Upper Don Valley

Physical Regeneration Strategy

Final Baseline Report
October 2006
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Plan 1 – The Study Area
Plan 2 – Opportunity Sites
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Plan 4 – Site Prominance
1. Introduction

The Brief

1.1 In February 2005 the consultancy team of Taylor Young, DTZ and JMP Consulting was appointed by Sheffield City Council, City Development Division, to prepare a Physical Regeneration Strategy for the Upper Don Valley, Sheffield. The project has been managed by a Steering Group, made up of officers from Sheffield City Council, and representatives of other organisations involved in the area.

1.2 The brief for the study stated that the main purpose of the Physical Regeneration Framework was to develop the broad principles of two key studies that had been carried out in the Upper Don Valley, in to more robust development proposals. The two studies are the Claywheels Lane/Upper Don Valley Study, prepared by Civic Regeneration in 2003, and the Plan 4 Travel in the UDV, prepared by Arup for Sheffield City Council in 2004. These studies were both prepared in the last three years and suggest potential development principles and projects for the UDV. The brief specified that, in developing the Strategy, the feasibility and associated risk, transport, funding implications and delivery mechanisms of potential development should be explored.

1.3 The brief for the commission considered that there were three key areas of information which the previous reports did not address:
   - Specific site information and investment opportunities
   - Transport and access information linked to regeneration of specific sites
   - Design vision for the area.

Responding to the Brief

1.4 The brief has been addressed in two main documents:
   - Baseline Report – Research and Analysis (this document)
   - Final Report – (the) Physical Regeneration Strategy
Why a Physical Regeneration Strategy for the Upper Don Valley?

1.5 The Physical Regeneration Strategy will establish a new vision and linked actions to regenerate the Upper Don Valley. The Strategy builds on current proposals; previous studies the current property market situation, the planning policy context, the socio-economic context, strategic transportation issues, urban design issues and the potential of the river. It takes a fresh look at the existing proposals in light of this analysis and seeks to create a practical plan bringing forward development, which will start in turn the regeneration process in the Upper Don Valley.

The Baseline Report

1.6 The Strategy is influenced by a great deal of background and baseline information. The nature of regeneration on a scale envisaged in Upper Don - both in terms of geographical area, range of projects and the long timeframe - means that the information base is always shifting and updating. Conditions should be kept under review. But as a baseline for this commission the following aspects have been considered to give a snapshot of the issues.

- General Overview
- Socio Economic Context
- Property Market Review
- Strategic Transportation Issues
- Urban Design Issues
- Riverside Character and Quality
- The Impact of a Waterfront Location on Development
- Site Identification and headline information.
2. General Overview

Location and Context

2.1 The Upper Don Valley is a predominately urban area in Sheffield, which stretches from just outside Sheffield city centre to the north west of the city fringe along the river valley of the Rivers Don and Loxley. It covers over 62 hectares of mainly brownfield land, dominated by employment and industrial land uses. There are very few houses or other uses, although to the east and west of the valley are suburban residential areas.

2.2 One of the city’s main arterial routes runs through the area; the A61 Penistone Road, and forms the boundary of the study area at the south west. It is a busy main road, which offers few crossings for pedestrians, or connections in to its frontage sites. The rivers also represent barriers to movement in and around the area; they are generally hidden behind industrial sites, with no access or crossings.

2.3 On the eastern side of the valley there is open land covering the valley side. There is a steep change in level which separates it from the adjoining residential area and together with the route of the old railway line, this change in level forms the boundary of the study area. The north part of the site is bound by the River Don and the railway line.

2.4 The character of the area along Penistone Road is urban, with car sales and industrial premises fronting the road. To the east is a large area of open space, Parkwood Springs, which is inaccessible for the most part as it is a working tip. Adjoining Parkwood Springs is an outdoor dry ski slope, which utilises the steep valley side for its slopes and which are visible across Sheffield.

2.5 To the north, at Claywheels Lane, there are industrial and employment uses, but within a more rural setting, particularly towards the end of the cul-de-sac where the surrounding land is farmland and woodland.

2.6 The area was formerly one of the key employment areas in Sheffield, with many industrial and manufacturing businesses, including steel works and other heavy industrial uses. However, it has suffered an economical and physical decline for a number of years and now there are a number of vacant sites, under utilisation and business, operating from run down premises. Levels of interest from developers are reported to have increased in the last few years, but land values and low rental values are considered to be still holding back development.
2.7 The map below illustrates the study area’s strategic context, and Plan1 shows the study area in greater detail.
Planning Context

2.8 The Upper Don Valley sits within a context of national, regional and local planning policy, which will have a significant impact on the acceptable land uses for different parts of the area.

National

2.9 Nationally, the Planning Policy Guidance notes and emerging Planning Policy Statements, cover a broad range of policy issues which will be relevant to development in the Upper Don Valley. In general national guidance supports sustainable development and the regeneration of brownfield sites, particularly within existing urban areas.

Regional

2.10 At the regional level, a number of bodies influence the direction of development and funding, most significant are the Yorkshire and Humber Assembly (Regional Planning Body), Yorkshire Forward (Regional Development Agency) and Government Office for Yorkshire and the Humber.

2.11 The Yorkshire and Humber Assembly is responsible for preparing planning policy for the region, which is currently changing from a system of Regional Planning Guidance to Regional Spatial Strategies under the new planning system. The current RSS is a selective review of RPG12, which was published by Government and is a regional framework that addresses the spatial implications of broad issues like healthcare, education, crime, housing, investment, transport, the economy and environment. This guidance will be replaced in 2007 by the new style RSS which is currently being prepared.

2.12 A number of the RSS policies are relevant to the Upper Don Valley, in particular S1, S2, S3 and S4, which support the sustainable development, regeneration, urban renaissance and quality in design. Policy S2 identifies the more deprived parts of the older industrial areas as one of the second priority areas for focusing regeneration (with South Yorkshire and the coal fields as the first priority). The policy also recognises that regeneration priority areas will also be defined locally within development plans.

Local

2.13 The local planning policy is currently undergoing a period of change, moving from the adopted Sheffield UDP (adopted 1998), to the new form of development plan required by the changes to the planning system (Planning and Compulsory Purchase Act 2004).
2.14 The current land uses in the area broadly follow the current UDP Proposals Map. The Proposals Map designates a large proportion of the valley bottom for ‘general industry’, some of which has a special focus. Parkwood Springs is allocated as an open space area, but with a large proportion for a waste disposal area. Penistone Road, Rutland Road, Herries Road and Herries Road South are strategic roads. The Rivers Don and Loxley are waterways and areas of natural history interest (including the riversides in some parts).

2.15 Under the new planning system, local authorities are required to prepare a new type of local development plan which consists of a number of planning documents within an overarching ‘Local Development Framework’. Sheffield City Council has begun this process and their Local Development Scheme sets out the programme for the preparation of the ‘Sheffield Development Framework’ (SDF) documents. The emerging SDF will be the portfolio of local development documents to deliver the City’s spatial planning strategy and the first Local Development Document to be prepared is intended to be the Core Strategy, followed by the City Policies document, the City Sites document and the Proposals Map which will be developed simultaneously.

**Emerging Options for the SDF Core Strategy**

2.16 A paper on the Emerging Options for the Core Strategy has been prepared, which considers the strategic focus for physical development and land use planning. For the Upper Don Valley a number of issues are discussed including the future for business and industry, new potential for housing, quality bus corridors, park and ride and walking and cycling. The options for consideration are based on the options derived from the Claywheels Lane/Upper Don Valley Study (discussed in the Regeneration Context section).

2.17 With regard to the location of business and industry in the Upper Don Valley the following options are considered:

- Improving industry and business in their current location, with major improvement to access, new sites identified and land decontamination

- Existing industry and business uses relocate from possibly unsuitable declining premises to a new industrial/ business estate at Claywheels Lane.

2.18 With regard to the location of new housing a number of options are explored including resisting new housing in favour of industry and business; allowing new housing in areas
closest to the city centre; limiting new housing to the riverfront; and, allowing new housing throughout the Upper Don Valley, even in industrial areas.

2.19 Options for the continuation of regeneration of Hillsborough District Centre are also outlined, notably the potential to extend and encourage nearby education and leisure uses in the vicinity of Livesey Street, with improved pedestrian links to Hillsborough town centre.

Further Development of the SDF

2.20 This Physical Regeneration Strategy is being prepared at a crucial time for local planning policy making. The Local Development Scheme proposes that the Core Strategy, City Policies document, City Sites document, Proposals Map and Statement of Community Involvement will be produced over the next three years. Therefore the proposals of this Strategy can potentially contribute to future planning policy.

Regeneration Context

2.21 The Upper Don Valley has been a focus for regeneration activity in Sheffield for the last few years and is one of five Strategic Regeneration Areas identified by Sheffield City Council.
2.22 A number of regeneration studies there have already been prepared to help influence development within this area. These studies have been prepared by a range of statutory, community and charitable organisations, as well as the private sector. The studies focus on a variety of aspects of regeneration, including economy, traffic and transport, housing, town centres and environment for a number of overlapping geographical areas.

2.23 To understand the context for any future regeneration proposals all the studies have been reviewed. The strategies which are directly relevant to the Upper Don Valley are illustrated on the following page. The detail of these strategies and initiatives have not been considered in detail in this report, but in developing the Strategy the team has drawn out the key messages. Indeed, a consistent regeneration agenda is starting to emerge which is centred upon:

- A high quality environment - both landscape and built fabric
- Sustainable communities and healthy local centres
- Investment in the future and thinking beyond today
- The value of community vision and endorsement
- Focusing on local distinctiveness and what is special about this part of Sheffield
- Creating conditions for investment and promoting measures to support job creation
- Improving accessibility - both physically as well as linking people to opportunities.
Figure 1

Key Regeneration Strategies for the Upper Don Valley
Claywheels Lane/Upper Don Valley Study

2.24 The most significant of these strategies for the Physical Regeneration Strategy is the Claywheels Lane/Upper Don Valley Study prepared by a team led by Civic Regeneration for Sheffield City Council, City Development Division in 2003. Proposals in this study have been endorsed by the Sheffield City Council Cabinet, although some land use recommendations remain contrary to adopted planning policy.

2.25 The study identifies a regeneration concept for the Upper Don Valley based on three distinct areas of change. To the north, in the Claywheels Lane area, the emphasis is to retain the industrial focus and create a competitive business environment. To the south-east, at Parkwood Springs, recommendations include an expanded and improved ski village and a new outdoor leisure facility. For the central spine of the valley area, referred to as the 'Upper Don Urban Quarter', proposals include an education and training cluster around the new Sheffield College campus at Livesey Street; consolidation of leisure uses around Livesey Street; mixed use riverside business and residential development between Livesey Street and Rutland Road; and new business uses some of which will be relocated businesses from the Inner Relief Road.

2.26 Successes to date from the Claywheels Lane/Upper Don Study include:

- The Completion of Hillsborough College
- Commencement of Inner Relief Road in the Gibraltar Street Area
- Proposals for the Snow Mountain (improved ski village) was granted planning permission in February 2006
- Proposals have been put forwards to modernise key business and industrial sites in the Claywheels Lane area with access improvements supported by Objective 1 funding.
- Plan 4 Travel Completed
- Physical Regeneration Strategy Commissioned
- Upper Don Riverside Access Feasibility Commission nearing completion.

2.27 This commission takes the initial regeneration concept forwards, refining and testing aspects to create a more robust, more detailed and more practical Regeneration Strategy.
Plan 4 Travel in the Upper Don Valley

2.28 The Plan 4 Travel in the Upper Don Valley, prepared by Arup for Sheffield City Council in 2004, is another important document the main messages of which are central to the Strategy. The Plan considers in greater detail the transportation issues arising from the Civic Regeneration work and makes linkages to other projects and opportunities.

