

Part 4

ANALYSIS

4.0 Introduction	25
4.1 A Socio-economic Profile	26
4.1.1 The Master Plan Study & Area of Influence	
4.1.2 Quality of Life Indicators	
4.1.3 Economic Indicators	
4.1.4 Implications for the Masterplan	
4.2 Market Appraisal	28
4.2.1 Office Market	
4.2.2 Industrial Drivers	
4.2.3 Retail Drivers	
4.2.4 Residential Drivers	
4.3 Visitor Economy	34
4.3.1 Regional Performance	
4.3.2 How Does Sheffield Compare?	
4.3.3 Visitor Activity in the Lower Don Valley	
4.4 Physical Environment	36
4.5 Transport & Infrastructure	38
4.6 Summary of Challenges	41
4.7 Summary of Opportunities	42
4.8 Conclusions	43

4.0 Introduction

To produce an achievable Vision and realistic Masterplan for the regeneration of the Lower Don Valley, it is important to first understand the underlying social, environmental, economic and physical conditions influencing the area. The following sections provide a review of these conditions to set the context for intervention. Existing conditions, key issues for resolution, opportunity drivers and related implications for the Masterplan have been identified for the following areas of appraisal:

- **Socio-economic** baseline to understand the social character of the Study Area and highlight key non-physical issues to be addressed;
- **Market Appraisal** considers the emerging demands in retail, residential, tourism, office and other commercial opportunities within the Lower Don Valley;
- **Physical Environment** considers the built environment and open spaces network of the Lower Don Valley; and
- **Infrastructure & Transport** considers the overall infrastructure of the Lower Don Valley including the road network, pathway system, rail and public transport opportunities.

4.1 Socio-Economic Profile

At the heart of the process for developing the Lower Don Valley Masterplan is the need to deliver long-term sustainable communities that integrate economic prosperity, social inclusion and quality of life. A more detailed analysis is provided at **Appendix B**.

4.1.1 The Masterplan Study Area & Area of Influence

Most of the Masterplan Study Area lies in the ward of Darnall, with the remainder overlapping into Brightside and Burngreave wards, as shown in Figure 4.1. However, several wards are close enough to warrant inclusion in this assessment as they are likely to be significantly affected by any regeneration that takes place. These additional wards are Firth Park and Manor Castle Wards. This larger area beyond the boundary of the Masterplan Study Area is referred to as the 'Area of Influence'.

Combined, the Masterplan Study Area and its wider Area of Influence comprise five of the 28 wards in Sheffield and 21% of Sheffield's total population. It is therefore an important area in terms of population. Paradoxically, on its own, the Masterplan Study Area comprises only 2% of the total population of the five wards.

4.1.2 Quality of Life Indicators

Statistically, poverty is typically measured at ward level using the Index of Multiple Deprivation (IMD). Due to the mismatch between ward boundaries and the Study Area boundary it is difficult to extrapolate deprivation figures at a very local level. However, the extent of deprivation in the surrounding wards should be a suitable general representation of the circumstances present within the Masterplan Study Area.

Those factors considered as the most appropriate quality of life indicators across the Masterplan and its wider Area of Influence are presented below:

- **Life expectancy** levels are lower than the city and national averages of 75 years for men and 80 for women. In some cases, notably the wards of Manor Castle and Burngreave, ages are as much as 5 years lower for both genders.
- The proportion of the population that is classified as having a **long-term illness** is also significantly higher than the national average of 18%, with Manor Castle again noted as having 29% of its population classified as such. These statistics are supported by the Index of Health Deprivation, which highlights that all the wards in the Study Area are ranked among the bottom 15% of wards in the country.

- **Crime** statistics are only available at a city level, and showed that in June 2002 the number of offenses per 1000 population was 35.8 compared to 28.9 for England (with Wales). Importantly, **perception of crime** is also poor, particularly in relation to the rest of the city. In fact, such is the scale of the problem in Burngreave, that the local authority has taken significant steps to reduce crime by locating more police officers in trouble spots, which has led to a reduction in petty crime levels in the ward.
- **Housing** in the Masterplan Study Area is mainly council owned. From the index of housing deprivation below, all wards in the Sheffield Area of Influence are in the bottom 20% nationally.
- **Geographical access to public services** (such as health care, environment, and waste disposal services) scores relatively well on the deprivation index ranking at least in the top 50% nationally. It should be noted, however, that the ward of Darnall is the lowest of all wards in the wider area of Influence.
- **Education** levels in the wider area of influence are classified as poor with 9 out of the 10 wards residing among the bottom 5% of poorest educated in the country.
- The proportion of **full-time students** of working age appear to be marginally lower than the national average.
- In terms of the working age population, the proportion that is **economically active** suggest that, apart from Brightside, each of the wards have significantly lower levels of economically active populations at around 10% lower than the national average.
- **Unemployment** rates are high, with each of the wards showing higher levels than the national level of 3.4%.
- With so many residents in the wider Area of Influence of lower occupational skill and educational attainment compared to the national average, coupled with the heavy competition for better paid jobs from residents in the rest of Sheffield, **average income** levels are significantly lower than the national average. The Income Index of the IMD rates all the wards in the wider area of influence within the bottom 10% of wards nationally in terms of average income.
- Overall, the wards within the Masterplan and its Area of Influence are consistently rated among the 10% most deprived wards in England.

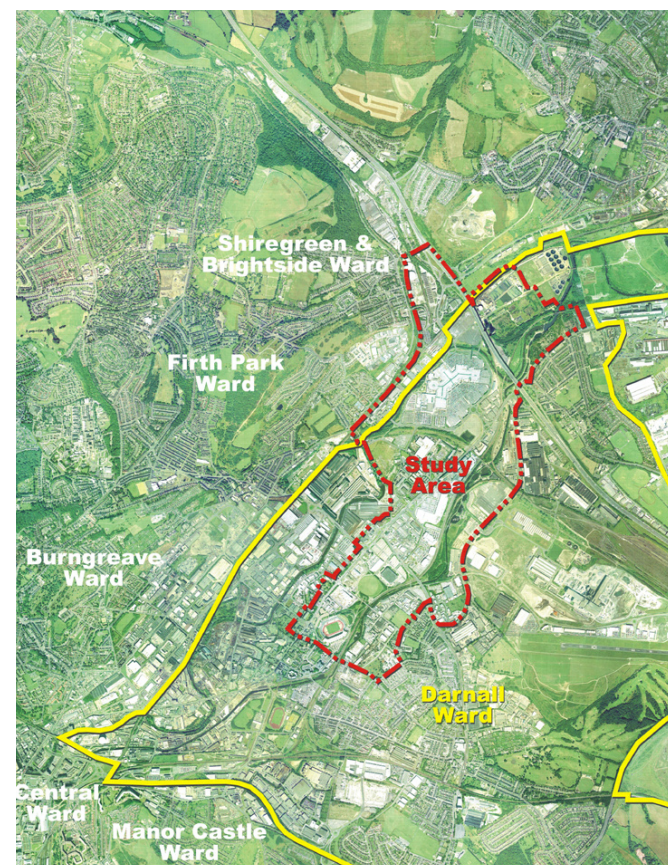


Fig 4.1: The Study Area and surrounding wards.

Table 4.1: % of employees by industry sector (SIC 2 digit codes)	Sheffield		Masterplan Wider Area of Influence*		Masterplan Study Area**	
	No.	%	No.	%	No.	%
Extraction, Food, Textiles			977	1	40	0
Wood, paper, chemicals, plastic, metals, machinery			15,082	22	2,940	23
Computers, electrical, motor, furniture, recycling			2,493	4	388	3
Total Manufacturing Sector	36,176	16	18,552	27	3,368	27
Energy, water, construction			3,581	5	310	2
Total Production Sector	11,458	5	3,581	5	310	2
Retail, hotel, restaurant			19,967	29	5,724	46
Transport, postal, financial,			6,335	9	1,295	10
Property, hire, computing, research, other business, public admin			7,491	11	1,106	9
Education, health, social			9,718	14	342	3
Waste disposal, recreation, other services			3,157	5	385	3
Total Services Sector	182,812	79	46,668	68	8,851	71
TOTAL	230,446	100	68,801	100	12,528	100

* Excludes the Nether Shire ward

** Statistics were derived from the postcode areas that overlap the Masterplan Study Area: S91, S92 and S95. As they all extend beyond the Masterplan boundaries, the statistics were apportioned to give a better representation of industry figures in the Masterplan Study Area.

4.1.3 Economic Indicators

Due to the very low number of residents living within the boundaries of the Masterplan Study Area and the limited availability of key economic indicators for this limited population, a full analysis of labour competitiveness is not appropriate. Of more relevance is a review of the business competitiveness of the area.

