



Manchester City Football Club

North Stand Development

Economic Impact Assessment

April 2023

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1 Introduction

1.1 Overview

AMION Consulting has been commissioned by Manchester City Football Club ('MCFC') to examine the economic benefits that might be derived from the North Stand development which includes:

- an improved North Stand with an additional 7,910 seats (including 750 in the new Sky Bar);
- a new 401-bed hotel integrated into the North Stand;
- a new corporate hire and entertainment venue with a capacity of up to 1,250 (City Hall);
- an improved 'City Square' for pre and post-match entertainment and other non-matchday events with 2,300 square metres of new food and beverage outlets (open to the public);
- a new 4,180 square metre commercial workspace with spaces let to start-ups, scale-ups and SMEs;
- a new museum and club shop replacing existing facilities;
- a new interactive (high-wire) visitor attraction; and
- improvements to public realm.

In preparing this report, AMION Consulting has received trading data and business information from MCFC on a confidential basis and has held a number of working sessions with MCFC and its project advisors.

This report deals, specifically, with the additional impacts arising from the North Stand development. However, it should be stated that this particular development is another milestone in the creation of MCFC's longer term ambition (which is shared by the local authority) to create a world-class entertainment district in East Manchester. The hotel, new entertainment spaces, visitor attractions and food and beverage opportunities will combine with the new Co-Op Live Arena to create a critical mass that will deliver long-term meaningful impact in jobs, skills development and business growth.

The approach to the assessment of benefits has been developed in line with best practice guidance, including the HM Treasury Green Book (*Appraisal and Evaluation in Central Government*) and the Homes England Additionality Guide (formerly Homes and Communities Agency).

The North Stand development will contribute to the growth of jobs and GVA¹ in a number of ways:

- by creating temporary employment linked to the construction project;
- by employing more staff (directly and through third parties) on-site to operate the expanded facilities;

¹ GVA is a measure of the economic value of goods and services produced in an area. 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."

- by attracting visitors whose off-site visitor expenditure will create jobs in other businesses in Greater Manchester;
- by MCFC incurring additional operating expenditure which will create employment in the supply chain in Greater Manchester; and
- by new employees spending their wages on goods and services in the economy (induced effects).

The assessment has sought to estimate both the gross and net additional impact of the programme, at the Greater Manchester level, in line with appraisal guidance.

1.2 Assessment of additionality

Of key importance in assessing the impact of the project on the local and wider economy is the extent to which new activity is truly additional. Furthermore, it is important to understand who is likely to benefit from the impacts generated. In order to assess the net additional impact of the proposals and overall anticipated additionality of the project, the following factors have therefore been considered:

- **leakage** – the extent to which economic outputs benefit those outside of Greater Manchester;
- **displacement** – the extent to which the project displaces economic activity elsewhere in Greater Manchester;
- **multiplier effects** – further economic activity associated with additional local income and local supplier purchases; and
- **deadweight** – economic activity that will occur even if the project does not go ahead.

1.3 This report

This report continues in four sections, as follows:

- Section 2 – estimates the existing economic impact of the Etihad Stadium and on-site operations;
- Section 3 – provides an assessment of the additional economic benefits that will be created through the project;
- Section 4 – sets out details of the wider social impacts of MCFC and the City Football Group activities; and
- Section 5 – provides a summary of the overall impacts.

2 Existing Economic Impact

2.1 On-site employment

City Football Group is already a significant employer with 891 people employed in Manchester in a variety of full-time and part-time roles (845 FTE). On matchdays and event days, an additional 1,885 people are employed through a number of third parties including stewards, catering staff, cleaning staff and car parking staff which equates to 255 full time equivalents.

Based on information provided by MCFC, it is estimated that current operations support 2,776 jobs including full time, part time and casual work. This equates to around **1,100 full time equivalent jobs (FTE) on site.**

2.2 Employment through off-site visitor expenditure

In addition to existing employment, City Football Group creates economic impact by attracting visitors to Manchester who spend with other businesses (hotels, bars, shops, taxis etc.) which in turn, creates and supports employment.

In a typical season, the Etihad Stadium has an aggregate football attendance of around 1.41m. On average, around 96% of attendees are home fans with around 61,000 away fans visiting the Etihad Stadium in a typical year. However, data provided by MCFC shows that a significant proportion of home fans live outside of Greater Manchester and many travel from overseas.

Table 2.1: Origin of visitors to football fixtures at the Etihad Stadium			
	Home fans	Away fans	Total
From Greater Manchester	798,000	2,600	800,600
From rest of UK	475,000	50,500	525,500
From overseas	79,000	7,900	86,900
Total	1,352,000	61,000	1,413,000

In addition to football attendance, the Etihad Stadium hosts a number of music concerts in the summer months. MCFC budgets for a minimum of four concerts per summer but in some years, the stadium has hosted as many as eight concerts. Five is considered typical in a year and, depending on who is touring, an attendance of 50,000 per concert is expected. Analysis of the concerts in 2022 shows the following origin of visitors.

Table 2.2: Origin of visitors to music concerts at the Etihad Stadium	
From Greater Manchester	60,000
From rest of UK	187,000
From overseas	3,000
Total	250,000

In total therefore, a typical season would see approximately 1.66m visitors to the Etihad Stadium.

Data from Visit Britain² suggests that day visitors to Manchester spend £43.07 per head whilst overnight leisure visitors spend an average of £228.25 per trip. Meanwhile, ONS³ data suggests that overseas visitors to Manchester spend an average of £430.56 per trip.

