

November 2020



# EXPANSION OF ANFIELD ROAD STAND, ANFIELD

## J1/1 - Socio-Economic Statement



**Turley**

# **Socio-Economic Statement**

## Anfield Road Stand Expansion, Liverpool

November 2020

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## Pre-ambble

This Socio-Economic Statement is one of a suite of core documents prepared in support of the application submitted on behalf of Liverpool Football Club and Athletic Grounds Limited (“Liverpool FC” or “the Club”) for full planning permission to expand the Anfield Road Stand to accommodate an additional c.7,000 spectators with associated hospitality and spectator facilities, new public realm, and the realignment of Anfield Road.

This development forms part of the phased regeneration of the Anfield stadium and follows successful delivery of the Main Stand redevelopment and associated public realm (96 Avenue and Paisley Square) and a new free-standing LFC club store and cafe.

It also reflects the wider regeneration of the Anfield area (The Anfield Project) that includes new and improved homes and regeneration of the Walton Breck Road high street, fuelled by the Club’s significant investment in redevelopment of Anfield Stadium.

The following documents comprise the application:

- A1/1 Summary Guide to the Planning Application
- B1/3 Planning Statement
- B2/3 Appendices to Planning Statement
- B3/3 Draft S106 Agreement
- C1/2 Application Drawings
- C2/2 Design and Access Statement
- D1/3 Environmental Statement, Volume 1: ES Chapters and Figures
- D2/3 Environmental Statement, Volume 2: Technical Appendices
- D3/3 Environmental Statement, Volume 3: Non-Technical Summary
- E1/3 Transport Assessment
- E2/3 Transport Strategy
- E3/3 Staff Travel Plan
- F1/1 Air Quality Assessment
- G1/1 Phase I Geo-Environmental Desk Study
- H1/1 Flood Risk Assessment
- I1/1 Heritage Assessment
- J1/1 Socio-Economic Statement

K1/1 Health and Wellbeing Statement

L1/1 Lighting Impact Assessment

M1/1 Statement of Community Engagement

N1/1 Sustainability Statement

This statement has been prepared by Turley (Planning and Development Consultants) with additional work, research and information provided, with thanks, by:

- Mott MacDonald (Consultant Engineers, Environmental Consultants and Transport Planners)
- Planit ie (Urban Design, Landscape and Master planners)
- KSS Design Group (Architects)
- Liverpool Football Club
- Liverpool City Council



# Economic Impact of an Expanded Anfield Stadium

## Supporting a rebooted visitor economy

*"...a reason why many people visit the city"<sup>1</sup>*



**Up to 1.95 million**

spectators drawn to matches at an expanded Anfield each year, increasing current capacity by **14%**



**Up to 102,000**

additional visitors each year from outside Liverpool and the surrounding area, based on recent trends



**Up to £20.5 million**

spent each year where these additional trips involve an overnight stay



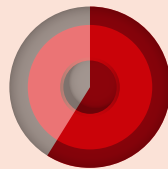
**A continued contribution from concerts and major events,**  
secured through this planning application<sup>2</sup>

## Growing the Club's role as a major employer



**2,800 people**

directly employed on matchdays at an expanded Anfield, following creation of **400 new jobs**



**59%**

of matchday workforce typically live in the city of Liverpool, with vast majority (95%) living in the City Region



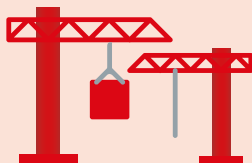
**At least 62 new jobs**

for people living in Anfield and Everton<sup>3</sup>, where **2,800 people** are currently seeking work



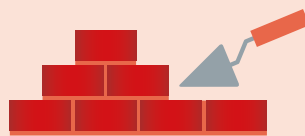
**More frequent opportunities for employment**  
during concerts and major events<sup>2</sup>

## Generating a welcome economic boost during construction



**£42 million**

investment in construction of the new Anfield Road Stand



**Up to 217 jobs**

supported throughout the Liverpool City Region during each year of construction



**£22.1 million**

gross value added to the economy during construction

<sup>1</sup> Liverpool Visitor Economy Network (2016) Growth Strategy Summary 2020

<sup>2</sup> Turley (2019) Economic Contribution: Music Events at Anfield

<sup>3</sup> Based on trends in the workforce directly employed on average across nine matches early in the 2019/20 season

# 1. Introduction

1.1 This report has been produced by Turley Economics on behalf of Liverpool FC to demonstrate how the proposed expansion of its Anfield stadium to accommodate around 7,000 additional spectators would enhance the benefits that it already generates for the local and wider economy, in normal circumstances<sup>1</sup>.

1.2 The report is structured as follows:

- **Section 2 – Economic Value of Football** – available evidence on the wider economic contribution of football, both nationally and regionally, is introduced for context;
- **Section 3 – Existing Economic Impact of Anfield** – a summary of the stadium’s role in providing employment opportunities on normal matchdays and drawing visitors to Liverpool and the wider City Region;
- **Section 4 – Strategic Objectives and Policy** – the extent to which an expanded Anfield could directly or indirectly support the economic ambitions of Liverpool City Council (LCC) and other stakeholders is considered;
- **Section 5 – Benefits of an Expanded Anfield Road Stand** – the potential economic impact of an expanded Anfield Road Stand is estimated; and
- **Section 6 – Summary** – a concise overview of the findings of this report.

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<sup>1</sup> These economic benefits have been moderated since March 2020 while matches have been played behind closed doors, but can be expected to return as Covid restrictions are gradually eased

## 2. Economic Value of Football

- 2.1 This section summarises the economic value of football, with a particular focus on the Premier League, at a national and regional level, to provide context for the remaining sections of the report.

### **National context**

- 2.2 Football matches generate significant levels of economic activity and make a substantial contribution to the national economy.
- 2.3 Some 32.9 million people attended football matches in the top four divisions in the 2018/19 season, the latest to have been completed without restrictions, representing the highest collective attendance for almost sixty years<sup>2</sup>. The Premier League was responsible for circa 14.6 million of these spectators<sup>3</sup>.
- 2.4 Recent research by EY established that the activities of the Premier League and its twenty clubs, as of the 2016/17 season<sup>4</sup>:
- Contributed a total of £3.3 billion in taxes to the treasury annually;
  - Directly supported 12,000 full-time equivalent (FTE) jobs;
  - Supported a total of 100,000 FTE jobs both directly and in supply chains;
  - Generated £7.6 billion gross value added (GVA) within the national economy annually;
  - Supported 150 football clubs outside the Premier League (both professional and amateur) with £96.6 million to fund training facilities and programmes and to deliver wider community programmes, engaging over 500,000 young people across the country;
  - Attracted 686,000 visitors to the UK for the specific purpose of visiting a Premier League club, with a significant proportion travelling to areas outside of London; and
  - Recorded 96% stadium capacity for matches, the highest rate of any major European league.
- 2.5 Additionally, the report highlighted that the Premier League's 2016/17 GVA contribution of £7.6 billion equates to growth of almost 1,000% since the 1998/99 season, when its GVA was estimated as £0.7 billion.

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<sup>2</sup> Deloitte (2019) World in motion: Annual Review of Football Finance 2019

<sup>3</sup> Ibid.

<sup>4</sup> EY (2019) The Premier League: Economic and Social Impact Assessment 2016/17



## Contribution to the North West economy

- 2.6 The EY report additionally broke down the contribution of Premier League clubs to the North West economy. It identified an annual GVA contribution of £2.0 billion, supporting a total of 20,000 FTE jobs directly and in supply chains<sup>5</sup>.
- 2.7 Beyond this quantifiable contribution, the region's football clubs are also recognised as significant components of its "brand". For example, Tim Newns, CEO of MIDAS, Manchester's inward investment agency, states that the city's football teams represent *'one of, if not our most significant brand ambassadors and therefore a vital element of city promotion'*<sup>6</sup>, creating positive perceptions of the area as a place to live, study, visit and invest. That statement is equally applicable to Liverpool, as is evident from the economic strategy documents profiled in section 4.
- 2.8 Research published in 2015 by VisitBritain<sup>7</sup> highlighted that a *'remarkable'* 11% of international visits to the North West feature time at a football match (in comparison to just 1% of visits to the South East), with VisitBritain concluding that this *'reveals just how effective a tool football is for encouraging visitors from overseas to explore different parts of Britain'*<sup>8</sup>. The research additionally highlighted that Anfield recorded the third-highest attendance figures (99,000) amongst the UK's stadiums for overseas visitors (behind Old Trafford and the Emirates Stadium, which both recorded 109,000 fans from overseas), although it should be noted that at the time of that study those stadia had significantly greater capacity than Anfield which has since grown through the redevelopment of its Main Stand.

