCR</b>	<b>North West</b>
<b>Visitor expenditure impacts</b>			
Visitor expenditure	£42,342,062	£43,031,456	£45,327,797
1-year FTE employment	425	432	455
GVA	£16,103,454	£16,365,643	£17,238,983
<b>Organiser expenditure impacts</b>			
Organiser expenditure	£10,925,146	£11,728,533	£15,903,244
1-year FTE employment	164	179	243
GVA	£7,399,325	£8,079,978	£12,122,747
<b>Total expenditure impacts</b>			
Total expenditure	£53,267,208	£54,759,989	£61,231,041
1-year FTE employment	589	611	698
GVA	£23,502,779	£24,445,621	£29,361,730

### 7.2 Eurovision 2023: Leaving a legacy

Eurovision's presence in Liverpool is expected to leave a lasting impact on the city, representing another major and high profile event which shapes views of Liverpool as follows:

- Liverpool's hosting of Eurovision in 2023 led to a significant short-term boost in economic activity.** The influx of tourists from around the world contributed to a significant increase in business activity, creating employment opportunities across various sectors. This economic impact is likely to have a ripple effect, benefiting local businesses, hotels, restaurants, and transportation services over time. The increased economic activity could also provide a catalyst for further investment in the city's infrastructure and amenities. The significant

influx of visitors during Eurovision presents a unique opportunity for the growth of tourism in Liverpool. Building upon the positive Net Promoter Score and strategically capitalising on the event's popularity, the city can further promote itself to tourists to explore its rich musical history and thriving contemporary music scene, as well as its heritage and other attributes.

- Hosting Eurovision in 2023 elevated Liverpool's international profile, garnering global recognition as a dynamic and culturally vibrant city.** It showcased Liverpool's ability to orchestrate large-scale, high-profile events successfully. It drew attention from international organisations, businesses, and investors. This recognition will position Liverpool as an attractive destination for not only cultural events but also as a place with significant visitor potential. Liverpool's hosting of Eurovision in 2023 contributed to enhancing the city's image on the global stage. The event demonstrated that Liverpool was not only a historic city but also a modern, forward-looking one with the capacity to host world-class events. This positive image extended beyond the event, attracting attention from various sectors and influencing perceptions about Liverpool as a place to visit, invest, and live. The city's vibrancy, culture, and inclusivity took centre stage, making a lasting impression on both visitors and observers worldwide.
- The successful hosting of Eurovision in 2023 fostered a strong sense of community pride among Liverpool's residents.** The collective effort and shared excitement in being part of such a monumental event united the city. Residents took pride in showcasing their city's hospitality, culture, and capabilities to a global audience. This sense of pride continued to resonate even after the event, contributing to a heightened sense of identity and unity among Liverpool's diverse population.
- Eurovision 2023's promotion of inclusivity created an atmosphere of acceptance, drawing diverse audiences and providing a welcoming platform for artists from various backgrounds.** This commitment to inclusivity can serve as a foundational principle for upcoming events, ensuring that Liverpool's cultural and music scene remains vibrant and representative of its diverse population.
- Eurovision 2023 also offers the chance to nurture local talent and increase music engagement across all communities in Liverpool.** By investing in education, providing access to instruments, performing arts opportunities, and training programs, the event can create a legacy of inclusivity in talent development. Collaborations with schools and community spaces will ensure effective resource utilisation for the future. Hosted in a city like Liverpool, known for its global outlook and history of embracing diversity, Eurovision becomes a symbol of hope and reconciliation. It not only demonstrates the power of music and art to bridge gaps but also underscores the enduring significance of unity and freedom in a world grappling with shifts in economic, political, and social dynamics.