In estimating off-site visitor expenditure, it has been assumed that:

- all visitors from Greater Manchester are day visitors;
- 80% of visitors from the rest of UK are day visitors and 20% stay in Manchester; and
- all visitors from overseas stay in Manchester.

After accounting for fan expenditure within the Etihad Stadium (food, beverage, merchandise and programmes) it is estimated that the 1.66m annual visitors to the Etihad Stadium generate £109.6m of off-site visitor expenditure each year. This £109.6m of off-site visitor expenditure has been converted to FTE jobs by employing a metric derived from a Deloitte study⁴ on behalf of Visit Britain in 2013 which asserts that £54,000 of visitor expenditure is required to support 1 FTE job. After inflating this figure to 2022 prices, it is estimated that visitors to the Etihad Stadium support **1,580 full time equivalent jobs** elsewhere in the Greater Manchester visitor economy (2,370 jobs when part time and casual work is included).

2.3 Indirect and induced employment

City Football Group buys goods and services from other businesses which creates further rounds of indirect employment.

In addition, employees use their wages and salaries to purchase additional goods and services which creates further rounds of employment. This is known as the induced effect.

To take account of the indirect and induced effects, a composite multiplier is applied to the employment figures set out in Section 3.1 and 3.2. A multiplier of 1.56 has been applied at the Greater Manchester level which takes account of national guidance and benchmarks and specifically the HCA Additionality Guide which provides specific figures for recreation projects.

² Great Britain Day Visitor Survey 2019 and Great Britain Tourism Survey 2019

³ International Passenger Survey 2019

⁴ The economic contribution of the tourism economy in the UK, Deloitte and Oxford Economics for Visit Britain, 2013

2.4 Total employment

Taking account of existing on-site employment; off-site visitor expenditure employment; indirect supply chain employment; and induced employment, it is estimated that **MCFC's existing operations already support 4,180 full time equivalent jobs within Greater Manchester** (or 7,400 full time, part time and casual jobs).

Table 2.3: Existing employment impact	
On-site employment FTE	1,100
Off-site visitor expenditure employment FTE	1,580
Indirect and induced employment FTE	1,500
Total full-time equivalent jobs (FTE)	4,180
Total jobs including full time, part time and casual	7,400

Data from the Office of National Statistics (based on census data) shows that 62% of workers in Manchester travel in from elsewhere in Greater Manchester and the North West. It is therefore assumed that around 1,588 of the 4,180 FTE jobs supported by the club's existing activity are taken by residents of Manchester.

2.5 Employment at the new Co-op Live Arena

The North Stand Development is another milestone in the creation of MCFC's longer term ambition to create a world-class entertainment district in East Manchester. The proposed hotel, new entertainment spaces, visitor attractions and food and beverage opportunities will combine with the new Co-Op Live Arena (scheduled to open in December 2023) to create a critical mass that will deliver long-term meaningful impact in jobs, skills development and business growth. Therefore, the employment and GVA impacts of the arena should be considered as part of the baseline together with the existing impacts of MCFC's operations.

Co-op Live Arena is scheduled to open in December 2023 which means that by the time that the North Stand Development is fully complete, the new arena will have been operating for several years and will have established itself.

According to the 2020 planning application, the arena is expected to create a net gain of 586 FTE jobs as a result of its on-site operations. In addition, it is expected to attract attendance of 1m per annum with off-site visitor expenditure estimated at £36m per annum which could support a further 580 FTE jobs. In total, the Co-Op Live Arena is expected to support 1,166 jobs per annum.

2.6 Total GVA impact

GVA is a measure of the economic value of goods and services produced in an area.⁵ Data provided by Experian⁶ suggests that the GVA per full time equivalent employee in the visitor economy in Greater Manchester is £39,969. MCFC's current employment and economic activity together with that expected from Co-Op Live Arena is estimated to support £213.7m of GVA in Greater Manchester every year.

Table 2.4: Existing GVA impact	
Total FTE employment – MCFC operations	4,180
Total FTE employment – Co-Op Live Arena operations	1,166
Total FTE employment	5,346
GVA per FTE employee in GM visitor economy	£39,969
Total GVA per annum	£213,674,274

⁵ 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."

⁶ Experian Regional Planning Service – based on ONS data.

3 Project Economic Impact

3.1 Temporary construction impacts

3.1.1 Gross employment

The total project costs of £217.8m have been estimated by the project cost consultants (Turner and Townsend) and are based on plans and specifications provided by the design team. This estimated project expenditure has been used as the basis for calculating the number of temporary construction jobs by applying labour coefficients used in the 2015 HCA best practice note.⁷

The construction project could support **2,678 person years of construction related employment** (the equivalent of 2,678 people being employed on a full-time basis for 12 months). With a construction period of approximately three years (albeit phased to allow for the North Stand to be completed by August 2025 and the hotel, public realm, food & beverage and workspace development to follow a year later) this could equate to **c.890 people employed full time for three years**. On the basis of the standard convention that each permanent job equates to ten person years of temporary employment, this would be equal to 268 *permanent* full-time equivalent (FTE) jobs.

Table 3.1: Construction employment (temporary)	
Construction phase capital expenditure	£217.8m
Gross temporary employment (person years)	2,678
Number of people employed full time for three years	890

3.1.2 Net additional GVA

To estimate the net additional impact during the construction phase, an allowance has been made for leakage, displacement and multiplier effects. The proposals could lead to some displacement of construction activity elsewhere in Manchester and Greater Manchester and a displacement rate of 20% and 30% has been applied respectively.