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<sup>5</sup> Premier League (2019) 'League's impact reaching the far corners of UK'. Available at: <https://www.premierleague.com/news/981553>

<sup>6</sup> Ibid.

<sup>7</sup> VisitBritain (2015) Foresight – issue 141: Football tourism score for Britain – Inbound visitors that watch live football

<sup>8</sup> Ibid.

### 3. Existing Economic Impact of Anfield

- 3.1 This section provides an overview of the economic benefits normally generated by Anfield, specifically capturing its role in attracting visitors and its provision of employment opportunities through matchdays and other events.

#### **Spectators drawn to matchdays**

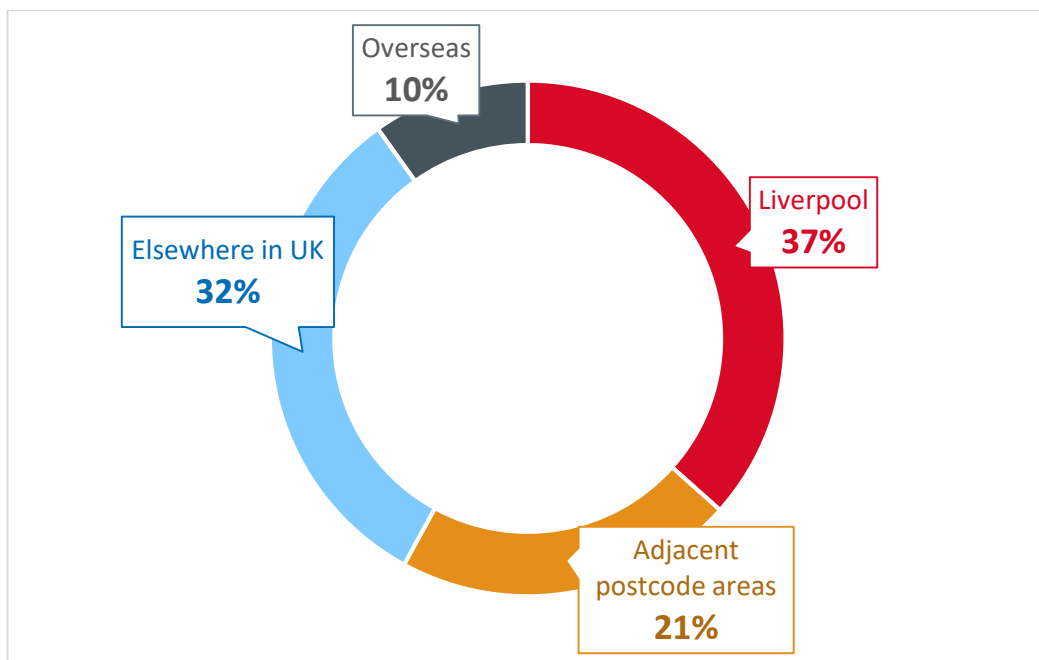
- 3.2 Anfield currently has capacity to accommodate up to 53,394 spectators on a normal matchday. Over a typical football season, in hosting up to 32 first team matches, it can therefore attract up to 1,708,608 spectators each year, albeit it should be recognised that this headline measure of *visits* does not account for a single individual attending multiple matches during a football season.
- 3.3 It is important to acknowledge that spectators are currently unable to attend matches at the stadium, due to restrictions introduced during the COVID-19 pandemic that is ongoing at the time of writing. It is anticipated, however, that attendance will recover to utilise available capacity as restrictions are eased, eventually returning to the levels described above.
- 3.4 In normal circumstances, matches are typically attended both by residents of the city and people travelling to the stadium from further afield. Data supplied by the Club to inform this report broadly indicates that Liverpool residents – in the “L” postcode area<sup>9</sup> – accounted for around 37% of those attending league matches in the last full season to have been completed without restrictions (2018/19). Around one in five (21%) spectators were drawn from the adjacent postcode areas of Chester, Warrington, Preston and Wigan<sup>10</sup>. Around one third of ticket sales originate from within the UK but outside of these proximate areas, with a further 10% coming from overseas.

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<sup>9</sup> This covers the administrative area of Liverpool and extends into the neighbouring boroughs of Knowsley, Sefton and West Lancashire

<sup>10</sup> CH, WA, PR and WN

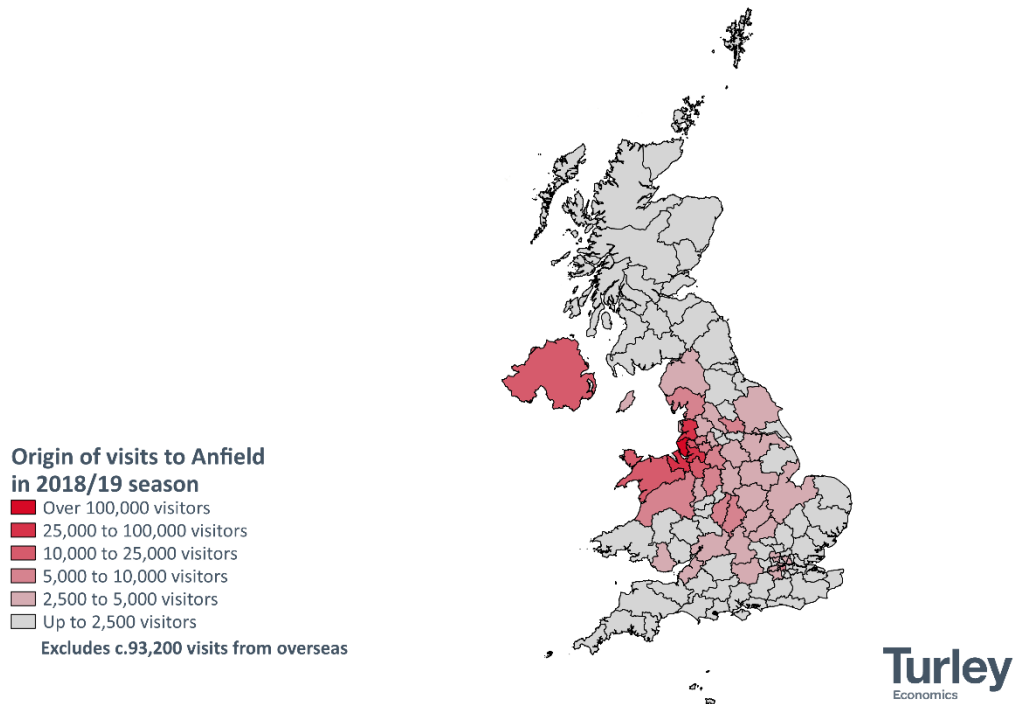
**Figure 3.1: Origin of Ticket Sales (2018/19)**



*Source: Liverpool FC*

- 3.5 When broken down further, it is evident that the stadium attracted at least one individual from every postcode area in the UK during the 2018/19 season. Figure 3.2 illustrates the extent to which the stadium draws a substantial number of spectators from a wide geographic area, with 19 different postcode areas – from Belfast to south west London – each responsible for over 5,000 trips during the season.

**Figure 3.2: Origin of UK Ticket Sales (2018/19)**



*Source: Liverpool FC*

- 3.6 The geographic spread of ticket sales suggests that spectators will often be required to stay overnight in Liverpool or nearby, prior to or following matches. This undoubtedly benefits the visitor economy, which overall saw an estimated 2.7 million overnight visitors attracted to Liverpool – and 5.5 million to the wider City Region – in 2018<sup>11</sup>. The visitor economy directly or indirectly supported some 57,100 jobs throughout the City Region at that point, including around 37,900 jobs in Liverpool alone<sup>12</sup>.
- 3.7 A recent survey suggested that overnight visitors to the City Region spent around £201 per head on average during their trip, primarily on eating, drinking, shopping and accommodation<sup>13</sup>. Where individuals drawn to matchdays stay overnight and align with this trend, it is therefore reasonable to expect an associated boost in visitor spending, directly benefiting local businesses including hotels, restaurants, bars and retailers.
- 3.8 Visitors to Anfield also more broadly help to sustain and grow the visitor economy, with some 94% of those attending a match from outside the local region recommending the city of Liverpool to others. One quarter of these fans said that they themselves were likely to return to visit the city<sup>14</sup>.