2.29 The purpose of the Plan 4 Travel study is to ensure that strategic traffic is accommodated on primary routes, that new road links and junctions can accommodate demand, that public transport provides the appropriate links between the community and employment areas and that walking and cycling options are available. The report recommended a number of improvements, which would potentially meet the transport requirements in the valley and these are considered in detail in section 2 of this report. It is worth noting that the Strategy seeks to complement and not re-invent existing detailed transportation work. In addition the transportation aspects of this commission have provided an opportunity to consider projects either not considered in the Plan 4 Travel or which have progressed to a more detailed level since the plan was completed, specifically at the Ski Village.

Project Headlines

2.30 A number of projects are already underway in and around the Upper Don Valley, some of which stem from existing regeneration initiatives. Some projects such as Hillsborough College have been completed and demonstrate a significant investment in the Valley. The feasibility study into riverside access in the Upper Don has identified draft proposals. Initiatives at Hillsborough Park and the commitment to a Town Centre Manager post in Hillsborough give cause for optimism that both the park and centre can begin to strengthen their position and offer and this can only be positive for the Upper Don. Others initiatives, such as the Viridor landfill operation and timespan at Parkwood Springs has implications for regeneration in this area. Developer proposals on major sites also need to be considered, most significantly at this stage the proposals for the Ski Village and for the UCAR site, where separate planning applications have now been submitted to Sheffield City Council. These main projects are illustrated below, although this is not an exhaustive list of all projects. Section 4 of this report considers in greater detail the proposals for the ski village and Claywheels Lane, which were the most progressed private development proposals at the start of the study.
Figure 2

Key Projects in the Upper Don Valley
3. Socio Economic Context

Population

3.1 Sheffield is the third largest Metropolitan District after Birmingham and Leeds with a population of over half a million (513,278). The Upper Don Valley area is predominantly comprised of employment uses and has a small population; however, there are substantial residential areas to the east and west of the area.

3.2 The population of the five wards surrounding the Upper Don Valley (Burngreave, Central, Hillsborough, Southey and Walkley) is almost 98,0001. This represents approximately 20% of the total population for Sheffield. There is therefore a large potential workforce in the area immediately surrounding the Upper Don Valley.

3.3 Between 1992 and 2003 the total population in Sheffield decreased slightly compared to increases in the sub region, region and Great Britain.

Figure 3.1: Population Change 1992-2003

Source: ONS, DTZ Locus

1In December 2003 Sheffield City Council revised it’s ward boundaries - all changed to some extent (most changed significantly). Sheffield City Council have aggregated best fit output areas to fit the new ward boundaries and all ward level data in this section is based on this analysis.
3.4 The presence of two universities in the City means that Sheffield has a large student population (circa 35,000) which impacts on the demographic profile in terms of lowering economic activity rates and creating a high proportion of young single adults.

Economic Performance

3.5 GVA (Gross Value Added) is used to analyse the overall strength of an economy. Figure 3.2 shows that GVA in Sheffield has grown year on year since 1989 at a slightly greater rate than the sub-region, region and country. At 2002 GVA per capita stood at almost £14,000 slightly higher than the average for South Yorkshire and Yorkshire and Humber, but lower than the national average which was just over £15,000.

Figure 3.2: GVA Change 1989-2003 (1989=100)

Figure 3.3: GVA per capita 2002

Source: DTZ Locus
Source: ONS, DTZ Locus

3.6 Figure 3.4 shows that the VAT registered stock in Sheffield has increased between 1980 and 2004. The number of registered businesses in Sheffield peaked in 1991 then fell in 1992 and again in 1993 but has since climbed upwards and stood at 11,275 in 2004 (16% higher than the 1980 level). This overall pattern mirrored the trend of South Yorkshire and Yorkshire and Humber and Great Britain. However, rate of growth since the mid 1990’s was lower in Sheffield than at sub-regional, regional or national level and indeed has flattened since the late 1990s whereas the growth rate has increased in the wider areas.

Source: DTZ Locus
Economic Structure

3.7 Over the past decade employment levels in Great Britain have increased and unemployment levels have decreased. Sheffield, South Yorkshire and Yorkshire and Humber have generally performed well against this national picture.

3.8 Sheffield and South Yorkshire shifted from suffering a negative employment change between 1991-2002 to achieving a growth in employment between 1997-2002. Employment levels also grew in the region and nationally, but to a lesser extent (probably due in part to a stronger base position in 1991).

3.9 Between 1992-1997 and 1998-2003 the overall level of unemployment has decreased. The rate of decrease was most significant for Sheffield, South Yorkshire and Yorkshire and Humber between 1998-2003, whereas nationally the largest percentage change in
unemployment was experienced between 1992-1997. The most dramatic change in employment change was in South Yorkshire which achieved -43.5% change between 1998-2003 compared to a change of only -14.3% between 1992-1997.

3.10 At 2003 the unemployment rate in Sheffield stood at 3.5%, which was higher than the sub-regional, regional and national averages. In 2002 Sheffield’s employment rate (75.4%) was higher than the sub-region, comparable to the region but still lagged significantly behind the national average (76.7%). Figure 6 illustrates the level of unemployment across Sheffield. The highest levels of unemployment are found in the City centre and along three ‘spokes’ out of the City towards the north west (along the eastern boundary of the Upper Don Valley), to the north east (along the Lower Don Valley) and to the south east. These higher than average levels of unemployment represent an available pool of labour to businesses in the Upper Don Valley, however, this group of people may not currently have the skills required by investing businesses.

Figure 3.7: Unemployment rate and Employment rate

Figure 3.8 below shows that in employment terms non-market services and customer services are most important to Sheffield’s economy - accounting for almost 60% of all employment.

3.11 Figure 3.8 below shows that in employment terms non-market services and customer services are most important to Sheffield’s economy - accounting for almost 60% of all employment.

3.12 Figure 3.9 illustrates that the sectoral strengths of Sheffield’s economy are skewed compared to the profile for Great Britain. Sheffield demonstrates a particular specialism in traditional manufacturing (Figure 3.8 shows that this sector employs 13% of the workforce), but is comparably weak in regard to advanced manufacturing.
3.13 The strength in traditional manufacturing is a product of the City’s rich industrial legacy, however employment in this sector has been declining as globalisation introduces competition from countries able to operate with lower production costs. Manufacturing in Sheffield has responded by concentrating on specialist areas, however this specialisation has not yet been sufficient enough to create a significant sectoral strength.

**Education and Skills**

3.14 Overall Sheffield has a relatively highly skilled workforce compared to the sub-region and region. The percentage of the workforce qualified to NVQ level 4 or above is 23.3%, 4.9 percentage points more than the sub-region and 2.4 percentage points higher than the region. However, Sheffield, South Yorkshire and the Yorkshire and Humber region have above average percentages of the workforce with no qualifications.
Table 3.1  
Workforce Skills 2002

<table>
<thead>
<tr>
<th></th>
<th>NVQ 4+</th>
<th>NVQ 1-3</th>
<th>No qualifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>GB</td>
<td>24.2%</td>
<td>60.2%</td>
<td>15.6%</td>
</tr>
<tr>
<td>Yorkshire &amp; Humberside</td>
<td>20.9%</td>
<td>61.8%</td>
<td>17.3%</td>
</tr>
<tr>
<td>South Yorkshire</td>
<td>18.4%</td>
<td>61.7%</td>
<td>19.9%</td>
</tr>
<tr>
<td>Sheffield</td>
<td>23.3%</td>
<td>57.7%</td>
<td>19.0%</td>
</tr>
<tr>
<td>Wards surrounding UDV:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Burngreave</td>
<td>13.7%</td>
<td>35.2%</td>
<td>44.4%</td>
</tr>
<tr>
<td>Central</td>
<td>26.6%</td>
<td>49.4%</td>
<td>20.6%</td>
</tr>
<tr>
<td>Hillsborough</td>
<td>16.4%</td>
<td>46.1%</td>
<td>30.4%</td>
</tr>
<tr>
<td>Southey</td>
<td>6.2%</td>
<td>38.6%</td>
<td>47.8%</td>
</tr>
<tr>
<td>Walkley</td>
<td>26.0%</td>
<td>36.8%</td>
<td>30.6%</td>
</tr>
</tbody>
</table>

Source: LFS, DTZ Locus, Sheffield City Council Census 2001

3.15 However, the table also shows that the five wards surrounding the Upper Don Valley have lower skills levels than average for the City. In particular a higher proportion of the workforce has no qualifications compared to the average for Sheffield. The Index of Multiple Deprivation (IMD) education rank across Sheffield and shows a concentration of low skills levels north east of the Upper Don Valley and a belt surrounding the south and east of the centre, which could hamper the ability of local people to benefit employment and could ultimately impact employment growth. The presence of the new Hillsborough Campus of Sheffield College provides an opportunity to develop targeted training to meet the skill requirements of existing and incoming business into the area.

3.16 The skills profile is reflected in the occupational structure of the City shown below. Sheffield has a high proportion of professionals compared to the sub-region, region and Great Britain. However compared to Great Britain, Sheffield has a slightly lower proportion of managers and senior officials and associate professional and technical staff and a larger proportion of elementary occupations, this is in line with the sub-regional and regional profile.

Figure 3.10: Occupation Structure 2003
3.17 Sheffield is a net importer of workers, which means that more people travel into the City for work than travel out of the City for work. Therefore the proportion of people travelling long distances to work is smaller than the national average. The conurbation is relatively compact but due to its topography and transport links there are relatively low levels of commuting by cycle and train, the majority of people travel to work by car, but there is also a higher than average utilisation of buses.

3.18 Having reviewed the multiple deprivation across Sheffield based on Super Output areas, it is clear that the most deprived areas of Sheffield lie to the east of the City notably within the wards of Arbourthorne, Manor and Castle, Central, Walkley, Burngreave and Damall. The outer areas are generally more affluent (the Peak District lies to the west of the City). There are some pockets of deprivation to the east of the Upper Don Valley, particularly around Southey and Firth Park wards, and at the south of the area on the edge of the City Centre within the Central ward.

**Sectoral Trends**

3.19 Table 3.2 illustrates the sectoral strengths in Sheffield in terms of location quotient and employment growth. The location quotient compares the proportion of employees in Sheffield in a certain industry sector with the average for Great Britain. A location quotient figure of substantially more than zero implies that the area has a specialism in that activity compared to the benchmark. The employment growth column gives an impression of whether each sector has been growing or shrinking in employment over the past 5 years.

<table>
<thead>
<tr>
<th>Table 3.2</th>
<th>Sectoral Strengths in Sheffield</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sector</td>
<td>Location Quotient 2002 (compared to GB average at zero)</td>
</tr>
<tr>
<td>Basic Metals</td>
<td>0.7</td>
</tr>
<tr>
<td>Metal Products</td>
<td>0.6</td>
</tr>
<tr>
<td>Higher Education</td>
<td>0.4</td>
</tr>
<tr>
<td>Social Economy</td>
<td>0.2</td>
</tr>
<tr>
<td>Health</td>
<td>0.2</td>
</tr>
<tr>
<td>Public Services</td>
<td>0.1</td>
</tr>
<tr>
<td>Financial Services</td>
<td>0.1</td>
</tr>
<tr>
<td>Forest Products</td>
<td>0.1</td>
</tr>
<tr>
<td>Average Representation (LQ=0)</td>
<td></td>
</tr>
<tr>
<td>Other Mechanical Engineering</td>
<td>0.0</td>
</tr>
<tr>
<td>Retail</td>
<td>0.0</td>
</tr>
<tr>
<td>Environmental Technologies</td>
<td>0.0</td>
</tr>
<tr>
<td>Construction</td>
<td>0.0</td>
</tr>
</tbody>
</table>
Table 3.2
Sectoral Strengths in Sheffield