It is estimated that there are some 12,500 jobs currently located in the Masterplan Study Area, approximately 50% of which are provided at Meadowhall Shopping Centre. As highlighted in Table 4.1, the area also supports a significant employment level within the manufacturing sector with a high level of employment in the metal manufacturing sector - especially when compared to the city average. Dominant firms in the industry are Sheffield Forgemasters and Outokumpu, both of which have acted as key drivers for the local economy.

Due to its history as one of the main employment centres for Sheffield, the Masterplan Study Area has always been attractive for business relocation. Indeed, it still offers attractive investment opportunities for businesses, particularly given the previously successful redevelopment, the presence of prestige recreational and retail facilities, its accessibility and proximity to the M1 and the provision of physical infrastructure.

Within the study area's wider Area of Influence, some 2,335 businesses are registered for VAT purposes, of which 96% are classified as small and medium sized enterprises (SMEs). According to Sheffield City Council, the SMEs in the Area of Influence are predominantly focussed on serving residential population needs such as food and clothing.

Since the Masterplan Study Area is highly industrialised with very few residents located there, it might be expected that there would be more larger firms located here compared with the Area of Influence. However, this is not the case - with only Darnall and Burngreave wards housing any notable large industries. The remaining five wards consist almost solely of SMEs. The exception is Manor Castle, part of which comprises the industrial area to the south of the Masterplan area.

As a consequence of the domination of SME's in the area, there are very fewer companies able to provide well paid work and act as economic leaders. The domination of a few large firms and many SME's makes the business population unbalanced across the Lower Don Valley.

One of the few economic leaders in the area is Meadowhall Shopping Centre, employing as many as 7,000 people. Since its introduction to the Lower Don Valley in 1991, the shopping centre has been a major influence in diversification of the business sector and, in turn, has helped to attract other businesses to the area, notably Abbey National and Dixons. Other major employers in the Lower Don Valley include Meadowhall Retail Park, Centertainment, Royal Mail Sorting Office and Bekaert (formerly Tinsley Wire).

Although the Lower Don Valley has had some recent economic success stories, economic indicators suggest that there is substantial room for improvement in terms of competitiveness. The current reliance on the steel industry could put the Sheffield Study Area in a very vulnerable position should the circumstances that prompted the last decline arise again. However, with developments that have recently taken place, it is clear that there is potential for the area to attract new sectors and increase its stock of medium and large firms.

4.1.4 Implications for the Masterplan

- The Masterplan must promote and develop more sustainable business and residential communities to allow for a stronger balance of uses and economic well-being to the Lower Don Valley than what currently exists.
- Inhibiting factors for further diversification and commercial expansion in the Lower Don Valley are the shortage of suitable land able to support the growth in non-industrial sectors and the current planning restrictions on the zones around the motorway. This could restrict the area's potential as an economic driver for Sheffield.
- A programme of major redevelopment on sites in the Lower Don Valley provides the potential to open up a range of new sites and employment opportunities in the immediate locality. Such opportunities cannot be provided elsewhere.
- In the very challenging and relatively isolated environments around Meadowhall Shopping Centre, there is significant advantage in permitting the development of complementary uses if they encourage in enabling the wider redevelopment of derelict sites. Meadowhall can act as a catalyst for new investment in these brownfield parcels.
- Improvements to the existing infrastructure are required to link communities to areas of potential economic growth – from outside the Study Area as well as within the Study Area.
- In addition to physical improvements, social benefits must be gained through any new development proposed within the Lower Don Valley. This will allow for improvements in the labour supply and increased competitiveness – not only for businesses in the Lower Don Valley, but in Sheffield as a whole.

4.2 Market Appraisal

This section provides guidance on property market dynamics related to the Lower Don Valley area of Sheffield. Key economic drivers reviewed include office, industrial, retail and residential. For each section, the market overview seeks to outline:

- current supply;
- demand;
- take-up;
- issues for the Lower Don Valley property market; and
- implications on the Lower Don Valley Masterplan.

4.2.1 Office Market

The review of the office market draws on data set out in **Appendix C** and includes statistics related to take up, demand, supply, rental and yield data, key employers and total amount of stock in the market are available.

From an office market perspective, Sheffield equates in scale to centres such as Liverpool and Nottingham. Estimated total office stock currently stands at 600,000m² compared to Leeds (1.2 million m²), Manchester (1.1 million m²) and Birmingham (1.1 million m²).

Sheffield does not have an easily identifiable City Centre office core. Developments have been sprinkled across various parts of the City Centre reflecting different expansion areas at different times. Historically, office uses were concentrated along West Bar and Tenter Street but, during the 1990s, office occupation shifted to north eastern and south western peripheries – including the Development Corporation area in the Lower Don Valley. Within the City Centre, newer development areas include Victoria Quays, Riverside Exchange and Nunnery Square.

Beyond the City Centre, the Lower Don Valley and the Dearne Valley Enterprise Zone are considered to be the main out-of-centre office locations. Within the Lower Don Valley a number of new office schemes have been brought forward including Carbrook Business Park (occupied by Abbey National and Sheffield City Council), Arena Square and Meadow Court Business Park.

Across Sheffield, Grade A office space is in short supply (space that is prime, central area accommodation, delivered at high specification) – a trend that is echoed in other provincial markets. Grade B (edge-of-centre sites built to lower specification) and Grade C (refurbished space in non-prime areas) is three times more abundant

than Grade A provision. This points to a market based on pre-letting activity unable to respond quickly to large requirements. Again this is a fairly common situation in the provincial office market at the current time with speculative office development not taking place on a large scale in any of the major markets of Leeds, Manchester or Birmingham.

In the first quarter of 2004 there was 37,000m² of office floorspace available which is slightly above the three year average of 31,700m². This represents a vacancy rate of 6.1%. It is interesting to note that supply levels are at a low level when compared with the late 1990s when supply was in the order of 80,000m². Much of the unwanted office stock has been taken out of the supply pipeline through conversion or redevelopment for residential use.

Market demand for office space is, in general terms, running at around 25,000m² per annum on larger requirements. This ties back to the high proportion of larger requirements in the market. The public sector has driven office sector growth over the last 5 years in Sheffield, accounting for 31% of all take up. This is followed by ICT at 18% and business services at 17%. A high number of completions have been in the 2,000m² to 5,000m² range reflecting an inward investment bias on major occupation. There are a number of large schemes planned for the City Centre, however, apart from the Heart of the City and Riverside Exchange these schemes do not appear to be progressing at any great pace.

The take up of office space across Sheffield over the last three years has averaged around 30,000m². This is broadly in line with trends in other provincial City locations and compares quite favourably with peer group markets including Nottingham and outstrips centres such as Bradford and Derby. The market has witnessed solid demand for larger scale floorspace over the last three to four years. This has helped the market to mature and consolidate into a number of areas including the Lower Don Valley.

Rental levels in the City Centre had, until the last quarter of 2003 remained static in the £13.00 to £14.00 per square foot (£140/m² - £150/m²). Yields are currently running at around 8% in line with peer group centres. The deal recently completed with DLA in the Heart of the City has set a headline rent well in advance of this figure at a reported £18.00 per square foot (£195/m²). There is, however, no other evidence of similar rental levels being achieved on large-scale lettings. The limited supply of quality office space has assisted in keeping rents and yields in a competitive range, whilst most other competing centres have actually witnessed a decline in rents over the same period.





For Sheffield to compete more strongly in the office market with Birmingham, Leeds or Manchester, it must look more expansively at its office market by broadening the product available and bringing forward schemes that can compete with what other major provincial cities are promoting. This type of office product includes:

- major City Centre flagship office projects;
- significant out-of town business activity;
- a move to more mixed use – commercial development combining with on-site residential; and
- a 'twin centre' strategy that promotes the best attributes of the City Centre marketplace as well as larger strategic edge of centre sites, such as the Lower Don Valley. This will appeal to the broadest market possible.



Employment

There are a total of 230,000 people employed in offices in Sheffield; key sectors represented include 10% in finance, 11% in professional and business services, 30% in public services and 20% in other services. Sheffield is underweight in the financial, computing R&D, and telecom sectors and is overweight in the public services.

Due to the large number of people employed in Public Services, public sector jobs are an important facet of City Centre occupation. Key employers include the Inland Revenue, the Home Office, the Department for Education of Skills, the Learning Skills Council, the University of Sheffield, Sheffield Hallam University and Sheffield City Council. Continued levels of high government spending and the important Lyons Review may lead to further public sector investment and the creation of further public sector employment.

Major private office employers in Sheffield include a number of call centre operators including Freemans, Dixons, Telewest, Midland Mainline and William Hill. Clearly, the call centre market is an important employer for the city. The banking and financial sector is represented in the city by HSBC, Halifax, Norwich Union and Abbey. Whilst ICT is not a particularly strong part of the office stock, there have been some encouraging signs including set up by Insight Enterprises of their European Head Quarters in the Lower Don Valley and the occupation of significant floorspace by EDS.

