

Socio-economic Regeneration Impact Statement

Cambridge Halls, Manchester Metropolitan University

May 2025

Contents

Socio-economic Regeneration Infographic	i
1. Introduction	2
2. Planning Policy Context	5
3. Socio-economic Baseline and Need Context	9
4. Construction Phase Impacts	13
5. Operational Phase Impacts	18
6. Conclusion	25

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Client

Unite Students and Manchester Metropolitan University

Our reference

UNIM3028

May 2025

Socio-economic Regeneration Infographic

PROPOSED DEVELOPMENT: Demolition of existing halls of residence and erection of two buildings of 30 and 24 storeys, comprising 2,302 purpose-built student accommodation (PBSA) bedspaces with private internal and external amenity spaces and up to 1,277sqm of commercial and community uses.

SITE: Cambridge Halls

Construction Phase



Significant Investment

In the scheme's construction



280 gross jobs

Full time equivalent (FTE) jobs supported on average throughout construction (c. 5 years)

Generating 190 direct jobs

Net additional FTE jobs in Greater Manchester, including 80 for Manchester residents

Plus 90 indirect/induced jobs

Net additional FTE supply chain jobs in Greater Manchester, including 20 for Manchester residents



£222 million Productivity boost

GVA¹ generated during construction, including £195 million in Manchester

Operational Phase



Supporting growth in Manchester

Helping to meet PBSA needs and reinforcing the city's appeal to students



40 On-site jobs

Supporting the ongoing operation of the accommodation and occupying the commercial floorspace



£1.8 million Productivity boost

GVA generated annually in Greater Manchester, including £1.2 million in Manchester



£9.7 million Resident expenditure

Annually on retail, leisure and other living expenses, helping to support local businesses



£1.3 million Visitor Expenditure

From families and friends visiting residents each year, supporting the local leisure and tourism industry



85 Retail and leisure jobs

Supported by PBSA residents' and visitors' expenditure

PBSA: Expanding Choice and Capacity in the Housing Market



Up to 390 homes

Made available for c. 955 new residents through freeing up former student HMOs



Up to £570,000 Council Tax

Revenue for Manchester City Council each year from non-exempt homes²

¹ GVA (Gross Value Added) measure the value of output created (i.e. turnover) net of inputs used to produce a good or service (i.e. production of outputs). It provides a key measure of economic productivity. Put simply the GVA is the total of all revenue into businesses, which is used to fund wages, profits and taxes.

² Estimate assumes all Band A properties.

1. Introduction

- 1.1 This Socio-economic Regeneration Impact Statement has been prepared by Turley Economics on behalf of Unite Students and Manchester Metropolitan University (MMU) ('the Applicant') in support of a full planning application to Manchester City Council (MCC) for the redevelopment of MMU residential campus at All Saints Cambridge Halls ('the Site') for replacement and additional residential accommodation ('Purpose Building Student Accommodation' or 'PBSA') and associated facilities.

The Proposed Development

- 1.2 The proposal will provide up to 2,302 student bedrooms with private internal amenity spaces and associated services and up to 1,277 sqm of ancillary facilities across a variety of use classes that support the functioning of the site as a student accommodation campus.

- 1.3 The description of development is as follows:

"Demolition of existing halls of residence and erection of two buildings of 30 and 24 storeys above ground, plus basement and rooftop plant levels, comprising purpose-built student accommodation with internal and external rooftop communal amenity space (Sui Generis). Ground floor commercial and community uses (Flexible Use Classes E, F1 or F2), hard and soft landscaping and associated highway works."

Economic Impact Assessment

- 1.4 The assessment considers the quantifiable impacts of the Proposed Development during both its construction and operational lifetime. Economic impact estimates are presented as net figures, accounting for additionality factors such as existing uses (the 'Reference Case'), leakage, displacement and multiplier effects.
- 1.5 This assessment is informed by the 2014 Homes & Communities Agency's (HCA, now known as Homes England) Additionality Guide (4th edition)¹. It draws on published statistical data sources (including from the Office for National Statistics, ONS, and organisations such as Experian) and information specific to the Proposed Development provided by the Applicant.

Study Area for the Assessment

- 1.6 For the purposes of this assessment, a functional economic geography has been determined using available Census data on labour market containment. This analysis has resulted in economic impacts being measured at two spatial scales:
- The **local impact area**, covering the local authority of Manchester. The 2021 Census shows that 42% of people who travel to a workplace in Manchester (i.e.

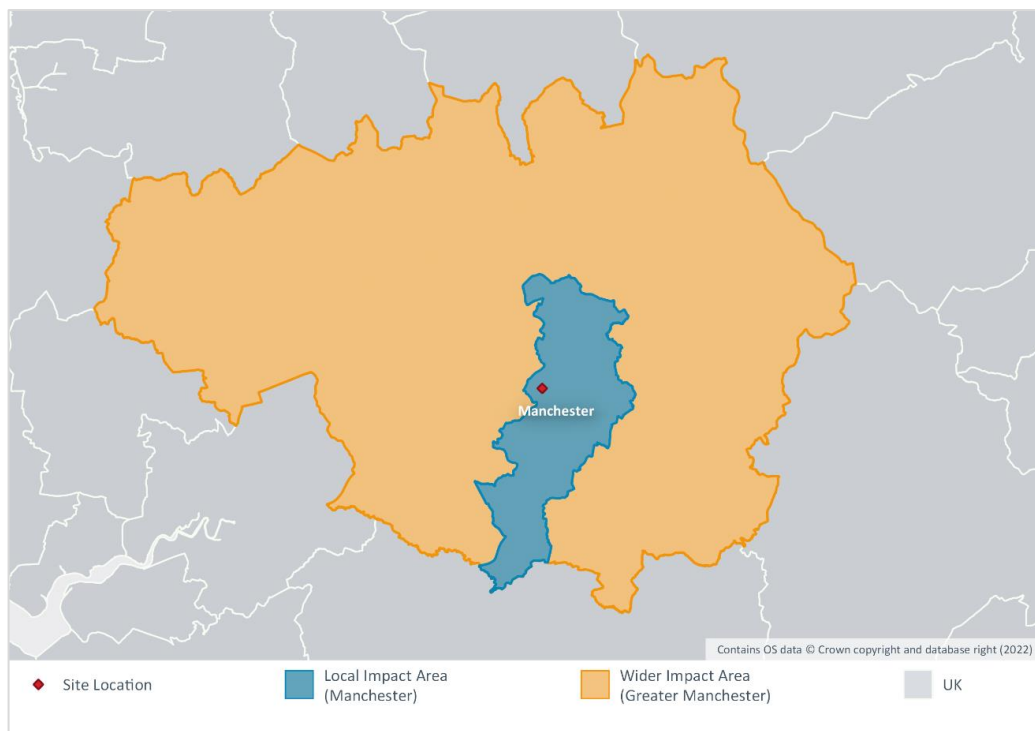
¹ Homes & Communities Agency (2014) Additionality Guide (4th Edition)

do not work mainly from home) also live in the area, demonstrating a reasonable level of socio-economic containment at this scale².

