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Stadia development as a catalyst for regeneration

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Abstract

For many, the World Cup stadia in Japan and Korea set new standards in terms of stadium design and left people in England asking 'Why can't our stadia be like that?'. Perhaps what is easily forgotten is that recent years have witnessed considerable investment in stadia in the UK in the light of legislative and other pressures. England now has some of the safest, most comfortable and atmospheric stadia anywhere. This paper explores some of the trends in stadia development over the last ten years and argues that issues surrounding stadia development and redevelopment form part of the wider debate concerning urban regeneration. Citing as examples the Riverside Stadium, Middlesbrough, the Stadium of Light, Sunderland, the Britannia Stadium, Stoke and Bolton's Reebok Stadium, it argues that the feasibility of stadia development is affected by matters concerning land, infrastructure and property development opportunities. It argues that there is an interaction between stadia development and other commercial development opportunities so that, in some cases, a location and development decision regarding a stadium can act as a catalyst for attracting new development in the locality.

Drawing on examples in the USA, and more recent developments at Southampton and Leicester, the paper argues that, in future, stadia provision is likely to be driven by two key factors: financing of football and the regeneration and property development opportunities. In the light of this argument the future plans for Arsenal and Everton are analysed and conclusions drawn.

INTRODUCTION

For many, the World Cup stadia in Japan and Korea set new standards in terms of stadium design and raised the question: 'Why hasn't England succeeded in developing stadia — at Wembley or elsewhere — like those?'

Perhaps what is easy to forget amidst the hype of the problems that have beset the redevelopment of Wembley stadium (for non-UK readers, the public debate over the future of Wembley, which was the national stadium for over half a century until it closed for redevelopment some three years ago, has been long running; issues of funding, ownership and planning have resulted in the site lying

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England has sophisticated stadia

abandoned, with an agreement as to the financing and design of its reconstruction only being announced by the government on 24 September 2002, after this paper was written) is that England has some of the best football stadia in the world. They may not all be designed with inspiration taken from a warlord's fighting helmet or the snowy egret, but, arguably, they provide some of the safest, most comfortable and atmospheric stadia anywhere.

In support of this assertion, Alan Rothenburg, leader of FIFA's 2006 World Cup inspection team, is on record as stating that England's footballing infrastructure, system of stadia and security arrangements were 'probably the most sophisticated anywhere'.¹

What is also relevant is that UK football stadia have been developed over very many years. This has had a profound effect on where they have been located. In many cases their location was determined by where supporters lived and could easily access on foot. Therefore, many have been sited in or close to the heart of the communities they were built to serve. They often pre-date the car-borne society and were thus not located on greenfield sites in the middle of nowhere. Such places may offer no space restrictions, no problems of conflict with adjoining users and no parking problems, but they also offer no heart. Heart is an essential part of the footballing tradition in the UK, as Rothenberg also remarked.²

Stadia development leads to urban regeneration

The issue of relevance to the arguments developed in this paper is that, over the last decade, a set of circumstances have come together in the UK that have led to the redevelopment and, in many cases, the relocation of football stadia, and these circumstances have led to stadia development playing a significant part in the regeneration of urban communities.

THE RENAISSANCE IN FOOTBALL STADIA DEVELOPMENT

The UK has seen a renaissance in new stadia construction in the last ten years. The main impetus for this was the recommendations of Lord Justice Taylor into the tragedy at Hillsborough, Sheffield in April 1989 when 96 football fans were crushed to death during a football match. The Taylor Report,³ which was extremely critical of the design and safety of the football stadium, recommended, *inter alia*, the phasing out of standing terraces and general improvements in ground safety. The result was that football clubs have taken up the recommendations and in the last decade there has been a major drive towards stadium improvement. Twelve major new club stadia have been built with a total spending on stadia improvements of over £1.25bn (see Table 1).

The Taylor Report

To help fund these developments substantial grants were made available for land and infrastructure packages and generous planning permissions were awarded. To help subsidise the required improvements in stadia, the Football Trust was set up by the government. Table 2 indicates the main sources of funding for football stadia in the years immediately following Hillsborough and the Taylor Report.