<sup>11</sup> Liverpool City Region Local Enterprise Partnership (2019) Tourism Data Summary

<sup>12</sup> *Ibid*

<sup>13</sup> Liverpool City Region Local Enterprise Partnership (2016) Liverpool City Region Visitor Survey 2015, p27. Eating, drinking, accommodation and shopping collectively accounted for circa 81% of overnight visitor spending

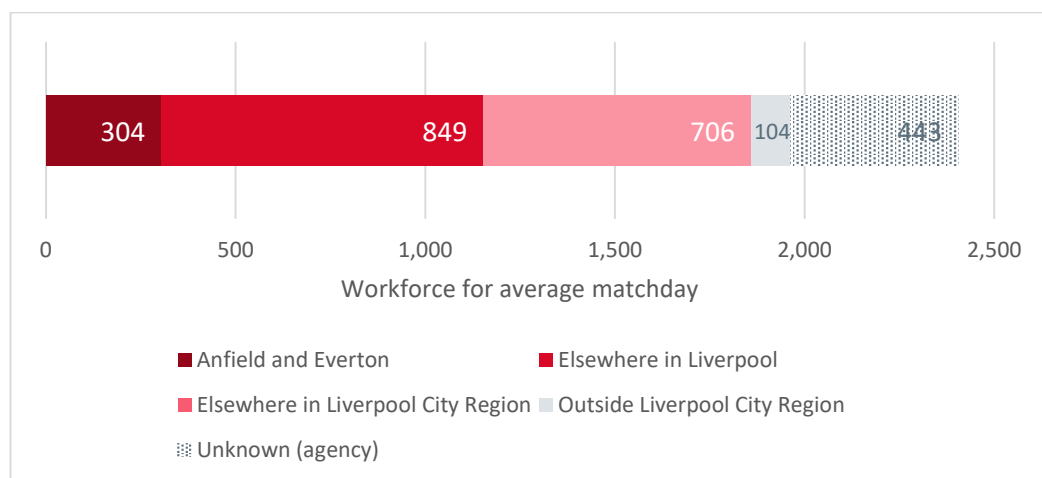
<sup>14</sup> Deloitte (2019) The Economic Impact of LFC: key data from the Deloitte Report, season 2017/18

- 3.9 The Club’s impact on the visitor economy is not limited to matchdays. Stadium tours run throughout the week, and the museum is also open daily. Anfield is therefore an attraction in its own right, and indeed the stadium currently ranks as travellers’ favourite attraction in Liverpool according to Tripadvisor<sup>15</sup>.

### Valued employment opportunities

- 3.10 Liverpool FC is one of the largest employers in its area of north Liverpool. Data supplied by the Club indicates that some 1,963 people are directly employed on a normal matchday, with a further 443 people employed through agencies<sup>16</sup>. A typical matchday therefore provides employment for around 2,405 people in total, with up to 32 such matchdays per year.
- 3.11 While more limited data is available for agency staff, it is evident even from data on the directly employed workforce that at least 300 positions are typically taken by people living in the Anfield and Everton wards, which surround the stadium. More broadly, over half (59%) of the directly employed matchday workforce resides within the area administered by LCC, with a further 36% residing elsewhere in the Liverpool City Region. This suggests that much of this economic benefit is captured within the City Region.

**Figure 3.3: Place of Residence for Matchday Workforce (2019/20)**



Source: Liverpool FC

- 3.12 The offer of employment to local residents, and its uptake, is of considerable benefit when recognised that Liverpool continues to rank amongst the most deprived local authorities in England<sup>17</sup>. Most of the neighbourhoods in the adjacent Anfield and Everton wards similarly fall within the 10% most deprived in England.

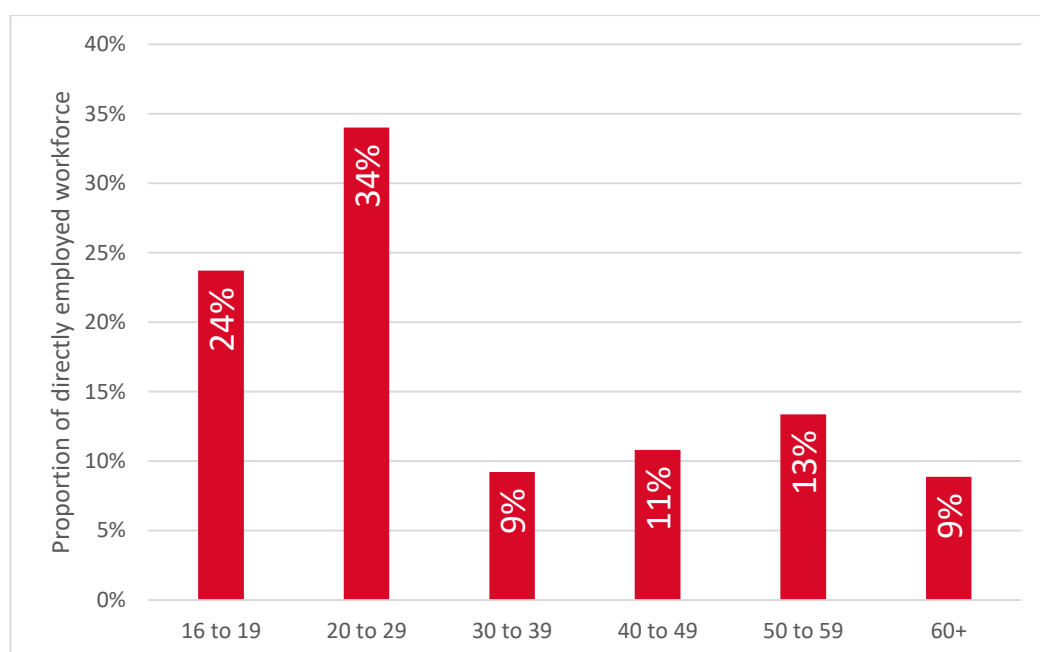
<sup>15</sup> As of November 2020; “traveller favourites” takes account of Tripadvisor reviews, ratings, photos and popularity

<sup>16</sup> Based on workforce data supplied by Liverpool FC for the first nine matchdays of the 2019/20 season (August – November 2019)

<sup>17</sup> MHCLG (2019) English Indices of Deprivation. Only Middlesbrough saw a higher proportion of its communities rank within the most deprived 10% nationally, for example

- 3.13 Unemployment is both a cause and consequence of this relative deprivation, and has only worsened as a result of the pandemic. As of September 2020, around 2,835 people living in Anfield and Everton were claiming benefits for the principal reason of being employed<sup>18</sup>. This is not simply a feature of the pandemic, as circa 1,685 people were claiming even prior to the lockdown in March.
- 3.14 Around one third of those currently claiming unemployment benefits were under 30 years old, both in March and September, and it is relevant in this context to note that younger people particularly benefit from the employment opportunities normally offered on matchdays. Some 58% of the workforce directly employed by the Club is under 30, and around one in four (24%) are under 20 years old.

**Figure 3.4: Age of Workforce Directly Employed by the Club for Matchdays (2019/20)**



*Source: Liverpool FC*

- 3.15 While the above focuses on jobs provided by the Club, its presence indirectly supports and induces further employment opportunities throughout Liverpool and the wider City Region, through its supply chain and relationships with other businesses. It has been estimated that the Club supports a total of 4,564 full time equivalent (FTE) jobs throughout the city in this way, including but nearly doubling the current extent of its own matchday employment as reported above. This increases further to circa 5,706 FTE jobs throughout the City Region<sup>19</sup>.