- The **wider impact area**, covering Greater Manchester. The 2021 Census shows that 88% of all jobs in Manchester are taken by people residing in the wider combined authority area, suggesting a relatively high level of containment at this scale³. It is considered, therefore, that the majority of socio-economic effects would be concentrated and experienced within the wider impact area.

1.7 The study area is presented spatially overleaf at Figure 1.1.

Figure 1.1: Assessment Study Area



Source: Turley Economics, 2025

Structure of Report

1.8 The remainder of the report is set out as follows:

- **Section 2: Planning Policy Context** – outlines the policy and economic context for the site.
- **Section 3: Socio-economic Baseline and Need Context** – presents a socio-economic baseline of the local area, highlighting key characteristics of the local

² ONS via Nomis (2025) 2021 Census: Origin-destination Data. It should be noted that the 2021 Census collected responses during the Covid-19 pandemic, during which rates of home-working increased significantly. Whilst the ONS therefore advises exercising caution in the use of 2021 Census travel-to-work data, it should be noted that the equivalent rate of labour force containment for Manchester recorded by the 2011 Census was 38%, and therefore only marginally lower than reported in the 2021 Census. It is therefore considered that 2021 Census data represents a robust basis for the purposes of establishing suitable economic impact areas.

³ Ibid.

population, economy and business base in comparison with wider geographies. PBSA accommodation need is also summarised.

- **Section 4: Construction Phase Impacts** – estimates the future net additional economic impact which may be generated by the Proposed Development during the construction phase.
- **Section 5: Operational Phase Impacts** – estimates the future net additional economic impact which may be generated by the Proposed Development once completed and fully operational.
- **Section 6: Conclusion** – summarises the net additional benefits resulting from the Proposed Development.

2. Planning Policy Context

- 2.1 This section firstly provides an overview of the relevant economic policy and strategy context; demonstrating both a national and local level commitment to facilitating sustainable economic growth with a focus on creating employment opportunities and delivering infrastructure and housing through a supportive planning system.

National Policy and Economic Strategy Context

National Planning Policy Framework

- 2.2 On 12 December 2024, the new Labour Government (elected on 4 July 2024) published the new National Planning Policy Framework (NPPF) which sets out the Government's planning policies for England and how these should be applied. The NPPF provides a framework for a planning system centred around sustainable development, including the provision of homes, commercial development and supporting infrastructure.
- 2.3 The Government's response to the proposed reforms to the NPPF, released alongside the publication of the 2024 NPPF, affirmed its ambition to create a *"pro-growth National Planning Policy Framework"*. The Government affirms that this is required to support its commitment to rebuild Britain and deliver *"1.5m new homes along with the critical infrastructure that underpins economic growth"*.⁴ It states that the new NPPF reflects its *"commitment to radically boosting the supply of housing, while delivering homes and places that are high-quality and genuinely affordable"*.⁵
- 2.4 The latest iteration of the NPPF continues to be built around a policy commitment to sustainable development, outlining the expectation that future development will play in meeting economic and social objectives. Details of these objectives are provided at paragraph 8 of the NPPF:
- a) "an economic objective – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure;*
- b) a social objective – to support strong, vibrant and healthy communities, by ensuring that a sufficient number and range of homes can be provided to meet the needs of present and future generations; and by fostering well-designed, beautiful and safe places, with accessible services and open spaces that reflect current and future needs and support communities' health, social and cultural well-being"*.⁶
- 2.5 In order that sustainable development is pursued in a positive way, at the heart of the NPPF is a *"presumption in favour of sustainable development"*.⁷ Amongst other things, this requires local authorities to produce Local Plans that seek to *"meet the*

⁴ [Government response to the proposed reforms to the National Planning Policy Framework and other changes to the planning system consultation - GOV.UK](#)

⁵ Ibid.

⁶ Ministry of Housing, Communities & Local Government (2024) National Planning Policy Framework, para 8

⁷ Ibid, para 10.

*development needs of their area*⁸. It expects local authorities to quickly approve proposals that accord with such plans, and to weigh the benefits of development against adverse impacts when one does not exist or is not up-to-date⁹.

- 2.6 Furthermore, the NPPF states in relation to delivering a sufficient supply of homes that:

“To support the Government’s objective of significantly boosting the supply of homes, it is important that a sufficient amount and variety of land can come forward where it is needed, that the needs of groups with specific housing requirements are addressed and that land with permission is developed without unnecessary delay”.¹⁰

City-regional Policy and Strategy Context

Places for Everyone Joint Development Plan 2022-2039

- 2.7 Places for Everyone (PfE) Joint Development Plan¹¹ became part of the statutory development plan for each of the nine PfE authorities on March 2024. It sets out the development framework for each of the nine Councils, guiding future development and decision-making throughout the period up until 2039.

- 2.8 The Plan is central to achieving sustainable growth in the region. It focuses on creating new employment opportunities, improving housing accessibility, and rejuvenating town centres. The plan places significant emphasis on boosting jobs and housing at the core of Greater Manchester while enhancing competitiveness through infrastructure development, including transport and green space regeneration. Importantly, it ensures that 90% of the identified housing land is within urban areas¹², aiming for sustainable urban development while protecting Green Belt land with a new, permanent boundary.

- 2.9 This strategic plan aligns with broader goals like tackling climate change by ensuring new developments are carbon-neutral by 2038. It also integrates with other regional strategies, such as transport and housing, to support growth. While it serves as a high-level plan, individual local authorities will create more detailed local plans tailored to specific needs and circumstances.

- 2.10 PfE identifies Manchester city centre and immediate surrounds as Greater Manchester’s ‘Core Growth Area’, which is highlighted as the most significant economic location in the country outside London, stating that:

“The Core Growth Area offers the conditions to boost the role of Greater Manchester as a Global City. It is the home of many global businesses and continues to attract high profile companies seeking to invest. Conditions for growth are in place, with high rates of productivity, innovation and global competitiveness. The Core Growth Area offers businesses, residents and visitors access to a highly skilled population, a wide range of

⁸ Ibid, para 11a.

⁹ Ibid, para 11c-d.

¹⁰ Ibid, para 61.