<table>
<thead>
<tr>
<th>Sector</th>
<th>LQ</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary &amp; Secondary Education</td>
<td>0.0</td>
<td>51%</td>
</tr>
<tr>
<td>Food &amp; Drink</td>
<td>0.0</td>
<td>5%</td>
</tr>
<tr>
<td>Welfare</td>
<td>0.0</td>
<td>13%</td>
</tr>
<tr>
<td>Wholesale</td>
<td>0.0</td>
<td>2%</td>
</tr>
<tr>
<td>Other Consumer Services</td>
<td>0.0</td>
<td>-3%</td>
</tr>
<tr>
<td>Relative Under Representation (LQ&lt;0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Life Sciences</td>
<td>-0.1</td>
<td>34%</td>
</tr>
<tr>
<td>Extractive</td>
<td>-0.1</td>
<td>-46%</td>
</tr>
<tr>
<td>Tourism</td>
<td>-0.1</td>
<td>3%</td>
</tr>
<tr>
<td>Producer Services</td>
<td>-0.1</td>
<td>-10%</td>
</tr>
<tr>
<td>Misc. Manufacturing</td>
<td>-0.1</td>
<td>-26%</td>
</tr>
<tr>
<td>Creative &amp; Cultural</td>
<td>-0.2</td>
<td>7%</td>
</tr>
<tr>
<td>Glass &amp; Ceramics</td>
<td>-0.2</td>
<td>-41%</td>
</tr>
<tr>
<td>Knowledge</td>
<td>-0.2</td>
<td>26%</td>
</tr>
<tr>
<td>Transport</td>
<td>-0.3</td>
<td>-20%</td>
</tr>
<tr>
<td>Building Materials</td>
<td>-0.3</td>
<td>79%</td>
</tr>
<tr>
<td>Hi-Tech Manufacturing</td>
<td>-0.3</td>
<td>26%</td>
</tr>
<tr>
<td>Plastics &amp; Rubber</td>
<td>-0.3</td>
<td>2%</td>
</tr>
<tr>
<td>Further &amp; Adult Education</td>
<td>-0.4</td>
<td>-79%</td>
</tr>
<tr>
<td>Chemicals</td>
<td>-0.4</td>
<td>-5%</td>
</tr>
<tr>
<td>Textiles &amp; Clothing</td>
<td>-0.5</td>
<td>-58%</td>
</tr>
<tr>
<td>Energy</td>
<td>-0.7</td>
<td>-52%</td>
</tr>
<tr>
<td>Land Based</td>
<td>-0.7</td>
<td>-23%</td>
</tr>
</tbody>
</table>

Source: ABI, DTZ Locus

3.20 **Sectoral strength and growing:** The higher education sector is the most specialist sector in Sheffield that has experienced employment growth over the past 5 years (79%). Four other sectors with relative strengths have also enjoyed employment growth. The social economy sector has experienced the most significant growth of all sectors, almost doubling the number of employees (91%), although in absolute terms this sector is probably still relatively small. Health and public services also experienced significant employment growth (44% and 48% respectively). The financial services sector is a slight strength with a location quotient of 0.1 and has shown promising signs of growth with 28% increase in employees over the past five years.

3.21 **Sectoral strength and declining:** Three sectors with a relative strength in terms of location quotient have experienced decline in actual employment between 1997-2002. Basic metals and metal products are the two strongest sectoral specialisms in Sheffield with LQs of 0.7 and 0.6 respectively, however both are declining in employment terms; the basic metals sector lost almost half of its workforce over the past years (-47%) and the number of employees in the metals sector decreased by 16%. Therefore whilst the metal industry is important in employment terms compared to the average for the Country, its significance in employment terms within the City economy is declining.
3.22 **Not a sectoral strength but growing:** The growing importance of the education sector is again highlighted within this classification, with the primary and secondary sectors experiencing a 51% growth in employment (in addition to growth in higher education discussed above). Seven sectors which are relatively under represented (negative location quotient) have grown in employment terms. The most significant of these is the building materials sector which increased by 79%. Other non-specialist sectors which experienced significant employment growth include; life sciences (34%), knowledge (26%) and hi-tech manufacturing (26%).

3.23 **Not a sectoral strength but declining:** Many of the sectors that fall within this classification are primary industries or manufacturing related. For example, there were significant decreases in employment in the following non-specialist sectors: textiles and clothing (-58%), extractive industries (-46%), glass and ceramics (-41%), miscellaneous manufacturing (-26%) and other mechanical engineering (-24%). Interestingly, despite good performance in other areas of the education sector, further and adult education is not a specialist sector (location quotient −0.4%) and decreased significantly in employment terms between 1997-2002 (-79%).

**Size of Business**

3.24 Small businesses (employing 1-10 people) make up a smaller proportion of businesses in Sheffield (78.1%) than in the sub-region (79.1%), region (80.9%) and Great Britain (83.1%). Medium sized businesses employing between 11-199 are more prevalent in Sheffield (21%) than in the sub-region (19.9%), region (18.3%) and Great Britain (16.2%).

**Socio-Economic Summary**

- The five wards surrounding the UDV maintain a population of approx. 98,000 or 20% of the population of the City.
- Strength in large student population.
- Weakness in decreasing population in Sheffield and sub region against increases in region and UK.
- Strength in large % with good qualifications (NVQ 4+), but weakness at other end of spectrum as higher than average % with no qualifications.
The five wards surrounding the area have lower than average skills levels with a high proportion with no qualifications at all.

The occupational structure reflects the skills profile with a high proportion of professionals compared to the region and nationally.

Unemployment in Sheffield is above sub regional, regional and national averages, but employment levels are increasing. This signals a strengthening economy but one still offering an available workforce.

The area surrounding the UDV with higher than average unemployment rates supports an available labour force but due to the lower than average skill levels will require investment in training initiatives to meet the requirements of existing and new businesses.

Sheffield demonstrates a particular specialism in traditional manufacturing but is currently comparably weak in advanced manufacturing compared to UK, although this is growing.

Sheffield’s specialist sectors (basic metals and metal products) have been reducing in employment terms.

Sheffield’s economy is growing illustrated by a rise in GVA and a fall in unemployment and is generally outperforming the sub region.

VAT registration although rising are lower than the regional and national average, indicating a lower level of new business start ups.

To support the growth in the economy the City and particularly the UDV needs to reduce its reliance on traditional manufacturing and foster the conditions to support the growth of the knowledge, hi-tech and service sectors.
4. Property Market Review

4.1 This section is split into the following key sectors.

- Industrial
- Office
- Retail
- Leisure
- Residential.

Industrial Property Market

4.2 This section assesses Sheffield’s industrial property market under the following headings:

- Existing supply
- Pipeline development
- Market demand
- Potential for industrial development in Upper Don Valley
- Industrial market summary.

4.3 The assessment draws upon information and data from Sheffield City Council, Sheffield First for Investment, Promislive Property Market Reports and consultations with DTZ’s agency team and other commercial agents active in Sheffield and the Upper Don Valley.

Existing Supply

4.4 Sheffield has a total industrial stock of around 4.4 million m² (47.3 million ft²), of which 72% is factory space and 28% is warehousing. With less than 3% having been built within the last five years, much of this stock comprises dated metal manufacturing plants, particularly in the Lower Don Valley, for which demand is declining and is now more likely to be demolished than re-occupied. Over the last two decades such demolitions, alongside changes of use and some new development, have led to a net reduction in stock of around 20%.

4.5 Nevertheless Sheffield City Council and Sheffield First for Investment believe that there are many reasons to be positive about Sheffield’s manufacturing sector. They point to the fact that many indigenous companies are investigating, specialising and “moving up the value chain” and the fact that the city is attracting high-quality inward investors in areas such as aerospace engineering and sustainable energy technologies, on the basis of its world-class engineering
expertise. The general view locally is that ‘Sheffield’s manufacturing sector may be smaller than it used to be, but it is also leaner, smarter and more profitable’.

4.6 However, local partners suggest that a fundamental deficiency is threatening to hold back the development of the city’s advanced manufacturing sector. SF4I suggest that Sheffield is, in many cases, unable to accommodate prospective investor companies, due to a shortage of suitable industrial land and property. This deficit, it is argued, is not only affecting the “low value” firms that might be expected to migrate form an increasingly prosperous city, Sheffield is also failing to accommodate high-value, high-tech prospective inward investors with a specific preference for locating within the city – close to the knowledge base and a well-educated workforce. Meanwhile, successful indigenous companies, often employing significant numbers of skilled workers, are being forced to consider sites outside Sheffield as they invest and expand.

4.7 Sheffield has four main industrial locations, as follows:

- **Lower Don Valley** - running from the city centre in a north easterly direction to Junction 34 of the M1 and Sheffield Airport. There are still traditional heavy industries in the area including Avesta, Alvac and Sheffield Forgemasters. This area with its excellent links to the M1 is a popular location for distribution uses.

- **Upper Don Valley** - running from the city centre in a north westerly direction along Penistone Road and still home to a number of important traditional and advanced manufacturing industries, including Doncasters, Bassetts, Hillfoot Steel, Fletchers, Swann Norton, Hydra Clarkson, Symmetry Medical/Norton Precision.

- **M1 Junctions 35 and 35a** - north of Sheffield, this area saw the speculative development of Thorncliffe Distribution Centre and Provincial Park in the 1980s which attracted large distribution uses such as B Braun, Exel Logistics, Parceline and Next

- **Holbrook** - 5 miles to the south east of the city centre, this established industrial area provides small to medium sized industrial units at Holbrook Industrial Estate and Meadowbrook Industrial Park.
4.8 Completions of new industrial space have averaged around 25,550m$^2$ (275,000ft$^2$) over the last 5 years, of which just 22% has been speculative development with the remaining 78% being pre-let or purpose built. Reflecting the local and regional nature of much of the demand, most recent speculative development has been small units, with larger units tending to be pre-let or purpose built.

<table>
<thead>
<tr>
<th>Year</th>
<th>m²</th>
<th>ft²</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>8,500</td>
<td>92,000</td>
</tr>
<tr>
<td>2001</td>
<td>37,800</td>
<td>407,000</td>
</tr>
<tr>
<td>2002</td>
<td>53,300</td>
<td>574,000</td>
</tr>
<tr>
<td>2003</td>
<td>3,600</td>
<td>39,000</td>
</tr>
<tr>
<td>2004</td>
<td>25,400</td>
<td>274,000</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>25,700</strong></td>
<td><strong>277,000</strong></td>
</tr>
</tbody>
</table>

Source: Promislive Sheffield Industrial Market Report

4.9 Availability of industrial stock has fluctuated over recent years as older space has been put back on the market and then demolished. There was thought to be around 134,700m$^2$ (1.45 million ft$^2$) available space as at mid 2004.

4.10 Agents active in the area are well aware of the poor quality of much of Sheffield’s dated industrial stock and are of the view that there is a need for more modern buildings. The Upper Don Valley in particular has seen very little new development over recent years, simply because the Lower Don Valley is considered to be a preferable investment location due to its motorway accessibility and Government support. Agents also suggest a shortage of available development land in the Upper Don Valley upon which either speculative development could take place or businesses undertake their own development. Industrial space in the Upper Don Valley meanwhile remains dated and poor quality, often letting for just £21psm (£2psf).

4.11 Sheffield First for Investment currently has 14 opportunities located in the Upper Don Valley on its database of available property, representing a small proportion of availability across Sheffield. Only one of these opportunities, at Peacock Industrial Estate on Livesey Street, is a new development and even this is reliant on a pre-let before it will be built.