While Sheffield has seen some growth in office jobs over the last five years, it has been at a lower rate than other competing centres. Forecasts undertaken by Jones Lang Lasalle in 2004 suggest that between 2002 and 2007 the total number of employees in offices is likely to rise by 0.3 per cent per annum. Prospects in terms of financial and business services employment growth are better with rates expected to be 2.1% per annum. It may be that the prospects of employment in Sheffield are positively affected by the availability of financial incentives in the City, and this could encourage further inward investment beyond that predicted.

Implications for the Masterplan

- Given the location and financial advantages that Sheffield enjoys, there are real opportunities to deliver large scale in-movers to the Sheffield market. Easily accessible sites with short lead in times will be required to meet this type of demand. The Lower Don Valley is ideally placed to respond to this area of demand.
- While absolute supply is not constrained there is a shortage of Grade A product as well as sites able to accommodate larger floorplates. There is an opportunity in the Lower Don Valley to provide floorspace able to meet future demand from larger scale in-movers. Sites, with good accessibility and able to accommodate significant occupiers, can be brought forward quickly.
- Given the historic trend profile, take up rates across the Sheffield area are predicted to be around 40,000m² over the medium term. In the Lower Don Valley, take up rates of 20,000m² per annum are achievable across a variety of different office types. Over a 15-year period this might lead to a take up of 300,000m².
- New office development being brought forward in the Lower Don Valley can take forward best practice sustainable development principles emerging across Europe and be a model for UK development.
- To compete more effectively with other regional and sub-regional centres, Sheffield's office strategy should support a twin centre focus. The Lower Don Valley has proved a popular location with occupiers – this should continue to be encouraged on sites adjacent to Meadowhall. The strategy will complement the City Centre office developments being brought forward on a number of sites without prejudicing either area's opportunity to compete successfully for occupiers against other regional centres. This is ably demonstrated by looking at other centres such as Manchester and Birmingham, where twin- and multi-centre strategies are being pursued successfully.

4.2.2 Industrial Drivers

The review of the industrial market draws on data from **Appendix C**.

Despite changes in the economic profile of Sheffield, the City still supports a strong industrial base dominated by traditional steel and engineering industries. Excellent logistic links, in particular proximity to the M1 and the M18 make Sheffield a good location for manufacturing/distribution employment uses. Key sectors include steel, engineering and distribution.

Around 75,000m² of industrial and warehouse space was taken up in Sheffield in 2002, the highest level yet recorded. However, trends in the industrial market are moving more towards logistics and distribution and away from traditional manufacturing. Take-up in 2003 was lower at 26,500m² over the first half of the year. Top rents currently stand at approximately £5.25/ft² (£56.50/m²), although rents of £6.50/ft² (£70.00/m²) have been achieved on a small number of deals.

The Lower Don Valley is one of three traditional locations for industrial development in Sheffield. More recently, a number of new industrial schemes have been brought forward on sites such as Shepcote Business Park and the Avesta site on Shepcote Lane. These developments are delivering new high quality industrial space into the market. Other major developments are being brought forward on sites outside the City boundary, most notably the Waverley AMP (see inset). There are also other significant sites in areas, such as the Dearne Valley, being targeted at the industrial sector.

Most recently, the development of the Polestar printing factory has been announced on land being brought forward for development by Gazeley. This 65,000m² project will deliver 1,300 jobs on a brownfield site at Shepcote Land in Tinsley.

In 2001, more than 36,000 people were employed in the manufacturing sector in Sheffield. This represents 16 per cent of the total employment base – a significantly higher proportion of the work force than the national average. This difference between local and national trends suggest that further localised decline is likely. Major employers include Avesta, Alvac, Forgemasters and Stanley Tools. Already, significant job losses have occurred at manufacturers such as Dorma, Stanley, Paramo and Corus.

In addition to housing some of Sheffield's largest industries, as highlighted above in the economic overview, the Lower Don Valley is also home to a large number of SMEs. The area is likely to witness continuing demand from small businesses that recognise the Lower Don Valley as a traditional location for this type of activity. It is worth noting, however, that significant growth in demand from indigenous occupiers is not forecasted. These types of occupier tend to be owner-occupiers who move infrequently. The more dynamic sectors of the market are logistics and larger scale advanced manufacturing.

The Lower Don Valley has the opportunity to bring forward sites for distribution uses, but competition is strong in the M18 and M1 corridor. Access to the Lower Don Valley from the motorway network is also constrained to some degree – therefore we do not perceive this market sector as a strong driver for growth.

Implications for the Masterplan

- Demand is forecast for around 50,000m² of floorspace per annum over the medium term. While a proportion of this requirement will be met in the Lower Don Valley (perhaps 10,000m²) we would expect the majority to be focussed on the AMP site and sites in the Shepcote Lane area. Consequently, it is predicted that new larger scale industrial requirements will be relatively limited in the Lower Don Valley.
- Prospects for the Lower Don Valley relate more strongly to the smaller scale manufacturing sectors where there are excellent opportunities to harness aspects of the City Strategy related to cluster development.



Advanced Manufacturing Park (AMP), Waverley
The 100 acre AMP site is part of a larger 730 acre development initiated by UK COAL Mining Ltd in anticipation of the final completion of the opencast coal mining operations programmed for completion in 2007.

The AMP is the centrepiece of a broad regional strategy for Advanced Engineering & Metals (AEM) Industries, backed by the Regional Development Agency. The AMP will contain 180,000 sq. metres of industrial and commercial floorspace, 3,700 residential units; open park space; a lake. Planning permission has been granted by Rotherham MBC for 20 acres of employment use and an application lodged for a further 80 acres.

This large and highly accessible, site in a high profile and significant regeneration priority area, will provide strong competition for any similar types of development being promoted in the Lower Don Valley.





4.2.3 Retail Drivers

The review of the retail market draws on data set out in **Appendix C**.

Shopping is a core component of any community and it is important to emphasise the key role that retail can have in 'place making'. Sheffield is the second largest retail centre in the Yorkshire region. The City Centre has 156,000m² of floorspace with a further 130,000m² located at Meadowhall Shopping Centre. The planning authority's focus in the short term is on the development of the new Retail Quarter in the City Centre. Scheduled for completion in 2010, the development will add approximately 75,000m² of new retail accommodation to the Sheffield offer.

Sheffield's main retail competition comes from developments in Doncaster, Barnsley, Nottingham, Bradford, and Leeds City Centres, as well as from out of town schemes such as Crystal Peaks at Mosborough. In 2003, despite being the fourth largest city in England, Sheffield ranked only 25th on the Management Horizons Shopping Index (based on floorspace, prime rents, shopper population, etc.). Meadowhall Shopping Centre was ranked separately to Sheffield City Centre and placed 31st. In contrast, Manchester placed second, Leeds and Nottingham tied for fourth, Newcastle placed 13th and Liverpool, 14th.

Current planning policy largely prohibits retail expansion within the Lower Don Valley - particularly at Meadowhall Shopping Centre - despite the fact that this important economic engine is facing increased competition from other City Centre schemes as well as other out-of-centre retailers. The absence of any retail development potential outside the City Centre presents a number of challenges for Meadowhall and, in fact, the Lower Don Valley, as a whole.

Comparative Retail Provision

Within the Lower Don Valley, the comparative retail offer is dominated by Meadowhall Shopping Centre and Meadowhall Retail Park, a big box retail park. Meadowhall Shopping Centre has proven to be one of the most successful shopping centre developments in the U.K. Prime rents in the centre are approximately £360/square foot (£3,875/m²), reflecting the demand from retailers for representation in this high profile location.

At present, as a self-contained retailing and leisure environment, the Meadowhall Shopping Centre does not link particularly well to adjacent sites. This is an important consideration given the requirement to regenerate significant tracts of land in close proximity to the Centre. Consideration should be given to creating a development scheme that can provide opportunities for regeneration by reaching into adjacent derelict sites and opening up the Shopping Centre through connections

with surrounding communities. Such a scheme must be at an appropriate scale and must not have a significant impact on other high priority projects being brought forward in the City Centre.

Meadowhall Shopping Centre has the potential to be complementary to the City Centre, by drawing consumers into Sheffield and – more importantly – away from other major competing centres, such as Leeds and Nottingham. To effectively achieve this, Meadowhall must be allowed some degree of flexibility to help it meet existing and future demands from both retailers and visitors.

The existing Meadowhall Retail Park and Meadowhall Shopping Centre provide quality comparison goods' leave. There are no significant drivers in place to support further retail investment in the Lower Don Valley. One-off end users such as, Costco or Ikea could find a home in the Lower Don Valley – however they could also be located in other parts of the City.