Table 1: English stadia relocations as part of the post-Taylor initiative

Club	Stadium	Year	Capacity
Chester City	Deva Stadium	1992	6,000
Millwall	New Den	1993	20,146
Northampton Town	Sixfields Stadium	1994	7,653
Huddersfield Town	McAlpine Stadium	1995	19,663
Middlesbrough	Riverside	1995	30,000
Derby County	Pride Park	1997	30,500
Sunderland	Stadium of Light	1997	40,669
Bolton Wanderers	Reebok Stadium	1997	25,000
Stoke City	Britannia Stadium	1997	28,083
Reading	Madejski Stadium	1998	24,200
Southampton	St Mary's Stadium	2001	32,551
Leicester	Walkers Stadium	2002	32,000

Note: Since opening, a number of these stadia have been expanded. Present day capacities of the expanded stadia are as follows: Huddersfield, 24,500; Middlesbrough, 35,049; Derby, 33,597; Sunderland, 48,300; Bolton, 27,879.

Reasons for stadium relocation

These funding opportunities enhanced the feasibility of stadium relocation rather than redevelopment. Stadium relocation came on the agenda for football clubs for a number of reasons.

- Many of the existing stadia were in residential areas and, given the changes in transport patterns, had outgrown their original reasons for being located there. Indeed, to attract the numbers of spectators required to support the modern game, the focus had shifted to accessibility to the main road and rail network.
- The all-seater requirement meant a greater footprint was required due to the greater space taken for a seat than a standing space. A significant reduction in capacity results if a stadium is converted from standing to seated within the same footprint. Hence, a move to edge of town or out of town was often the only economically sound proposition.
- Facilities used for football matches alone were increasingly viewed as wasted opportunities. The 1990s also saw opportunities for increasing usage of conferencing and banqueting facilities within stadia on non-match days as well as synergies with leisure, health and fitness activities. But this could only be achieved with appropriately designed and located facilities. There was thus a requirement to change stadium usage from 50hrs/year to a 5,000hrs/year operation.

Wasted economic opportunities

Table 2: Funding football stadia, post-Hillsborough (£m)

	Raised by club	Football Trust grant	Total cost
1991	32.5	10.6	43.1
1992	71.9	29.5	101.4
1993	69.5	24.3	93.8
1994	46.9	26.2	73.1
1995	20.7	10.5	31.2
1996	60.2	18.7	78.9
1997	69.6	16.7	86.3
Total	371.3	136.5	507.8

Source: Sir Norman Chester Centre for Football Research, University of Leicester (2002) *Football Stadia after Taylor*, March.

Clubs can create high profile

The prospect of relocation enabled state-of-the-art facilities to be designed that could not be accommodated within the existing footprint. Higher average attendance was achieved due to improved facilities. An average increase of 40 per cent in attendance in the season following completion of the new stadium has been realised across all the new stadia developed in this time.

Local authorities also started to realise the potential for stadia to act as catalysts to open up derelict brownfield sites, justifying remediation and infrastructure improvements and paving the way for regeneration. They also recognised that clubs create high profiles for towns and cities and there are great opportunities for community benefits to spring from the club and stadium activities. This is important as, despite the ability to generate at times high gate receipts, few clubs have been able to contemplate, from their own funds, large-scale redevelopment or change sufficient to meet the Taylor recommendations. Despite their sometimes assumed wealth, the economics of football clubs has meant that few clubs operate at a profit.⁴

Over half of recent developments are on brownfield sites

Twelve major new club stadia have been developed in the last decade, ten of which have over 20,000 seats. Of these, seven have been built on brownfield sites:

- Southampton: gas works
- Reading and Derby: refuse tips
- Stoke and Sunderland: coalfields
- Middlesbrough: chemical tank farm
- Leicester: power station.

Four of the major new stadia are now detailed below to demonstrate the factors that gave viability to the developments.

Middlesbrough Football Club

One of the first major clubs to look at relocation options was Middlesbrough FC. The restricted site at Ayresome Park, former home of the football club, meant it was not possible to redevelop the stadium as an all-seater with a capacity even close to the original 24,000. To redevelop within the existing ground would have meant insufficient revenue capacity to assure economic viability.