<table>
<thead>
<tr>
<th>Address</th>
<th>Size</th>
<th>Tenure</th>
<th>Price</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neepsend House, Percy Street</td>
<td>14-325m² (150-3,500ft²)</td>
<td>Leasehold</td>
<td>£40 per week</td>
<td>Offices and workshops</td>
</tr>
<tr>
<td>Unit 1, Arundel Business Park, Claywheels Lane</td>
<td>347m² (3731ft²)</td>
<td>Leasehold</td>
<td>£13,000pa</td>
<td>Detached recently refurbished warehouse/workshop</td>
</tr>
</tbody>
</table>
### Table 3.4
Industrial Availability in the Upper Don Valley

<table>
<thead>
<tr>
<th>Address</th>
<th>Size</th>
<th>Tenure</th>
<th>Price</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Units 16-18 Penistone Road Industrial Estate</td>
<td>270m² (2910ft²)</td>
<td>Leasehold</td>
<td>£27,558pa</td>
<td>Industrial unit</td>
</tr>
<tr>
<td>Unit 7 Rutland Way</td>
<td>381m² (4100ft²)</td>
<td>Leasehold</td>
<td>£17,500pa</td>
<td>End terrace industrial unit with single storey office block</td>
</tr>
<tr>
<td>Unit 11-12 Penistone Road Industrial Estate</td>
<td>160m² (1720ft²)</td>
<td>Leasehold</td>
<td>16,890pa</td>
<td>Industrial unit</td>
</tr>
<tr>
<td>Unit 4 Parkwood Industrial Estate</td>
<td>578m² (6220ft²)</td>
<td>Leasehold</td>
<td>On application</td>
<td>Modern warehouse</td>
</tr>
<tr>
<td>Claywheels Lane Industrial Estate</td>
<td>1,976m² (21,275ft²)</td>
<td>Leasehold</td>
<td>£38-43/m² (£3.50-4/ft²)</td>
<td>Currently being refurbished and located on modern terraced development. 3 units available individually or combined</td>
</tr>
<tr>
<td>Unit 27 Penistone Road Industrial Estate</td>
<td>80m² (867ft²)</td>
<td>Leasehold</td>
<td>£8,809pa</td>
<td>Industrial unit</td>
</tr>
<tr>
<td>Unit 5 Arundel Business Park, Claywheels Lane</td>
<td>1,405m² (15,124ft²)</td>
<td>Leasehold</td>
<td>£55,000pa</td>
<td>Industrial warehouse incorporating offices and laboratory</td>
</tr>
<tr>
<td>Livesey Street, Hillsborough</td>
<td>3,037m² (32,695ft²)</td>
<td>Freehold</td>
<td>£650,000</td>
<td>Range of industrial and ancillary buildings, potential for redevelopment</td>
</tr>
<tr>
<td>Beeley Wood Business Park</td>
<td>4,055m² (43,658ft²)</td>
<td>Leasehold</td>
<td>£165,000pa</td>
<td>Detached manufacturing property with craneage and ancillary</td>
</tr>
<tr>
<td>Unit 8 Rutland Way</td>
<td>3,911m² (42,110ft²)</td>
<td>Leasehold</td>
<td>£172,945pa</td>
<td>Factory/warehouse with offices</td>
</tr>
<tr>
<td>Peacock Industrial Estate, Livesey Street, Hillsborough</td>
<td>272m² (2,924ft²)</td>
<td>Leasehold</td>
<td>£5.50/ft²</td>
<td>New detached unit at end of terrace of units – construction will take 6 months from pre-let</td>
</tr>
<tr>
<td>Unit 14 Penistone Road Industrial Estate</td>
<td>64m² (913ft²)</td>
<td>Leasehold</td>
<td>£9,276pa</td>
<td>Industrial unit</td>
</tr>
</tbody>
</table>

*Source: Sheffield First for Investment*

The properties registered and details used in this report were accurate to the best of Sheffield First for Investment’s knowledge at the time of the request for information by the Consultants TY/DTZ/JMP
Pipeline Development

4.12 There is around 674,000 m$^2$ (7.3 million ft$^2$) of industrial development in the pipeline across Sheffield, equating to around 15% of total stock of which approx 2.3 million ft$^2$ (30%) is distribution/warehouse use with the remainder a mix of B1 Business and B2 General Industrial uses.

4.13 Of this, around 6% is under construction, 71% has planning permission and 23% is at pre-permission stage. The 41,340m$^2$ (445,000ft$^2$) under construction relates entirely to a high-tech printing facility being developed for Polestar and Gazeley’s G-Park in the Lower Don Valley. The remaining 631,720m$^2$ (6.8 million ft$^2$) in the development pipeline equates to around 25 years worth of development at the development rate seen over the last five years.

4.14 The majority of this pipeline development is located within the following three locations:

- **Lower Don Valley** – This is where the largest and most high profile schemes are clustered, including a planning permission for a 92,900m$^2$ (1 million ft$^2$) distribution park and rail freight terminal at Sheffield International Rail Freight Terminal (SIRFT), a 30,700m$^2$ (330,000ft$^2$) B2 and B8 development at Shepcote Lane, a 9,000m$^2$ (97,000ft$^2$) warehouse for Mastercare at Shepcote Business Park and a 32,515m$^2$ (350,000ft$^2$) steel production facility for Avesta, in addition to Polestar’s development at G-Park.

- **M1 Junctions 35 and 35a** – Pipeline development in this area is generally large scale including a 3,900m$^2$ (42,000ft$^2$) distribution facility, Junction 35a Business Park, an 8,200m$^2$ (80,000ft$^2$) warehouse (Ronseal Ltd) and also a 17,200m$^2$ (185,000ft$^2$) B1 led business park which includes 9,300m$^2$ (100,000ft$^2$) industrial development.

- **Holbrook** – Although some distance from the motorway network, this is an established industrial location which is continuing to be the focus of pipeline development activity across a wide size range.

4.15 In contrast, however, pipeline development schemes within the Upper Don Valley appear to be limited to the following.

<table>
<thead>
<tr>
<th>Table 3.5</th>
<th>Industrial Pipeline Development in the Upper Don Valley</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Address</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Club Mill Road/Sandbed Road/Hoyland Road/Parkwood Road</td>
<td>3 industrial units totalling 3,700m$^2$</td>
</tr>
</tbody>
</table>
Market Demand

4.16 Sheffield’s industrial take-up over the five years to 2003 has averaged around 50,250m² (541,000ft²) per annum, although there have been year by year fluctuations. The high take-up in 2003, for example, was influenced by two large deals which accounted for 40% of space taken – 20,250m² taken by Next at Provincial Park and 27,000m² (291,000ft²) taken as a pre-let by Mastercare at Shepcote Business Park.

<table>
<thead>
<tr>
<th>Year</th>
<th>m²</th>
<th>ft²</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999</td>
<td>74,400</td>
<td>801,000</td>
</tr>
<tr>
<td>2000</td>
<td>30,300</td>
<td>326,000</td>
</tr>
<tr>
<td>2001</td>
<td>51,600</td>
<td>555,000</td>
</tr>
<tr>
<td>2002</td>
<td>68,100</td>
<td>733,000</td>
</tr>
<tr>
<td>2003</td>
<td>27,000</td>
<td>291,000</td>
</tr>
<tr>
<td>Average 1999-2003</td>
<td>50,300</td>
<td>541,000</td>
</tr>
</tbody>
</table>

4.17 Take-up has been dominated over recent years by large scale warehousing of over 9,290m² (100,000ft²), accounting around 38% of space taken. However, there has also been relatively strong take-up of space in the 929-2,300m² (10-25,000ft²) and the 4,650-9,290m² (50-100,000ft²) size ranges.

<table>
<thead>
<tr>
<th>Size Range (000 ft²)</th>
<th>% Take-Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-10</td>
<td>13</td>
</tr>
<tr>
<td>10-25</td>
<td>18</td>
</tr>
<tr>
<td>25-50</td>
<td>13</td>
</tr>
<tr>
<td>50-100</td>
<td>18</td>
</tr>
<tr>
<td>&gt;100</td>
<td>38</td>
</tr>
</tbody>
</table>

Source: Promislive Sheffield Industrial Market Report
4.18 Of the 28 major investment successes recorded by Sheffield First for Investment for 2004-05 and for 2005-6 to date, about a third (10) have been industrial projects.

<table>
<thead>
<tr>
<th>Table 3.8 Recent Industrial Investment Successes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
</tr>
<tr>
<td>Lower Don Valley</td>
</tr>
<tr>
<td>Polestar Printing company</td>
</tr>
<tr>
<td>Chesterfield Cylinders Manufacture of</td>
</tr>
<tr>
<td>high value special cylinder products for</td>
</tr>
<tr>
<td>Disenco Developer and manufacturer of</td>
</tr>
<tr>
<td>combined heat and power systems for</td>
</tr>
<tr>
<td>ITM Leading edge design and manufacture</td>
</tr>
<tr>
<td>of fuel cells</td>
</tr>
<tr>
<td>Coldco Ltd Commercial refrigerator</td>
</tr>
<tr>
<td>Linnet UK Production of cables</td>
</tr>
<tr>
<td>Bolton Surgical Manufacture of surgical</td>
</tr>
<tr>
<td>surgical equipment</td>
</tr>
<tr>
<td>Holbrook</td>
</tr>
<tr>
<td>Compass Holdings Not known</td>
</tr>
<tr>
<td>William Whiteley &amp; Sons Manufacture of</td>
</tr>
<tr>
<td>Parkway</td>
</tr>
</tbody>
</table>
Table 3.8
Recent Industrial Investment Successes

<table>
<thead>
<tr>
<th>Company</th>
<th>Nature</th>
<th>Size</th>
<th>Location</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arnold Wragg</td>
<td>Manufacture of specialist aerospace</td>
<td>1,490m²</td>
<td>Parkway 1 Business</td>
<td>Established Sheffield company</td>
</tr>
<tr>
<td></td>
<td>fasteners</td>
<td>(16,000ft²)</td>
<td>Parkwood</td>
<td></td>
</tr>
</tbody>
</table>

Source: Sheffield First for Investment

4.19 It is interesting to note from these examples that, although Sheffield’s manufacturing economy has no doubt declined dramatically over recent years, it is still attracting some innovative and high value manufacturing activity, some of which is deciding to locate in the Upper Don Valley. The Upper Don Valley has attracted a handful of industrial deals over the last couple of years, particularly at its southern end. For example, a unit of 1,690m² (18,200ft²) was sold to H&D Sports on Rutland Way in February and a unit of 1,490m² (16,000ft²) was let to Phoenix Healthcare Distribution at Parkwood Industrial Estate in March 2003.

4.20 Sheffield has undoubtedly seen a dramatic decline in its traditional manufacturing base in recent years, but these are encouraging signs that the city is starting to attract innovative and higher value manufacturing activity. The Upper Don Valley is home to a number of advanced manufacturers including Symmetry Medical, Swann-Norton and H&D Sports. Between them, Symmetry Medical and Swann-Norton (both medical technology companies) employ over 600 people in the Upper Don Valley and both are continuing to invest heavily in equipment. Furthermore, according to Sheffield First for Investment (SF4I) both of these are proving to be catalysts for a ‘mini-cluster’ of advanced manufacturing companies in the Upper Don Valley; Swann-Norton owns other companies based in the area. In addition, Symmetry Medical has plans for an advanced manufacturing ‘supplier park’ situated alongside its premises, the site for which is now being cleared on the frontage to Penistone Road.

4.21 The Upper Don Valley is also home to several ‘niche’ manufacturing companies located in unsuitable premises, generally at the Neepsend end of the valley. Whilst SF4I recognises the poor quality of current premises and the fact that the land may be more suitable for uses other than industry, it is experiencing difficulties finding suitable new premises in the area. SF4I is also handling a number of enquiries from high-tech companies (particularly in the sustainable energy technology sector) with a requirement for hybrid office/workshop units for which it believes the Upper Don Valley would be a suitable location.
4.22 There continues to be a healthy level of enquiries for industrial space across Sheffield, most of which are for small premises under 278m² (3,000ft²), followed by larger units over 1,858m² (20,000ft²).

Figure 3.12 Enquiries for High Quality Industrial Premises 2004

4.23 The number of enquiries received by Sheffield First has been increasing for the last few years, particularly in respect of high quality (new or good refurbished) space.

Figure 3.13 Industrial Enquiries 2001-2004

Source: Sheffield First for Investment
4.24 It is clear from the earlier analysis that areas such as the Lower Don Valley and M1 Junctions 35 and 35a are attracting significant regional and sub-regional demand. The Upper Don Valley, on the other hand, tends to attract only local demand from businesses serving the needs of other local businesses and the large population on this northern side of Sheffield. There will also be an element of demand for trade counter industrial uses attracted by the busy Penistone Road.

4.25 The limited demand for industrial space in the Upper Don Valley based on recent completions and pipeline developments relates partly to locational criteria relative to other areas but also due to the fact that there is a limited amount of available quality land and buildings for industrial/business use. Sheffield First for Investment maintain that if supply can be improved, then it is likely there will be increased demand within the area for industrial and business space from existing and new businesses, particularly those who are not dependant on direct access to the M1.