¹¹ Greater Manchester Combined Authority (2024) Places for Everyone Joint Development Plan

¹² Ibid, para 1.42

premises and accommodation, digital infrastructure, excellent accessibility, a high-quality environment, cultural and retail opportunities”¹³

- 2.11 Policy JP-J 1: ‘Supporting Long-Term Economic Growth’ states that *“a thriving, inclusive and productive economy will be sought in our boroughs”¹⁴*, outlining that there will be a focus on facilitating the development of high-value clusters in prime sectors.
- 2.12 It is also stated that Greater Manchester’s universities will be a vital component of its developing as a globally important city region, highlighting that Greater Manchester has one of the largest concentrations of students in Europe, and an enormous supply of new graduates across a wide range of subjects each year who can help to drive future economic growth.
- 2.13 PfE Policy JP-P 5: ‘Education, Skills and Knowledge’ consequently states the importance of *“supporting the continued growth and success of the university sector”* by *“continuing to help develop Greater Manchester as the UK’s best destination for students”*.

Local Policy and Strategy Context

Manchester’s Core Strategy 2012-2027

- 2.14 Manchester’s Core Strategy¹⁵ was adopted in 2012 and sets out the planning principles and policies that will deliver Manchester City Council’s (MCC) vision for the city as one *“with a growing economy”* and with *“an increased and sustainable healthy population and a community which both benefits from and drives the City’s productivity upwards”¹⁶*.
- 2.15 The Core Strategy highlights that students account for a significant proportion of the city’s population and that much of the retail and leisure offer in areas of the city with high student populations has evolved to primarily meet student needs.
- 2.16 A key component of the aim to manage student housing demand and ‘protect the sustainability and amenity of neighbourhoods’ is detailed within the Core Strategy in relation to the occupation of Houses in Multiple Occupation (HMOs) as student households. Whilst family households are considered essential for sustainable communities, given that they support a range of local facilities such as schools and tend to have a greater commitment to the neighbourhood as they live there longer than other types of households, the Core Strategy reports that areas with a high concentration of student-occupied HMOs can experience increased prevalence of issues such as anti-social behaviour.
- 2.17 PBSA is therefore identified as key towards meeting demand for student accommodation in Manchester, whilst potentially also freeing up family housing and

¹³ Ibid.

¹⁴ Ibid.

¹⁵ Manchester City Council (2012) Manchester's Local Development Framework: Core Strategy Development Plan Document

¹⁶ Ibid.

broadening housing choice for residents of all types in the city. Criterion 4 of Policy H12 of the Core Strategy outlines with respect to PBSA that:

“Proposals that can demonstrate a positive regeneration impact in their own right will be given preference over other schemes. This can be demonstrated for example through impact assessments on district centres and the wider area. Proposals should contribute to providing a mix of uses and support district and local centres, in line with relevant Strategic Regeneration Frameworks, local plans and other masterplans as student accommodation should closely integrate with existing neighbourhoods to contribute in a positive way to their vibrancy without increasing pressure on existing neighbourhood services to the detriment of existing residents”

Corridor Manchester

- 2.18 The site is situated within the Corridor Manchester Strategic Spatial Framework (CMSSF) area¹⁷. In 2018, MCC set out its strategic vision to guide development in this area to 2025. Fundamentally, this looked to build upon existing strengths in the area, these being universities and knowledge-intensive organisations and businesses. The Strategic Vision stated that by 2025, Corridor Manchester will be:

‘Manchester’s cosmopolitan hub and world-class innovation district, where talented people from the city and across the world learn, create, work, socialise, live and do business; contributing to the economic and social dynamism of one of Europe’s leading cities’

- 2.19 The CMSSF recognises that there is ‘growing demand for city living, with more people keen to live in or near to the city centre’ adding that ‘the lively social and cultural scene helps make Corridor Manchester a great place to live and visit’.

Summary

- 2.20 Planning and economic strategy as expressed through national priorities alongside PfE and MCC’s Core Strategy and the CMSSF highlights the importance of growing Manchester and wider city region’s economy, population and workforce and that the delivery of significant levels of different types of residential development to meet different needs will be required in order to do so.

¹⁷ Manchester City Council (2018) Corridor Manchester: A Decade of Opportunity Strategic Vision to 2025

3. Socio-economic Baseline and Need Context

- 3.1 This section provides a socio-economic baseline of the ward of Hulme in which the Site of the Proposed Development is located, highlighting key characteristics of the local population, economy and business base in comparison with wider geographies.
- 3.2 Where possible and relevant, data is presented at the scale of Hulme. Where information is not available at this scale, the analysis will consider the baseline at other geographies, such as the local authority level of Manchester as a whole.

Socio-economic Baseline

Age Profile and Student Population

- 3.3 ONS data indicates that as of 2021, there were c. 19,480 people living in Hulme. Of this total, c. 6,650 were aged between 18 and 24 (34%), which is a much greater proportion than in Manchester (15%) and Greater Manchester (9%).
- 3.4 The proportionate representation of the student-age population within the Hulme ward is therefore over double that of the wider Manchester local authority area, which in turn is substantially greater than the rest of Greater Manchester.

Table 3.1: Population Composition by Age

	Hulme	Manchester	Greater Manchester
Age 18-24	6,650	84,640	260,280
All Ages	19,480	551,940	2,867,770
%	34%	15%	9%

Source: ONS via Nomis, 2021

Economic Activity, Employment and Unemployment

- 3.5 The above is consistent with data from the 2021 Census data which reports that there were c. 4,330 residents living in Hulme who were economically inactive due to being a student, plus a further c. 1,920 residents recorded as being economically active and a student¹⁸. These figures are proportionally notably higher than in Manchester and the wider city-region.
- 3.6 Around half (50%) of residents overall were economically active within Hulme, which is a lower rate than Manchester as a whole (54%) and Greater Manchester (57%). A slightly higher proportion of economically active people in Hulme are unemployed (8%) in comparison to Manchester (7%) Greater Manchester (6%).

¹⁸ ONS via Nomis (2025) Census 2021

Table 3.2: Economic Activity

	Hulme	Manchester	Greater Manchester
Economically active	50%	54%	57%
<i>Economically active: Employed</i>	<i>92%</i>	<i>93%</i>	<i>94%</i>
<i>Economically active: Unemployed</i>	<i>8%</i>	<i>7%</i>	<i>6%</i>
<i>Economically active: Full-time Student</i>	<i>11%</i>	<i>5%</i>	<i>3%</i>
Economically Inactive: Full-time Student	25%	13%	7%

Source: ONS via Nomis, 2021

3.7 Claimant Count data published by the ONS¹⁹ provides an indication of the number of people claiming benefits principally for the reason of being unemployed. This reveals that as of January 2025, there were c. 26,190 people claiming out-of-work benefits in Manchester, accounting for 6.8% of the resident working-age population. This is slightly higher than the proportion across Greater Manchester, with the city-region's 97,770 claimants equates to 5.3% of working-age residents.

3.8 Analysis Jobseeker's Allowance (JSA) claimants²⁰ (a sub-set of the overall claimant count) highlights that c. 235 people were recorded as unemployed and specifically seeking employment in construction-related trades in Manchester in January 2025, rising to 980 at the scale of Greater Manchester. This indicates that there is available construction labour force supply in the local impact area and wider city-region.