[“What happened this week through the city is absolutely outstanding. The vibe, the people, I love. It's been the best week I've ever had. I live here in Liverpool and it is literally the best thing I've ever experienced.”](#)

Eurovision Visitor May 2023 (click on the link to listen to the whole quote)

- **Eurovision 2023 significantly bolstered LCR’s institutional capacity to host future events.** Continued partnership efforts around significant events, as well as topics such as employment, ensure that the benefits of Eurovision are spread across the broader City Region. The event further enhances the city's institutional capacity to host future events and provides a deeper understanding of Eurovision's unique features, highlighting its diversity and cultural significance. The successful execution of Eurovision has provided invaluable experience in event planning, coordination, and management on a large scale, enhancing the city's expertise and readiness to host diverse events in the future. This newfound institutional capacity will undoubtedly be a valuable asset, attracting a wider range of cultural, entertainment, and sporting events, further contributing to the city's appeal as a dynamic and capable host.
- **Eurovision 2023 has given Liverpool a better understanding of the distinctive features that sets the Eurovision Song Contest apart from other major events.** The City Region is leveraging this insight to create a more culturally attuned environment. Building upon its successes in hosting major events like Capital of Culture in 2008, celebrations connected to sports and other cultural events (e.g. Turner Prize, Golf, Giants), Eurovision brings a unique blend of diversity and cultural richness. It is not solely about intense competition but also a celebration of music, diversity, and collaboration among nations. This understanding has led to a more nuanced approach to event planning, with a focus on cultural enrichment and inclusivity, making it distinct from the more sports-centric occasions. The continuing track record in major events aligns with Liverpool’s identity, making it a more welcoming and culturally vibrant destination for both residents and visitors, while still maintaining the exciting elements that attract large-scale events.

[\*“I met so many people from so many different places, UK and abroad, and we've been able to show off our beautiful city”\*](#)

Eurovision Visitor May 2023 (click on the link to listen to the whole quote)

### 7.3 Next steps

Following this report, a second report, encompassing an assessment of the longer term and enduring impacts of Eurovision 2023 will be produced in May 2024.

A series of additional analyses will, as noted above, inform this second report including:

- **econometric approaches such as the Travel Cost Method to add additional analysis to the economic impact.** This method will allow us to gain a deeper understanding of attendees' spending habits, their willingness to travel, and the broader economic benefits generated by their participation;
- we will continue **business surveys** to gain a more in-depth insight into the direct impact of Eurovision on local businesses. By collecting data on increased sales, customer footfall, and changes in business operations during the event period, we can better quantify the event's economic contribution to the local business landscape;

- a **legacy survey** with visitors and other groups to capture valuable feedback regarding the enduring impact of the event, including any lasting changes in perceptions, sustained engagement, and ongoing benefits;
- AMION plan to engage in **follow-up interviews or surveys with the volunteers** who actively contributed to the Eurovision event. By gathering insights into their experiences, acquired skills, and perceptions of the event's influence on the community, we can better assess the event's longer term social and cultural ramifications;
- further **follow up cohort studies with job seekers** that were seeking employment prior to Eurovision and those who secured jobs during the event's planning and execution. This study will help us explore whether the event played a role in creating additional job opportunities and positively influencing the local labour market;
- we will conduct focused **follow-up discussions with key stakeholders**, including hoteliers and cultural organisations. These conversations will provide valuable insights into how Eurovision impacted their operations, occupancy rates, revenue, and long-term strategies, giving us a comprehensive view of the event's influence; and
- collaborating closely with the LCRC and LCC, we will actively **share the lessons learned** from the research. Through these insights, recommendations, and findings, we aim to contribute valuable knowledge to inform the work of the new Liverpool City Region Visitor Economy Partnership (LVEP), future event planning, economic development strategies, and community engagement efforts.



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AMION worked with Spirul to capture the primary data. Visit their website here: <https://spirul.co.uk/> and contact them here: **01484 686377**

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# Appendices

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## Appendix A - Beyond the data: case studies of impact from Eurovision.

Beyond the economic impact data, the below case studies detail the tangible impact of Eurovision on individuals and organisations. These case studies explore a close-up view of how Eurovision has left an imprint on lives and enterprises, celebrating the transformative power of music, culture, and community.

The case studies set out below provide a more detailed picture of how Eurovision impacted upon people and organisations.

### **Case Study 1: Students gaining valuable experience with Liverpool**

Eurovision provided unique opportunities for people in Liverpool. It also provided a once-in-a-lifetime, career development experience for many Liverpool Institute for Performing Arts (LIPA) students and graduates.