4.26 The local nature of demand means that, whilst it does exist, it is limited in its extent and agents would certainly not describe it as ‘buoyant’. Requirements are generally at the smaller end of the market, ranging from very small starter units up to units of around 1,800m² (20,000ft²) suitable for either light manufacturing or industrial uses. As is often the case with smaller scale demand, there are requirements for both leasehold premises and also for freehold premises.

**Potential for Industrial Development in Upper Don Valley**

4.27 In recent years, the Lower Don Valley and the area around M1 Junctions 35 and 35a have capitalised on their excellent motorway access to attract high profile and large scale industrial and distribution uses. Although the Upper Don Valley does not have this locational advantage, it does, however, benefit from proximity to Sheffield University and Royal Hallamshire and Northern General Hospitals. Its accessibility to the M1 could be impoved by the construction of the Inner Relief Road (IRR). We believe that its role as an industrial location is likely, in the main, to be twofold:

- Businesses servicing Sheffield’s large business and residential population
- Where possible growing existing UDV manufacturing businesses by encouraging them to move their businesses up the value chain from pure manufacturing towards advanced manufacturing and R&D.
- Accommodate potential inward investment projects.
4.28 There is a need for modern industrial space in the Upper Don Valley to serve this local demand.

4.29 Demand is likely to be at the smaller end of the market ranging from starter units up to units of around 1,850m² (20,000ft²) available either to rent or to buy. There may also be demand for small plots of land offering design and build opportunities for small businesses.

4.30 The Upper Don Valley has seen little development over recent years and, as a result, existing supply is dated and poor quality, often letting for as little as £21psm (£2psf). The challenge of translating reported demand into actual development activity on the ground therefore remains. If supply could be improved, Sheffield First For Investment believes that it is likely there will be an increased demand for industrial land in the Upper Don Valley to accommodate prospective inward investors due to Sheffield’s shortage of suitable industrial land and property locations.

4.31 Speculative industrial development in Sheffield has been limited, however, and there continues to be a reliance on pre-lets, particularly outside of the principal industrial locations nearer to the motorway where the market is less established and the development risks higher. Furthermore, the Upper Don Valley continues to face stiff competition from other areas such as the Lower Don Valley, where natural market forces are encouraging the demolition of dated manufacturing plants to provide new development opportunities.

4.32 It is clear that the industrial property market in the Upper Don Valley is not currently strong enough to attract significant development activity without some intervention from the public sector. This public sector intervention could be in the form of:

- Land assembly either to create opportunities for design and build projects or to encourage speculative development by the private sector
- Improvements to access and infrastructure and remediation of sites ready for development
- Speculative development by the public sector to kick-start development activity and, providing it is successful, demonstrate to the private sector that demand exists
- Development of a strong brand for the Upper Don Valley and a pro-active marketing campaign to developers and investors.

**Industrial Market Summary**

- Sheffield has a total industrial stock of around 47.3 million ft² of which less than 3% has been built in the last five years
• Much of the existing industrial stock is comprised of outdated former metal manufacturing/processing factory space not particularly suited to modern requirements

• Sheffield’s four main industrial locations are the Lower Don Valley, the area around M1 Junctions 35 and 35a, Upper Don Valley and Holbrook to the south east

• Completions of new space have averaged around 275,000ft² over the last 5 years, of which just 22% has been speculative

• There is 25 years worth of industrial development in the pipeline, much of which is located primarily outside of the UDV and approx 30% of which is for distribution/warehousing

• Average take-up is around 541,000ft² per annum and tends to be dominated by large units over 100,000ft² but also 10-25,000ft² and 50-100,000ft²

• Sheffield First for Investment monthly enquiry analysis (Oct 2005) shows a high level of enquiries from the manufacturing sector across Sheffield, which can be broken down in to industrial, high quality and lower quality commodity manufacturing.

• Most enquiries for industrial premises continue to be for small premises up to 3,000ft² followed by units of over 20,000ft²

• Around a third of Sheffield’s recent ‘investment successes’ have been industrial in nature

• According to Sheffield First for Investment, Sheffield has a pipeline of high tech, high value investment projects requiring hybrid office / workshop “technology” units, typically between 1,000 and 5,000 sq ft. However, as of 20 October 2005, only one unit of this type is currently available in the city.

• Sheffield First for Investment considers that Sheffield’s most serious supply side deficiency is in the area of freehold industrial land, without developer involvement. Not only is this deficit affecting the city’s capacity to accommodate inward investors; it is also causing indigenous “niche manufacturing” companies to seek sites outside the city for their relocation and expansion projects. It is believed locally therefore that Sheffield needs to take action to provide freehold industrial land for more quality advanced manufacturing companies.
• The UDV is already home to a number of advanced manufacturers which, according to SF4I, are proving to be catalysts for the growth of an advanced manufacturing ‘mini-cluster’

• Existing supply of industrial space in the UDV is limited and outdated often letting at only £2 per sq.ft with little new space in the pipeline but this is often all that existing businesses can afford

• The market acknowledges the need for some modern industrial space in the Upper Don Valley, particularly at the smaller end of the market from starter units up to 20,000ft^2, but the area is still considered too high risk to attract speculative development.

• Public support in the form of land assembly, grant or even speculative development will be required to support the limited demand for industrial space within the area.

**Office Property Market**

4.33 This section assesses Sheffield’s office property market under the following headings:

- Existing supply
- Pipeline development
- Market demand
- Potential for office development in Upper Don Valley
- Office market summary.

4.34 The assessment draws upon information and data from Sheffield City Council, Sheffield First for Investment, Promislive Property Market Reports and consultations with DTZ’s agency team and other commercial agents active in Sheffield and the Upper Don Valley.

**Existing Supply**

4.35 In the 1970s Sheffield was considered as important an office location but, as Leeds continued to grow throughout the 1980s, Sheffield saw very little growth. It was not until the 1990s that significant development activity returned to Sheffield, driven primarily by the growth in call centres.

4.36 The public sector was a key driver during this period of growth, through speculatively built space on Sheffield Development Corporation land around the edge of the city centre and
along the Lower Don Valley. The important role played by the public sector has continued beyond 2000, in particular through Sheffield One’s 13,500m² (145,000ft²) Heart of the City scheme, developments at Sheffield Airport Business Park and, more recently, through a 7,150m² (77,000ft²) pre-let to the Benefits Agency at Hartshead Square and a 9,290m² (100,000ft²) HQ for Insight.

4.37 In contrast to the trends seen in industrial stock, total office stock has increased by 20% over the last two decades. Sheffield now has an office stock of around 604,000m² (6.5 million ft²), of which a relatively high 18% has been developed since 1999.

4.38 The growing demand for space is reflected in the rents which are the fastest growing of any Yorkshire city with rents nearing the £18 per sq.ft and likely to exceed £20 per sq.ft by the end of the year.

4.39 The recent success of the City is down to a number of factors including a highly skilled workforce, Objective One status and location close to the M1 and national motorway network and the Peak District National Park.

4.40 In addition to the traditional city centre office location, Sheffield has two principal city fringe locations which developed during the 1990s:

- **Victoria Quays** – to the north east of the city centre and home to occupiers such as Nabarro Nathanson, Halifax and Parexel. Development activity here is continuing with Wilson Bowden’s Riverside Exchange where 10,000m² (108,000ft²) has been pre-let to Irwin Mitchell.

- **St. Mary’s Square** – to the south west of the city centre and comprising two large office buildings of which 5,760m² (62,000ft²) is occupied by the Inland Revenue. Also in this area are the Department for Education and Skills, EDS and Norwich Union.

4.41 Sheffield also has some principal out of centre locations:

- **Lower Don Valley** – Regenerated by Sheffield Development Corporation in the 1990s assisted by planning and tax benefits. Office schemes completed at that time included Carbrook Business Park where occupiers include Abbey National and Sheffield City Council, an 8,000m² (87,000ft²) call centre for Freemans, the 1,115m² (12,000ft²) Arena Square scheme where occupiers include Barclay Bank and Standard Life and the 9,290m² (100,000ft²).
- **M1 Junction 35a** – The Rotunda Business Park at Junction 35a was developed in the 1990s providing smaller office space for occupiers such as Longden Homes, Initial, Midland Copying and Metaserve. Also in this area is St. Paul’s Sheffield 35a scheme where occupiers include Longcross, Bright Finance and a British Gas R&D facility.

- **Sheffield Business Park** – More recently, office development has been attracted to Sheffield Business Park at the Airport, where occupiers include Fluent Europe, PSI Net, Kingfield Heath and Primecare.

4.42 Although located outside of the Sheffield LA area in Barnsley/Rotherham, the Dearne Valley EZ is an important location in the sub-regional office market, which is emerging as a focus for large scale office developments aimed at call centre operators. Financial grants and incentives in this area have attracted call centres for T Mobile, Ventura, PowerGen, the Post Office, IKEA and Trillium. However, development has been stimulated by grants as much as by actual demand or speculative investments, the result of which has been the build up over the last few years of significant vacant space.

4.43 Completions of new office space over the last five years (excluding Dearne Valley which is outside of Sheffield’s boundary) have averaged around 21,830m² (235,000ft²) following an average for the previous five years of just 10,100m² (109,000ft²). 34% of this development has been in the town centre compared with 66% out of town and over half has been developed speculatively.

<table>
<thead>
<tr>
<th>Table 3.9 Office Completions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>2000</td>
</tr>
<tr>
<td>2001</td>
</tr>
<tr>
<td>2002</td>
</tr>
<tr>
<td>2003</td>
</tr>
<tr>
<td>2004</td>
</tr>
<tr>
<td>Average</td>
</tr>
</tbody>
</table>

Source: Promislive Sheffield Office Market Report

4.44 Office availability in Sheffield stood at around 74,600m² (803,000ft²) in mid 2004 representing a relatively low 12.3% of the total.

4.45 The Upper Don Valley is not currently considered by Agents or investors to be an established office location due to the nature and supply of existing stock, the lack of office development
activity and more preferable opportunities in other parts of the city. This is reflected in SF4I’s availability database which identifies only 7 available properties in this area.

<table>
<thead>
<tr>
<th>Office Availability in the Upper Don Valley</th>
<th>Address</th>
<th>Size</th>
<th>Tenure</th>
<th>Price</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>JC Albyn Complex, Burton Road, Sheffield</td>
<td>22-232m² (240-2,500ft²)</td>
<td>Leasehold</td>
<td>£23.79-59.42psm £2.21-£5.52psf</td>
<td>Office and workshop units on four floors</td>
</tr>
<tr>
<td></td>
<td>Hillsborough Trading Estate</td>
<td>1340-3166m² (14,434-34,087ft²)</td>
<td>Leasehold Freehold</td>
<td>£70psm (£6.50psf) £807psm (£75psf)</td>
<td>Single storey office, formerly BT call centre</td>
</tr>
<tr>
<td></td>
<td>Globe Centre, Penistone Road</td>
<td>83m² (900ft²)</td>
<td>Licence</td>
<td>£900</td>
<td>Fully serviced all inclusive office accommodation</td>
</tr>
<tr>
<td></td>
<td>Herries Road, Hillsborough</td>
<td>284m² (3060ft²)</td>
<td>Leasehold</td>
<td>£27,500pa</td>
<td>First floor accommodation</td>
</tr>
<tr>
<td></td>
<td>Unit 3 Hillsborough Trading Estate</td>
<td>1825m² (19,653ft²)</td>
<td>Leasehold</td>
<td>£43psm (4psf)</td>
<td>Single storey office accommodation</td>
</tr>
<tr>
<td></td>
<td>Unit 4, Hillsborough Trading Estate</td>
<td>1340m² (14,430ft²)</td>
<td>Leasehold</td>
<td>£43psm (£4psm)</td>
<td>Single storey office accommodation</td>
</tr>
<tr>
<td></td>
<td>Infirmary Road/ Montgomery Terrace Road</td>
<td>37m² (400ft²)</td>
<td>Leasehold</td>
<td>£8,800pa</td>
<td>Newly constructed corner retail/office unit</td>
</tr>
</tbody>
</table>

Source: Sheffield First for Investment

**Pipeline Development**

4.46 There is reported to be around 16,700m² (180,000ft²) office space currently under construction in Sheffield, all of which is pre-let or purpose built and all of which is in the city centre or city centre fringe.