Labour Market and Economic Output

3.9 The latest Business Register and Employment Survey (BRES)²¹ recorded that the Hulme ward²² accommodated c. 40,400 workforce jobs in 2023, which is an increase of 13% on the 35,765 recorded in 2016.

3.10 As shown below at Figure 3.1, all comparator areas displayed employment growth since 2016, albeit Hulme's 13% employment growth is slightly below the 14% recorded across Greater Manchester as a whole, which in turn is lower than the 20% in Manchester during the same period.

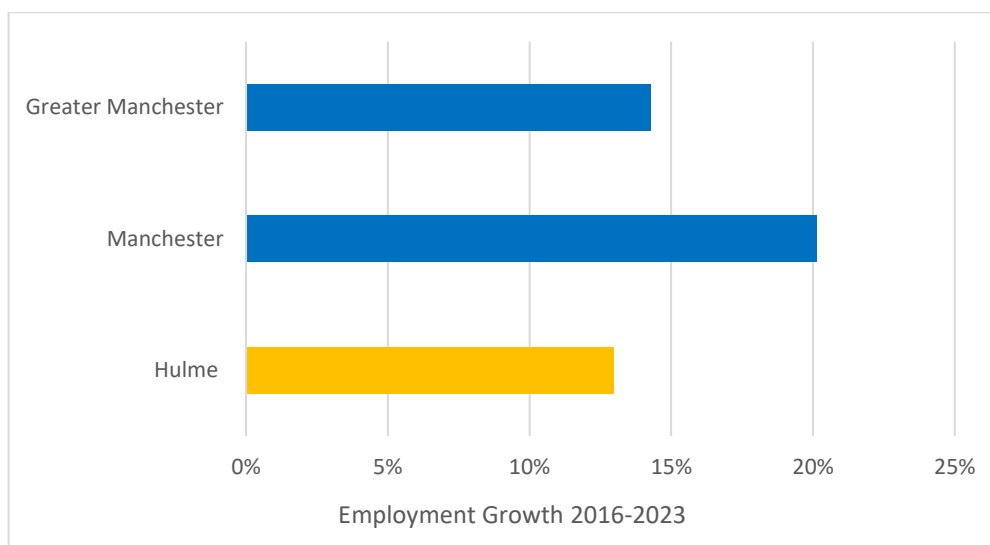
¹⁹ ONS via Nomis (2025). Claimant Count: January 2025

²⁰ ONS via Nomis (2025). Jobseeker's Allowance by Occupation: January 2025

²¹ ONS via Nomis (2025). Business Register and Employment Survey: 2023

²² E05011368: Hulme

Figure 3.1: Percentage Employment Growth, 2016 – 2023



Source: ONS via Nomis, 2023

- 3.11 Table 3.3, below, takes a closer look at employment amongst the Manchester's retail and leisure businesses. These sectors would typically be expected to be supported by student expenditure, and related employment has generally grown over recent years, noting recent falls in retail employment post-2019 (albeit with a rebound in 2023), potentially reflective of the impacts of the pandemic and wider changes in the sector.

Table 3.3: Retail and Leisure Employment in Manchester City Centre, 2016 – 2023

Date	Retail	Accommodation & food services	Arts, entertainment, recreation	Total
2016	35,000	34,000	7,000	76,000
2017	37,000	30,000	8,000	75,000
2018	35,000	36,000	7,000	78,000
2019	35,000	34,000	9,000	78,000
2020	36,000	30,000	7,000	73,000
2021	32,000	35,000	7,000	74,000
2022	30,000	37,000	7,000	74,000
2023	34,000	38,000	9,000	81,000
Change 2016-23	-1,000	4,000	2,000	5,000
% Change	-3%	12%	29%	7%

Source: ONS via Nomis, 2023

- 3.12 Gross Value Added (GVA) measures the value of output created (i.e. turnover) net of inputs purchased and used to produce a good or service (i.e. production of the output),

and therefore provides a key measure of economic output and productivity. Experian data²³ indicates that total economic output in Manchester in 2024 equated to £32.40 billion GVA, this representing over a third (36%) of Greater Manchester's total output.

Student Accommodation Need Context

- 3.13 Evidence regarding demand of PBSA in Manchester was presented to MCC's Executive Committee in May 2023²⁴. The report identified need for between an additional 5,440 to 11,320 bedspaces up to 2030, and concluded that demand for PBSA city-wide equated to need for 750 new bed spaces annum up to 2030. This reflects an under-provision in the city relative to the size of its student population, with the report affirming that there is a clear need for additional PBSA in Manchester. It is also noted that the Site is identified by the report ('Cambridge Halls') as one of 20 sites that could contribute towards meeting PBSA need in Manchester during this period.
- 3.14 Further industry analysis²⁵ of PBSA need conducted in 2024 suggests that Manchester's shortfall in PBSA could extend to c. 16,000 bedspaces, and therefore need is potentially higher still than the Council's assessment of requirements for this type of housing.

Summary

- 3.15 The socio-economic baseline has highlighted that the neighbourhood of the Site is one which presently accommodates notably high proportions of younger people, many of whom are students. As highlighted in Section 2, the GMCA and MCC identify the student population as a key driver of the local economy.
- 3.16 The city's leisure, hospitality and tourism businesses – amongst the sectors supported by to a significant degree by students– will also benefit from increased activity; Manchester's students have considerable purchasing power in the local economy, and increasing capacity to accommodate students will help support growing levels of student expenditure retained locally.
- 3.17 The alignment of the occupants of the PBSA with existing local demographics and the known contribution of students to economic development are both factors which strongly suggest that the delivery of new PBSA is likely to closely integrate with the existing neighbourhood and contribute in a positive way to local vibrancy without detriment to the existing residential community.
- 3.18 It is therefore concluded that the Proposed Development is well-suited locationally, quantitatively and qualitatively to making an effective contribution towards meeting local needs.

²³ Experian (2025) Local Market Forecasts Quarterly: December 2024

²⁴ Manchester City Council (2023) Purpose Built Student Accommodation: Supply and Demand Update

²⁵ Midollo (2024) The Battle for Beds: Tackling Manchester's Purpose-Built Student Accommodation Crisis

4. Construction Phase Impacts

- 4.1 This section outlines the economic impacts estimated to result from the Proposed Development during the construction phase. The economic benefits are outlined with respect to Manchester (the local impact area) and Greater Manchester (the wider impact area).
- 4.2 The following economic benefits are quantified: construction employment (direct, indirect/induced and net additional) and economic output (measured in Gross Value Added (GVA) to the local and wider economy).

Gross Employment

- 4.3 The construction of the Proposed Development will require significant investment²⁶ of the scale that could be expected to support approximately 1,400 'person-years' of direct employment, based on the average turnover per employee in the construction industry in the North West²⁷. This equates to an average of c. 280 gross full-time equivalent (FTE) construction-related jobs on site throughout the approximate 5-year construction period.