Convenience Retail Provision

Recent research completed in early 2004 by Jones Lang Lasalle on behalf of Sheffield City Council, identified that the Lower Don Valley is, at present, poorly served by convenience retail, particularly by food stores. This is in large part due to the absence of an established residential population in the area. With the introduction of an estimated population of between 12,000 to 15,000 over the next two decades, significant pressures for supporting infrastructure will emerge and a clear requirement for the provision of more convenience retailing and services will be necessary. To attract new residents to the Lower Don Valley, facilities will have to be of high quality and conveniently located.

The Masterplan proposal for Attercliffe Village identifies a community strategy requiring a significant overhaul of the High Street. The development of the High Street should be underpinned by construction of a new food store that will add a quality retailing component to the wider Attercliffe Village area. In addition, convenience retailing will support new residential development in the Pathfinder area and the wider Attercliffe area.

Implications for the Masterplan

- Until the new City Centre Retail Quarter is completed towards the end of this decade, discussions suggest that the planning authority will not contemplate any further major retail development in the Lower Don Valley.
- The Lower Don Valley has not benefited from any significant investment in convenience retailing. The development of significant new residential areas will require additional convenience retail facilities. Such development can be supported through both quantitative and qualitative retail assessments.
- At Meadowhall Shopping Centre, an opportunity exists to integrate more effectively the main shopping centre with the surrounding hinterland – currently a mixture of vacant sites and lower grade industrial estates. Meadowhall is a critical asset for Sheffield and must be supported to allow it to remain nationally competitive.
- In the environments around Meadowhall, there is great benefit in allowing complementary retail uses to assist the redevelopment of derelict brown field sites into viable investment sites for commercial uses. Meadowhall should be used as a catalyst for investment.
- The axis between Meadowhall and the City Centre is well established. This route could be improved through the introduction of further ancillary retail/leisure development along road corridors which, in turn, would complement any residential intensification and employment generation strategies being promoted through the Masterplan.

4.2.4 Residential Drivers

The review of the residential market draws on data set out in **Appendix C**.

Although established residential communities are located on either side of the Lower Don Valley in Burngreave, Darnall and Tinsley, the Masterplan Study Area itself contains very little housing. The limited housing provision in the Lower Don Valley is concentrated in Attercliffe Village.

For future demand, the Sheffield Unitary Development Plan (UDP) and regional planning guidance provide the context for projections on the supply of new homes to the Sheffield area. The UDP is currently being reviewed by the Council and will be published at a later date as a Local Development Framework under the new development plan provisions.

The current UDP identifies land for the construction of 10,700 dwellings over a 10-year period. It should be borne in mind that any new home construction targets for the City will be net – not taking account of the demolition of property likely to take place in Pathfinder areas. It is therefore likely that actual development rates will increase beyond 1,000 per annum as the Pathfinder programme advances even in the absence of any other development scheme. Clearly, these limited projections will need to be revisited.

Due to the geography of the city and the resultant physical confines caused by the Peak District National Park, areas for future housing development are limited to the east and north of the city. The Lower Don Valley therefore represents an excellent opportunity for future residential growth providing balance and increased choice for new home buyers. As opportunities to develop new housing are constrained in some parts of Sheffield, evidence suggests that builders are actively seeking brownfield development opportunities in other areas of the City, including the Lower Don Valley.

In line with current Government policy, which specifically points to the re-use of previously developed land (PDL) for the provision of new housing, Sheffield, like all other authorities across the country, has an obligation to maximise the use of PDL for housing. Significant land areas previously occupied by industrial uses but situated in close proximity to the City Centre, could be brought forward for the development of new homes.



As previously identified, many of the adjacent communities suffer from significant housing market problems – particularly low demand in the social rented sector and some abandonment of property in the private sector.

In April, 2002, the government announced a new programme aimed at tackling low demand and weak and collapsing housing markets. Transform South Yorkshire Housing Market Renewal Pathfinder programme was established to address issues of housing market failure and allied socio-economic problems. The Pathfinder is part of the wider Partnership area that takes in communities in Barnsley, Doncaster and Rotherham.

Although at least a 10 year programme, the Partnership has, to date, been awarded approximately £71 million for 2004-2006 to bring forward its three year action plan. Part of this will involve the development of Area Development Frameworks (ADFs) for targeted renewal areas. Sheffield's three ADFs are North Sheffield, North East Sheffield and South Sheffield. The Lower Don Valley Vision and Masterplan Study should be used to directly inform the development of the relevant ADFs and, in particular, the masterplanning exercises currently under way for Darnall, Attercliffe & Tinsley Area and the Wincobank & Brightside Area.

There is a major opportunity in the Lower Don Valley to make a huge contribution to the supply of new homes for Sheffield over the next 15 years. Creating an excellent, high quality, new residential community may well result in more housing units than originally anticipated by existing regional planning policy. This might mean that Sheffield attracts “more than its fair share” of projected regional housing, a laudable objective if it is a catalyst for regeneration of the Lower Don Valley.

The market analysis points to strong potential for housing of various types across the Lower Don Valley. However, to crystallise demand, it will be imperative to create a destination in which people want to live. This will require a complete re-imagining of the Lower Don Valley. Experience gathered from other UK and European cities suggest that residential development can be brought forward as long as it forms part of a comprehensive regeneration plan that includes workspace, leisure, retail and community facilities. Residential development of this nature in the Lower Don Valley would add the ‘missing ingredient’ to the current land use mix and underpin other elements of the development strategy.

Implications for the Masterplan

- Housing within the Lower Don Valley can play a number of key roles. First, it will create opportunities for mixed use and a more vibrant, sustainable Lower Don Valley area. Second, it will establish a market where currently one does not exist. Third, if successful, it will have a knock-on effect for the Pathfinder area, improving market conditions in these locations.
- The opportunities to deliver new housing in the Lower Don Valley will contribute to the Government’s urban living agenda and create a new sense of place. Development does, however, need to be of a sufficient scale to support the provision of amenities to attract residents to the area. Residential uses must therefore drive part of the regeneration strategy – not simply be a ‘nice to have’ element of the plan.
- The Housing Market Renewal programme will have a significant impact on the Lower Don Valley. It will lead to the improvement of thousands of homes in the locality and assist in improving socio-economic conditions across the area. The Pathfinder will have the most direct effect on Attercliffe Village area. Such development would also have a beneficial impact on proposals for new retail and employment development in Attercliffe.

4.3 Visitor Economy

Tourism is a fast growing market and should be a critical component of any contemporary economic development strategy. Tourism allows for increased local spending, job creation, an enhanced quality of life for residents and an improved image and quality of environment.

In the past, Sheffield has suffered from a low tourism profile, but there are signs that this is beginning to change – in large part due to the continued appeal of Meadowhall Shopping Centre, investment in the Town Centre public realm and retail offer, and the development of numerous visitor and sports related attractions. In addition, the marketing and promotional efforts of Destination Sheffield should be commended for helping to raise the profile of the city as a whole.

A review of the role of tourism in Sheffield is provided at **Appendix E**.

4.3.1 Regional Performance

The twenty most popular towns and cities among overseas visitors to the U.K. are shown below. London received significantly more visits than any other U.K. city. Sheffield does not feature in the list, although York and Leeds - also in the Yorkshire and Humber region - are both present. Significantly, Birmingham, Manchester, Glasgow, Cardiff and Bath, all of which compete strongly with Sheffield as sporting cities, feature within the top twenty most visited towns.

Top Towns Visited by Overseas Residents (2002)

City/Town	Visits (thousands)	City/Town	Visits (thousands)
London	11,600	Brighton/Hove	230
Edinburgh	850	York	230
Birmingham	670	Bath	200
Manchester	590	Nottingham	200
Glasgow	400	Liverpool	190
Oxford	390	Inverness	180
Bristol	310	Coventry	160
Cambridge	280	Reading	150
Cardiff	280	Canterbury	150
Newcastle-upon-Tyne	240	Leeds	140

Source: International Passenger Survey 2002

Led by visits to York and Leeds, the Yorkshire region receives approximately 13 million staying visits per year, of which the vast majority (12.2 million) are made by U.K. residents. The value of staying visits to the region is around £1.9 billion annually. Of the 13 million staying visits made to the Yorkshire region in 2002, South Yorkshire received just under 2.3 million. U.K. residents made 2.1 million visits with 170,000 visits being made by overseas guests. On the whole, visits to South Yorkshire in 2002 were shorter and of less value than in the rest of the Region. The Peak District National Park, an important asset for Sheffield, receives 22 million day visits a year.

4.3.2 How Does Sheffield Compare?

When benchmarked against seven other English “Core Cities” (Newcastle, Birmingham, Liverpool, Manchester, Leeds, Nottingham, Bristol), a review of Sheffield’s tourism performance suggests that the city lags behind its competitors in terms of quality accommodation, arts & cultural attractions, conference facilities and airport access – especially when compared to Manchester, Leeds or Birmingham.

In spite of these areas of relative weakness in some tourism related areas, Sheffield does compete strongly as a visitor destination in terms of sports venues of international standard. However, although benefiting from numerous sports facilities, it has been noted that there is a relative deficit of international events – especially in athletics – throughout the year. This is critical considering that it is *events*, more so than specific *attractions*, which shape a city’s tourism destination identity.