A joint financial endeavour

The club could raise just £10m. This is a long way short of the costs of construction and site purchase required to develop a stadium able to accommodate 30,000 seats, which was the club's aspiration. However, Teesside Development Corporation (TDC) stepped in with the provision of a brownfield site in the dockland area, together with financial support for land decontamination and provision of infrastructure, including roads, bridges and car parks. With the assistance of TDC it was, therefore, seen to be feasible to relocate rather than redevelop their existing ground. The ground developed now has a capacity of 35,049 seats, far above that which was achievable without relocation.

This scheme is perhaps the first UK urban redevelopment where a football stadium provided the catalyst to unlock a brownfield site, bringing with it the infrastructure to kickstart regeneration. Situated in an area of low regional economic wealth and where football is an essential part of the community, the importance to the area socially as well as economically is high.

Sunderland Football Club

Similarly, Sunderland FC had to review their options for relocation due to the constrained size of the site at Roker Park. Once more the economics of redevelopment of existing facilities were not favourable. Again, with the assistance of a development corporation a site was made available at the former Wearmouth Colliery. An initial 42,000-seat stadium costing £18.6m was built on the brownfield site. The adjacent site is now available for commercial development and the club has been appointed as preferred developer.

Bolton Wanderers Football Club

A stadium, however, cannot stand on its own and be an instant draw for other development. Picking a location that is synergistic with other land uses is key to using a sports facility as the catalyst for new development. Furthermore, a master plan should be developed that has been market tested to ensure commercial realism and space take-up.

This is perhaps best demonstrated by the Reebok Stadium in Bolton. Property development played a key role in the feasibility of FA Premiership club Bolton Wanderers' new stadium. The club realised the opportunity of creating a major development on a site known as Middlesbrook on the outskirts of Bolton. In conjunction with the local council and orbit developments the club created a major new destination for a range of commercial activities to complement the football.

The site was a strategic location that could generate high commercial land values. The stadium provided the key to bring this site forward for development. The first £13m of development profit in the scheme went towards cross-funding the 25,000-seater stadium. Without this contribution, the award-winning Reebok Stadium would not have been built.

The stadium is now part of a mixed-use development including a retail park, leisure park and sports complex. Commercial and residential developments are all included within the master plan.

Nevertheless it is an out-of-town location which has a number of problems with transportation. Given current UK planning policy, such a scheme would no longer be likely to gain consent, despite the economic gains that it has brought to the town. Under the current planning policy guidance (PPG6), the operation of a 'sequential test' aimed at protecting and enhancing town-centre viability provides that permission for out-of-town commercial

**Choosing locations
that are synergistic**

**Commercial activities
complement the
football...**

**... including retail
and leisure**

Need to comply with PPGs

development will only be given if it can be shown that not only is there a requirement for the development but also there is no possibility of obtaining a site in the town centre or edge of town. Transport policy, as laid out in PPG13, also works against out-of-town developments. Planning for open space, sport and recreation as laid out in PPG17 provides guidance that planning permission for stadia and major sports developments which will accommodate large numbers of spectators, or which will also function as a facility for community-based sports and recreation, should only be granted when they are to be located in areas with good access to public transport.

Stoke City Football Club

In the case of Stoke City, the city council in partnership with St Modwen Developments regenerated the former coal mine and spoil tips at Trentham Lakes. This is now a major development on the edge of town which is achieving critical mass and has regenerated 175 hectares of brownfield land.

The new Britannia Stadium was the first development to take place on the derelict site, paving the way for other developments to ensure a regeneration of the area. The stadium was very much a council-led initiative and it provided significant financial contributions towards the stadium.

The role of the local authority is critical

THE FUTURE

From the case studies it is evident that the role of the local authority in providing both financial assistance and development opportunities, including infrastructure on the surrounding land, has been critical in ensuring development takes place. This is particularly the case with Bolton's Reebok Stadium and Stoke's Britannia Stadium, for without council support neither would have proved feasible.