Not all of the construction workers will come from Greater Manchester. Data from the Office of National Statistics (based on census data) shows that 62% of workers in Manchester come from outside of the Manchester local authority and 16% of workers travel in from outside of Greater Manchester. It is therefore assumed that leakage is 62% at the Manchester level and 16% at the Greater Manchester level.

In addition, there will be additional rounds of employment through indirect and induced effects. To take account of these effects, a multiplier of 1.25 has been applied at the Manchester level

⁷ HCA (now Homes England), Calculating Cost Per Job: Best Practice Note, 2015. Expenditure uplifted to account for inflation.

and 1.46 at the Greater Manchester level which is informed by national guidance and benchmarks including the HCA's Additionality Guide and reflects the structure of the local economy.

After adjusting for displacement and multiplier effects, it is estimated that the project would support the creation of 2,299 net additional person years of construction employment in Greater Manchester (1,018 in Manchester).

Data provided by Experian⁸ suggests that the GVA per full time equivalent employee in the construction sector in Greater Manchester was £83,138 in 2022 which would provide a temporary GVA impact of £191.1m to Greater Manchester over the course of the three-year project (£84.6m in Manchester).

Table 3.2: Construction phase net additional GVA (temporary)		
	Manchester	Greater Manchester
Gross temporary employment (person years)	2,678	2,678
Indirect and induced effect	669	1,232
Total direct, indirect and induced employment	3,347	3,910
Displacement and leakage effect	-2,330	-1,611
Net additional temporary employment (person years)	1,018	2,299
GVA per FTE in construction in Greater Manchester	£83,138	£83,138
Net additional GVA (temporary)	£84,596,862	£191,117,669

3.1.3 Other impacts from the construction project

Alongside directly supporting employment through the construction works, the project will also create supply chain opportunities for businesses within Greater Manchester including through, for example, the purchase of construction equipment and supplies. The new Everton stadium in Liverpool is expected to spend half of its construction budget with local suppliers whilst the adjacent Co-op Live arena is targeting 43% of its budget with local suppliers. When MCFC developed the City Football Academy, MCFC exceeded its target of retaining 43% of supply chain expenditure within Greater Manchester.

With this project, MCFC expects it will spend circa 50% of its construction budget locally in line with these other projects. With a total project cost of £217.8m, it is expected that a minimum of **£108.9m local supply chain expenditure** will be created during the construction period.

The construction activity from the implementation of the project also provides a real opportunity to increase skills in the area. Based on the anticipated construction spend and assumptions relating to labour costs, average wages and new entrants, it is estimated that between 7,000 and 7,500 person weeks of **training** could be provided.

In terms of **apprenticeships**, it is expected that approximately 78 apprentices could be engaged during the project. Though the activities of Manchester Life Development Limited, a joint venture

⁸ Experian Regional Planning Service – based on ONS data.

with Manchester City Council, which has delivered new developments in Ancoats and New Islington, the wider group has significant experience of successfully delivering construction apprenticeships, as shown in Box 1.

Box 1: Manchester Life Apprenticeship Programme

In 2015, the Manchester Life Apprenticeship Scheme, a partnership between Manchester City Council, Manchester Life, The Manchester College and Manchester Life's supply chain, was created to support more local young people into careers in construction and development. There have been 26 Higher Apprenticeships over the past two years, with Year 4 recruitment currently underway.

Apprentices are employed by one of the Manchester Life partner companies for two years, with an annual salary, local travel costs covered, and placements across six partner companies, providing the apprentices with a broad base of skills to kick-start their careers.

Placements include Manchester Life development team, architect, engineer, project manager, building contractor, quantity surveyor and within the local authority planning department. Apprentices also study with The Manchester College for a Level 4 HNC in Construction and work towards a Level 4 NVQ in Construction and the Built Environment. At the end of two years, the apprentices can continue with a general qualification to a Level 5 Higher National Diploma or transfer to a specialist degree. Apprenticeships will count as the first year of a degree course.

The apprentices supported by Manchester Life have hugely benefited from this experience and have now obtained full-time employment in the industry. Manchester Life have continued to liaise with their apprentices during their onward careers, as shown by the strong successes below:

- **Benjamin Susca at Mace:** Ben won 'Apprentice of the Year' at the Made in Manchester Awards. Ben explained in 2019 that *"I started with Mace in August 2015 after enrolling on an apprenticeship programme called the Manchester Life Advanced Apprenticeship. During my time on the apprenticeship programme, I undertook various roles at different companies as well as attending college on a day release basis. At the end of the two years I gained a level four HNC and NVQ in construction and the built environment"*.
- **Jessica Sharples at Eric Wright Construction:** Jessica is an assistant site manager at the company, after completing the Manchester Life Advance Apprenticeship as part of the 2018 cohort. Jessica explained in 2023 that *"Without the Manchester Life Apprenticeship I wouldn't have been able to find my career and path in the construction sector and understand what the construction industry entails. Eric Wright's sponsorship and differing placements have enabled me to gain a true representative understanding of the different stakeholders in the industry from client-side management to architectural aspects as well as main contracting"*.
- **Jack Layfield at Caddick Construction:** Jack is a site engineer at Caddick Construction, after completing the Manchester Life Advance Apprenticeship as part of the 2016 cohort. Jack explained in 2023 that *"the Manchester Life apprenticeship enabled me to gain a wealth of knowledge and experience in a variety of disciplines within construction. I was able to work on projects at different stages for both contractors and consultants, which not only helped me understand what best practice looks like, but also where my interests and skills could be best applied. Ultimately, the apprenticeship provided me with an excellent foundation for a successful career in construction"*.