At the national and regional level, Sheffield has few major visitor attractions. The city’s most visited attraction in 2002 was the Millennium Galleries, receiving 172,000 visits.

In terms of hotel accommodation, Sheffield lacks any five star accommodation and supports only a very small number of three and four star hotels. Research, conducted by Tri Hospitality Consulting in 2004, indicated that there is a significant interest in new hotel development in Sheffield, particularly four and five star accommodation. This is evidenced by the number of applications approved or currently in the works for new hotel accommodation. If all hotel plans are realised, it will equate to an addition of 956 bedrooms across Rotherham and Sheffield. Coupled with new hotel development, the research indicated that there is scope to include additional conference venues as part of any future hotel development.

Although Sheffield does not boast any purpose built conference centre, it is currently enjoying a boom in conference business – in large part due to the city’s relative affordability, ease of access and quality of complementary conference facilities. A lack of bedspaces has, however, been identified by the Sheffield Conference Bureau as one of the main problems in attracting larger conferences to the city. Consequently, it is important to recognise that, in the absence of an increase in quality hotel accommodation, the future development of any stand alone conference venues is not advisable and could further inhibit the profile of Sheffield as a premier conference destination.

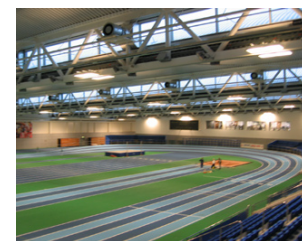


Photo from Anthony Hunt Assoc.

Gambling in the UK

The very recent changes to UK gambling laws has led to a number of plans being brought forward across the country for the development of large-scale casinos. Sheffield City Council has had at least four casino proposals presented to date. Others are underway in Rotherham and Doncaster. It is our opinion that for a large-scale development to be approved by all relevant public bodies, and considered worthwhile by the casino operator, a site in South Yorkshire should be selected and a single proposal taken forward for a casino of a regional scale.

Sheffield has a good chance of delivering a casino development in the Lower Don Valley as this location meets a number of criteria for successful casino development, including:

- providing physical, social and economic regeneration opportunities to the communities within and around the Lower Don Valley;
- strong geographic positioning, offering a casino operator sufficient catchment to support a large-scale development;
- excellent motorway access;
- availability of public transport;
- available sites of sufficient size;
- proximity to retail and other leisure activities is beneficial;
- possibility of developing a casino / hotel / conference complex is feasible, both in market and physical terms; and
- the area is likely to meet possible central government criteria for permitting very large-scale casino development only where it will have the most impact as a regeneration catalyst.

Locational criteria for Casino are provided in more detail at **Appendix A**.

Within the Study Area, two proposals have been put forth by different operators:

- Sun International has proposed a development attached to the Don Valley Stadium; and
- MGM Mirage, in association with British Land, has proposed a development at Meadowhall.

The timescale for decision-making will extend well beyond this Masterplan Study, and it is important that a casino not be considered a key anchor or financial driver of essential work specified in the Masterplan. Nevertheless, it is recommended that Sheffield City Council select its preferred proposal in the immediate term and vigorously pursue and support the proposal with Yorkshire Forward and the ODPM to ensure the greatest chance of securing the regeneration benefits a casino will bring.

4.3.3 Visitor Activity in the Lower Don Valley

Within the Sheffield and South Yorkshire context there is a significant level of visitor activity in the Lower Don Valley, generated by a series of high quality attractors. Clearly, the most successful attractor in the area is Meadowhall Shopping Centre.

The other main attractors in the Lower Don Valley are dominated by sports and leisure venues, including the Don Valley Stadium, the Hallam FM Arena, Ice Sheffield and the English Institute of Sport's regional headquarters. Attracting 1.5 million visits per year, Valley Entertainment is a very popular leisure complex comprising a multi-screen cinema, bowling alley and restaurants. In addition, the Sheffield & Tinsley Canal and the River Don attract a number of recreational anglers and walkers to the area.

Catchment for visitor activity in the Lower Don Valley varies widely. It is of interest to note that, although Meadowhall Shopping Centre is a nationally recognised destination, much of its visitor base is drawn from the local area, with 60 per cent of visitors travelling less than ten miles. Other visitors tend to come from areas clustered around the main arterial routes across the wider catchment area. The sports venues range from a local catchment for minor events to international catchment for major events.

Based on its existing assets, the Lower Don Valley has two clear areas of brand strength: Meadowhall has considerable equity as a retail brand, whilst the Sports & Leisure Hub offers unique regional and national sporting facilities and programmes. However, it appears that, in the case of the sports facilities, the brand is not as strong as the product – with many viewing the collection of venues as a 'well-kept secret'. This offers an opportunity for further development.

Furthermore, although there are a number of high profile and widely appealing visitor facilities within the Lower Don Valley, these attractions tend to be disjointed and difficult to move between - especially for the pedestrian visitor. There is a marked lack of infrastructure and services to draw the attractors together, and, as a result, there is little in the way of a coherent "destination package". This results in a fragmented visitor market that inhibits spin-off benefit between venues and activities. Further consideration needs to be given to how attractions can be more strongly linked to derive greater benefit from the existing investment in the area, increasing its appeal to a broader cross section of people, generating greater trips to the area and between destinations, and attracting more visitors to the Lower Don Valley and Sheffield as a whole.

Implications for the Masterplan

- While large-scale visitor attractions can play a role in regeneration, a number of factors – including the high-risk nature of such projects and the poor funding climate for large attractions – encourages a more blended and thoughtful approach to destination making that combines leisure, commercial and residential developments.
- Based on emerging national and international tourism trends and the work undertaken for this study, Sheffield should not establish a destination strategy based on a single iconic development. It should look to a more multi-layered plan that builds on the strength of its existing assets. The emphasis should be on creating a sustainable and unique mixed-use destination, encouraging cross-fertilisation and integrating activities. Co-working between the property sector, the City, the universities and other partners will be critical.
- Large-scale sports related retail would be an interesting complement to the Sports & Leisure Hub, but should be considered only in the light of existing provisions in the City Centre, subject to planning policy guidance. Larger scale formats, such as "Try & Buys" (retailers which allow customers to 'try-out' sports related equipment on-site before purchasing) demand large internal and external sales and testing areas and could not be accommodated in the City Centre, would be appropriate.
- There is a significant interest in hotel development in Sheffield. Coupled with any new hotel development, there is scope to provide purpose built conference facilities to expand the appeal and capacity of Sheffield as a conference destination. The Lower Don Valley – in particular, those areas that are highly accessible, well served by public transport and able to offer complementary facilities – could best accommodate these type of uses.
- As a result of the proposed changes to UK gambling laws, there has been significant interest from major international casino operators in sites all over the country. Sheffield City Council has at least four casino proposals to date. There are also others being put forward in neighbouring local authorities. For a large-scale development to be approved by all relevant public bodies and for it to be considered worthwhile by the casino operator, a single site in South Yorkshire should be selected and a single proposal taken forward.

4.4 Physical Environment

The Study Area is primarily defined by its flatness, a characteristic particularly suitable for the large floor plate industries which dominated the area a century ago. Steep rises in geography bound the south, north and western edges of the Valley, with the eastern edge sloping gently upwards into the communities of Darnall and Tinsley. The top of the Study Area is sharply defined by the M1 Motorway Viaduct which slices across the Valley in a northwest/southeast direction.

The River Don snakes through the valley travelling on a course from the City Centre northeast on route to Rotherham. Along its course it steps down over a series of weirs. While generally shallow in depth and, for the most part, contained by embankments and industrial brick walls, the river is less well contained as it approaches Meadowhall. Flood risk in this immediate vicinity is a real concern as demonstrated by the river's breach of its banks in years past.

The eastern edge of the Study Area is delineated by the Sheffield-Tinsley Canal. The canal enters the area elevated above the surrounding landscape before dropping via a series of locks to meet the River Don at Blackburn Meadows.

The north and south portions of the site are severed by an abandoned rail embankment. This embankment physically cuts-off Meadowhall Shopping Centre from the largely disused industrial lands to the south and helps to further isolate the Centre from the rest of the Lower Don Valley.

While neither the river nor the canal act as significant barriers to movement, the road and supertram networks that run parallel to the waterways impede the movement of pedestrians and cyclists. In addition, a railway line runs from the City Centre to Meadowhall along the western edge of the river. Add to this the M1 viaduct and the net result is a major part of the Study Area being physically severed from the adjacent communities of Brightside, Tinsley and Darnall.