What can be seen from all four of these examples is that land, infrastructure and property development opportunities played a key role in the feasibility of the relocation, while at the same time the stadium has acted as a catalyst for attracting new development. It is perhaps relevant that in all these case studies the stadia schemes have proved to be catalysts to further commercial development activity in towns and cities which have significant amounts of brownfield land and which have faced problems in attracting inflow of investment funds. In all cases the local authorities involved have seen the connectivity between football and the community as well as economic benefits and regeneration potential.

Connectivity between football and the community

The analysis above points to the drivers of future stadia provision being dominated by two key factors:

- financing of football
- regeneration and property development opportunities.

Taking each in turn, this paper will firstly consider the future of

Public funding of new stadia

Figure 1: Cost and public funding of new stadia

Note: The costs in this Figure relate to stadium build costs, infrastructure and land remediation costs but exclude land acquisition. The public funds include local authority investment, regeneration grants, European funding, Football Trust grants and Lottery awards. Note that the public funding for Bolton excludes the subsidy from the commercial enabling development.

financing of football stadia and then secondly look at the connection to property development and regeneration.

THE FINANCING OF FOOTBALL

Unlike many stadia in the USA and European cities, stadia are not wholly subsidised in the UK from the public purse, as can be seen in Figure 1. If these facts are combined with those in Table 2, two findings can be reached.

- The role of public funding via Football Trust grants and public sector donations, including the provision of sites, is very significant, running at just over 25 per cent of all funding.
- Despite the assistance from the public and charitable purses, clubs have to raise the major portion of funds themselves. This drives the need to achieve increased capacity, but even then the amount required to be raised by clubs may be unsustainable by football revenue alone.

It follows that a ‘third leg’ of financing is needed to ensure that clubs can redevelop and/or relocate. Further, the funding gap is set to widen as the Football Foundation (formerly the Football Trust) grants reduce and planning development controls tighten. Clubs will therefore have to look to other sources of funding to ensure economic viability. Two main sources of finance can be identified:

Public funding, club finance and a ‘third leg’

Alternative source of finance

- private finance
- property development opportunities linked with regeneration.

Many clubs are technically insolvent ...

... despite growth of turnover

Popularity of debt funding

Southampton FC used a bond issue

Private financing

In terms of private finance the options include traditional bank loans, rights issues and bond issues. When it is appreciated that only 18 out of 92 clubs in the Premiership and Football League made a profit last year,⁵ it is not surprising to learn that the majority of lower-league clubs are technically insolvent and cannot service debt. Bank loans are not therefore available to most of these clubs for any substantial borrowing. The inability to raise money by private means is despite the continued growth of turnover, which was estimated to be in the order of 18 per cent in 2001; this, however, has been swallowed up by players' wages, which increased in the Premiership by 17.6 per cent in the same period.⁶ The situation is exacerbated by increasing disparity of income potential between the top Premiership clubs and the others. The difference is largely driven by broadcasting income (Deloitte and Touche estimate that the average Premiership club is five-and-a-half times the size of its Division One counterpart),⁷ but in part it does reflect the ground capacity.

Some clubs have raised money through rights issues, but these have not performed well. Indeed, the collapse of UK stock market values (within the UK, the FTSE 100 index of leading shares has fallen by some 40 per cent over a two-year period) has meant that the stock market has effectively been closed to clubs over the last two years.

With this effective inability to raise money through equity, the only option has been to adopt a debt funding route. The most usual method is bond issues. Here clubs have mostly securitised gate receipts to fund new stadia. Two examples where this method of financing has been adopted are Southampton and Leicester.

Southampton Football Club

After failing to resolve funding and planning issues at an out-of-centre site, with the assistance of the local authority Southampton FC reverted to the St Mary's site in the city centre, the only readily available site to accommodate a stadium. The Southampton case provides an example of the effect of the tightening of planning restrictions and moves to resist out-of-town developments.