4.47 A further 448,000m² (4.8 million ft²) has planning permission and 160,800m² (1.7 million ft²) is at pre-permission stage, equating to around 28 years worth of development at the rate of completions seen over the last five years. Just under a fifth of this pipeline floorspace is located within the city centre with the other four fifths in out of centre locations and around 68% speculative development.

4.48 The majority of pipeline office development is located within the Lower Don Valley area, in particular at Sheffield Business Park, Shepcote Business Park and Atlas Way. There are also significant business park developments proposed at Vantage Park near Junction 34 and at Thoncliffe Business Park at Junction 35. Dearne Valley, outside Sheffield, is also the location of a number of pipeline schemes.

4.49 There is also a significant amount of office development proposed for the city centre or city fringe, including Sheffield One’s E-Campus and Station schemes on Sheaf Street, Phase 2 of St. Paul’s Place where 6,670m² (72,000ft²) has been pre-let to DLA, The Crescent at St. Mary’s
Gate, Sheaf Quay at Victoria Quays and the redevelopment of the former National Union of Miners HQ.

4.50 The Upper Don Valley is not considered by the market to be an office location. We have identified just one pipeline scheme at the Former Neepsend Plc site on Neepsend Lane – a 2,100m$^2$ (22,600ft$^2$) development of offices in a 4 storey block with 98 apartments which has been granted full planning permission.

**Market Demand**

4.51 Take-up of office space over the five years to 2003 averaged around 32,600m$^2$ (351,000ft$^2$) per annum (excluding the Dearne Valley Enterprise Zone), of which around 40% has been take up of pre-let or purpose built space. The peak in 2001 was a result of two particularly large deals with Insight and the Benefits Agency.

<table>
<thead>
<tr>
<th>Year</th>
<th>M$^2$</th>
<th>ft$^2$</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999</td>
<td>32,700</td>
<td>352,000</td>
</tr>
<tr>
<td>2000</td>
<td>33,400</td>
<td>360,000</td>
</tr>
<tr>
<td>2001</td>
<td>41,000</td>
<td>441,000</td>
</tr>
<tr>
<td>2002</td>
<td>32,800</td>
<td>353,000</td>
</tr>
<tr>
<td>2003</td>
<td>24,900</td>
<td>268,000</td>
</tr>
<tr>
<td>Average 1999-2003</td>
<td>32,600</td>
<td>351,000</td>
</tr>
</tbody>
</table>

*Source: Promislive Sheffield Office Market Report*

4.52 Office take-up has been dominated by the smaller end of the market with units of less than 2,320m$^2$ (25,000ft$^2$).

<table>
<thead>
<tr>
<th>Size Range (000 ft$^2$)</th>
<th>% Take-Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-25</td>
<td>49</td>
</tr>
<tr>
<td>25-50</td>
<td>31</td>
</tr>
<tr>
<td>50-100</td>
<td>14</td>
</tr>
<tr>
<td>&gt;100</td>
<td>6</td>
</tr>
</tbody>
</table>

*Source: Promislive Sheffield Office Market Report*

4.53 Sheffield is generally acknowledged as filling a back office administration and call centre role, attracted by low labour and property costs and staff availability. However, over the last few years, it has attracted increasing demand for offices from the business services sector. As a result, office rents have increased significantly with rents of around £188psm (£17.50psf) being achieved in the city centre and £145psm (£13.50psf) being achieved out of town.
Of the 28 major investment successes recorded by Sheffield First for Investment for 2004-05 and for 2005-6 to date, over half have been office projects. Furthermore, many of these investments have been in the knowledge-based sectors, in particular ICT/digital industries and professional services.

<table>
<thead>
<tr>
<th>Company</th>
<th>Nature</th>
<th>Size</th>
<th>Location</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICT and Digital Industries</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inovar</td>
<td>IT solutions</td>
<td>70m²</td>
<td>Chantrey House, Chesterfield Road</td>
<td>11 jobs relocated to Sheffield from Derbyshire</td>
</tr>
</tbody>
</table>
| Online Travel Group      | Internet based travel company | -          | Science Park in Sheffield City Centre | 35 jobs relocated from Ski Village to city centre |}
| Xovox Communications     | Voice recognition technology  | -          | Sheffield Technology Park, Attercliffe | New start business creating 4 jobs, involved in voice recognition technology |
| 4Com                     | Telecommunications            | 164m²      | President Buildings             | Setting up northern base in Sheffield – currently number 21 on Sunday Times list of fastest growing companies, relocating 3 jobs and creating 17 jobs |
| Zoo Digital Group        | Digital                       | 913m²      | Furnival Street                 | Sheffield company expanding into new premises in the CIQ, safeguarding 60 jobs and creating 31 jobs |
| Curve IT                 | IT                            | -          | Blades Business Centre, Bramall Lane | Partial relocation and expansion of company from Leeds involved in selling hardware, creating computer solutions and managed learning for schools – 13 jobs |
| Line Communications Group| E-learning and communications | -          | S1 St. James                    | Opening of satellite office with 13 jobs – looking to grow over next 2 years |
| Sumo Digital             | Digital                       | 483m²      | Arena Square                    | 20 jobs safeguarded and 24 new jobs                                    |
| Professional Services    |                               |            |                                 |                                                                          |
| Irwin Mitchell           | Legal services                | 10,030m²   | Riverside Exchange              | Relocation and rationalisation within Sheffield – 200 jobs             |
| Bright Finance           | Personal services             | -          | Sheffield 35a                   | Phase 2 of larger project – 183 jobs                                   |
| Hart Shaw                | Chartered accountants         | 1,390m²    | Sheffield Business Park T2      | Rationalising operations in Sheffield and Rotherham into one state of the art facility – 100 jobs |


### Table 3.13
**Recent Industrial Investment Successes**

<table>
<thead>
<tr>
<th>Company</th>
<th>Nature</th>
<th>Size</th>
<th>Location</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>P.Inc</td>
<td>Virtual office services</td>
<td>-</td>
<td>Meadowhall Riverside</td>
<td>Sheffield company safeguarding 7 jobs and creating 31 jobs. Expanding into telemarketing and sales services</td>
</tr>
<tr>
<td>MJ Gleeson Group plc</td>
<td>Construction</td>
<td>873m²</td>
<td>Broadfields</td>
<td>Relocation of Northern Construction Division head office and 80 jobs from Woodseats</td>
</tr>
<tr>
<td>Loan Assured</td>
<td>Contact centre dealing with loans and mortgages</td>
<td>-</td>
<td>Waterside Court, Don Valley Link</td>
<td>20 safeguarded jobs and 80 new jobs</td>
</tr>
<tr>
<td>Westside Publications Ltd</td>
<td>Magazine company</td>
<td>650m²</td>
<td>Broadfields</td>
<td>Regional magazine company relocating 34 jobs within Sheffield and creating 16 new jobs</td>
</tr>
<tr>
<td>Stanley Tools</td>
<td>Headquarters of tool manufacturers</td>
<td>929m²</td>
<td>Sheffield Business Park</td>
<td>Relocation of headquarters and 100 jobs from Rutland Road</td>
</tr>
</tbody>
</table>

*Source: Sheffield First for Investment*

4.55 It is worth noting that two of these successes were relocations away from the Upper Don Valley - Online Travel Group which has relocated from the Ski Village to a science park in Sheffield City Centre and Stanley Tools’ HQ which has relocated from Rutland Road to Sheffield Business Park.

4.56 The improving quality of office demand is perhaps reflected in the increasing number of enquiries received by Sheffield First for Investment for high quality premises (although there was a slight drop in 2004) in contrast to a slight fall in the number of enquiries for lower quality premises.

*Figure 3.14 Office Enquiries 2001-2004*
4.57 The greater number of enquiries for high quality premises is true across all size bands, but particularly for small units up to 278m² (3,000ft²) and large units over 1,858m² (20,000ft²). Figure 2.2 below illustrates the proportion of enquiries for high quality space in 2004, broken down by size. It clearly illustrates that by far the most enquiries are for small premises up to 278m² (3,000ft²).

**Figure 3.15 Enquiries for High Quality Office Premises 2004**

![Pie chart showing distribution of enquiries by size band]

Source: Sheffield First for Investment

4.58 The Upper Don Valley is not currently regarded by the market as an office location and this is reflected in the absence of significant investment or development in the area. However, there is a view that a limited office development in this area could work, particularly where there is good accessibility and other amenities nearby.

4.59 This view is supported by Sheffield First for Investment who regard the Upper Don Valley as a potential growth area for high quality business space citing the recent success of the Broadfields Business Park scheme in the south of the city as an example of strong demand in what is regarded as a similar location as regards distance from the City centre and M1.

**Potential for Office Development in the Upper Don Valley**

4.60 Following a period of largely public sector led growth in the office market in the 1990s, activity in the office market has continued over the last five years with 18% of stock having been developed since 1999 and two thirds of this being located out of town. However, the Upper Don Valley has not benefited from this activity and is still considered to be an industrial, rather than an office, location. There is limited office stock in this part of the city and what is available tends to be older space located within industrial settings.
4.61 However, in market terms, there may be potential to encourage new office development on the back of the current buoyancy of Sheffield’s office market. In the Upper Don Valley, the creation of a sustainable office market is likely to be focused towards the southern part of the valley and will be dependent on:

- Changing the image/role of the area
- Creating a requirement for office functions related to other new business in the area
- Creating the right environment (probably on the back of an improving industrial offer)
- Improved access to the city centre
- Creating a critical mass of other activity, i.e. residential, leisure and employment
- Making the most of the riverside location
- Planning policy.

4.62 Even so, the Upper Don Valley is always likely to be a secondary office location serving a largely local market and unlikely to attract the top quality developments found in the city centre or other out of town locations such as Sheffield Airport Business Park. Furthermore, despite over half of recent office development across Sheffield being speculative, this is unlikely to be the case in the Upper Don Valley where the relatively untested market will mean that investment risks are higher. The exception to this could be the development of small ‘hybrid’ office/industrial units.

4.63 It should also be emphasised that this is a longer term ambition that will only be achievable as the area as its image, accessibility and economy changes.

**Office Market Summary**

- The public sector has been a key driver of growth in the office market over the 1990s and since resulting in an increase in office stock of 20% over the last two decades
- Offices tend to be concentrated in the traditional city centre core, at Victoria Quays and St. Mary’s Square on the city fringe and, out of town, in the Lower Don Valley, Junction 35a and also outside of Sheffield in the Dearne Valley Enterprise Zone
- Completions of office space have averaged around 235,000ft\(^2\) per annum over the last 5 years
- There is around 180,000ft\(^2\) office space under construction in the city centre or city fringe and a further 28 years worth in the development pipeline of which 68% is speculative.

- The majority of pipeline development is out of town, particularly in the Lower Don Valley, Sheffield Business Park, Junction 35 and further a-field in the Dearne Valley.

- Average take-up over the last five years has been 351,000ft\(^2\) per annum and half of this has been units of less than 25,000ft\(^2\).

- Around two thirds of recent ‘investment successes’ have been office based and many of these have been in the knowledge based sectors such as ICT and professional services, but two of these have been relocations out of the Upper Don Valley.

- For office/business demand to be realised it will require the long term commitment of the City and other agencies to provide assistance in improving access and infrastructure to key sites and the overall image and environment of the area to support a change in perception as a business location.

**Retail Property Market**

4.64 This section assesses Sheffield’s retail warehousing property market under the following headings:

- Existing supply
- Pipeline development
- Market demand
- Potential for retail development in Upper Don Valley
- Retail market summary.