Net Additional Employment

- 4.4 Net additional employment is a term used to refer to the final scale of employment that is generated once a number of economic considerations have been taken into account, and is the sum of the total net direct, indirect and induced employment impacts of the Proposed Development.
- 4.5 The creation of temporary construction jobs during the build period will provide new employment opportunities for the local and wider labour force in Manchester and across the Greater Manchester city region, and the positive economic impacts of the Proposed Development will extend beyond construction employment. Expenditure on construction materials, goods and other services will have far-ranging benefits both locally and further afield as it filters down the supply chain.
- 4.6 The Homes & Communities Agency (HCA) recommends a specific approach to calculating additionality²⁸. Its recommended approach takes account of multiplier effects generated both through the site supply chain and induced financial benefits arising from increased local expenditure. The approach allows for the consideration of the following methodological points:

²⁶ Construction costs and build period advised by the Applicant.

²⁷ Department of Business, Energy and Industrial Strategy (2024) Business population estimates: Table 12 – North West

²⁸ 'Additionality' is defined in the Homes & Communities Agency (2014) Additionality Guide (4th Edition). The Guide advises on the assessment of the additional impact (or 'additionality') of interventions in terms of local and regional economic growth.

- **The Reference Case** – the economic outcomes which would occur if the Proposed Development were not implemented (sometimes termed ‘deadweight’);
- **Leakage** – a measure of the extent to which employment will be taken up by persons residing outside of the target area;
- **Displacement** – the extent to which investment in the Proposed Development will lead to existing companies or employees within the target area relocating activities to the Proposed Development, as opposed to the attraction of new investment and employment arising from businesses located outside of the target area; and
- **Multiplier effects** – further economic activity (jobs, expenditure or income) associated with additional local income (from employment), local supplier purchases and longer-term expenditure effects.

4.7 These factors are considered in turn below to estimate the net additional employment benefit generated by construction of the Proposed Development. The Reference Case is considered to be zero during construction and is not explored in further detail, given that a continuation of the Site’s existing state will not generate additional employment opportunities in the construction sector.

Leakage

4.8 The creation of construction jobs at the application site can be expected to provide new employment opportunities both for local residents of Manchester and those residing in the rest of Greater Manchester.

4.9 The 2021 Census found that 42% of those working in Manchester also resided in the city council area with 88% of jobs in Manchester being filled by residents of Greater Manchester²⁹. It is therefore reasonable to assume that a rounded proportion of approximately 40% of jobs created through construction of the Proposed Development will be contained and accessed by residents of the city, expanding to 90% being filled by those residing elsewhere within the wider Greater Manchester city region, the remainder living further afield, outside of the wider impact area.

Displacement

4.10 Displacement occurs when new development takes existing market share – in this case labour – from other existing local businesses. During construction, this allows for the possibility that an increase in demand for construction workers could result in delays to other developments or increased costs, if there is a temporary shortage of construction labour.

4.11 As highlighted in Section 3 of this report, as of January 2025 there are 235 JSA claimants in Manchester seeking employment in construction-related occupations³⁰. Further latent labour force capacity also exists beyond the city in the rest of the wider

²⁹ ONS (2025) Census 2021: Origin-destination Data

³⁰ ONS via Nomis (2025) Jobseekers Allowance by Occupation: January 2025

impact area of Greater Manchester, with a total of 980 people seeking employment in occupations relating to construction.

- 4.12 Displacement effects are therefore considered to be low. This recognises the large latent supply of construction workers and the scale of employment effect generated by the Proposed Development. Taking into consideration guidance outlined in the HCA Additionality Guide³¹, a low (25%) rate of displacement has been assumed during construction at the scale of both the local and wider impact areas.

Multiplier Effects

- 4.13 Investment in the Proposed Development will generate considerable expenditure on construction materials, goods and other services that will be purchased from a wide range of suppliers. This expenditure has far-ranging benefits both locally and further afield, as it filters down the construction supply chain (indirect effects). Employees working in construction in relation to the development will also spend their wages on goods and services (induced effects).
- 4.14 This will result in an amplification of the initial investment in the Proposed Development; in other words an economic multiplier effect, with linked benefits in terms of expenditure on goods and services locally. This will bring indirect employment and financial benefits for local individuals and firms involved in skilled construction trades and associated professions and could help to sustain employment within this sector across the local and wider economy.
- 4.15 Based on the Additionality Guide's recommendations³², a sub-regional composite multiplier of 1.25 has been applied at the scale of the local impact area, with a multiplier of 1.5 being applied at the scale of the wider city region.

Net Additional Employment

- 4.16 Allowing for these additionality factors, it is estimated that the construction of the Proposed Development will directly generate 190 direct FTE employment opportunities for Greater Manchester residents each year, of which 80 will be local to Manchester.
- 4.17 A further 90 indirect and induced FTE jobs could be annually supported across Greater Manchester through economic multiplier effects, of which 20 could be local to Manchester.
- 4.18 In total, the direct, indirect and induced impacts of the construction of the Proposed Development can therefore be expected to annually create 280 net additional FTE employment opportunities for Greater Manchester residents, inclusive of 100 jobs for residents of Manchester. This is summarised in at Table 4.1 overleaf.

³¹ Homes & Communities Agency (2014) Additionality Guide (4th Edition)

³² Ibid.

Table 4.1: Construction Phase Employment

	Local Impact Area	Wider Impact Area
Person-years of Employment		1,400
Construction Period (Years)		5
Gross FTE Employment		280
Direct Net Additional FTE Employment	80	190
Indirect / Induced Net Additional FTE Employment	20	90
Total Net Additional FTE Employment	100	280

Source: Turley Economics, 2025

Economic Output and Productivity

- 4.19 The construction phase of the Proposed Development will generate a significant increase in GVA.
- 4.20 Estimates sourced from economic data provider Experian indicate that the average FTE employee in the construction industry in Manchester generates £133,000 GVA annually³³. This is significantly higher than the GVA generated by the average employee across all sectors in the local and wider impact areas (respectively £84,300 and £73,700), demonstrating the importance of the construction sector to local and regional economy.
- 4.21 Applying the appropriate GVA measures to the net additional employment generated by construction of the Proposed Development indicates that an additional £44.4 million GVA could be generated annually across the wider impact area during construction, inclusive of £39.0 million concentrated in the local impact area. Over the 5-year construction period, it is therefore calculated that construction of the Proposed Development will generate £222.0 million GVA within Greater Manchester, inclusive of £195.0 million concentrated in Manchester. This is summarised at Table 4.2 overleaf.

³³ Experian (2025) Local Market Forecasts Quarterly: December 2024.