3.2 Operational impacts

3.2.1 On-site employment

City Football Group is already a significant employer in Manchester with approximately 2,776 people employed directly or indirectly in a variety of full-time, part-time, casual and matchday support roles. Based on information provided by MCFC, it is estimated that current operations support **1,100 full time equivalent jobs (FTE) on site** (including through third party providers). It is also estimated that the on-site operations of the Co-Op Live Arena will support **586 FTE jobs**.

As a result of the North Stand Development, new on-site employment will be created. Based on information supplied by MCFC, its consultant teams and AMION projections, it is estimated that **602 full time equivalent jobs** will be created on-site (1,131 when part time and casual workers are taken into account) including:

- 223 full time equivalent jobs created in the 4,180 sqm of new commercial workspace (based on typical employment densities for co-working and managed workspaces⁹);
- 133 full-time equivalent jobs created in the new 401-bed hotel (based on typical employment densities in mid-scale hotels⁹);
- 92 full-time equivalent jobs created in the 2,300 sqm of new food and beverage units (based on typical employment densities for restaurants and cafes⁹);
- 85 full time equivalent jobs created within MCFC's back-office functions (operations, legal, HR, finance, marketing etc.) based on an assumed 10% increase of existing CFG employment;
- 38 full time equivalent jobs created within the Etihad Stadium on catering, stewarding, security and car parking based on a 15% increase in overall stadium capacity and requiring around 285 additional people on any given matchday/event night;
- 11 full time equivalent jobs created in the new Etihad Stadium events space (City Hall) based on trading projections provided by MCFC;
- 9 full time equivalent jobs created in the new interactive visitor attraction based on employment levels at other similar venues (The O2, Tottenham, Anfield, ArcelorMittal Orbit and Cutty Sark);
- 7 full time equivalent jobs created in the new 1,408 sqm shop which is additional to existing employment within the club's retail operations (based on typical employment densities in retail⁹); and
- 4 full time equivalent jobs created in the new 480 sqm museum which is additional to existing employment within the museum (based on typical employment densities within visitor attractions⁹).

Upon completion of this phase of work and once fully operational, it is estimated that the site will support a total of **2,288 full time equivalent jobs** (including existing employment and Co-Op Live).

⁹ Employment Density Guide (3rd Edition), Homes and Communities Agency, 2015

However, the number of actual jobs created will be higher once part-time and casual workers are taken into account and is likely to be in the order of **5,000 jobs**.

3.2.2 *Indirect employment from off-site visitor expenditure*

In addition to the onsite employment that will be created as a result of the new development, the site will generate further economic impact by attracting additional visitors to the area who will go on to spend with other businesses which in turn will create and support employment.

With stadium capacity increasing by 7,910 seats, annual matchday and concert attendance could increase from 1.66m to 1.91m (250,000 additional).

Furthermore, it is estimated that an additional 20,000 people will attend conferences, functions and events in the new events venue, City Hall.

In total therefore, a typical season would see approximately 1.93m visitors to the Etihad Stadium (an increase of 270,000).

Data from Visit Britain¹⁰ suggests that day visitors to Manchester spend £43.07 per head whilst overnight leisure visitors spend an average of £228.25 per trip. Meanwhile, ONS¹¹ data suggests that overseas visitors to Manchester spend an average of £430.56 per trip.

In estimating off-site visitor expenditure, it has been assumed that:

- the number of season ticket holders will not increase but that the additional capacity will be taken by home supporting 'match-by-match' fans;
- the geographic profile of these additional visitors will reflect the existing profile of home-supporting match-by-match ticket buyers (30% Greater Manchester, 50% rest of UK, 20% from overseas);
- all visitors from Greater Manchester are day visitors;
- 80% of visitors from the rest of UK are day visitors and 20% stay in Manchester; and
- all visitors from overseas stay in Manchester.

It is estimated that the 270,000 additional visitors to the Etihad Stadium will generate £35.8m of off-site visitor expenditure each year. This £35.8m of additional off-site visitor expenditure has been converted to FTE jobs by employing a metric derived from a Deloitte study¹² on behalf of Visit Britain in 2013 which asserts that £54,000 of visitor expenditure is required to support 1 FTE job. After inflating this figure to 2022 prices, it is estimated that visitors to the Etihad Stadium will support an additional **550 full time equivalent jobs** in the Greater Manchester visitor economy (hotels, taxis, transports, parking, bars, retail and restaurants).

Taking account of existing activity and including Co-Op Live, off-site visitor expenditure associated with visitors will support 2,710 full time equivalent jobs (c.4,065 jobs when part time employment is taken into consideration).

¹⁰ Great Britain Day Visitor Survey 2019 and Great Britain Tourism Survey 2019

¹¹ International Passenger Survey 2019

¹² The economic contribution of the tourism economy in the UK, Deloitte and Oxford Economics for Visit Britain, 2013

3.2.3 Indirect and induced employment

In buying-in goods and services from the wider supply chain, MCFC and its partners on-site will contribute to further rounds of indirect employment. In addition, employees use their wages and salaries to purchase additional goods and services which creates further rounds of employment. This is known as the induced effect.

To take account of the indirect and induced effects, a composite multiplier is applied to the employment figures set out above. A multiplier of 1.56 has been applied at the Greater Manchester level which takes account of national guidance and benchmarks and specifically the HCA Additionality Guide which provides specific figures for recreation projects.