<sup>18</sup> ONS (2019) Claimant count by sex and age. Data includes people claiming Jobseeker's Allowance plus those claiming Universal Credit that are required to seek and be available for work

<sup>19</sup> Deloitte (2019) The Economic Impact of LFC: key data from the Deloitte Report, season 2017/18

## **Complementary economic impact of concerts**

- 3.16 While this section has focused on the economic impact of matchdays, the granting of temporary permission to host concerts and major events at Anfield has demonstrably enhanced its economic contribution. This has been considered in detail within a separate report produced by Turley and submitted in support of a recent application to extend the current permission<sup>20</sup>, and is not reproduced in full here.
- 3.17 To summarise, however, the hosting of three live music events in 2019:
- Allowed the Liverpool City Region to attract events of a scale that could not have otherwise been accommodated, therefore capturing benefits that would have been lost from its economy;
  - Attracted a combined audience of 124,000 people, providing the means through which overall attendance at live music events in the Liverpool City Region could have been boosted by 13%;
  - Drew their audience from both the city and elsewhere in the UK, with around one in four tickets sold to people living outside Liverpool and its surrounding area. This is likely to have necessitated overnight stays in some cases, providing a boost to the visitor economy;
  - Generated total expenditure worth an estimated £6.9 million across three events, inclusive of an estimated £890,000 on travel and £2.1 million on food and drink. This could have been increased where events attracted a particularly large number of music tourists, who typically spend more during their visit; and
  - Provided additional employment opportunities at the stadium, where fewer events would have otherwise taken place. This has particularly benefited young people, as over half of the 1,550 people employed directly by the Club for each concert were under 30 and almost a quarter were under 20 years old. The Club drew 84% of its workforce for the concerts from the city of Liverpool<sup>21</sup>, and around 260 jobs were filled by people living in the vicinity of Anfield. This will have been boosted by around 300 agency staff, which cannot be broken down in a comparable manner and also unavoidably excludes transport management operations, cleaning and security services. At least 1,850 people were therefore employed as a direct result of each concert held at Anfield in 2019.

## **Summary**

- 3.18 This section has provided an overview of the economic benefits currently generated by Anfield, in normal circumstances.
- 3.19 The stadium is currently able to accommodate up to 1.7 million spectators to matchdays each year, with one third typically drawn from beyond Liverpool and its

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<sup>20</sup> Turley (2019) Economic Contribution: Music Events at Anfield; planning application reference 20F/0082

<sup>21</sup> This relates to the “L” postcode area, which differs from the administrative area of LCC and extends into the neighbouring boroughs of Knowsley, Sefton and West Lancashire

surrounding area, but within the UK, and a further 10% originating from overseas. The extent of its geographic draw suggests that spectators will often be required to stay overnight, benefiting a sizeable visitor economy and generating spending in hotels, restaurants, bars and shops.

- 3.20 A typical matchday with spectators provides employment for around 2,400 people, at least 300 of whom live in the Anfield and Everton wards that surround the stadium. This area remains relatively deprived, with comparatively high rates of unemployment that have only worsened during the pandemic, and the offer of regular employment to younger people in particular – with 58% of the directly employed existing workforce under 30 years old – is of considerable benefit within this context. The scale of this benefit is amplified when accounting for the jobs indirectly supported or induced by Liverpool FC, with circa 4,560 FTE jobs estimated to be supported in this way throughout the city rising to 5,700 jobs across the City Region.
- 3.21 Beyond matchdays, the granting of temporary permission to host concerts and major events at Anfield has demonstrably enhanced its economic contribution, as outlined in a separate report recently produced by Turley in support of a separate application to extend this permission<sup>22</sup>. The three concerts held in 2019 attracted additional visitors to the city, generated spending in the local economy and provided further employment opportunities at a stadium where fewer events would have otherwise taken place.

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<sup>22</sup> Turley (2019) Economic Contribution: Music Events at Anfield; planning application reference 20F/0082



## 4. Strategic Objectives and Policy

- 4.1 This section introduces strategic objectives and policy aimed at supporting the sporting and visitor offer – particularly in relation to football – within Liverpool and the wider City Region. This is initially contextualised with reference to relevant strategies produced nationally and across the North.
- 4.2 With this planning application also seeking permanent consent to host concerts and other major events, it is equally important to acknowledge that numerous strategies are in place to capitalise upon the international reputation of Liverpool as a music city by growing the economic contribution of such live music events<sup>23</sup>. A summary of these strategies is not reproduced here but can be found in a separate report produced by Turley<sup>24</sup>.

### National Industrial Strategy

- 4.3 In November 2017, the Government published its Industrial Strategy<sup>25</sup>, aiming to provide a framework which will boost productivity and increase earning power throughout the UK.
- 4.4 It recognises the role that sport can play in contributing to the fulfilment of its objectives, stating that *‘investment in culture, sport and heritage can contribute to positive economic and social outcomes’*.
- 4.5 The Strategy highlights that such investment should be embedded in the aims and objectives of Local Industrial Strategies and, in turn, align with city regional, regional, and national economic strategy.
- 4.6 The Industrial Strategy also states that visitor economy sectors such as the hospitality and tourism industries – which are closely related to the running of high-attendance sporting events, such as Premier League matches – are those with potential to undergo significant economic development and contribute to boosting overall productivity. It highlights that:

*“Some of the biggest opportunities for raising productivity come in sectors of the economy that have lower average productivity levels, but where many people work and which are vital to our economy”*

### Northern Powerhouse

- 4.7 The Government published its Northern Powerhouse Strategy<sup>26</sup> in November 2016, aiming to tackle the region’s main barriers to productivity and *‘unleash its economic potential’*. The Strategy asserts that the North’s existing strength in the sport sector

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<sup>23</sup> Liverpool City Region Combined Authority (2018) Culture and Creativity 30-Year Strategy; BOP Consulting (2018) Culture Liverpool: Developing a Liverpool City of Music Strategy

<sup>24</sup> Turley (2019) Economic Contribution: Music Events at Anfield, section 3; planning application reference 20F/0082

<sup>25</sup> HM Government (2017) Industrial Strategy: Building a Britain fit for the future

<sup>26</sup> HM Government (2016) Northern Powerhouse Strategy

should be supported, and highlights that the region's 'world renowned' sports teams make a positive contribution to its offer as a place to live and work.

- 4.8 Similarly, an Independent Economic Review of the Northern Powerhouse states that the varied sporting and cultural offer of the region contributes to residents' quality of life, which in turn is identified as a critical supporting asset that underpins its economic capabilities<sup>27</sup>. This offer supports the visitor economy, which is identified as a key strength of the Liverpool City Region in particular, the report stating that:

*"The Visitor Economy (both business and leisure travellers)...has played an important role in supporting private sector job creation (accounting for almost 50,000 jobs in total) and attracting substantial investment into the [Liverpool City Region]. Liverpool is the sixth most visited city in the UK by people from overseas, representing a destination of national importance, and Liverpool John Lennon Airport is one of the fastest growing airports in the UK"*<sup>28</sup>

## **Liverpool City Region**

### **Local Industrial Strategy**

- 4.9 The Government has introduced a requirement for Local Industrial Strategies through its national Industrial Strategy, as a means of identifying 'local strengths and challenges, future opportunities and the action needed to boost productivity, earning power and competitiveness'<sup>29</sup>.
- 4.10 A Local Industrial Strategy (LIS) for the Liverpool City Region, prepared by the Combined Authority (LCRCA) and the Metro Mayor, was agreed in draft in March 2020<sup>30</sup>. This unfortunately coincided with the onset of the coronavirus pandemic, which is seen by the LCRCA to have 'altered the landscape' such that 'the next stage will...reframe the strategy to ensure that the fundamental changes within economy and society are fully reflected'<sup>31</sup>. The opportunities identified in the draft LIS are, however, felt to 'hold true' and are summarised below before considering plans – subsequently developed – for economic recovery.
- 4.11 The draft LIS describes a 'recent economic renaissance' that is 'laying the foundations for truly transformational economic success in the years and decades to come', and observes that the City Region is 'once again emerging as an international centre for culture'.
- 4.12 This leads the draft LIS to highlight a 'transformational' opportunity associated with 'global cultural capital' – one of only four identified – whereby culture creates prosperity for all'. It cites Liverpool's experience as European Capital of Culture as evidence that 'an investment in cultural infrastructure and place can pay economic as

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<sup>27</sup> SQW and Cambridge Economics (2016) The Northern Powerhouse Independent Economic Review

<sup>28</sup> SQW and Cambridge Economics (2016) The Northern Powerhouse Independent Economic Review Workstream 2: City Region & Local Area Profiles

<sup>29</sup> HM Government (2017) Industrial Strategy: Building a Britain fit for the future

<sup>30</sup> Liverpool City Region Combined Authority and Liverpool City Region Metro Mayor (2020) Local Industrial Strategy Draft

<sup>31</sup> <https://www.liverpoolcityregion-ca.gov.uk/growing-our-economy/lis/>

*well as social dividends and create new opportunities for people and places'. It is unequivocal that 'harnessing cultural capital will develop quality of place across LCR, increase investment and create new economic opportunities'.*