Built on a former gasworks, the St Mary's stadium is located in an industrial area near the docks. With no opportunities for adjoining property development due to site constraints, the club had to raise finance through a bond issue to develop the stadium. There is also an issue as to whether a city the size of Southampton would have been able to accommodate further integrated commercial developments within the stadium scheme, given another recent major retail scheme in the city.

The Friends Provident St Mary's stadium involved the regeneration of a brownfield site, and is a good example of sustainable development. It is located close to the centre of the city to benefit from existing transport links.

**Leicester City, too,
used a bond issue**

Leicester Football Club

A similar story exists at Leicester. The football club's original plans for Bede Island included a major out-of-centre retail development. However, it was too late in conception to come about before the planning environment changed. Consequently, the club aborted the scheme due to uncertainties and rising costs and reverted to Freeman's Wharf, which was a former power station site in the city centre. Their stadium at Freeman's Wharf has been funded primarily by a bond issue.

**The problem of
moving from debt to
equity funding**

Both these examples are driven by the need to deliver a new stadium within the financial constraints available. Both leave the club with a long-term debt burden. If a stock market recovery were to take place then a restructuring of debt to equity could be contemplated, but in the short term at least this is not likely. Although Williams and Neatrou argue that football may be a good investment emotionally,⁸ they support the view that economically it is not. As long as rational investors take that view, debt funding based on the prospects of long-term income growth must be the route adopted. For lenders to be persuaded that long-term growth does exist, clubs must be able to argue that their gate receipts and other income — including, for example, broadcast income — are on a rising trajectory. Given the increasing disparity between top clubs and the rest, this will mean that funding stadia redevelopment for lower-ranking clubs will simply not be possible unless the scheme can be integrated with other profitable users.

In the current climate of football finance, for clubs to remain successful they need to work with local authorities and benefit from cross funding from commercial development linked with regeneration opportunities.

**Current planning
policy now leads to
town centre
relocations**

Property development and regeneration

The second key driver identified to enable future provision of new stadia is the exploitation of regeneration opportunities. Where sites are available the trend is likely to be towards stadia relocating within the existing central areas, thus benefiting from central transport hubs. These may well be integrated within mixed-use development schemes, and they will play a major role in enabling urban regeneration. Such developments would comply with planning policy and be seen to meet both social and environmental concerns, as well as giving the opportunity of gaining economic viability.

In trying to predict what may happen in the future in the UK, it may be relevant to examine trends in the USA, as in many aspects of life this can provide an insight into possible developments. It is interesting to note that, in America, there is an observable trend towards the integration of football stadia with wider urban regeneration schemes.

The current observable trend is in stark contrast to earlier trends in America, which saw stadia developed out of town without any

long-term scheme for associated commercial or residential development. This left some cities, such as Buffalo and Phoenix, having new venues but surrounded with virtually nothing other than a sea of car parking.

**USA developments
mainly out of town**

Case studies from the USA

However, if that was the past, the present shows that there are now a number of examples in the USA where stadia are at the heart of urban regeneration in downtown areas. The most commonly cited example is Baltimore's Oriole Park, which moved the Orioles from the city's outskirts to the inner harbour.

**Baltimore's Oriole
Park coincided with a
harbourside
regeneration**

Baltimore's Oriole Park was completed in 1993 and its development coincided with the regeneration of the harbourside. This included a shopping centre and the National Aquarium, which together created a major visitor destination. Other developments have been attracted to the area, including a football stadium and further retail outlets. One of the chief advantages of the location is that the site is linked to the downtown commercial area.

In San Diego, the Padres are building a new ball-park downtown. The Padres, along with the city authorities and the San Diego Redevelopment Agency, have assembled a ball-park district encompassing 26 blocks to hold the stadium and associated mixed-use development.

Similarly, a major development is proposed for Cincinnati, Ohio, with two stadia in the Arena district. As Cincinnati's largest development, the scheme incorporates a mixed-use complex including housing, speciality retail, hotels and offices on the city's waterfront linked closely to Cincinnati's downtown area. At the heart is a new football and baseball stadium integrated within the mixed-use scheme.