Table 4.2: Construction Phase GVA

	Local Impact Area	Wider Impact Area
Direct Net Additional GVA (Annual)	£37,200,000	
Indirect / Induced Net Additional GVA (Annual)	£1,800,000	£7,200,000
Total Net additional GVA (Annual)	£39,000,000	£44,400,000
Total Net Additional GVA (5 Year Construction Period)	£195,000,000	£222,000,000

Source: Turley Economics, 2025

Note: Some figures appear not to sum due to rounding.

Summary

4.22 In summary, the construction of the Proposed Development has the potential to generate the following economic impacts:

- **Significant investment** made in construction, directly supporting **1,400** person-years of employment, equating to an average of **280** FTE gross jobs over 5 years;
- An average of **280** direct, indirect and induced net additional FTE jobs generated for workers in Greater Manchester during construction, of which **100** could be held by residents of Manchester; and
- Total net additional contribution of **£222 million** GVA to the Greater Manchester economy, including **£195 million** concentrated in Manchester.

5. Operational Phase Impacts

- 5.1 This section presents the quantified economic impacts likely to be generated during the operational phase. Upon completion and full operation, the Proposed Development will deliver a range of economic impacts which will persist over the long term. This will support the wider economic recovery and growth objectives of local and city-regional policy and strategy.

PBSA's Expenditure and Housing Market Impacts

- 5.2 Information regarding existing bedspaces (i.e. 'the Reference Case') has been provided by the Applicant. There are 771 PBSA bedspaces currently on-site.
- 5.3 The Proposed Development will provide 2,302 PBSA bedspaces, accommodating an equivalent number of students residents. This will increase the supply of PBSA bedspaces in Manchester by 1,531, providing accommodation for students who could potentially otherwise live in other types of housing, such as houses in multiple occupation (HMOs). The Proposed Development could therefore potentially free up family-style housing in Manchester and thereby increasing housing choice in the city more broadly.

Expenditure

PBSA Student Expenditure

- 5.4 Whilst the overall number of students in Manchester will not necessarily increase as a result of PBSA being available at the Proposed Development, the expenditure impacts of the students accommodated are provided for illustrative purposes.
- 5.5 The following provides a breakdown of the expenditure both for the Proposed Development as a whole and for the PBSA bedspaces' uplift following redevelopment.
- 5.6 Survey-based research by the organisation Save The Student!³⁴ provides a breakdown of average student expenditure of MMU students, enabling analysis to be conducted regarding the contribution of students to the local economy. Save the Student! research suggests that students spend an average of £468 per month (not including rent or household bills) on goods and services.
- 5.7 This total (presented below, broken down by type of expenditure) can be applied to the capacity for the total of 2,302 students to be accommodated at the Proposed Development. As presented at Table 5.1, based on expenditure of £468 per student per month multiplied out to a total of £4,212 per student over a 9-month academic year³⁵, it is estimated that the 2,302 residents accommodated at the Proposed Development

³⁴ Save The Student! (2025) 'Student living costs in the UK 2025' [Online]. Available at: <https://www.savethestudent.org/money/student-budgeting/what-do-students-spend-their-money-on.html#average>

³⁵ It should be noted that this is a conservative estimate, given that many PBSA tenancies are offered based on periods which extend beyond term-time of the university academic year (e.g. 50 weeks being typical).

could generate c. £9.7 million in expenditure each year, with the 1,531 uplift in bedspaces accounting for £6.5 million.

Table 5.1: Proposed Development Estimated Student Spend

Type of Spend	Student spend per month	Student spend per year	On-site Uplift (1,531 bedspaces)	Whole Site (2,302 bedspaces)
Groceries, Takeaways and Eating Out	£215	£1,935	£2,960,000	£4,450,000
Retail (inc. clothes and course materials and other retail)	£49	£441	£680,000	£1,020,000
Going Out, Socialising & Events	£126	£1,134	£1,740,000	£2,610,000
Transport	£69	£621	£950,000	£1,430,000
Health and Wellbeing	£9	£81	£120,000	£190,000
Total Spend	£468	£4,200	£6,500,000	£9,700,000

Note: Academic year assumed to be 9 months. Spend per type rounded to nearest £1,000 and total spend rounded to nearest £10,000.

Source: *Save The Student!*; Turley Economics, 2025

- 5.8 It is reasonable to expect that a considerable proportion of this expenditure will be retained within the local economy, thereby sustaining economic activity and employment in retail, leisure and a range of other sectors. This is likely to benefit businesses both in the local area within easy walking distance of the Proposed Development, as well as other cultural, leisure and retail businesses in the city centre, the neighbouring district and local centres and across the rest of Manchester and the GMCA area.
- PBSA Visitor Expenditure**
- 5.9 Students residing in the Proposed Development will receive visits from friends and family, and the impact of the expenditure derived from these visitors can therefore be attributed to the Proposed Development.
- 5.10 It can be conservatively assumed that each student living at the Proposed Development will receive at least one visit per year from friends and/or relatives and with each visit assumed to last 2 days. Evidence published by Marketing Manchester³⁶ indicates that overnight visitors to Manchester each spend an average of £150 per day (including accommodation).
- 5.11 Therefore, an increase in the number of visits linked to the Proposed Development equating to one two-day visit to Manchester per student per annum could therefore generate c. £1.3 million in tourist expenditure, including c. £900,000 relating to the on-

³⁶ Marketing Manchester (2023) One Stop Intelligence Document: Greater Manchester's Tourism Sector – Tourism, its Value to the Local Economy (June 2023)

site uplift in PBSA bedspaces. This will support the local leisure and tourism industry in the city and help sustain associated employment, including in shops, hotels and restaurants which will benefit from increased expenditure.

Employment Supported by the Spending of Students and their Visitors

- 5.12 Student and visitor expenditure will also help retain employment in local businesses, particularly those operating in those sectors such as leisure and hospitality, which are in normal times supported to a significant degree by the student population.
- 5.13 Based on the average turnover per employee across the leisure, retail and transport sectors in the North West³⁷, it is estimated that the £9.7 million annual expenditure generated by residents of the Proposed Development as a whole, plus £1.3 million visitor expenditure would have the capacity to support approximately 85 jobs in the retail, leisure and transport sectors in the Manchester and wider city-region's economy. It is estimated that 55 of these jobs are supported by the £7.4 million resident and visitor expenditure generated by the uplift in bedspaces.

On-Site Employment

- 5.14 It is estimated that a total of c. 10 FTE jobs are currently supported at the Site, to support ongoing operations of the accommodation.
- 5.15 The Proposed Development will incorporate flexible non-residential floorspace, including c. 420 sqm (GIA) new Class E commercial floorspace, supporting permanent employment opportunities once the Site is operational.
- 5.16 Based on the application of average employment densities recommended by published guidance³⁸, it is estimated that the commercial floorspace to be delivered at the Proposed Development has the capacity to directly support a gross total of 20 FTE jobs. Based on past professional experience of similar schemes, it is estimated that a further 20 FTE jobs could be supported through residential and commercial building management activities (e.g. concierge, cleaning, maintenance, landscaping) to support the ongoing operations of the increased provision of PBSA. This represents an increase of 30 on-site FTE jobs in comparison with the Site's existing employment.