- 4.13 The draft LIS recognises in this context that *'the City Region is able to build on a wealth of distinctive assets and strengths',* including *'world-renowned sporting venues'.*
- 4.14 It sees culture as *'foundational'* to the *'long-term success and resilience'* of the City Region, and considers investment in culture to be *'an investment in a dynamic, responsive, outward looking and growing industry that is synonymously a public good'.* Culture is seen to expose and connect the City Region to *'an international marketplace',* introducing people and businesses to global opportunities as a result.
- 4.15 The draft LIS also views *'a thriving visitor economy'* as *'central to providing foundational strength to the City Region and in building an attractive place offering'.* It intends to support the upcoming Visitor Economy Strategy, yet to be published at the time of writing, with a view to attracting *'increasing numbers of visitors from across the globe'.*

#### **Economic Recovery Plan: Build Back Better**

- 4.16 While the draft LIS is to be reviewed to account for the pandemic, the LCRC and Metro Mayor have – in the interim – produced an Economic Recovery Plan called *'Building Back Better'*<sup>32</sup>, which was published in July 2020.
- 4.17 This expresses a *'firm belief'* that *'the long-term opportunities set out in our Local Industrial Strategy still exist',* and that the *'vision for a globally competitive, environmentally responsible, socially inclusive economy remains still valid'.* It emphasises that the pandemic has not dimmed the vision, but only changed how it must be achieved.
- 4.18 The Plan acknowledges that:
- "The Liverpool City Region has enjoyed a sustained period of growth and development. We have emerged from a period of hard-earned regeneration with transformative economic opportunities, an internationally recognised brand and renewed ambition. We have much to protect and more to contribute"*
- 4.19 It explicitly cites the City Region's success over the past ten years in reducing its unemployment rate from well above to slightly below that recorded nationally, and its development of *'an internationally-popular culture and visitor economy'.* This is recognised as one of several strengths that were planned to be expanded before the pandemic, with a view to transforming the economy. The ambition clearly remains, the Plan referring to *'the UK's most exciting city'* and stating that *'we trust our cultural vibrancy to lead us forward'.*

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<sup>32</sup> Liverpool City Region Combined Authority and Liverpool City Region Metro Mayor (2020) Building Back Better: Our Economic Recovery Plan

- 4.20 One of six key principles for ‘*building back better*’ is that the City Region will ‘*project itself internationally through its cultural, sporting and natural assets*’. The Plan explains that:

*“The rapid expansion in the visitor economy, the attraction for students and the thriving creative sector has fuelled the growth and the reputation of the region over the last 10 years. We will use our unique strength of brand and ability to shape places to create a compelling narrative for investment which will support a post COVID-19, post Brexit UK on the international stage”*

- 4.21 It proceeds to recognise that the City Region has ‘*strong, international appeal*’, adding that:

*“Our cultural offer, be it music, sport or heritage, has proven to be the rocket fuel of regeneration. It is more than just about jobs, growth or even just our brand – culture binds our communities together and supports people’s health, wellbeing, and quality of life. Culture is amongst our most important assets, and one we must use for economic recovery as we reimagine our communities”*

- 4.22 At the heart of the Plan is an acknowledgement of the potential role of ambitious and deliverable investment projects, capable of both providing a short-term economic stimulus and delivering long-term growth to ‘*level up*’ the North of England. While this statement is made in the context of a number of specific projects, the principle arguably also applies to other major investments not listed in the Plan, such as the proposed expansion of Anfield.

#### **Growth Strategy: Building Our Future**

- 4.23 The draft LIS and the Economic Recovery Plan naturally build upon earlier strategies, including the 2016 Growth Strategy<sup>33</sup> produced by the LCRC in partnership with the Local Enterprise Partnership (LEP). This outlines a strategy to realise ambitions for economic growth over a long-term period of 25 years, building on unique strengths and assets.
- 4.24 The Strategy focuses on the three growth pillars of:
- **Productivity** – aiming to maximise the potential of sector strengths and related assets and growing businesses;
  - **People** – aiming to raise the skills of local people and attract new talent; and
  - **Place** – aiming to improve infrastructure and enhance key assets in order to improve quality of life and attract and retain residents, visitors and investment.
- 4.25 In light of these pillars, the Strategy highlights the City Region’s ‘*incredible array*’ of assets, including its ‘*world renowned*’ football teams, these being – along with music – the area’s biggest cultural exports. Sporting institutions are identified as a key potential component of the area’s tourism offer, and the Strategy’s ambitions for place-making

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<sup>33</sup> Liverpool City Region Local Enterprise Partnership (2016) Building Our Future: Liverpool City Region Growth Strategy

highlight the need to capitalise on existing spaces and maximise new spaces of economic opportunity in the sport sector. Its overarching vision for the visitor economy similarly confirms that capitalising and building on the strength of the City Region's cultural assets is a key opportunity for the sector.

#### **Visitor Economy: Strategy and Destination Management Plan**

- 4.26 In November 2014, the LEP published its Visitor Economy Strategy and Destination Management Plan<sup>34</sup>, which outlines the key priorities, activities and projects that offer the best prospects to increase the competitiveness of the City Region and maximise productivity from tourism. It sets a long-term vision to 2025, alongside shorter-term targets for 2020. This is understood to remain the latest strategy for the visitor economy, pending an update signposted in the draft LIS<sup>35</sup>.
- 4.27 Through this document, the LEP has clearly set out its vision that by 2025, Liverpool will be *'world famous for its exceptional and distinctive culture, music and sport'*, with Premier League football being highlighted as a key component of its offer.
- 4.28 Strengths in sport and *'international assets'* in the sector are recognised as enabling to the City Region to orientate itself effectively towards the international visitor market. Maximising the economic benefits of major midweek events, such as football matches against European opposition, is particularly highlighted as a key contributor to longer term visitor economy growth over the period to 2025. Additionally *'making more of organisations that 'export' the Liverpool brand such as Liverpool Football Club'* is also identified as a key opportunity in terms of developing the city of Liverpool's *'brand'*.

#### **Spatial Development Strategy**

- 4.29 The LCRCA and Metro Mayor are in the process of developing a Spatial Development Strategy (SDS) for the Liverpool City Region, recently launching a second stage of public consultation that is to *'help form the blueprint for the city region's approach to planning and development for years to come'*<sup>36</sup>. This consultation is scheduled to run until 1 February 2021, and makes numerous references to both the draft LIS and the Economic Recovery Plan introduced earlier.
- 4.30 The consultation invites comments on various elements of the SDS, summarised online<sup>37</sup>. It proposes a vision, for example, where *inter alia*:
- "Opportunities for Building Back Better have been taken, creating a genuinely inclusive economy that is more competitive, connected, resilient, sustainable and greener; providing quality jobs, prospects and prosperity"*
- 4.31 This is proposed to be achieved by, for example:

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<sup>34</sup> Liverpool City Region Local Enterprise Partnership (2014) Visitor Economy: Strategy and Destination Management Plan

<sup>35</sup> Liverpool City Region Combined Authority and Liverpool City Region Metro Mayor (2020) Local Industrial Strategy Draft, p40

<sup>36</sup> <https://www.liverpoolcityregion-ca.gov.uk/steve-rotheram-wants-your-views-on-the-future-of-jobs-housing-and-transport-across-the-region/>

<sup>37</sup> <https://lcrsdsvisionandobjectives.commonplace.is/>; <https://lcrsdspolicies.commonplace.is/>

- Transforming the City Region economy so that it is competitive, environmentally clean, well connected, socially inclusive and future ready;
  - Supporting the growth of innovative, sustainable and socially responsible enterprises of all sizes and types; and
  - Redefining economic growth so that it values and involves the prosperity of all people and places.
- 4.32 This objective has been proposed because the LCRC and Metro Mayor have '*set the ambition for the City Region to punch its weight on the national and international stage, and for a prosperous economy that creates wealth for our nation and opportunity for our people*'. It is underpinned by the clear principle that '*economic growth benefits everyone*'.