The related environs of the River Don and the Canal create an atmosphere that is in stark contrast to the Lower Don Valley. The five Weirs Walk, part of the Trans Pennine Trail, is vegetated and populated by birds and other small wildlife. Industry's brick walls edge the river bank in parts; embankments elsewhere provide a sense of enclosure before transitioning into the more manicured landscape of Meadowhall. The Sheffield-Tinsley Canal has, for the most part, a well-maintained towpath along which anglers fish and local residents stroll. Together, the river and the canal form a continuous circuit from the City Centre to Meadowhall and back again. The path continues beyond

the M1 motorway through Blackburn Meadows and on to Rotherham. Regrettably, this valuable asset of the Valley is under-appreciated and underutilised.

Not surprisingly, due to the area's role as Sheffield's manufacturing and steelworks hub, large-scale stand-alone industrial developments dominate much of the Lower Don Valley. This is particularly apparent closer to the M1 and adjacent to the heavy rail network. Many large scale industrial developments also back onto the river, limiting visual and physical access to this important amenity.

Buildings supporting larger floor plates and expanses of open land gradually give way to housing, high street retail and small manufacturers towards the south of the Study Area. A finer texture of built form characterises the communities of Attercliffe and Darnall. The area's road network reflects the finer grain of Attercliffe and Darnall as well as the coarse texture of the industrial uses and Leisure/Retail environments.

While the Study Area has a rich array of uses as illustrated by Figure 4.2, the overall impression is one of disconnection and under-utilisation.

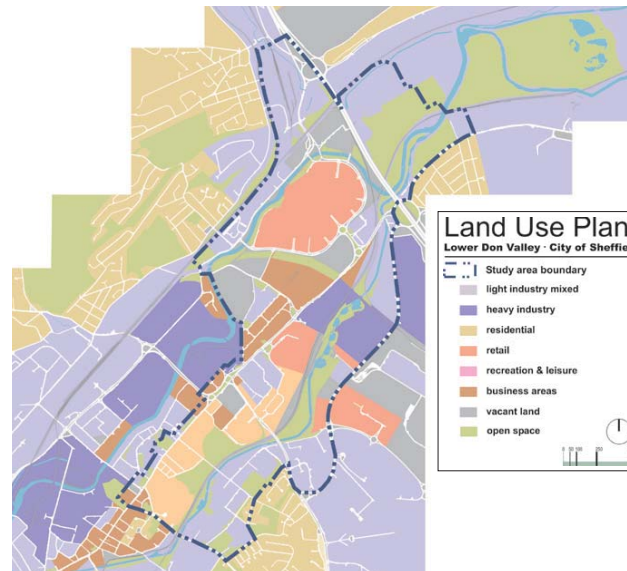


Figure 4.2: In contrast to the generic 'Industrial' & 'Business' Land Uses outlined in the City's current UDP for this area, the actual land uses across the Lower Don Valley, as interpreted above, are much more varied.

Open Space



Flooding

A major feature of the Study Area is the River Don which flows in a north easterly direction through the area. Large parts of the Study Area are within the 1 in 100 year Indicative Floodplain (IFM) as currently defined by the Environment Agency.

Current planning guidance, in particular PPG25 – ‘Development and Flood Risk,’ seeks to restrict development in the floodplain with the application of a ‘sequential test’ that supports development in areas of least flood risk over those in areas of greater risk. Strict application of the sequential test to the Study Area would constrain the Masterplan to a significant degree and, therefore, a range of solutions to the flooding issue will be required.

The risk of flooding is a very real barrier to the comprehensive redevelopment and regeneration of the Lower Don Valley. Due to the extent of the floodplain and the implications that this has across lands in Sheffield, Rotherham and Doncaster, flooding is not an issue that should be resolved in piecemeal fashion; rather, it must be addressed more strategically at a regional level. Although a solution to flooding is beyond the scope of this study, one of the primary aims of the Masterplan will be to ensure that there will be no derogation in the flooding situation either upstream or downstream of the Study Area.

The approach to the flooding issues within the Study Area will need to ensure the following:

- the true extent of the existing floodplain is determined and agreed; and
- changes to the floodplain arising from the Masterplan do not result in increased flooding downstream.

Options for flood alleviation to be considered, possibly in combination, are the following:

- additional flood defences on certain development sites;
- floodplain management, i.e. providing floodplain storage areas such as car parks or landscaped areas;
- flood alleviation measures to reduce flood levels in the Study Area such as channel improvements or a bypass channel; and
- wider scale options, such as providing flood storage outside the Study Area.

Flooding is a potentially complex multi-regional issue that will require high-level input from a variety of partners to produce a satisfactory solution. **Appendix H** provides further information on options for flood risk management.

Air Quality

Part of the Lower Don Valley lies within the M1 Air Action Zone (AAZ), an Air Quality Management Area declared by Sheffield City Council under the Local Air Quality Management Regime introduced by the Environment Act 1995. It has been declared for exceedence of the nitrogen dioxide (NO₂) national air quality objective to be achieved by the end of 2005. The AAZ covers an area of just under four square kilometres adjacent to the M1 around Junctions 34N and 34S, including part of Meadowhall Shopping Centre and Tinsley.

The main source of emissions is road transport. Sheffield City Council have identified a need to reduce emissions of nitrogen oxides (NO_x) by 30% to achieve their own objectives. The main source of NO_x is the M1, with between 60% to 68% of the emissions coming from the motorway. Heavy-duty vehicles (lorries and buses) contribute approximately 60% of the total emissions.

A working draft Action Plan has been produced in collaboration with the M1 Corridor Clean Air Partnership, a stakeholder group involving local industry, residents, businesses and others. It identifies a number of options for the improvement of local air quality. The Action Plan reinforces and supports the Local Transport Plan and other city-wide strategies. It also “seeks to identify and maximise opportunities to secure air quality improvements as well as social and economic benefit through the promotion of good practice”. In addition the Action Plan “is designed to promote environmental quality rather than to inhibit development”.

Eight packages of policies are recommended relating mainly to the transport sector, but also for the industrial and business communities, and national and local government. To aid the improvement of air quality across the Study Area, key ambitions of the Masterplan include:

- improving public transport;
- introducing new traffic controls;
- providing additional transport infrastructure;
- promoting the use of cleaner vehicles;
- introducing stronger controls of industrial combustion and process emissions (environmental management systems); and
- embracing national guidelines and standards for environmental performance.

Further details on these approaches is provided at **Appendix G**.

Implications for the Masterplan

- A series of environmental issues needs to be addressed if new commercial and residential communities are to be introduced to the area. Issues include the implementation of appropriate mitigation measures to address potential flooding issues and stronger recognition of air quality issues, arising in particular from auto emissions from the M1 corridor and affecting the “Air Action Zone”.
- Despite its industrial past, the Lower Don Valley contains an abundance of wonderful natural features and open spaces. To date, many of these charming environmental features have been underutilised and kept hidden from view. As part of the Masterplan, key features should become central to the Valley and contribute to the creation of a distinctive and positive sense of place.
- A large part of the Study Area is characterised by shed-like industrial complexes or lower-end smaller office infill projects. The required image change in the area demands that greater attention be paid to the quality of new development.
- Streetscape and landscaping is inconsistent and of relative poor quality across the Lower Don Valley Study Area. A higher quality public realm will create the settings to attract a higher order of new development.
- Physical barriers need to be reduced across the site to allow for greater permeability within the Study Area as well as to adjacent neighbourhoods.
- A more public transport-oriented, pedestrian and bicycle friendly approach will require the development of new fully connected routes.



4.5 Transport & Infrastructure

The Study Area has a highway network incorporating access roads, local roads, trunk roads and a section of the strategic M1 motorway. There is also a comprehensive multi-modal public transport network in place throughout the Lower Don Valley which comprises heavy rail, bus, coach, Park and Ride and Supertram. The public transport hub is centred on the Meadowhall Passenger Transport Interchange (PTI) on Meadowhall Road adjacent to Meadowhall Shopping Centre.

Highway Network

The M1 is one of Britain's busiest motorways and runs through the northern tip of the Masterplan Study Area. The M1 provides easy access to Leeds, Birmingham and London. The M1 operates as a three lane motorway in each direction, except between the north and south junctions of Junction 34 where a lane is dropped in both directions resulting in two lanes each way across the viaduct. Access from the local road network to the motorway is via Junction 34. This junction essentially operates as two separate junctions, namely Junction 34 North and Junction 34 South. Access to the northbound carriageway can only be achieved from J34 North and access to the southbound carriageway via J34 South. Southbound traffic leaving the motorway can only do so at J34 North and northbound traffic at J34 South.