³⁷ Department for Business, Energy and Industrial Strategy (2024) Business Population Estimates 2024: Table 12 – North West. Analysis utilises BPE turnover per employee data for the retail; food and accommodation services; and arts, entertainment and recreation sectors to determine the number of jobs supported and / or generated by retail and leisure expenditure.

³⁸ Homes and Communities Agency (2015) Employment Density Guide 3rd Edition. For the commercial floorspace, an assumption of 1 FTE job per 17.5 sqm (NIA) has been applied to the 420 sqm (GIA) Class E commercial floorspace (with an 85% conversion from GIA to NIA assumed). A further c. 860 sqm Class F1/F2 floorspace will also be provided; the use and occupation of such floorspace is, however, currently unconfirmed, and therefore no permanent employment has been assumed in the assessment as a conservative scenario. The assumption of the number of FTE jobs supported through residential and commercial building management is based on past professional experience of similar schemes.

Net Additional Employment

- 5.17 Allowing for the Reference Case and for the additionality factors of leakage³⁹ and displacement⁴⁰ in line with recommendations set out in published guidance⁴¹, it is estimated that a total of 20 direct net additional FTE jobs will be generated for residents of Greater Manchester, including 10 FTE jobs for residents of the local impact area of Manchester.
- 5.18 After also accounting for multiplier effects as recommended by guidance⁴², it is estimated that the operations of the Proposed Development could be expected to support a further 10 FTE jobs within the wider impact area via indirect and induced effects, including several for residents of the local impact area.
- 5.19 Summing the above totals, it is therefore estimated that the non-residential floorspace, along with the commercial building management activities once delivered and fully operational, will generate a total of 30 direct, indirect and induced net additional FTE jobs in the wider impact area Greater Manchester, including 10 for residents of the local impact area of Manchester. This is summarised in Table 5.2.

Table 5.2: Operational Phase – Net Additional Employment

Employment	Local Impact Area	Wider Impact Area
Gross FTE Employment		40
<i>Less Reference Case On-site FTE Employment</i>		<i>-10</i>
Net On-site FTE Employment		30
Direct Net Additional FTE Employment	10	20
Indirect / Induced Net Additional FTE Employment	<5	10
Total Net Additional FTE Employment	10	30

Source: Turley Economics, 2025

Note: Figures rounded to the nearest five.

Economic Output and Productivity

- 5.20 The operational phase of the Proposed Development will also contribute to economic output and productivity across the local and wider impact areas.
- 5.21 Applying the relevant GVA per employee measures⁴³ to the net employment effects presented above suggests that an annual uplift of £1.8 million GVA will be generated in Greater Manchester following the delivery of the Proposed Development, including £1.2 million concentrated in Manchester. This is summarised in the below table.

³⁹ ONS via Nomis (2025) 2021 Census: WU01UK - Location of usual residence and place of work by sex. Leakage rates of 60% and 10% applied at the respective scales of the local and wider impact areas.

⁴⁰ Homes & Communities Agency (2014) Additionality Guide (4th Edition). Low displacement rates (25%) applied at the scales of the local and wider impact areas.

⁴¹ Ibid.

⁴² Ibid. Multipliers of 1.25 and 1.5 applied at the respective scales of the local and wider impact areas.

⁴³ Experian (2024) Local Market Forecasts Quarterly: December 2024; annual average 2020 – 2024

Table 5.3: Operational Phase GVA

	Local Impact Area	Wider Impact Area
Net Additional Direct GVA (Annual)	£1.0 million	
Indirect / Induced Net Additional GVA (Annual)	£0.2 million	£0.8 million
Total Net additional GVA (Annual)	£1.2 million	£1.8 million

Source: Turley Economics, 2025

PBSA: Expanding Choice and Capacity in the Housing Market

- 5.22 By increasing the proportion of students accommodated in PBSA, the Proposed Development could contribute to meeting the Core Strategy's objectives relating to reducing the numbers of students living in HMOs, which, as outlined in Sections 2 and 3, seek to free up family housing and broaden housing choice for other types of residents.
- 5.23 Whilst such a shift will not occur with immediate effect, the Proposed Development represents an opportunity for the gradual re-orientation of housing in areas of Manchester with high numbers of HMOs towards providing for a more diverse mix of residents and creating more sustainable communities. A number of economic and social benefits of freeing up family housing are considered below.

Housing freed up and new residents accommodated

- 5.24 The 2011 Census recorded the average household size in Manchester where all residents are full-time students as being 3.9 persons⁴⁴. It is therefore estimated that the uplift of 1,531 student bedspaces at the Proposed Development could provide accommodation equivalent to c. 390 houses currently used as student HMOs; homes which could subsequently be freed up for new residents all of household types.
- 5.25 It is estimated that expanding housing availability by 390 homes could accommodate c. 955 new non-student residents if occupied in line with the average household size (2.5 persons) in Manchester as of the 2021 Census⁴⁵. These new residents will also contribute towards generating expenditure within the local economy and creating demand for local services, shops and businesses.
- 5.26 Based on Manchester's current age⁴⁶ and economic activity⁴⁷ profile, c. 610 of these newly accommodated residents could be working age (16-64) and employed, contributing to the on-going competitiveness of the city by growing the supply of skilled labour available to local businesses.

Resident Income and Expenditure

- 5.27 Household incomes and expenditure in the local economy will occur over the long period in which homes are occupied. Based on the latest ONS Annual Survey of Hours

⁴⁴ ONS via Nomis (2021) 2021 Census: Create a custom dataset

⁴⁵ ONS via Nomis (2025) 2021 Census : TS017 – Household Size

⁴⁶ Ibid.

⁴⁷ ONS via Nomis (2025) Annual Population Survey: October 2023 – September 2024

and Earnings (ASHE)⁴⁸ and the occupational profile of Manchester residents⁴⁹, it is estimated that residents of 390 homes could earn a combined income of £19.8 million per annum⁵⁰.

- 5.28 Whilst a proportion of this income will be used to meet housing and other fixed household costs, a considerable proportion will be available for discretionary expenditure by households in the local economy. Expenditure by residents permanently living in the new apartments will therefore contribute towards sustaining local shops and services in Manchester and across the wider region, which in turn are an important source of local employment.
- 5.29 Expenditure on convenience and comparison retail goods is estimated to equate to an average of c. £5,600 per annum per person in Manchester, with annual average expenditure on leisure goods and services being estimated as c. £2,790⁵¹.
- 5.30 It is therefore estimated that the occupants of 390 homes could generate total household retail and leisure expenditure of £8.0 million per annum, contributing to sustaining local shops and businesses and the employment they support. This retail and leisure expenditure could be expected to benefit district centres in those areas such as Fallowfield that currently have high numbers of student HMOs and where there is the greatest potential to re-balance the stock to provide more general housing.