## Local Strategy

### Liverpool Visitor Economy Network

- 4.33 The Liverpool Visitor Economy Network (LVEN) Board has responsibility for driving tourism in the city, and is made up of representatives from the main sectors of the visitor economy. The LVEN published a report in 2016 which outlines the area's visitor economy growth targets to 2020<sup>38</sup>. The headline objective targeted by the report is that of growing the number of annual overnight visitors by circa 13% in comparison with 2014's figures; that is an increase of 300,000 from 2.2 million per annum to 2.5 million. The city is understood to have been firmly on track to achieve and surpass this target, having welcomed 2.7 million overnight visitors in 2018; the latest year for which data is currently available<sup>39</sup>.
- 4.34 A number of Strategic Themes were outlined in the LVEN report as the means through which this target could be achieved, including the need to '*exploit our international brands*', Liverpool Football Club being identified as one of these. It is stated that '*very few destinations can boast two brands of such international significance as the Beatles and Liverpool Football Club [which are] not just almost universally recognised, but they are a reason why many people visit the city*'.
- 4.35 A key priority of this strategic theme was to mainstream Liverpool FC as part of the tourism offer, working with VisitBritain on specific international football marketing campaigns, and it is stated that this will serve to further increase the competitiveness of Liverpool's product.

### Liverpool Local Plan

- 4.36 The draft Local Plan<sup>40</sup> – published in draft in January 2018, and currently undergoing examination – seeks to provide a long-term spatial vision, strategic priorities and policies for future development in Liverpool up to 2033. The city's football stadia are identified within the Local Plan Vision as being among its '*unique and important assets*'. Their sustainable development and redevelopment is recognised to contribute

<sup>38</sup> Liverpool Visitor Economy Network (2016) Growth Strategy Summary 2020

<sup>39</sup> Liverpool City Region Local Enterprise Partnership (2019) Tourism Data Summary

<sup>40</sup> Liverpool City Council (2018) Liverpool Local Plan 2013 -2033 Pre-submission draft January 2018

towards Liverpool being a city with a *‘sustainable, vibrant and distinctive global city at the heart of the City Region’*, with a *‘competitive and robust economy’*.

- 4.37 As such, the draft Plan’s Policy EC3, ‘Delivering Economic Growth’ states that:

*“Development of new and existing business sectors with strong growth potential in Liverpool and the City Region will be supported and, where appropriate, protected and enhanced”*

- 4.38 The tourism/visitor economy is identified as one such business sector with strong growth potential, with Liverpool and Everton football clubs specifically referenced as being key components of the city’s tourism offer.

- 4.39 Similarly, the draft Plan’s Policy EC4, ‘Culture, Tourism and Sport’, outlines support for *‘proposals which reinforce and promote Liverpool’s role as a centre for tourism, culture and major events and as a key destination for business tourism’*. It further supports:

*“Proposals for new or expanded provision where it contributes to the City’s continued success as a destination for visitors and venue for major events, including those for sports. This includes proposals for the sustainable development or redevelopment of Everton and Liverpool football clubs where they are of an appropriate scale, and subject to other relevant planning policies”*

- 4.40 Development of the city’s football stadia is subsequently identified by the draft Plan as a significant component of the above policy.

#### **Liverpool Inclusive Growth Plan**

- 4.41 The Mayor of Liverpool produced an Inclusive Growth Plan in March 2018, to outline the overarching vision for *‘a strong and growing city built on fairness’*<sup>41</sup>. It is framed around six aims, including the development of *‘a strong and inclusive economy’* and the growth of the city’s reputation as *‘a cultural and sporting capital and the most exciting city in the UK in which to live, visit, work, study and invest’*.

- 4.42 The aim of the strategy is to distribute economic growth and prosperity widely and fairly across the city, which will require opportunities to be delivered in all of its neighbourhoods, the Strategy stating the firm desire for the city to:

*“Use its magnetism and brand to **develop its economic potential and spread the impacts beyond the city centre, into its communities**”* (emphasis added)

- 4.43 The Plan further recognises that:

*“To stay ahead, Liverpool needs to **continually renew its offer** and sustain investment in its heritage and visitor assets, deliver transformative infrastructure projects and innovative cultural programming”* (emphasis added)

- 4.44 In expanding upon the aim to develop a strong and inclusive economy, the Plan describes Liverpool’s sporting institutions as elements of its *‘lifeblood’* which *‘positions*

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<sup>41</sup> Mayor of Liverpool (2018) Inclusive Growth Plan: a strong and growing city built on fairness



*the city globally and provides a distinctive competitive advantage'. The city's culture is cast as providing 'the rocket fuel for regeneration and the driver of spectacular growth within the visitor and night-time economy'.*

- 4.45 A related priority concerns the promotion of Liverpool as '*a global destination*', entailing the development of a '*whole city*' approach to boost the capitalisation of '*assets*' to attract tourism and anchor campaigns. There is an equal desire to grow the visitor economy through investment in the destination offer and infrastructure, the strategy affirming that growing the city's sport offer is a key component of this. An increase in the number of visitors staying for the day or overnight is also sought, along with associated growth in visitor spend.

#### **Liverpool City Plan**

- 4.46 The City Plan was recently published in October 2020 having been produced by the leaders of Liverpool's largest public sector organisations, as well as the private and third sector<sup>42</sup>. It expresses a shared ambition and drive to work collaboratively, with a view to building a thriving, sustainable and fair city for everyone.

- 4.47 Like the Inclusive Growth Plan, the City Plan is structured around six themes which again include the development of '*a strong and inclusive economy*'. It likewise describes Liverpool as '*the most exciting city in the UK*', stating that:

*"Culture, sport and creativity is Liverpool's USP and makes the city attractive for residents, workers, visitors and investors"*

- 4.48 Stated priorities include the '*rebooting*' of the visitor economy by '*delivering major events and initiatives, and supporting the creative, cultural and visitor sectors to drive the city's economic recovery*'. There is also an intention to position Liverpool as '*a distinctive, outward-facing, globally attractive city with a strong and diverse cultural identity*', for example by developing '*the city's appeal as a centre of sporting and musical excellence*'.

#### **Summary**

- 4.49 There is local, regional and national recognition of the economic and social contribution of live sport, including Premier League football, and the potential to grow this further. World renowned teams and their stadia are acknowledged as key economic assets of the Northern Powerhouse, the Liverpool City Region and the city itself.
- 4.50 Culture more broadly has helped to drive the economic renaissance of Liverpool, laying the foundations for truly transformational change and offering the opportunity to further harness the city's global cultural appeal to create prosperity for all. Culture has been seen as foundational to the long-term success and resilience of the entire City Region, and this opportunity continues to be recognised even following the pandemic. Indeed, there is a firm belief that the cultural vibrancy of Liverpool and its reputation as the UK's most exciting city will actually drive economic recovery, with cultural and sporting assets having a key role to play in projecting the city to an international

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<sup>42</sup> Team Liverpool (2020) cityPlan



audience. Major investments, of the kind proposed at Anfield, can also generate a short-term economic boost through their construction, preceding an economic contribution that will persist over the long-term.

- 4.51 Rapid expansion of the visitor economy – a key economic strength – has also fuelled the growth of the City Region over the past decade, with an ambition to take full advantage of the unique international brand of Liverpool to support its recovery after the pandemic. Premier League football has long been recognised as a key element of the city’s offer in this respect, with Liverpool FC specifically acknowledged as a reason why many people visit the city. Rebooting the visitor economy is seen as a priority as the city recovers, with a key role envisaged for major events and sporting institutions.

## 5. Benefits of an Expanded Anfield Road Stand

- 5.1 This section outlines the economic benefits that can be expected to result from an expanded Anfield, following the proposed expansion of the Anfield Road Stand. These benefits are contextualised where relevant through reference to the economic impact of the existing stadium, in normal circumstances, as outlined in section 3. It reasonably assumes that restrictions currently limiting the stadium's economic contribution during the pandemic will have lifted before the expanded stand is operational.
- 5.2 The section largely focuses on the economic benefits generated on matchdays, on the basis that the expansion will have the most pronounced impact on matchday attendance with a resultantly measurable economic impact. This is based on matchdays during a normal football season, but could – through this planning application – increase on an annual basis through the hosting of additional sporting events at the stadium. Certain economic benefits relating to visitors and spending should therefore be viewed as minima on this basis.
- 5.3 Concerts would also continue where the application for expansion is granted, thus permanently securing the ongoing economic contribution of such events, although it is understood that they would not be expected to utilise any additional capacity given the need for specialist configuration of the stadium. The economic benefits of concerts held at Anfield would therefore remain comparable to those reported in section 3, albeit a more frequent programme of events is expected each year which would naturally grow their cumulative impact on an annual basis. This should be recognised as an important additional benefit of the current proposals.

### Extra spectators and additional spending

- 5.4 The proposed expansion would increase the matchday capacity of Anfield by around 14%, allowing the accommodation of around 61,000 spectators per match. The expanded stadium could therefore attract up to 1.95 million spectators over the course of a season, representing an increase of around 244,000 people from the current level.