LIPA opened its door to its first intake of students in 1996 and the subjects taught are based around the Performing Arts, covering on-stage subjects such as drama and dance, off-stage elements such as Sounds Technology and Theatre Production Technology, as well as other “behind-the-scenes” roles in the sector such as Management for the Creative Industries and Performing Arts. LIPA is a world-renowned institution, that has produced famous alumni graduates such as The Wombats, Dawn O’Porter, and Evie Pickerill.

Despite the high-quality education received by the students and graduates of LIPA, cohorts of recent years have faced challenges in gaining experience and entering the job market. For the Graduates of 2020-2023, their studies have been impacted in some form by the COVID-19 Pandemic. During this time, studying and teaching the curriculum became more challenging, with classes that usually involved some form of physical interaction or use of specialist equipment, having to be undertaken online or with enforced social distancing. The learning experiences for LIPA students spill out of the classroom/studio and into opportunities to work on productions that are shared with public audiences, with the demise of live performances, several degree subjects, such as dance, did not gain these key experiences.

Once graduating, those that did so in 2020 and 2021 were faced with a collapsed job market. An already competitive field became even more narrow, and the pathways to gaining vital experience and connections for career development, were diminished. Opportunities started to increase again by late 2021, but now with multiple years of graduates competing.

**Opportunities for students and graduates**

Throughout the early planning and bidding process of Eurovision in Liverpool, a crucial concern was for the benefits of this international mega event to be directly felt by those from and living within Liverpool. Something the city felt an integral part of, rather than an event that so happened to use the city’s facilities. With this in mind, the BBC made contact with LIPA as a source of additional skills and talent required to match the scale of the event.

In total 150 students and recent graduates were employed from LIPA on Eurovision. These students came from six subjects: Dance, Management, Music, Sound Technology, Theatre & Production Technology and Costume Making.



Mollie Scholes, LIPA dance Graduate

**Eurovision as a unique experience**

Before even securing the job, the auditions themselves provided a significant experience for students and graduates. The experience allowed them to reunite with old classmates, be taught audition routines by the assistant choreographer, gain a free professional learning experience, and a chance to make professional connections.

Following auditions, in total 30 dancers were selected to perform at interval shows with big names such as Rita Ora and Kalush Orchestra. Another 15 dance students and graduates were also selected as stand-in performers, spending weeks building up to Eurovision learning the routines of participating countries and performing them during technical rehearsals. Mollie Scholes, a LIPA student, was chosen as an interval dancer. It came at a time following limited job opportunities, “needing that yes and that offer meant a lot to me”.

*“I never thought something like this would come my way”*

The 30 interval dancers performed alongside 24 professional dancers, going through an intensive two-week rehearsal period, learning the choreography by industry “big names”. The rehearsals involved gaining experience working with technical blocking to alter the choreography to match a range of camera angles. This was a unique experience for Mollie having “never done any tv work, never performed in an arena”.

*“To get the chance to be taught by and work with inspirational choreographers was a great experience”*

### A lasting legacy for students

The Eurovision experiences are already proving invaluable for the cohorts. Only three weeks after Eurovision, Mollie was hired for her second ever television job in a period drama piece. She believes the experience of having television work on her CV helped her secure that job, and the costume and make-up routines from Eurovision boosted her confidence to be able to work in such an environment. Overall, the Eurovision experience has enabled her to consider a broader range of work and career development than she had thought of previously.

In the long run, Eurovision has demonstrated to the world Liverpool's ability to host large international cultural events. To Mollie and her peers, it offers hope that they can follow their career dreams without having to move to London, which the current job market pressures them to do.



*“So nice for it for once to be in the North, and to be on such a big grand scale”*

## Case Study 2: Eurovision 2023: Partnership Working for a Sustainable Employment Legacy

In the lead-up to Eurovision 2023, LCR embraced the opportunity to establish a sustainable employment legacy through collaborative efforts. The event prompted local authorities, industry partners, and employment agencies to work together, ensuring that both the event and the wider hospitality industry would benefit from this global showcase.