Employment Supported by Resident Expenditure

- 5.31 This potential uplift in local expenditure will not only increase footfall, vitality and the trading performance of existing shops and leisure services in local and district centres; the additional expenditure is also expected to support jobs within the retail and leisure industries. It is estimated that approximately 55 retail and leisure related jobs could be supported by new household expenditure⁵².

Council Tax Revenues

- 5.32 The re-occupation of homes previously occupied by students – and therefore exempt from paying Council Tax – will also boost MCC's Council Tax revenues. Boosting Council income is a priority in the context of constrained local authority funding since 2010, which was compounded by the need for increased expenditure on public services during the pandemic.

Based on the conservative assumption of all re-occupied homes being Band A properties, it is estimated that payment of Council Tax for 510 non-exempt homes

⁴⁸ ONS (2025) Annual Survey of Hours and Earnings 2024

⁴⁹ Ibid.

⁵⁰ Note that this is based on median incomes in the North West for the average overall occupational profile in Manchester, and therefore wages earned by residents could, for example, be higher than this figure if residents work in higher-paid jobs than the average for their occupation in the North West and/or if the resident profile is weighted more towards professional occupations than the city average. This figure also does not include other sources of income, such as those derived from investments or social security benefits.

⁵¹ Experian (2024) Retail Planner: Consumer Retail Expenditure: 2021

⁵² Department for Business, Energy and Industrial Strategy (2024) Business Population Estimates 2024: Table 12 – North West. Analysis utilises BPE turnover per employee data for the retail; food and accommodation services; and arts, entertainment and recreation sectors to determine the number of jobs supported and / or generated by retail and leisure expenditure.

could generate revenue of c. £570,000 per annum at 2025/26 rates⁵³, which could be invested in delivering and enhancing public services in Manchester.

Summary

5.33 In summary, Proposed Development has the potential to generate the following economic impacts once complete and fully operational:

- Expenditure of **£9.7 million** per academic year generated by **2,302** students, with their visitors contributing a further **£1.3 million**. A significant proportion of this expenditure will be retained locally, supporting businesses in Manchester city centre, neighbouring district centres and across the city region.
- Student and visitor expenditure has the capacity to support **85** jobs locally, in industries such as hospitality and retail.
- Supporting approximately **40** FTE employment opportunities on-site, resulting in **30** net additional jobs in for Greater Manchester, including **10** for residents of Manchester.
- Generating an annual uplift of **£1.8 million** GVA, including **£1.2 million** concentrated in Manchester.
- Up to **390** student HMOs could be freed up by instead accommodating students in PBSA, supporting:
 - Accommodation for **955** new residents in former HMOs, **610** of whom could be of working age and in employment;
 - Up to **£8.0 million** in retail and leisure expenditure generated by new occupants of former student HMOs;
 - Up to **55** jobs in retail and leisure industries through the expenditure of new occupants of former student HMOs; and
 - Up to **£570,000** per annum in Council Tax revenue collected by MCC following the re-occupation of former student HMOs.

⁵³ Note that this figure does not account for any occupants who are exempt from paying Council Tax for reasons other than being a student.

6. Conclusion

- 6.1 This Socio-economic Regeneration Impact Statement has been prepared by Turley Economics on behalf of Unite Students and MMU in support of a full planning application to Manchester City Council for the redevelopment of the MMU's residential campus at All Saints Cambridge Halls comprising 2,302 bedspaces.
- 6.2 The delivery of the necessary student accommodation to support investment, job opportunities and to grow the local population and economy is considered by published planning and economic policy and strategy to be key to the recovery in Manchester and the wider city region in order to respond to ongoing economic challenges, such as inflationary pressures and the cost-of-living crisis.
- 6.3 The Corridor Manchester area is one which presently accommodates notably high proportions of people who are of typical student age, and the GMCA and MCC identify the student population as a key driver of the local economy.
- 6.4 The city's leisure, hospitality and tourism businesses – amongst the sectors most impacted by the pandemic and those usually supported by to a significant degree by students – will also benefit from increased activity; Manchester's students have considerable purchasing power in the local economy and increasing capacity to accommodate students will help support growing levels of student expenditure retained locally.
- 6.5 The alignment of the occupants of the PBSA with existing local demographics and the known contribution of students to economic development are both factors which strongly suggest that the delivery of new PBSA is likely to closely integrate with the existing neighbourhood and contribute in a positive way to local vibrancy without detriment to the existing residential community.
- 6.6 The Proposed Development will also help support the economic growth and recovery ambitions through providing new, high-quality accommodation for students in the city, whose expenditure will support retail and leisure businesses both in the immediate locality of the Site and wider city centre. This could also support ambitions to free up family housing currently used occupied by students in the private rented sector, further increasing local expenditure and Council Tax revenues for MCC.
- 6.7 Quantified economic impacts of the Proposed Development are summarised again below:

Construction Phase

- 6.8 The Proposed Development will generate the following economic impacts during its 5-year construction period:
- **Significant investment** made in construction, directly supporting **1,400** person-years of employment, equating to an average of **280** FTE gross jobs over 5 years;

- An average of **280** direct, indirect and induced net additional FTE jobs generated for workers in Greater Manchester during construction, of which **100** could be held by residents of Manchester; and
- Total net additional contribution of **£222 million** GVA to the Greater Manchester economy, including **£195 million** concentrated in Manchester.

Operational Phase

6.9 Upon completion and operation, the Proposed Development will generate a range of long-term economic impacts:

- Expenditure of **£9.7 million** per academic year generated by **2,302** students, with their visitors contributing a further **£1.3 million**. A significant proportion of this expenditure will be retained locally, supporting businesses in Manchester city centre, neighbouring district centres and across the city region.
- Student and visitor expenditure has the capacity to support **85** jobs locally, in industries such as hospitality and retail.
- Supporting approximately **40** FTE employment opportunities on-site, resulting in **30** net additional jobs in for Greater Manchester, including **10** for residents of Manchester.
- Generating an annual uplift of **£1.8 million** GVA, including **£1.2 million** concentrated in Manchester.
- Up to **390** student HMOs could be freed up by instead accommodating students in PBSA, supporting:
 - Accommodation for **955** new residents in former HMOs, **610** of whom could be of working age and in employment;
 - Up to **£8.0 million** in retail and leisure expenditure generated by new occupants of former student HMOs;
 - Up to **55** jobs in retail and leisure industries through the expenditure of new occupants of former student HMOs; and
 - Up to **£570,000** per annum in Council Tax revenue collected by MCC following the re-occupation of former student HMOs.

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