**Table 5.1: Impact on Spectator Numbers**

	Maximum attendance per match	Maximum attendance per year
Current capacity	53,394	1,708,608
Capacity following expansion	c.61,000	c.1,952,000
<b>Change</b>	<b>c.7,606</b>	<b>c.243,392</b>
% change	14%	14%

*Source: Turley Economics*

- 5.5 Figure 3.1 indicated that around one third (32%) of matchday tickets sold in the 2018/19 season were to UK fans travelling from beyond Liverpool and its adjacent areas, with a further 10% sold overseas. When illustratively assumed that these trends

persist, the expanded stadium could conceivably attract some 24,000 additional overseas visitors to matches each year, with a further 78,000 people attracted annually from other parts of the UK.

**Table 5.2: Potential Origin of Additional Spectators**

Place of residence	Share of ticket sales (2018/19)	Additional spectators per match	Additional spectators per year
<b>Total</b>	<b>100%</b>	<b>c.7,606</b>	<b>c.243,392</b>
Liverpool	37%	2,784	89,073
Adjacent areas	21%	1,625	52,011
Other parts of UK	32%	2,446	78,273
Overseas	10%	751	24,036

*Source: Turley Economics*

- 5.6 Such trips could contribute towards further growing the number of visitors to Liverpool and the wider City Region, and would likely trigger additional spending. Based on the average expenditure of visitors, introduced in section 3, up to £20.5 million could be conceivably spent each year if additional visitors travelling longer distances to the expanded stadium – including from overseas – stay overnight in the City Region<sup>43</sup>. This would naturally reduce if visitors stay only for a day, but would still be expected to generate spending of £3.9 million each year based on such visitors' average expenditure in restaurants, bars, shops and attractions<sup>44</sup>. Expenditure is actually likely to fall within this range given that some, but not all, of the additional spectators can be expected to stay overnight.
- 5.7 This solely captures the potential expenditure of those additional spectators travelling longer distances to the expanded stadium, but these individuals will likely be outnumbered by those drawn from Liverpool and the surrounding area based on current trends. At least some of these additional spectators can still be expected to generate expenditure outside the stadium, on transport, food and drink for example, and while challenging to quantify – in the absence of robust data on the average spend of such spectators – the beneficial nature of this expenditure for local businesses and the wider city should nonetheless be recognised.

### **Additional employment opportunities following completion**

- 5.8 Section 3 confirms that around 2,400 people are normally employed at the stadium on a typical matchday, and it is expected that 400 additional staff will be employed across

<sup>43</sup> Liverpool City Region Local Enterprise Partnership (2016) Liverpool City Region Visitor Survey 2015, p27. Eating, drinking, accommodation and shopping collectively accounted for circa 81% of overnight visitor spending

<sup>44</sup> *Ibid*

all operational areas following the proposed expansion<sup>45</sup>. This is equivalent to growing the matchday workforce by around 17%.

- 5.9 With around 95% of the directly employed current workforce known to live in the Liverpool City Region, a continuation of this trend would see the vast majority of these additional employment opportunities benefiting individuals living in this area. Circa 235 jobs could be taken by people living in Liverpool itself, on the same basis, including around 62 jobs for people living in the Anfield and Everton wards that surround the stadium. This is summarised in the following table, which for simplicity assumes – in the absence of comparably detailed evidence – that agency staff reside in the same locations as the directly employed matchday workforce.

**Table 5.3: Estimating New Employment Opportunities for Residents**

	Current employment	Future employment	New employment opportunities for residents
Anfield and Everton wards	373	435	62
Liverpool	1,414	1,649	235
Liverpool City Region	2,278	2,657	379
<b>All jobs</b>	<b>2,405</b>	<b>2,805</b>	<b>400</b>

*Source: Liverpool FC; Turley Economics*

- 5.10 Substantial capacity exists within the labour market – and did even prior to the pandemic – to respond positively to these employment opportunities, minimising or removing the risk of displacing existing activity and likely generating *additional* jobs. There are around 2,800 people currently claiming unemployment benefits in Anfield and Everton<sup>46</sup>, for example, and the estimated creation of circa 62 jobs for people living in this area would be of considerable value. Indeed, it is conceivable that people living in the vicinity of the stadium will ultimately occupy a larger share of the new jobs created, given the apparent volume of available labour and its proximity.
- 5.11 The above captures only those jobs directly supported on matchdays, either by the Club or through agencies. As highlighted in section 3, this is augmented by further jobs indirectly supported by the Club, previously estimated in a separate study<sup>47</sup>. It is not the intention of this report to update these earlier calculations, which have not been made available in detail, but the prospect of growing the Club’s wider employment impact can nonetheless be acknowledged and explored.
- 5.12 It is considered reasonable to envisage such an outcome where the Club increases its own matchday workforce by 17% and attracts 14% more spectators to the stadium

<sup>45</sup> Advised by Liverpool FC

<sup>46</sup> ONS (2019) Claimant count by sex and age, September 2020. Data includes people claiming Jobseeker’s Allowance plus those claiming Universal Credit that are required to seek and be available for work

<sup>47</sup> Deloitte (2019) The Economic Impact of LFC: key data from the Deloitte Report, season 2017/18

each year. The wider economic impact of the Club could be expected to broadly grow in proportion to such metrics following the proposed stadium expansion, because businesses serving spectators would naturally grow their customer base and new supply chain opportunities could emerge from the Club's further growth as a major employer, for example.

- 5.13 The following table therefore illustratively calculates how the previously reported total number of jobs supported by the Club could change following expansion of the stadium, when simply assumed to be directly proportionate to spectator numbers and the directly employed workforce. This suggests that its influence could grow to broadly support in the order of 5,300 jobs across Liverpool, and around 6,600 jobs throughout the entire City Region, albeit it must be recognised that this represents a relatively crude calculation.

**Table 5.4: Estimating Wider Employment Effect following Expansion**

	Liverpool	Liverpool City Region
FTE jobs supported in 2017/18	4,564	5,706
Increase proportionate to matchday spectators (14%)	5,214	6,519
Increase proportionate to matchday workforce (17%)	5,323	6,655

*Source: Deloitte; Turley Economics*

#### **Increase in economic productivity**

- 5.14 A matchday workforce 17% larger than currently employed would naturally be expected to make a greater contribution towards the economy, when productivity is measured on the basis of gross value added (GVA).
- 5.15 In Liverpool, an average job in the wider "recreation" sector, which includes sports activities, generates circa £36,400 in GVA each year<sup>48</sup>. This can be reasonably applied both to the current and future workforce, to estimate the overall impact of their employment at up to 32 matches plus further concerts and major events over the course of a year.
- 5.16 As summarised in the following table, this suggests that the larger workforce accommodated through the proposed expansion could generate an additional £14.6 million in GVA each year.

<sup>48</sup> Experian (September 2020) Local Market Forecasts Quarterly

**Table 5.5: GVA Annually Generated by Matchday Workforce following Expansion**

	GVA per annum
GVA currently generated by matchday workforce	£87,500,000
GVA generated by future matchday workforce	£102,100,000
<b>Change</b>	<b>£14,600,000</b>
% change	17%

*Source: Turley Economics*

### **Temporary economic boost during construction**

- 5.17 While the above has focused on the lasting economic benefits generated by an expanded stadium once operational, its construction can also be expected to generate a temporary economic boost.
- 5.18 It is envisaged that approximately £42 million will be invested in construction of the expanded Anfield Road Stand, excluding inflation. This could be sufficient to directly support around 290 person-years of employment throughout the construction period, based on the average turnover per employee in the North West construction industry<sup>49</sup>.
- 5.19 Over an expected construction period of around two years<sup>50</sup>, the proposed development could directly and temporarily support an average of 145 gross construction jobs per annum. On-site employment can, however, be expected to fluctuate throughout this period, peaking during intense periods of activity.
- 5.20 Investment in construction will also generate considerable expenditure on materials, goods and other services that will be purchased from a range of suppliers. This expenditure has potentially far-reaching benefits both locally and further afield, as it filters down the construction supply chain. Construction workers will also spend their wages on goods and services, generating induced economic effects.
- 5.21 This results in an amplification of the initial investment, with an economic multiplier effect and linked benefits in terms of expenditure on goods and services. This can 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 throughout the local and wider economy.
- 5.22 In the absence of detailed expenditure data for the proposed development, it is considered reasonable to apply composite multipliers drawn from best practice to broadly estimate the scale of such multiplier effects within the vicinity of the stadium, across the wider city and in the entire City Region<sup>51</sup>. This is summarised in the following

<sup>49</sup> Department for Business, Energy and Industrial Strategy (2020) Business population estimates

<sup>50</sup> Advised by Liverpool FC

<sup>51</sup> Homes and Communities Agency (2014) Additionality Guide: fourth edition. A multiplier of 1.1 is representative of 'the majority of interventions' at neighbourhood level. A multiplier of 1.25 is the mean for all forms of

table and indicates that investment could directly or indirectly support some 217 jobs throughout the Liverpool City Region, including circa 181 jobs per annum in Liverpool and 159 jobs per annum in the Anfield and Everton wards.