4.65 The assessment draws upon information and data from Sheffield City Council, Sheffield First for Investment, Promislive Property Market Reports and consultations with DTZ’s agency team and other commercial agents active in Sheffield and the Upper Don Valley.
Existing Supply

4.66 There is currently estimated to be around 130,245 m$^2$ (1.4 million ft$^2$) retail warehousing in Sheffield, according to Promislive, representing a relatively low level of provision per household. Almost half of this provision is located on the following purpose built retail parks:

- **Drakehouse Retail Park** – completed in 1998, the scheme is situated 7 miles to the south east of the city centre with occupiers including Currys, Focus, Halfords, JD Sports and JJB Sports
- **Meadowhall Retail Park** – situated in the Lower Don Valley to the north east of the city centre and adjacent to a leisure park, the scheme was completed in 1991 and occupiers include Homebase, PC World, Toys R Us, Hobbycraft and Co-op Travel
- **Heeley Retail Park** – situated 2 miles to the south west of the city centre on Chesterfield Road, the development opened in 1998 and comprises 5 units including Matalan and Currys
- **Queens Road Retail Park** – opened in 1994 one mile south of the city centre on the A61 with occupiers including Poundstretcher and Netto
- **Parkway Central Retail and Leisure Park** – opened in 2002 with a Matalan development and followed by a second phase in 2003 with Brantano and Carphone Warehouse.
- **Kilner Way Retail Park** – located within the Upper Don Valley, this is an outdated retail park occupied by Comet, Glyn Webb and Halfords alongside a Somerfield supermarket.

4.67 Other large scale freestanding retail warehousing units in Sheffield include:

- A modern B&Q near Hillsborough Barracks on the edge of the Upper Don Valley
- Wickes at Rutland Road in the Upper Don Valley
- Courts and Homebase and Woodside Park, Chesterfield Road
- Mothercare World and Staples at St. Mary’s Retail Park
- MFI to the south of the city centre.

4.68 Retail warehousing in the Upper Don Valley is concentrated within the Kilner Way Retail Park, which comprises 3 non-food units totalling 3,900 m$^2$ (42,000 ft$^2$) floorspace plus a Somerfield
supermarket and a Gala Bingo. There are proposals for further development of the park (see pipeline development below). Aside from this, there are a number of small scale retail units along Penistone Road including a Carphone Warehouse and a Charlie Browns. The nearest large supermarkets to the Upper Don Valley (aside from Somerfield at Kilner Way Retail Park) are Morrisons at Hillsborough Barracks and Tesco at Infirmary Road (albeit just outside the study area).

**Pipeline Development**

4.69 Sheffield City Council currently has around 19 ‘retail’ entries on their database of significant pipeline developments, of which five are located within the Upper Don Valley. The largest of these is the redevelopment of the Kilner Way Retail Park to provide 8 new units totalling 8,900m$^2$. Of the other four, three are for car showrooms to be located on the busy Penistone Road.

<table>
<thead>
<tr>
<th>Address</th>
<th>Description</th>
<th>Planning Status</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Former Iona Steelworks, Captel Street/Penistone Road</td>
<td>1,250m$^2$ motor dealership and workshop</td>
<td>Full planning permission</td>
<td>£2m</td>
</tr>
<tr>
<td>Penistone Road North</td>
<td>1,260m$^2$ car showroom</td>
<td>Full planning permission</td>
<td>£1m</td>
</tr>
<tr>
<td>Penistone Road/West Don Street</td>
<td>1,000m$^2$ motor car showroom</td>
<td>Full planning permission</td>
<td>£1m</td>
</tr>
<tr>
<td>Adjoining Livesey Street and Penistone Road</td>
<td>2,200m$^2$ three storey unit for sale of caravan and camping equipment</td>
<td>Full planning permission</td>
<td>£2m</td>
</tr>
<tr>
<td>Kilner Way Retail Park</td>
<td>8,900m$^2$ redevelopment of existing retail park to provide new units, creating 8 in total and raising the floorspace by 2,800m$^2$</td>
<td>Full planning permission</td>
<td>£15m</td>
</tr>
</tbody>
</table>

Source: Sheffield City Council

4.70 Other major pipeline developments across Sheffield include 1,858m$^2$ (20,000ft$^2$) of non-food retail and a 1,858m$^2$ (20,000ft$^2$) superstore in the Parkway area, a B&Q Warehouse under construction on Greenland Road in the Lower Don Valley and an extension of the Crystal Peaks Shopping Centre (including a new Sainsbury’s store) south east of Sheffield. There is also understood to be plans for a limited supermarket development at the Chaucer site just outside the Upper Don Valley.

4.71 Sheffield City Council’s Quantitative Retail Study recommends that there is no need to plan for any more retail warehousing over the development plan period, saying that ‘current levels of
retail warehouse commitment would result in this section of the market enhancing its market share at the expense of existing town centres’. This recommendation is likely to be incorporated into the Sheffield Development Framework.

**Market Demand**

4.72 Retailer demand for Sheffield is reported to be relatively buoyant with several high profile operators looking for space. Record rents of around £228 psm (£21.25 psf) were achieved for units on the Parkway development in 2003 following lettings to Matalan for £113 psm (£10.50 psf) in 2002 and Brantano for £150 psm (£14 psf). Meanwhile, rental values have reached £210 psm (£19.50) at Meadowhall Retail Park and £172 psm (£17.50 psf) at Heeley Retail Park.

4.73 The north west of Sheffield is relatively unexploited in terms of retail warehousing provision and the proposed redevelopment of Kilner Way Retail Park should address this to some degree. There is also a strong view from the market that the busy Penistone Road could provide an ideal location for smaller scale roadside retail such as trade counter uses and car showrooms. Although market view may not necessarily accord with planning priorities.

**Potential for Retail Development in Upper Don Valley**

4.74 Despite the fact that retail warehousing is under-represented in Sheffield, compared to the national average and that the north of the City, including the UDV, appear to be particularly unexploited, there appears to be little likelihood of any significant new retail warehousing being granted permission due to existing planning policy and sequential testing. This also applies to any additional supermarket development.

**Retail Market Summary**

- Almost half of retail warehousing provision is on retail parks, in particular Drakehouse, Meadowhall, Heeley, Queens Road, Parkway Central and Kilner Way retail parks
- The Kilner Way Retail Park is the only major retail presence in the area and is due for redevelopment to provide 8 new units totalling 96,000 ft² and three of the others are for car showrooms on the busy Penistone Road. Other retail warehouse provision in the area includes a Carphone Warehouse and a Charlie Browns
- Retailer demand across Sheffield is reported to be relatively buoyant with several high profile occupiers looking for space
Despite a potential market for retail warehousing it is unlikely that further retail warehousing would be supported in the Upper Don Valley by the local planning authority.

The opportunity exists to exploit smaller scale roadside retailing along the Penistone Road and close to the existing leisure and sporting attractions.

**Leisure Market**

4.75 This section assesses Sheffield’s leisure market under the following headings:

- Existing supply
- Pipeline development
- Market demand
- Potential for leisure development in Upper Don Valley
- Leisure market summary.

**Existing Supply**

4.76 The leisure market in Sheffield is concentrated in the City Centre and along the Lower Don Valley Corridor. The City Centre is an established regional hub for leisure and cultural uses being the home of Sheffield’s three main theatres, a range of museums and galleries, hotels and conference centres and numerous bars and restaurants. The key feature of the City Centre offer is the diversity of leisure uses available in a relatively compact area at the heart of the transport (in particular public transport) network.

4.77 The Lower Don Valley has grown as a leisure destination on the back of the presence of the Meadowhall Shopping Centre. The Lower Don Valley’s leisure offer is distinct from that of the City Centre, focussing on large scale commercial leisure (such as cinema and bowling) and sports uses (such as the Ice Centre and Don Valley Stadium) taking advantage of the area’s excellent transport links between the City Centre and M1 motorway.

4.78 The existing leisure market in the Upper Don Valley is much smaller scale than the City Centre and Lower Don Valley markets and serves a more local role (with the exception of the Ski Village and Hillsborough Football Ground). The main existing leisure uses in the Upper Don Valley include Hillsborough Leisure Centre, Owlcote Stadium, Napoleons Casino and the Ski Village. Although there are sport facilities at the new Sheffield College Campus, it is understood that these are not open to the public.
4.79 The potential for enhancing the leisure offer in the Upper Don Valley must be considered in the context of the profile of the existing leisure market. The Upper Don Valley can not, and indeed should not, compete with the City Centre or the more established Lower Don Valley. The potential for enhancing leisure uses within the Upper Don Valley lies in capitalising on the positive characteristics of the area, in particular through building on the presence of existing leisure uses, maximising profile through ensuring visibility from Penistone Road and making best use of vacant and under utilised sites.

4.80 Therefore this section focuses on the types of uses within the leisure sector that have greatest potential in the Upper Don Valley and those that will compliment the existing leisure/education offer. Those of particular relevance include:

- Hotels
- Conference centres
- Major leisure attractions.

**Hotels**

4.81 Our analysis has identified in the region of 40 hotels in Sheffield (excluding establishments at the lower end of the market in terms of size, price band and quality). These are identified in Appendix A.

4.82 The establishments range from AA and RAC four star establishments with rooms priced at over £80 (such as the Hilton, Marriott and Holiday Inn Royal Victoria) to hotels catering for budget requirements with rooms under £30 (Hillside, Ivory House and Riverside Court). Sheffield also has a number of national chain operators including Novotel, Marriott, Holiday Inn, Ibis, Premier Travel Lodge.

4.83 In terms of the geographic spread of hotels across the City, there are two main concentrations, the first in the east of the City Centre around Arundel Gate, Bridge Street and Castlelegate, the second around Sharrow in a quadrant to the south west of the City Centre between A625 and A621. Beyond these two areas the geographical spread across Sheffield is fairly dispersed.

4.84 There are few hotels to the north of the City; the exception being the two Premier Travel Inns on Attercliffe Common Road (A6178) which capture trade associated with Meadowhall, the leisure facilities along this corridor and from the motorway. There is one hotel in the Upper Don Valley study area; The Garrison Hotel, Hillsborough Barracks on Penistone Road. The Hillsborough Hotel lies just outside the study area near the junction of Langsett Road and

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2 The analysis was based on internet research using Sheffield City Council website and Yell.com.
Holme Lane/Bradfield Road. (Queens Ground Hotel on Langsett Road offer accommodation, does Coniston Guest House, Beechwood Road)

**Conference Centres**

4.85 Conference facilities usually form part of a wider development, for example part of a hotel or leisure complex. The table in Appendix B identifies the main conference venues in the centre and at the edge of Sheffield and some major venues on the outskirts of the City.

4.86 Of the conference venues that have been identified in Sheffield, most (20) are in the City Centre, but there are a significant number (16) on the edge of centre and several (7) outside the City in a more suburban and even rural setting. A brief analysis of the profile of the venues is provided below.

4.87 Hosting conferences/meetings is the prime function of only a small number of venues (4). Most venues are dual or multiple purpose, where conference use is but one element. For example 18 venues are hotels, 7 are arts/cultural attractions and 6 are sports facilities/stadia.

4.88 A large proportion (18) of the conference venues are hotels; 7 city centre hotels advertise conference facilities as do 5 edge of centre hotels. All of the out of centre conference facilities, with the exception of the Magna Centre, are based in hotels (6).

4.89 The venues provide a wide range of facilities catering from small groups of around 10 up to large audiences in excess of 1,000. There is also a variety of style of facility with some city centre venues and in particular the manor hotels providing a traditional atmosphere, venues with unique character such as Kelham Island and state of the art modern venues such as the Source and Workstation.

4.90 6 venues have capacity for over 1,000 people in a single room, 4 of these are in the city centre (Sheffield City Hall, Gatecrasher One, Ponds Forge International Centre, Lyceum Theatre), the other being Don Valley Stadium and the Magna Centre.

4.91 Owlerton Stadium and Sheffield Wednesday Football Club provide the most notable conference facilities in the Upper Don Valley.