3.2.4 Total employment

Upon completion of the project, MCFC will be supporting an estimated 5,975 full time equivalent jobs through on-site employment, employment created through off-site visitor expenditure, indirect supply chain employment and induced employment through household expenditure. Co-Op Live Arena will be supporting 1,166 FTE jobs.

This is an increase of 1,795 full time equivalent jobs. The actual number of people employed will be much higher once part-time and casual working is accounted for (likely to be in the order of 2,925 additional jobs).

Table 3.3: Employment impact			
	Baseline	Future	Additional
On-site employment FTE	1,100	1,700	600
Off-site visitor expenditure employment FTE	1,580	2,130	550
Indirect and induced employment FTE	1,500	2,145	645
Co-Op Live	1,166	1,166	0
Total full-time equivalent jobs	5,346	7,141	1,795
Total jobs including full time, part time and casual	9,375	12,300	2,925

Data from the Office of National Statistics (based on census data) shows that 62% of workers in Manchester come from outside of the Manchester local authority and 16% of workers travel in from outside of Greater Manchester. It is therefore assumed that leakage is 62% at the Manchester level and 16% at the Greater Manchester level.

Given the very special and unique nature of the facilities being created it is considered that there will be no displacement of economic activity from elsewhere.

3.2.5 Total GVA impact

An assessment has been undertaken of the net additional GVA generated as a result of the operational jobs expected to be created through the project. This has been based on the FTE job

estimates and average GVA per FTE job figures in Greater Manchester (sourced from Experian local market forecasts).

Overall, it is estimated that the North Stand development, once fully operational, will add £71.7 million of net additional GVA per annum into the Greater Manchester economy. Since GVA is a workplace measure, leakage has been added back when considering net additional GVA.

Table 3.4: GVA impact			
	Baseline	Future	Additional
Total employment (FTE)	5,346	7,141	1,795
Total jobs (including part time/casual)	9,375	12,300	2,925
GVA per FTE employee in GM visitor economy	£39,969	£39,969	£39,969
Total GVA per annum	£213,674,274	£285,418,629	£71,744,355

4 Wider Social Impacts

4.1 Social Impact of Previous Investment at the Etihad Campus

Aside from investment into the Etihad Stadium, MCFC and City Football Group have also created significant landmark facilities, building on the largely public sector investment into sporting facilities for the 2002 Commonwealth Games, and effectively extending the Campus to form the Beswick Hub.

The City Football Academy is home to Manchester City's men's and women's teams, Elite Development Squad and youth development. City Football Academy includes 16.5 football pitches (including a community use pitch), a 7,000 capacity stadium and staff offices. City Football Academy is the Headquarters of City Football Group's global operation. Built on an 32 hectare (80 acre) site at the heart of East Manchester, adjacent to the Etihad Stadium, MCFC spent twelve months remediating the polluted site before building work could begin.

As part of the joint venture between MCFC and the Council, 2.2 hectares (5.5 acres) of this land was donated for public use and is now home to the East Manchester Leisure Centre, Connell Co-op College and the Manchester Institute of Health & Performance (MIHP).

Each of these facilities is a significant development in their own right. The establishment of all four in quick succession represented a once-in-a-generation opportunity to accelerate the economic regeneration of East Manchester and deliver a range of lasting social, economic and environmental benefits to the local community.

New Economy were commissioned in 2016 to evaluate the impact of this investment. That analysis estimated that the total public value benefits of these new facilities would be £206 million over the next decade, including £89 million from permanent jobs creation, £51 million from improved educational outcomes, £38 million from health benefits, and £28 million from increased visitor spending. There were also public value benefits during the construction phase.

4.2 City in the Community

Founded in 1986, City in the Community is MCFC's charity, supporting people across Greater Manchester by empowering healthier lives through football. Youth-led programmes place physical and mental wellbeing at their core, whilst also creating healthy future and healthy communities.

Between 2018 and 2022, City in the Community has delivered 11,273 hours of programmes (7,002 from the City Football Academy and 4,271 from the Etihad Stadium) to 78,488 participants, together with outreach activities in Greater Manchester schools across the following projects:

(i) Healthy People

City Play is a bespoke programme that provides physical activity sessions for children aged between 2 and 5 years in nurseries and schools across Greater Manchester. Each themed session delivers a variety of fundamental movement and skills in a fun, engaging and inclusive environment. These sessions reflect the 7 learning areas of the EYFS framework, helping children to meet the nationally recognised 3 hours of physical activity per day. The programme aims to

use the power of football and the MCFC brand to encourage children in Manchester to live a health and active lifestyle from a young age.

City in the Community delivers the **Premier League Primary Stars** programme in schools across Greater Manchester. Pupils and teachers take part in national curriculum PE lessons, extra-curricular activities, PSHE lessons, English and Maths workshops, targeted interventions and collapsed curriculum days. City in the Community coaches work in five schools per week and deliver a full day each week of the academic year to each school. The aim is to use the inspiration of MCFC and the Premier League to engage pupils and teachers to lead healthier, more active lifestyles. The programme also intends to improve teacher's confidence and competence when delivering PE and School Sport, and to increase children's enjoyment and engagement in this area.

City in the Community **Soccer Schools** uses the brand of MCFC to engage participants in open access football, increasing physical activity throughout the school holidays with regular sessions in communities across the city. Participants are provided with free full day structured coaching sessions as well as free food provision at all sites to tackle holiday hunger in the most deprived areas of the city. Sessions are also adapted to include educational and supportive workshops to highlight important topics such as mental health and anti-bullying.