### Before Eurovision: Context and Challenges

Before Eurovision 2023, LCR's hospitality sector encountered significant challenges in the aftermath of Brexit and the COVID-19 pandemic. High turnover rates, staffing shortages, and evolving work preferences posed complex issues for employers. Government initiatives such as the Kickstart scheme, while well-intentioned, often struggled to meet the specific needs of the hospitality industry.

### During Eurovision: The Collaborative Approach

With the opportunity to host Eurovision 2023, local authorities and stakeholders recognised the need for a comprehensive strategy to address the staffing challenges. Understanding that Eurovision was not merely a singular event but a potential catalyst for broader change, partners engaged in collaborative efforts to address employment needs.

This partnership involved key stakeholders, including Liverpool City Council, the Growth Platform, Jobcentre Plus, learning and training providers, trade unions, and local authorities. Working together, they devised strategies to maximise the positive impact of the event on the local job market.

### Eurovision Jobs Fair: Making a Difference

The Eurovision Jobs Fairs strategically linked to the event's official planning and branding launch. This in-person recruitment event brought together over 40 employers, numerous learning and training providers, and thousands of job seekers. The fair aimed not only to fill immediate vacancies for the event but also to establish a sustainable talent pipeline for the broader hospitality sector.

The fair provided opportunities for on-the-spot interviews, CV workshops, and engagement with Jobcentre Plus staff. Notably, it also reached out to diverse communities, including the Ukrainian population, ensuring inclusivity and expanding the event's impact.

*" They told me they needed people with my time schedule and when we landed with that I said "When do you want me to start?" "Friday". Wow, I didn't expect it to happen so fast."*

Wirral Student March 2023

*"I watched Eurovision every year with my dad and now I'm here. It is unbelievable and I got a job as a Steward through the job Centre"*

Ohla and Anzhelike from Ukraine

### After Eurovision: Lessons and Legacy

The success of the Eurovision Jobs Fairs demonstrated the value of face-to-face recruitment events, even in an increasingly digital era. The fair exceeded expectations, resulting in job offers,

interview arrangements, and second interview scheduling. The positive outcomes led to discussions about replicating this model in the future, potentially on a regular basis.

Furthermore, the partnership approach cultivated during the Eurovision preparations forged enduring relationships and reinforced connections among stakeholders. This collaboration is anticipated to have a far-reaching impact, extending beyond the Eurovision event to establish a more resilient and robust hospitality industry in the LCR.

### **A Promising Future**

As Eurovision 2023 approached, the partnership efforts in LCR showcased the power of collaboration in tackling workforce challenges and creating a sustainable employment legacy. By seizing opportunities like the Eurovision Jobs Fair and harnessing the momentum of the event, the city region not only readied itself for the event but also set the stage for a stronger, more enduring hospitality industry in the years to come. This dynamic approach serves as a model for other regions seeking to generate lasting positive change through innovation and partnership.

### Case Study 3: Businesses as key partners in delivering a city-wide Eurovision experience.

A crucial part of the delivery of Eurovision in Liverpool has been private-sector businesses. The extent to which businesses engaged with Eurovision varied greatly. Some actively promoted Liverpool-themed products and services, some were just trading in the city at the time, whilst others have been involved in the delivery a city-wide festival experience directly (this case study) or indirectly (such as members of Liverpool Business Improvement District (BID) which contributed collectively over £600,000 to Eurovision hosting activities).



Camp & Furnace (C&F) played a key role in making Eurovision within Liverpool a success by hosting the official Euro Fan Club.

#### Ahead of Eurovision

C&F is an event space located in the Baltic Triangle area of Liverpool. The Baltic Triangle is known as the “creative, digital and independent” district of Liverpool, housing a community of musicians, creatives and hospitality businesses. The area has become a crucial part of Liverpool’s evening and night time economy. C&F, established in 2012, consists of two 1,200 capacity venues in one, that hosts a wide range of live events such as large-scale quizzes/bingo, club night, and live showings. C&F has taken part in previous Liverpool festivals such as Soundcity, and also previously hosted Eurovision live showings.