**Master planning
needed to ensure
successful stadium
development**

These examples drawn from the USA show how stadium development is assisting the regeneration of inner-city areas. Provided the whole is master planned and integrated, it is proving possible to unlock brownfield sites which may have been vacant for considerable periods of time. Local authorities have assisted in providing these facilities due to the economic benefits the stadia bring to the cities. So how do the latest proposals in England measure up to these examples? Everton and Arsenal are two high-profile developments currently under discussion (at the time of writing the Wembley scheme had not been announced and it is therefore not included).

Everton Football Club

**Everton FC's proposal
adopts a US-style
format**

The Everton proposal follows a similar format to the examples of urban regeneration in America. The proposal brings about a mix of uses integrated within the city centre. The scheme is being brought forward in partnership with the regional development agency, English Partnerships, the city council and the club to regenerate the King's Dock area of Liverpool.

**A visionary scheme
mixing leisure, retail
and residential uses**

The scheme combines high-density uses integrated to work together, support each other and create a major new destination in the city with a new sports and entertainment arena. The scheme will be funded by private finance, Everton FC, regeneration grants and cross-subsidy from the commercial property development. Liverpool City Council as a partner in the joint venture has shown great vision in bringing this scheme forward.

The scheme includes residential apartments, a multiplex, a family entertainment centre, a health clinic, a fitness club, a hotel, restaurants, shops, offices and a 55,000-seat multi-purpose arena. It brings together the key components of regeneration, integrated mixed uses within an urban area and development in partnership with local authority and regeneration bodies. It is particularly interesting in that it proposes to put football back within a scheme that contains residential units — a case of back to the original siting among the supporters!

Arsenal Football Club

**Arsenal FC: putting
football at the heart
of the scheme**

The new stadium for Arsenal at Ashburton Grove is a major urban regeneration scheme in Islington, north London. The scheme includes over 2,000 new homes, leisure facilities, business and industrial space and a 60,000-seat stadium. The scheme will be cross-funded from the residential and commercial development, and the club will clearly be at the centre of the regeneration of the urban environment. This is a major scheme integrated and master planned for the long-term redevelopment of Islington. The council has been key in facilitating the scheme to move forward and supporting the planning application to ensure a successful future for the club in Islington.

SUMMARY AND CONCLUSIONS

**Taylor Report
heralded a sea
change**

The publication of the Taylor Report heralded a new era for football stadia in the UK. The design and safety of existing facilities had been found to be woefully and tragically inadequate. Since the report was published, many clubs have been forced into taking action. The requirement to introduce all-seater facilities as a minimum response to Taylor has proved, for many clubs, impossible within their existing grounds. Sites have been too small and the effects of capacity loss untenable.

**A decade of
redevelopment
despite the funding
'gap'**

Accordingly, the last decade has witnessed considerable investment in new facilities. As clubs have decided to relocate, so they have been forced to exercise creativity in finding viable solutions. This has been partly driven by an extremely difficult revenue climate and a funding gap. In part the funding shortfall has been made up by grant aid and the cooperation of local authorities which have not wished to see the demise of clubs in their areas given the emotional tie between the populace and football.

In some cases, notably at the beginning of the decade, out-of-town or edge-of-town solutions were found, but even here the

Drivers for development

Private finance

Synergy with commercial uses

addition of other revenue-producing activities has been sought to ensure viability. More recently, however, as the planning climate has rendered very unlikely the possibility of out-of-town relocations, so other means have been explored.

The paper has identified two possible drivers to redevelopment of stadia. One has been the availability of private finance. This has been shown to be problematic as the weak stock market precludes equity funding and debt burdens can be untenable, despite prevailing low interest rates. Accordingly clubs are increasingly looking to exploit synergies with commercial property developments within central areas in need of regeneration. Models of such schemes in the USA may provide blueprints for adoption, with adaptation, in the UK.

In summary, for the success of future stadium developments in the UK, regeneration and property development will play an increasingly important role in achieving integrated master-planned solutions. Stadia provide economic and social benefits to towns and cities and can be seen as catalysts for regeneration. Local authorities and regeneration agencies can, and arguably should, take the initiative to create these opportunities so that football stadia will be development drivers at the heart of urban regeneration for the future.

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