One City Disability provides opportunity for participants to take part in free football and sporting provision relevant to their specific disability. Sessions are held in Primary and High Schools as well as in community venues outside of school hours ensuring that participants across Greater Manchester have access to disability specific provision and education. Disabled participants do not always feel comfortable or able to access universal provision, so it is important to provide disability specific sports to provide participants with a development and participation pathway, regardless of their disability or impairment.

City in the Community provides two free **Walking Football** session per week, aimed at engaging older participants in regular physical activity. By coming to the sessions, participants can meet others and build social relationships. Some individuals come to the sessions for the social interaction specifically as this is the only place that they have someone to talk to. City in the Community take this social interaction further by giving participants that chance to travel and play other Premier League teams that also have walking football sessions.

City Thrive embeds a mental health curriculum across all City in the Community programme for people aged up to 25. In partnership with the NHS, City Thrive utilises a blended approach, using football sessions, group workshops and one-to-one mentoring to educate students around mental health subjects whilst also equipping them with the tools to regulate their own mental wellbeing in a post COVID-19 landscape. The programme also embeds an NHS mental health clinician within the City in the Community team four days a week, meaning that participants can access immediate support if needed.

Reminiscity was launched to create a dementia safe environment for participants to enjoy social and physical activity, through the conduit of football and MCFC, to promote active and engaged lifestyles in the face of the challenges dementia can bring. The Reminiscity programme consists of a six-week programme of activity, taking place in and around the Etihad Stadium and Campus. Activity includes social elements, where participants can relive classic MCFC matches and group discussions on MCFC history, as well as physical activity such as stadium walks and arts and crafts.

(ii) Healthy Futures

The **City Girls** project engages female participants with free football training, leadership and mentoring opportunities. Through after-school clubs and community satellites, girls across Greater Manchester have the regular opportunity to play for free with City in the Community. Using the power of football and brand of MCFC, the City Girls project aims to provide safe spaces for girls to engage in football, improve their physical and mental wellbeing and develop their leadership skills.

Partnered with the Premier League, **City Inspires** aims to use the appeal of MCFC to work with secondary school learners who are at risk of not reaching their potential, and to support them through the education system and early adulthood. City in the Community coaches deliver a high-quality education curriculum that inspires pupils to succeed and excel academically, physically and socially. The programme provides an opportunity for pupils to learn essential life skills, with a focus of improving their engagement in education, prosocial behaviours and mental well-being. Within the City Inspires programme, City in the Community offers a wide range of PSHE sessions, which schools can choose from to tailor the programme to the needs of their students. It places a strong focus on behaviour, welfare and personal development as it is felt that these topics are vital for the cohorts that the programme is aimed at.

Delivered in colleges across Greater Manchester, City in the Community's **BTEC** programme aims to be totally inclusive, offering places to both male and female participants without trials. Coaches deliver a holistic education of football, supporting those who want to develop their skills and abilities on the pitch as well as receiving classroom-based education as well. The programme provides an opportunity for students who are passionate about football and their education, to combine the two as part of this course. The curriculum provides students with an insight into what life would be like coaching in an academy session, through the way in which City in the Community staff deliver sessions.

City in the Community's **Foundation and BSc Degree** programme brings together community football coaching knowledge with Manchester Metropolitan University's academic expertise, to offer the best of both worlds and an integrated path to rewarding career goals. With work-based learning in elite, professional sporting surroundings, this BSc course provides students with the skills, knowledge and experience needed to find success as a coach or sports programme leader.

City Careers is an eight-week employability programme, working in areas of deprivation creating health and education benefits, with an aim of getting young people into education and employment. Over the duration of the course, participants work with City in the Community officers, staff and external partners, on a series of employment workshops, with a focus on developing soft employability skills such as CV and cover letter writing, interview practice and how to approach job applications. There is also the opportunity to gain qualifications, such as ASDAN Level 1 Award in Employability Skills, First Aid Qualification, as well as Food Hygiene and Safe2Site Online CSCS qualifications.

In partnership with Hays, **92:30** is a long-term **Volunteer Programme** providing skills, experiences, qualifications, and pathways into employment both within City in the Community and across its network of partner organisations. Named after the iconic moment in May 2021, when MCFC became league champions for the first time in 44 years, it aims to inspire participants to never give up. 20 young people aged 16-25 from across various City in the Community programmes will

complete up to 93 hours of volunteering. Opportunities are designed to develop their skills and experience, to help them prepare for the world of work.

(iii) Healthy Communities

Kicks is an outreach programme which provides free evening, weekend and school holiday provision. Through mentoring and open-access football sessions, including specific Female Empowerment and disability provision, Kicks is delivered six days a week, 48 weeks a year, ensuring City in the Community has a consistent presence across Greater Manchester. The Kicks project addresses the lack of opportunity for those living in areas of social deprivation whilst providing positive activities at times and in communities where there is a gap in youth provision.

Kicks Targeted provision works alongside the Kicks regular sessions to deliver a bespoke mentoring programme for young people aged between 8-19 years, who are at risk of being affected by Serious Youth Violence, either as a victim or perpetrator. Young people are referred into the programme either by GMP or Youth Offending services, before they're given a personal development plan catered to their specific needs and circumstances. The overall aim is to transition the young people into positive activity, either with City in the Community or through an external partner.

The **Military Vets** project helps armed forces personnel stay active during and after transition to civilian life. It is a space for ex-military personnel to engage with each other, and enjoy the social aspects which team sports give, whilst maintaining regular physical exercise.