This reputation is what led those organising Eurovision in LCR to reach out to C&F early on in the planning processes to be part of the official bid. The team at C&F felt that they would be “privileged and honoured to host it on behalf of Ukraine”.

#### The Camp & Furnace Eurovision Experience

In preparation for hosting the Euroclub, C&F cited how supportive representatives from the Eurovision Fan Club (OAGE) were in helping them understand how to organise a good Eurovision fan event, such as what acts would be well received and the behaviour and movement patterns of the fan.

As such, C&F was able to prepare the most appropriate opening times and booking additional catering support. Eurovision also provided a good opportunity to bring forward needed cosmetic and technical maintenance work to the venue and their equipment.

*“Great to have a reason to be open for 9 nights in a row”*



C&F put the first tickets and week-long tickets exclusively to the Eurovision Fan Club members (£80) on sale in mid-February, with all 1,500 selling out in 10 minutes. The remaining tickets went on sale to the public, including day-tickets (£20), with all selling out by mid-April. As such C&F found themselves at capacity for 9 days straight, including on the Monday-Wednesday when C&F does not always open. The tickets had low “drop-out” rates (known as percentage of no-shows), only about 5-15% compared to the usual 20-30%. The team emphasised that hosting the Eurovision audience was a pleasure “one of the best crowd, really lovely people, no problems despite being at full capacity for 9 nights”.



**Eurovision Legacy**

The impacts of Eurovision for C&F are much more than having a financially strong May - it has also shaped the business’ operations. Crucially the experience helped the team work more closely together across departments, and in turn this has improved standards and efficiencies in communication, procedures, and safety.

Like many businesses in the hospitality sector, the post-pandemic period has been challenging. There was a need for C&F to “re-introduce itself” and regain its confidence. For C&F, Eurovision provided a crucial opportunity in their post-pandemic journey. As a business, they would “do it every year” if they could.

## Case Study 4: Visitors to Liverpool

LCR’s visitor economic impact topped £5 billion for the first time in 2022 according to the Growth Platform. This figure was achieved by just under 56 million visitors. However, the overall number of visitors are still over 15% less than the 2019 pre-pandemic estimates of 66 million visitors<sup>35</sup>.

Tourism and culture have been key to the city’s regeneration strategy for many years. Impact 08, the assessment of the 2008 European City of Culture in Liverpool concluded that the event assisted in moving Liverpool’s image away from being associated with positive but historic concepts such as the Beatles or the Industrial Revolution and away from the negative concentrations of social deprivation and unrest from the 1980s. However, a 2015 Visit Britain report concluded that despite high levels of Satisfaction among visitors of Liverpool, citing the retail, F&B and arts offer, there was still a relatively high level of ‘rejecters’ to the notion of visiting the city. This dynamic suggests that positive experiences by visitors were not being communicated to non-visitors, and the work of re-branding Liverpool’s image was still incomplete.



During Eurovision, visitors were asked what motivated them to come to Eurovision in Liverpool -several key themes stuck out among their responses. Firstly there were, as no surprise, diehard Eurovision fans who would visit regardless of location. These made up around 10% of responses. ‘opportunistic’ Eurovision fans, those who love Eurovision and were excited to have it in the UK, making it accessible to them, made up the biggest cohort of around 50% of responders.

*[“I’ve always wanted to actually go to but I’ve been priced out from travelling but with it on my doorstep why would I miss it, you know?”](#)*

Eurovision Visitor May 2023 (click on the link to listen to the whole quote)

There were also many visitors who were curious to visit Liverpool and Eurovision gave them a reason to attend (around 10% of responses reflected this sentiment). The remainder of responses mentioned living in the city and were curious to see what was happening. There was also one responder who had pride in the UK hosting Eurovision and wanted to show support by visiting.

Visitors also gave insights into what has been memorable about their experience, and what they would tell their friends and family about Eurovision in Liverpool. Visitors surveyed complimented “the friendliness of the people” and the appropriateness of the city’s architecture and the waterfront for hosting the festivities. The Eurovision show itself was cited as a highlight, but also the volume and breadth of cultural offerings happening in the city, citing specific acts (e.g. Miles Kane, the children’s choir), as well as the art exhibits.