**Table 5.6: Direct Employment with Multiplier Effects during Construction (per annum)**

	Total per annum
Direct employment per annum, gross	145
With multiplier effect in Anfield and Everton wards	159
With multiplier effect in Liverpool	181
With multiplier effect in Liverpool City Region	217

*Source: Turley Economics; HCA*

- 5.23 As with the Main Stand expansion, it is likely that a single main contractor will be appointed to oversee construction, before offering sub-contracted work packages. The identity and approach of the main contractor, yet to be procured at the time of writing, will ultimately influence the extent to which additional employment opportunities generated during construction benefit individuals and businesses located in each of the geographic areas specified above.
- 5.24 It is conceivable that a large contractor could draw upon a specialist workforce residing elsewhere, for example, resulting in the leakage of some or all direct employment effects (albeit retaining induced effects generated through spending close to the stadium). Such a large contractor could also redeploy its existing workforce in the city and City Region, displacing activity rather than necessarily generating new employment opportunities for residents.
- 5.25 There could nonetheless be scope to maximise the local benefits generated through construction where the chosen contractor locally advertises employment and supply chain opportunities, and considers local workers, contractors and suppliers where practical and reasonable. This could increase the economic benefit experienced during construction.
- 5.26 Regardless of how construction jobs are ultimately filled, the location of the construction site means that a boost in economic productivity is likely. This could be worth some £22.1 million in GVA across the City Region over the full construction period, based on the productivity of an average construction job<sup>52</sup>, including £19.0 million in Liverpool.

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intervention at the sub-regional scale, of Liverpool. A multiplier of 1.5 is average at the regional level, and therefore considered appropriate for the Liverpool City Region

<sup>52</sup> Experian (September 2020) Local Market Forecasts Quarterly

**Table 5.7: GVA Generated during Construction**

	Liverpool	Liverpool City Region
Effect of 145 direct jobs per annum		£7,800,000
Plus indirect/induced employment	£9,500,000	£11,000,000
<b>Total GVA during construction</b>	<b>£19,000,000</b>	<b>£22,100,000</b>

*Source: Experian; Turley Economics*

### Summary

- 5.27 This section has outlined the economic benefits that can be expected to result from an expanded Anfield, following the proposed expansion of the Anfield Road Stand and the lifting of temporary restrictions in place at the time of writing. It has focused on the economic benefits generated on matchdays, because concerts and major events – though covered and permanently secured by this planning application – would not utilise additional capacity and the benefits generated by each event would therefore remain as reported in section 3. The economic contribution of such events would nonetheless rapidly accumulate over time where permanent consent is granted.
- 5.28 The proposed expansion would **increase matchday capacity by around 14%** to accommodate up to 244,000 additional spectators over a season. A continuation of recent trends would see around 102,000 of these spectators drawn from outside Liverpool and its adjacent areas, including overseas. These trips alone could generate **up to £20.5 million in spending each year** where they involve an overnight stay, and would still be expected to generate **at least £3.9 million as a minimum** if additional visitors stay only for a day. This would be supplemented by the expenditure of those travelling shorter distances to the stadium on transport, food and drink for example.
- 5.29 It is expected that **an additional 400 staff will be employed across all operational areas** following the proposed expansion. Recent trends would see the majority (95%) of these jobs taken by people living in the Liverpool City Region, including **circa 235 jobs for people living in Liverpool and around 62 jobs for people living in the Anfield and Everton wards**. The latter could, however, conceivably rise given the apparent volume of available labour and its proximity to the stadium.
- 5.30 This larger matchday workforce would be expected to boost the productivity of the local economy, generating **around £14.6 million of additional GVA** beyond that generated by the current workforce each year.
- 5.31 While this section has not sought to remodel the previously estimated wider economic impact of the Club, it has acknowledged the potential for growth based on the larger workforce and increased number of spectators. Where the wider economic impact grows in proportion to these metrics, the Club's influence could grow to support in **the order of 5,300 jobs across Liverpool and around 6,600 jobs throughout the entire City Region**.



- 5.32 Beyond the lasting economic benefits generated by an expanded stadium once operational, its construction can also be expected to generate a temporary economic boost. Investment of around £42 million could support **as many as 217 jobs during each year of construction throughout the Liverpool City Region** when allowing for multiplier effects, and generate **around £22.1 million in GVA**. The extent to which this economic benefit will be captured in the local area will ultimately depend on the identity and approach of the main contractor, but there is likely to remain scope to maximise the economic benefit experienced locally during construction.

## 6. Summary

6.1 This report has been produced by Turley Economics to demonstrate how the proposed expansion of Anfield to accommodate around 7,000 additional spectators would create further benefits beyond those that the stadium currently generates for the local and wider economy.

6.2 In summary, the proposed expansion would:

- **Capitalise upon a recognised economic and cultural asset of Liverpool, the wider City Region and beyond.** Football clubs make a substantial and growing contribution to the national economy, and both Liverpool and the wider North West benefit specifically from their Premier League clubs which support the “brand” and encourage visits from overseas. There are local ambitions and opportunities to further grow this contribution, and use culture and sport as a driver of economic recovery following the pandemic. Sporting events can also play a unique role in rebooting a visitor economy that has thrived in recent years;
- **Increase matchday capacity by around 14% and create the opportunity, based on recent trends, to attract up to 102,000 spectators each year from outside Liverpool and its surrounding areas, including overseas.** These trips will support the recovery of the visitor economy and could alone generate up to £20.5 million in spending each year where they involve an overnight stay. This would be further boosted by the expenditure of those travelling shorter distances on transport, food and drink for example.
- **Strengthen the role of the Club as a major employer by directly creating around 400 additional jobs to grow the matchday workforce to circa 2,800 people.** These jobs are likely to be filled by people living in the Liverpool City Region, based on recent trends, and would particularly benefit those living in the city itself given that such residents recently filled around 59% of roles on a typical matchday. In normal circumstances, matchdays already provide employment for at least 300 people living in the relatively deprived Anfield and Everton wards that surround the stadium, and the expansion could create at least 62 additional jobs for people living in this area where this trend continues. This could conceivably rise on the basis that around 2,800 people are currently seeking employment in this area alone, with more than half doing so even prior to the pandemic, and this creates an opportunity for inclusive economic growth.
- **Boost the productivity of the local economy by generating around £14.6 million of additional GVA each year,** beyond that normally generated by the current workforce.
- **Expand the wider and positive economic influence of Liverpool FC,** which has been previously shown to extend far beyond the directly employed workforce to support jobs through its supply chain and relationships with other businesses<sup>53</sup>.

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<sup>53</sup> Deloitte (2019) The Economic Impact of LFC: key data from the Deloitte Report, season 2017/18

While not remodelled in detail within this report, it has been estimated that around 5,300 jobs across Liverpool could potentially be supported following expansion where the Club's wider influence grows in proportion with its attendance and workforce, rising to around 6,600 jobs across the entire City Region.

- **Generate a temporary economic boost during construction.** Investment of around £42 million could support as many as 217 jobs during each year of construction throughout the Liverpool City Region when allowing for multiplier effects, generating a total of around £22.1 million in GVA.
- **Secure and grow the proven economic contribution of concerts and major events, with the permanent consent for a greater number of events sought through this planning application.** As demonstrated in a separate report recently submitted to LCC<sup>54</sup>, the three concerts held in 2019 attracted 124,000 additional visitors to the city, generated spending of circa £6.9 million in the local economy and provided at least 1,850 people with further employment opportunities at a stadium where fewer events would have otherwise taken place.

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<sup>54</sup> Turley (2019) Economic Contribution: Music Events at Anfield; planning application reference 20F/0082

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