City Play Together is an initiative to help get families and their children aged between two and five taking part in physical activity together. This programme helps children and their parents to lead a healthy and active lifestyle.

4.3 Manchester Institute of Health & Performance (MIHP)

4.3.1 Overview

The MIHP is a world-class healthcare facility, combining modern diagnostic technology, sport medicine and education. MIHP was founded by Manchester City Council, Sport England and City Football Group, and is operated by Nuffield Health. The partnership brings together leaders from both elite and community sport, healthcare and local government to deliver cutting-edge facilities to the local community.

4.3.2 Community Outreach Examples

Nuffield Health launched a **Joint Pain Programme** and COVID Virtual programmes and have reached 130 beneficiaries and £1,151,000 Social Return on Investment (SROI). The Joint Pain Programme, trialled at the MIHP, has proven clinically effective and a switch to a non-cohort model allows more participants during the year. Nuffield Health intend to roll this programme out nationally later this year. 10 students from Connell Co-op College have shadowed the Joint Pain Programme and 202 students have been to an expert talk / applied learning session.

The clinical effectiveness analysis of the self-managed **COVID Rehab Programme** will be completed later this year, with positive initial beneficiary feedback.

Partnering with DWP and GMP, Nuffield Health have delivered over 100 health checks to police officers and staff.

Ten local people have been on courses in Nuffield Health's **Community Academy**.

Talk & Share, a mental health community café and the first Community Grant Project, has been launched. The café aims to reduce isolation, poverty and improve mental health by providing a welcoming space and free food. The café has been funded for another 20 weeks and is proving to be a great way for Nuffield Health to get to know more local people and become a trusted face.

Nuffield Health provided the warm-up for the MCFC Blue Run at the end of March 2023. The fitness team delivered a 10-15 minute warm-up to over a thousand runners on the day together with free blood pressure checks.

4.3.3 *Research and Applied Activities*

The **Major Trauma Enhanced Rehab** project is a partnership between Nuffield Health, Manchester University Foundation Trust and Northern Care Alliance NHS Trust. The foundations of the project are built around the legacy work undertaken at MIHP following the Manchester Arena Bombing in 2017.

Patients affected by Major Trauma have suffered life-altering injuries that severely impact their function, mental health and well-being. Funding has been secured for 50 patients to receive six months of intensive rehabilitation at MIHP, visiting twice per week for up to two hours at a time. Treatment is delivered by an interdisciplinary team of Surgeons & Consultants, Physiotherapists and Occupational Therapists, with Nuffield Health supporting with the provision of specialist equipment, facilities and expertise.

The 37th patient has recently been accepted into the programme. Mid-way outcomes are available for over half of the patients and the first three patients who have completed their full six months have been discharged and have transitioned into their complimentary membership to continue with their recovery with the support of teams in Nuffield Health's fitness and wellbeing centres.

This project is supported by the PROPERLY Study, which aims to assess the feasibility of this method of service provision with plans to influence the pathways for Major Trauma rehabilitation across Greater Manchester and beyond. The trial has received ethics sign off and is supported by Manchester University.

4.4 **Impact of the Etihad Campus on Young Athletes**

The world-leading co-location of facilities at the Etihad Campus, together with the educational and physical activity pathways offered by the key stakeholders, has made a huge impact on young Manchester athletes, including:

- **Jona Efoloko** is a member of Sale Harriers and a former Loreto High School student. His junior achievements include World U20 Champion and European U18 Champion in 200m. In 2022 he won gold medals for 100m relay at the European Championships in Munich and the Commonwealth Games in Birmingham before achieving a bronze in the same event at the World Championships in Eugene Oregon. Previously a keen footballer, Jona's talent was

spotted at school, and he was then invited to train with Sale Harriers at the Regional Arena at the Etihad Campus.

- **Abigail Irozuru** is a member of Sale Harriers who specialises in Long Jump. Manchester born and raised, she began participating in athletics as a 14-year-old, leading to an invitation to start training at the Regional Arena on the Etihad Campus. Her most recent achievements include competing at the Tokyo Olympics in 2021, where she placed 9th.
- **Aimee Pratt** was 13 when she was introduced to athletics through the Diane Modahl Sports Foundation at her school, Wright Robinson College. She then joined Sale Harriers, training regularly at the Regional Arena, Etihad Campus under coach Vicente Modahl. The 3000m steeplechaser competed in her first Olympics in 2021 and reached the finals of the Commonwealth Games (4th) and World Championships (7th) in 2022.

5 Summary

5.1 Overview

The redevelopment of the Etihad Stadium will include:

- an improved North Stand with an additional 7,910 seats (including 750 in the new Sky Bar);
- a new 401-bed hotel integrated into the North Stand;
- a new corporate hire and entertainment venue with a capacity of up to 1,250 (City Hall);
- an improved 'City Square' for pre and post-match entertainment and other non-matchday events with 2,300 square metres of new food and beverage outlets (open to the public);
- a new 4,180 square metre commercial workspace with spaces let to start-ups, scale-ups and SMEs;
- a new museum and club shop replacing existing facilities;
- a new interactive (high-wire) visitor attraction; and
- improvements to public realm.

Manchester is ranked as the 8th most income-deprived local authority in England with 22% of its population considered to be 'income-deprived'. The project will create a significant number of new jobs in Manchester and Greater Manchester and many of these jobs will be taken up by local residents, helping to generate increased economic activity, retain skilled people within the area and bring more people into employment. The project is perfectly aligned with a number of local, regional and national policy areas which aim to improve neighbourhoods, create employment, attract visitors, increase productivity and develop skills.