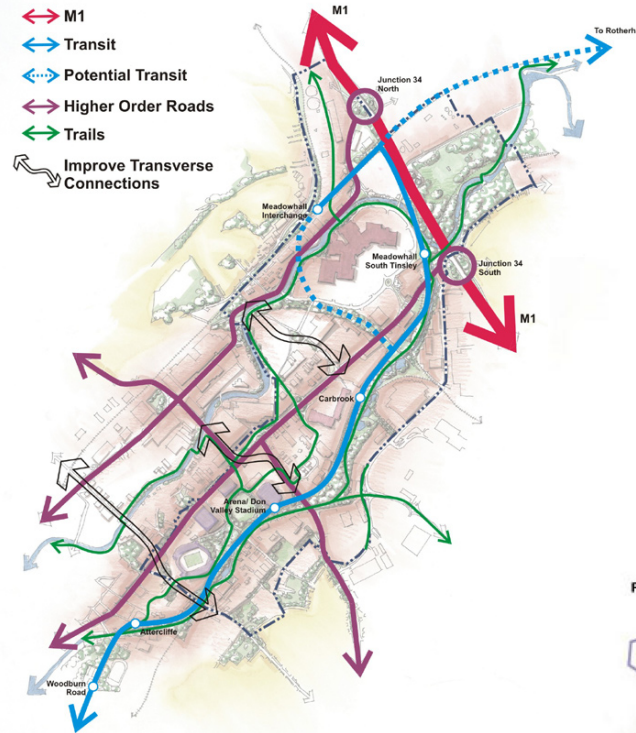
To the east and west of the Lower Don Valley area lies the A6109 (Meadowhall Road), and the A6178 (Sheffield Road), which run parallel to each other until they reach Sheffield City Centre to the south and Rotherham Town Centre to the north. The A6109 intersects with the M1 at Junction 34 North, the A6178 at Junction 34 South. The other significant road in the area is Meadowhall Way, which effectively serves as a ring road around the Shopping Centre linking the car parks and servicing areas. It acts as a link with both the A6178 and the A6109.

During peak periods the motorway and the local highway network is in parts congested, with a number of the junctions in the Study Area close to capacity including Junction 34 North and South.

However, despite the peak time congestion, using the existing flows and the maximum capacity estimates within the highway and public transport network, work undertaken for this Masterplan has identified some spare overall capacity within the network. At present, it is clear that this is quite minimal within the highway network with capacity issues occurring at Junction 34, Sheffield Road and Meadowhall Road.



Transit and Movement



Transport & Movement Networks



The Lower Don Valleys Structural Components

However, it has been observed from the transport analysis work undertaken that although spare highway capacity is at a minimum, there is significant spare capacity on the existing public transport networks throughout the Study Area.

Spare capacity across the complete transport network (highway and public transport) can be summarised broadly as follows:

	A.M. Peak Spare Capacity (total number of trips)	P.M. Peak Spare Capacity (total number of trips)
Into Study Area	12,255	9,442
Out of Study Area	17,648	14,624
Two-Way Flows	29,903	24,066

Supertram

At present, the Supertram system has three routes known as the Yellow, Blue and Purple. Both the Yellow and Purple routes originate or terminate at the Meadowhall Interchange. The Yellow route weekday frequency is approximately one tram every 10 minutes and the Purple route frequency is approximately one tram every half an hour for the same time period. Throughout the Study Area, the Supertram is at times operating at only 10% of its capacity.

The existing Supertram route through the Lower Don Valley provides stops mainly at leisure destinations within the Valley which are particularly 'peaked' in terms of hours of operation. The Supertram's route only services the eastern side of the Study Area, stopping at Attercliffe, Arena / Don Valley Stadium, Valley Entertainment, Carbrook, Meadowhall South / Tinsley and the Meadowhall Interchange. At present, the South Yorkshire Passenger Transport Executive (SYPTX) in association with Sheffield and Rotherham Council's, are assessing possible route extensions for Sheffield Supertram.

Rail

As part of the national rail network, the Meadowhall Interchange provides direct links to both Rotherham Central Station and the Barnsley via Chapeltown. There are a total of four platforms at the Meadowhall Interchange. Platforms 1 and 2 serve the Sheffield/Manchester to Rotherham/Doncaster/Cleethorpes services. Platforms 3 and 4 serve the Sheffield/Manchester to Barnsley services. There is a high frequency of trains in all directions with weekday services every 20 minutes. Up to 400 regional train services per day use the Interchange.

Heavy rail is well used in the Masterplan Area with almost 900 alighters and over 1,000 boarders during an average weekday from Meadowhall Interchange. This figure increases to over 9,000 alighters and over 8,500 boarders on an average Saturday.

Bus

Bus provision within the area includes 84 local and regional bus services running from the Interchange. These services serve Sheffield, Rotherham and other nearby towns. At the Interchange itself there are 16 bus bays. A further 14 bus stops are located in the area around the Meadowhall Shopping Centre.

At present, strategic routes efficiently service the north-south Meadowhall Road and Sheffield Road corridors. However, as with the Supertram route, these bus routes fail to penetrate the peripheral Masterplan Area. Connecting through the Masterplan Area in an east-west fashion (between the Brightside and Darnall communities) is impossible without first going into the City Centre and transferring services.

The interchange also provides national bus services for destinations across the UK.

Park & Ride

Local Park & Ride services currently operate from the Meadowhall Interchange as well as Centertainment. The Park & Ride facility currently has parking spaces for up to 200 cars. The facility is well-used and frequently the car park is at capacity before 8:00 am on weekdays, showing a high demand for the facility which can result in informal use of Meadowhall Shopping Centre parking facilities as an over spill.

Pedestrian and Cyclist Pathways

The area is heavily trafficked, and as such, walking and cycling are modes that suffer from vehicular severance, air quality issues, lack of road space and lack of priority measures. Most cycle paths are fragmented across the Masterplan Area – especially between the east and west. A fully connection path system is provided along both the river and canal.



However, cycle and pedestrian provision is of strategic importance and as such, requires measures that can enhance and encourage these modes to play a greater role within the Masterplan area. Many of these measures can be undertaken as part of area or company wide Travel Plans.

Additional details on the transportation systems of Sheffield and the Lower Don Valley are provided at **Appendix D**.



Implications for the Masterplan

- There is little spare capacity on the highway network, with capacity issues being particularly pertinent at Junction 34 and along the Meadowhall and Sheffield roads. There is, however, significant spare capacity on the public transport network. This capacity should be capitalised on further.
- To reduce the potential impacts of the Masterplan proposals on the highway network and the Lower Don Valley environment, there will need to be a managed approach to trip patterns within the area, with complementary land uses being critical to this.
- The Lower Don Valley supports strong north-south connections (from the M1 to the City Centre), but very weak east-west connections. This has resulted in the Lower Don Valley being relatively inaccessible from neighbourhoods on both its east and west sides. Stronger connections need to be forged. The problems around accessibility must be overcome if the Lower Don Valley is to become more attractive to investors.
- It will be essential that a robust transport strategy be devised and implemented to affect mode shift and reduce any future impact on the highway network through the utilisation of sustainable modes. Further details are provided in Section 5.4.



Transport SWOT

Type	Strengths	Weaknesses	Opportunities	Threats
Cars	Strategic motorway network; Large amount of car parking spaces; Car focussed development; VMS network.	Congestion on the M1 especially during peak periods; Junction 34 (N and S) at capacity during peak periods; Two lane Tinsley viaduct restricts traffic flow and results in congestion; Strategic and local roads have high levels of traffic.	Halfpenny Transportation Initiative would reduce congestion on the Sheffield Road; SWYMMS/SWYMMBUS proposals could increase highway capacity.	Increasingly restrictive parking policies; Fiscal traffic reduction measures; Possible further congestion.
Trains	Existing infrastructure; Meadowhall Interchange facility.	Inflexible routings.	Possible reinstatement of Blackburn Chord to Barnsley; Possible reinstatement of disused rail link south of the Meadowhall.	Limited scope to increase capacity.
Buses	Meadowhall Interchange facility.	Constrained by heavy congestion on the highway network.	Increase in number of Gold and Silver routes; Increase in bus priority; Halfpenny Transportation Initiative; Quality Bus Corridors (QBC's).	Further highway congestion.
Supertram	Modern; High frequency; Meadowhall Interchange.	Supertram currently has poor strategic routing; Supertram currently provides no links with Rotherham; Slow; Low patronage; Low revenue yield.	Proposed Supertram extensions and realignment will provide enhanced service and increased choice of destination; Supertram can maintain and enhance the sustainable nature of the Lower Don Valley.	Supertram extensions and realignment may not be delivered; On street sections delayed by increased traffic congestion.
Park & Ride	Operates at capacity.	Constrained by heavy congestion on the highway network; Large car attractor.	Opportunity for new local and/or strategic Park & Ride facility in Lower Don Valley.	Increased highway congestion; Lack of suitable sites for Park & Ride.
Pedestrians & Cycles	New cycle path between Meadowhall and Tinsley.	Lack of high quality cycle infrastructure; High traffic volumes in area hinder pedestrian and cycle movement; High proportion of development in area car orientated.	Cycle priority; Green travel initiatives; Company travel plans; Increased internalisation of trips.	Increased traffic congestion; Increased highway capacity (vehicular); Increased vehicular severance.