<sup>35</sup> <https://growthplatform.org/wp-content/uploads/2023/08/Tourism-Data-Summary-July-2023.pdf>

A third theme among visitors was the sense of community in an international melting pot, with people from a range of places coming together in a joyous and fun atmosphere. Fourthly, visitors were generally impressed with how well-organised the event was. Speaking to representation from the LGBTQIA+ community, those members of the community from abroad felt the city was welcoming and safe.

Overall, the visitor survey and other engagement with visitors indicated that visits to Eurovision in Liverpool has left a lasting positive impression of the city and its people, one that will have intangible benefits in the future, further shaping the outsider perception of the city.



**Case Study 5: Eurovision Volunteers - Elevating Eurovision's Experience and Impact**

A dedicated team of 475 volunteers was recruited for Eurovision. Originating from diverse backgrounds, these volunteers encompassed a wide spectrum of ages (23% were under 25 years old and 37% under 30), genders, and cultures, embodying the inclusive spirit of the event. With 90% of them hailing from the North West, they infused a local essence into the event. Notably, a contingent of over 30 Ukrainian volunteers contributed their unique perspectives and efforts.



Kateryna Miasoid, a 24-year-old teaching graduate from Ukraine who is currently living in Liverpool, said:

*“I volunteered because I wanted to support the city that accepted the responsibility of hosting Eurovision on behalf of my country. Leaving Ukraine was really frightening but the people of Liverpool have been so friendly and welcoming, I wanted to give something back.”*

*“Liverpool is the perfect city to host Eurovision on behalf of Ukraine because everybody is so open-minded and they genuinely want to learn about my country.”*

*“I am really grateful for the opportunity to volunteer. It is a once in a lifetime experience and a great source of learning with the power to not only help others but also myself. I am looking forward to making some great memories.”*

**Building a volunteer cohort**

In the lead-up to the event, volunteers discovered the opportunity through multiple channels such as Eurovision 2023 website and word-of-mouth recommendations. Their journey involved an online application process followed by interviews conducted by the Eurovision 2023 staff. The selection process sought out candidates with the right skills, experience, and a genuine enthusiasm for contributing to the event's success.

As Eurovision unfolded in Liverpool, these volunteers embraced diverse roles, forming the backbone of the operation. Their responsibilities spanned a wide array of activities, from providing warm greetings, taking pictures and dispensing event information to offering essential translation services. The volunteers' engagement was structured through 350 shifts, accumulating over 12,000 collective hours of input.

**Training and Education**

During their involvement, volunteers underwent comprehensive training that equipped them with vital skills. This training covered topics such as Disability & Neurodiversity awareness, Intercultural Communication, LGBTQ+ Inclusion, online first aid, and security protocols provided by Merseyside Police. Furthermore, volunteers benefited from insights shared by Claire Rider on tourism matters, as well as job centre support that bolstered their knowledge.

As part of the 475 volunteers, a cohort of Prep 4 Life students from Wirral MET College (29 volunteers) played a significant role during Eurovision celebrations. The individuals with learning difficulties and/or disabilities had the opportunity to gain valuable work experience and also assisted visitors and residents at Liverpool's official Eurovision Village, offering guidance, advice, and more.

### **Future volunteering**

Interviewees expressed enthusiasm for volunteering during Eurovision 2023 and mentioned how it had a positive impact on their lives. Many volunteers found the experience to be inspiring, leading them to consider volunteering for other events as well. The experience gave them confidence and a sense of purpose, and they encouraged others to get involved in similar opportunities. Beyond their individual contributions, the volunteers formed lasting connections and friendships, developed a newfound appreciation for Eurovision and the pivotal role that volunteers play in making such events possible. The experience often kindled a desire among volunteers to participate in future events.

Upon the conclusion of the Eurovision event, volunteers reflected on their experiences with fondness. Their collective rating of 9.3/10 underscored the overwhelmingly positive impact of their journey. It was notable that the majority of volunteers utilised public transportation for their commuting needs, reinforcing their connection with Liverpool's vibrant atmosphere and the surrounding community.