Crucially, the North Stand development including the new hotel, new events venue, new food and beverage outlets and new visitor attractions will enable MCFC, its partners and tenants to offer more high quality, year-round non-matchday employment which is more likely to be full-time and permanent as opposed to the seasonal/matchday/temporary employment that is currently prevalent. As part of this, MCFC is developing, in partnership with a local education provider, plans to create a '**Service Sector Skills Academy**' which will promote careers in the hospitality sector and will deliver training, qualifications and professional development within a centre of excellence for hospitality and leisure.

5.2 Construction impacts

The construction project will inject £191.1m of GVA into the Greater Manchester economy over the course of three years (£84.6m into Manchester) and could provide 2,678 gross jobs. This is the equivalent of 890 people being employed full time for three years.

MCFC will encourage its construction partners to use a significant amount of local labour, engage with well-established local supply chains and create meaningful apprenticeships and training opportunities for local people.

The construction activity from the implementation of the project also provides a real opportunity to increase skills in the area and could provide between 7,000 and 7,500 person weeks of training. In terms of apprenticeships, the construction project could result in up to 100 apprenticeship opportunities over the course of the construction phase.

5.3 Operational impacts

Upon completion of the project, activity at new world class entertainment district will support a total of 12,300 jobs in the Greater Manchester economy (7,141 full time equivalents). This represents an increase of 2,925 jobs (1,795 full time equivalents) in Greater Manchester with 1,112 jobs taken by residents of Manchester (682 full time equivalents).

The number of visitors to the destination will increase from a baseline of 2.66m (including Co-Op Live) to 2.93m and the additional visitors will spend an extra £35.8m within Greater Manchester's visitor economy each year.

Overall, it is estimated that the project will inject an additional £71.7m of GVA into the Greater Manchester economy each year.

The impact of the North Stand Development goes beyond simple job creation. In particular, the creation of the new 4,180sqm workspace will encourage business growth and new business formation which, in turn, will underpin local growth in East Manchester. The workspace will house a cluster of growing SMEs who work with MCFC, as well as businesses who want to be close to the new Co-Op Live Arena and to MCFC. MCFC's global platform and its influence on football and sports innovation will attract businesses, start-ups and SMEs to the new workspace. As this matures, it is expected that the demand for grow-on space elsewhere in East Manchester and Manchester more generally will increase.

In the visitor economy, the development of a 401-bed hotel is crucial, not only to meet the demand generated on matchdays and from the future Co-Op Live Arena but to underpin the area as a year-round destination which, in turn, will attract new private investment and further job creation. The North Stand Development with hotel, visitor attractions and entertainment spaces is another milestone in the creation of MCFC's longer term ambition (which is shared by the local authority) to create a world-class entertainment district in East Manchester.

5.4 Wider social impacts

MCFC and City Football Group have created significant landmark facilities and delivered extensive community, sport and health programmes outside of the Etihad Stadium. The City Football Academy has been built on a polluted, former industrial site adjacent to the Stadium. As part of the joint venture between MCFC and the Council, 2.2 hectares (5.5 acres) of this land was donated for public use and is now home to the East Manchester Leisure Centre, Connell Co-op College and the MIHP.

City in the Community is MCFC's charity, which supports people across Greater Manchester by empowering healthier lives through football. Between 2018 and 2022, it has delivered 11,273 hours of programmes (7,002 from the City Football Academy and 4,271 from the Etihad Stadium)

to 78,488 participants, together with outreach activities in Greater Manchester schools across its Healthy People, Healthy Futures, and Healthy Communities programmes.

The MIHP is a world-class healthcare facility, combining modern diagnostic technology, sport medicine and education. It was founded by Manchester City Council, Sport England and City Football Group, and is operated by Nuffield Health. The partnership brings together leaders from both elite and community sport, healthcare and local government to deliver cutting-edge facilities to the local community. It has delivered a wide range of community outreach activities, including the Joint Pain Programme and Talk & Share, a mental health community café. In addition, it undertakes research and applied activities, such as the Major Trauma Enhanced Rehab project.

The world-leading co-location of facilities at the Etihad Campus, together with the educational and physical activity pathways offered by the key stakeholders, has made a huge impact on young Manchester athletes including, Jona Efoloko, Abigail Irozuru, and Aimee Pratt.

5.5 Summary

Table 5.1: Summary of benefits			
	Baseline	Future	Additional
Construction phase (temporary)			
Gross construction jobs (temporary)	0	2,678	2,678
Full time construction jobs for three years	0	890	890
Net additional GVA in GM (temporary/one-off)	£0	£191.2m	£191.2m
<i>Of which in Manchester</i>	<i>£0</i>	<i>£84.6m</i>	<i>£84.6m</i>
Apprenticeships	0	78	78
Training (person weeks)	0	7,250	7,250
Operational phase			
Total jobs supported in Greater Manchester	9,375	12,300	2,925
<i>Full time equivalent</i>	<i>5,346</i>	<i>7,141</i>	<i>1,795</i>
Total jobs taken by residents of Manchester	3,564	4,676	1,112
<i>Full time equivalent</i>	<i>2,031</i>	<i>2,713</i>	<i>682</i>
GVA per annum in Greater Manchester	£213.7m	£285.4m	£71.7m
Matchday attendance	1,413,000	1,625,000	212,000
Non matchday attendance	250,000	308,000	58,000
Co-Op Live Arena attendance	1,000,000	1,000,000	0
Visitor expenditure with other businesses in GM	£145.6m	£181.4m	£35.8m