4.6 Summary of Challenges

Perception

In spite of the recent development successes, the Lower Don Valley suffers from a poor image arising from its decline as an industrial centre and consequent loss of population and businesses. This has resulted across the area in a poor quality physical environment, large areas of vacant and/or derelict land, an inappropriate street network, poor accessibility to adjacent neighbourhoods and a lack of diversity in uses.

The challenge for regeneration is to create a positive new image for the Lower Don Valley, in tandem with the on-going efforts to “re-brand” Sheffield as a whole emphasizing its urban renaissance and creating a stronger climate for reinvestment in the area.

Quality of existing development

The required image change in the area demands greater attention be paid to the quality of new development. Although the Lower Don Valley is home to high-quality recreational facilities and Meadowhall Shopping Centre, a large part of the Study Area is characterised by shed-like industrial complexes or lower-end smaller office infill projects. Furthermore, streetscaping and landscaping is inconsistent and the area as a whole suffers from a lack of cohesion and comprehensive planning.

If the character of the area is to be upgraded, greater attention will be needed to ensure the highest quality public realm and improved architectural treatment of new development. This will create a setting which will attract a higher order of new development - a basic objective of the Masterplan Study.

Accessibility

Sheffield is built around a series of peaks with the Lower Don Valley nestled between two of Sheffield’s seven hills. As a result of this topographic positioning, the Study Area contains strong north-south connections (from the M1 to the City Centre), but very weak east-west connections. The challenge will be to increase accessibility to and across all parts of the Study Area.

Transport

The strategic road network is currently operating close to capacity in some critical location, notably Junctions 33 and 34 on the M1. A more public transport-oriented, pedestrian and bicycle friendly approach will be required to reduce dependency on the automobile, thereby accommodating the additional development envisaged by the Masterplan. Strategic regional-level solutions are likely to be required to fully resolve the complex South Yorkshire and M1 issues.

Mix of Uses

At the moment, the Lower Don Valley is still largely characterised as a manufacturing area and is protected in planning regulation as an area largely for industrial employment. Hence, it has retained a primarily one-dimensional land use character. The Masterplan recognises that many new more sustainable employment uses are not as land-hungry as the previous manufacturing activities. It is proposed that additional recreational, leisure, and residential uses can be introduced to bring a renewed vitality to the area, whilst still protecting existing industries and businesses. The challenge is to create a better, more sustainable mix of new uses which are better integrated and connect to existing uses.

The suburban character of the Lower Don Valley is reinforced by the current land use classification system which tends to segregate open spaces, industrial, employment, residential, retail and leisure uses. The historic use of the area as the centre of Sheffield’s steel industry has, in the past, prevented many non-industrial or in more recent times, non-leisure related uses from taking root. Even with the decline of the steel industry and the resulting industrial dereliction, much of the area remains safeguarded for employment uses. This segregated and mono-use model is no longer sustainable.

To ensure the longer-term stability of existing employment and allow for future economic growth, it is important that prosperous businesses and industries are protected whilst also allowing for the introduction of more robust employment opportunities to the area.

Environmental Issues

A series of environmental issues need to be addressed if regeneration is to have the desired effect of creating a healthy, active community. These issues include:

- the need for environmental remediation of former industrial sites;
- the implementation of appropriate mitigation measures to address potential flooding issues; and
- the recognition of air quality issues, arising in particular from auto emissions along the M1 corridor and affecting the “Air Action Zone”.

All of these issues are being addressed in the Masterplan Study to ensure the best possible environmental conditions for residents and workers alike.

4.7 Summary of Opportunities

Location

The Lower Don Valley enjoys numerous locational advantages which are very attractive to business, but many of these have not been fully exploited to date. Such advantages include direct access to the M1, proximity to national rail, direct public transport links with the City Centre and a sophisticated internal road system. This location also provides strong access to both a local and regional labour supply.

Natural Features

In addition to its locational and infrastructure advantages, there are several natural features of the Valley that should feature more prominently, including the River Don, the Sheffield & Tinsley Canal and the open space network which meanders through the entire Valley. Many of these environmental features are underutilised and hidden from view. As part of the Masterplan, key features - namely the river and canal - will become more prominent across the Valley and contribute to the creation of a distinctive and positive sense of place. These unique environmental attributes will provide the setting for much of the Lower Don Valley's proposed new development.

Land Resources

The demise of many large-scale industrial areas has made available large tracts of land for redevelopment. Over both the short and longer-term, these significant land resources offer opportunities for redevelopment. The scale and relative low cost base of these parcels could provide enormous potential and appeal for investors and businesses.

History and Reputation

Despite the significant closure of manufacturing and industrial factories across the Lower Don Valley, many of the jobs lost have been replaced by the emergence of service related employment opportunities (primarily through Meadowhall Shopping Centre and, to a more limited degree, new office development). Consequently, the Lower Don Valley - although an area in transition - has retained its well-established reputation as a location for business and employment within Sheffield.

In addition, the area's industrial history is identified as a means of enhancing the Lower Don Valley's sense of place. This could range from the preservation and integration of industrial icons into new development, to the animation and celebration of the Lower Don Valley's industrial past through art and events.

Existing Leisure Investment

The Lower Don Valley is well positioned to seize the next generation of thinking about how to create destinations and integrate them into masterplanning and investment initiatives in a fashion that ensures they are set at the core of plans rather than as add-ons.

What is of critical importance in the delivery of successful destinations is the integration of an offer that has a unique role to play, not only in a regional context, but in a national one. In this regard the Don Valley Stadium, Meadowhall Shopping Centre and a strategically sound location play a vital role. To achieve this, there must be a focus on a full and genuine cross fertilisation of ideas and integration of activities.

A Complementary Approach

A major factor in determining the future success of Sheffield as a retail and commercial destination must be the promotion of both the City Centre and Meadowhall as complementary centres to the wider catchment area. The two centres together provide a high quality and diverse retail choice, a varied shopping and leisure experience and the possibility to create positive change in accordance with the area's Objective 1 status. Together, the City Centre and Meadowhall will help to consolidate Sheffield's position as a prime retail and leisure destination. Such an approach will raise the profile of both centres and will together help to enhance Sheffield's overall profile for wider regional and national audiences.

4.8 Conclusions

- New development in Sheffield should be directed towards the established regeneration areas to help stimulate economic growth, capitalise on funding opportunities, halt further decline and create a more robust and competitive local economy.
- The Lower Don Valley's traditional reputation as an industrial location remains intact. To support the Sheffield City Strategy, the Lower Don Valley should diversify as an employment area building on the strength of the small business sector and the larger businesses that will remain as a driving force.
- There is a lack of suitable quality office provision – particularly Grade A space – for larger scale floorspace across Sheffield. This has resulted in Sheffield losing office development to other competing centres.
- Since the 1980s and 1990s, retail and leisure development has proved a significant component of the local economic mix. Meadowhall Shopping Centre acts as a magnet and investment hub – further development adjacent to the complex will consolidate its role as a sustainable urban neighbourhood. However, the existing policy and political environment around new retail outside the City Centre could have implications for the ability of Meadowhall to assist Sheffield and the region in achieving its regeneration goals.
- A major factor in determining the future success of Sheffield as a retail and commercial destination must be the promotion of both the City Centre and Meadowhall as complementary centres. Together, these centres will help to consolidate Sheffield's position as a prime retail and leisure destination and raise the profile of the City as a whole.
- There is a marked lack of residential property across the whole area, which principally serves communities on either side of the Valley. The Lower Don Valley should be promoted as a location of choice for new and established residents offering a mix of accommodation in new neighbourhoods potentially clustered around Meadowhall and Attercliffe Village.
- A series of more defined and user-friendly development groupings set within distinctive neighbourhoods such as Attercliffe Village will assist in defining the communities that make up the Lower Don Valley.
- An inhibiting factor for diversification and commercial expansion is the shortage of suitable development land within the Lower Don Valley, as well as the planning restrictions on the area around the M1 Motorway. The lack of suitable available land could restrict the area's potential as an economic driver for Sheffield.
- There is little spare capacity on the highway network, but significant capacity available on the local network and public transport network.
- To reduce the potential impacts of the Masterplan proposals on the highway network and Lower Don Valley environment, it will be essential that a robust sustainable transport strategy be implemented to affect mode shift and reduce any future impacts on the highway network.
- Research undertaken for this study points to significant opportunities across a number of market sectors. Strong economic drivers underpin four geographic zones in market terms. To respond to this, the following main drivers for each of the defined development zones are set out below:
 - in Attercliffe Village, a sustainable neighbourhood developed to support existing and new communities;
 - in the Sports and Leisure Hub through the development of the Boulevard of Sport and allied hospitality and leisure uses;
 - in the Central Zone through support for new business; and
 - in the Meadowhall Quadrant by building a more sustainable neighbourhood based upon dynamic sectors of the market.