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3 The analysis was based on internet research using Sheffield City Council website and Yell.com.
Major Leisure Attractions

4.92 The following table lists some of the major commercial leisure attractions in Sheffield under key types and their general location (a more detailed description of each is provided in Appendix C).^4

<table>
<thead>
<tr>
<th>Type</th>
<th>Attraction</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports Stadia</td>
<td>Hillsborough Stadium</td>
<td>UDV</td>
</tr>
<tr>
<td></td>
<td>Bramall Lane Stadium</td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td>Sheffield United Academy</td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td>Sheffield Hallam FM Arena</td>
<td>LDV</td>
</tr>
<tr>
<td></td>
<td>Don Valley Stadium</td>
<td>LDV</td>
</tr>
<tr>
<td></td>
<td>Don Valley Bowl</td>
<td>LDV</td>
</tr>
<tr>
<td>Cinemas</td>
<td>UGC Cinema, Valley Centertainment</td>
<td>LDV</td>
</tr>
<tr>
<td></td>
<td>Vue Cinema, Meadowhall</td>
<td>LDV</td>
</tr>
<tr>
<td></td>
<td>Odeon</td>
<td>Centre</td>
</tr>
<tr>
<td></td>
<td>The Showroom</td>
<td>Centre</td>
</tr>
<tr>
<td>Bowling Alleys</td>
<td>Hollywood Bowl</td>
<td>LDV</td>
</tr>
<tr>
<td></td>
<td>AMF Bowling Sheffield, Firth Park</td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td>Fastlane Bowl, Handsworth</td>
<td>Other</td>
</tr>
<tr>
<td>Theatres</td>
<td>Sheffield City Hall</td>
<td>Centre</td>
</tr>
<tr>
<td></td>
<td>Crucible Theatre</td>
<td>Centre</td>
</tr>
<tr>
<td></td>
<td>Lyceum Theatre</td>
<td>Centre</td>
</tr>
<tr>
<td></td>
<td>Studio Theatre</td>
<td>Centre</td>
</tr>
<tr>
<td></td>
<td>Montgomery Theatre</td>
<td>Centre</td>
</tr>
<tr>
<td></td>
<td>Library Theatre</td>
<td>Centre</td>
</tr>
<tr>
<td>Casinos</td>
<td>Grosvenor Casino, Queens Rd</td>
<td>Centre</td>
</tr>
<tr>
<td></td>
<td>Napoleons Casino &amp; Restaurant, Owлерton</td>
<td>UDV</td>
</tr>
<tr>
<td></td>
<td>Napoleons Casino &amp; Restaurant, Ecclesall</td>
<td>Other</td>
</tr>
<tr>
<td>Sports Centres/Facilities</td>
<td>Edge Climbing Centre</td>
<td>Centre</td>
</tr>
<tr>
<td></td>
<td>The Foundry Climbing Centre</td>
<td>Centre</td>
</tr>
<tr>
<td></td>
<td>Sheffield Ski Village and Adventure Mountain</td>
<td>UDV</td>
</tr>
<tr>
<td></td>
<td>Ice Sheffield</td>
<td>LDV</td>
</tr>
<tr>
<td></td>
<td>Ponds Forge International Sports Centre</td>
<td>UDV</td>
</tr>
<tr>
<td></td>
<td>Hillsborough Leisure Centre</td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td>Concord Sports Centre, Wincobank</td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td>Woodburn Stadium</td>
<td>UDV</td>
</tr>
<tr>
<td></td>
<td>Sheffield Sports Stadium Ltd, Owlerton</td>
<td>UDV</td>
</tr>
</tbody>
</table>

Note: Location descriptions are: Upper Don Valley (UDV), Lower Don Valley (LDV), City Centre (Centre), Other. This list highlights major leisure attractions, but is not exhaustive.

4.93 The table shows the wide range of leisure facilities available across Sheffield. There is a particular presence of sports based leisure, including Ski Village, Ice Sheffield, various sports stadia and large leisure centres. The table also highlights the concentration of attractions in the City Centre and Lower Don Valley, although there are a number of large attractions in the Upper Don Valley.
Pipeline Development

4.94 There are currently four pipeline hotel schemes in Sheffield, there are three proposals for new hotels (all within the city centre) and one scheme relating to works to an existing hotel.

<table>
<thead>
<tr>
<th>Address</th>
<th>Description</th>
<th>Planning Status</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hilton Hotel, Victoria Furnival Road</td>
<td>Extension to former Stakis Hotel to form 36 additional bedrooms and conference facilities</td>
<td>Full planning permission</td>
<td>£2m</td>
</tr>
<tr>
<td>Former Education Department Building, Leopold Square</td>
<td>Alterations and extensions to form 44 apartments, a 60 bed ‘boutique’ hotel and bar/restaurant with elements of live/work units and a £1m public square. Some preliminary works underway</td>
<td>Full planning permission and under construction</td>
<td>£25m</td>
</tr>
<tr>
<td>Macdonald St. Paul's Hotel 119 Norfolk Street</td>
<td>161 bed, 6 storey 4/5 star hotel with conference and function facilities, restaurants and bars and 900m² fitness centre and beauty rooms. The conferences facilities include 9 meeting rooms with space for gatherings of all sizes from board meetings to theatre style conferences for up to 650 delegates and banqueting for as many as 450 guests.</td>
<td>Under construction Due to open November 2005</td>
<td>£20m</td>
</tr>
<tr>
<td>Castlegate</td>
<td>A 6 storey building (“The Square”) totalling 4,700 sq m has full planning permission, but an alternative outline application for a 10 storey office development was submitted in December 2004. The first phase is a 114 bed Travelodge Hotel, 400 space multi-storey car park and 3 retail units and the office block. A reversed matters application for a 6 storey, 5,000 sq m office building was approved in May 2005.</td>
<td>Full planning permission</td>
<td>£55m (overall scheme)</td>
</tr>
<tr>
<td>Sheffield Road</td>
<td>Offices in 2 x three-storey blocks and 4 x two-storey blocks – was approved in June 2003 subject to a legal agreement. An application to renew an earlier permission for a hotel was approved in January 2004</td>
<td>Full planning permission</td>
<td>£3m</td>
</tr>
</tbody>
</table>

4 The analysis was based on internet research using Sheffield City Council website, Yell.com and website of specific attractions.
Table 3.16
Pipeline Hotel Schemes

<table>
<thead>
<tr>
<th>Address</th>
<th>Description</th>
<th>Planning Status</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Former Central Post Office</td>
<td>Partial demolition, alterations, conversion and erection of buildings to form 41 apartments, 3,369 sq m of office, 97 bed hotel, restaurant, and mixed commercial space 1,773 sq m with landscaped gardens</td>
<td>Planning application submitted</td>
<td>£5m</td>
</tr>
<tr>
<td>Fitzalan Square</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sheffield Ski Village</td>
<td>Only Outline Expansion of ski village including indoor 300 metre, real snow slope hall. Also A1 retail units, including “Snow and Rock” (2,900 sq m), leisure (1,600 sq m), food outlets (1,400 sq m), 4 star hotel (4,650 sq m), 18 chalets, highway improvement works, infrastructure works, gondola cableway, car parking and associated interchange – Shirecliffe Rd, Langsett Rd</td>
<td>Planning application submitted</td>
<td>£80m (overall scheme)</td>
</tr>
<tr>
<td>Sheffield United FC, Bramall Lane</td>
<td>Erection of 150 bed, 10-storey hotel</td>
<td>Planning application submitted</td>
<td>Not known</td>
</tr>
</tbody>
</table>

Source: Sheffield City Council

4.95 In general, other pipeline leisure schemes are those forming part of wider mixed use developments including

Table 3.17
Other Pipeline Leisure Schemes

<table>
<thead>
<tr>
<th>Address</th>
<th>Description</th>
<th>Planning Status</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Butchers Works, 72 Arundel Street</td>
<td>4/5 storey office block, conversion to 55 apartments and 7 workshop/office/retail/café units at ground floor</td>
<td>Full planning permission</td>
<td>£9m</td>
</tr>
<tr>
<td>West Street/Carver Street Car Park and Former National Union of Miners HQ</td>
<td>2 five storey office buildings with 2,350m$^2$ A1/A3 uses and 62 flats. There is an alternative application for a mixed residential/office scheme of 140 flats, 3,577m$^2$ offices and 465m$^2$ retail/food/drink</td>
<td>Full planning permission</td>
<td>£8m</td>
</tr>
<tr>
<td>Former Hanover House, Hanover Way/Milton Street</td>
<td>Commercial uses comprising 1,000m$^2$ A1, A3 and D2, 1,500m$^2$ B1, 233 apartments and 9 live/work units</td>
<td>Full planning permission</td>
<td>£4m</td>
</tr>
<tr>
<td>Kerlham Island – Corporation Street/Alma Street</td>
<td>335 apartments and 1,200m$^2$ ground floor shops, bar restaurant and 1,200m$^2$ business units and riverside walk</td>
<td>Full planning permission</td>
<td>£4m</td>
</tr>
<tr>
<td>Hancock and Lant</td>
<td>Conversion/new build to provide</td>
<td>Full planning</td>
<td>£2m</td>
</tr>
</tbody>
</table>
### Table 3.17
Other Pipeline Leisure Schemes

<table>
<thead>
<tr>
<th>Address</th>
<th>Description</th>
<th>Planning Status</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buildings, Ladys Bridge/Blonk Street</td>
<td>A1/A3/B1 on ground floors and 125 flats above</td>
<td>permission</td>
<td></td>
</tr>
<tr>
<td>69 - 79 Carver Street &amp; Wellington Street</td>
<td>Erection of 3 one and two storey buildings for A3 retail &amp; D2 leisure uses</td>
<td>Full planning permission</td>
<td>£3m</td>
</tr>
<tr>
<td>Richmond Park Road/ Handsworth Road</td>
<td>700 sq.m. pub (still only with outline planning permission) and 300 sq.m. drive through restaurant, which has full planning permission.</td>
<td>Full planning permission</td>
<td>£2m</td>
</tr>
<tr>
<td>Sheaf House, Sheaf Street*</td>
<td>Mixed use development – A1, A2, A3, B1, C1 and D2 – Sheffield CC and Yorkshire Forward</td>
<td>Outline planning permission</td>
<td></td>
</tr>
<tr>
<td>Heart of the City – Charles Street/Arundel Gate/Norfolk Street</td>
<td>2 office blocks and 1 apartment block, A1, A2 and A3 uses and health and fitness club, landscaped square</td>
<td>Outline planning permission</td>
<td></td>
</tr>
</tbody>
</table>

*Source: Sheffield City Council*
4.96 In addition to the schemes above Sheffield United Football Club have entered into a joint venture deal with Las Vegas Sands Inc are seeking planning permission for a multi-million pound entertainment and leisure project to redevelop the Bramall Lane ground and adjacent land. It is estimated that the scheme, which includes a casino, 120 bed five star hotel, new stand for the disabled, a conference centre and facilities for the local community, will trigger 1,800 jobs. In a recent press notice the Club stated that the partners intended to submit a planning application once the details of the gaming Bill are finalised through Parliamentary processes.

4.97 The Lower Don Valley Masterplan also sets out proposals to link the string of sports venues in the Lower Don Valley to create a ‘boulevard of sport’. The plan includes, up to 4,200 new homes, shops, cafes, restaurants and a business park. The plan also includes improvements to public transport and the quality of the environment. The twenty year plan is estimated to create around 14,000 jobs and cost £1.25 billion.

4.98 The only major scheme proposed for the Upper Don Valley is the ‘Snow Mountain’ proposal at the existing ski village. The proposals include the development of a 300 metre indoor real snow facility with ancillary retail, leisure and food and drink. The scheme also includes a 120 bed a star hotel, 18 chalets and major improvements to access and infrastructure including highway/infrastructure improvement works, gondola cableway and associated car parking. An outline planning application was submitted in December 2004 and is currently under consideration by the local planning authority. Alongside this is the potential recreational value of Parkwood Springs as a ‘country park’.

**Market Demand**

4.99 The potential market demand for leisure uses can be considered with reference to the trends in the existing market in terms of supply and pipeline development and by analysis against market requirements.

4.100 Our assessment of demand within the leisure sector has focused on the specific demand for hotel and conference facilities to compliment the existing leisure/education uses and to fill a perceived gap in the market for such facilities within the Upper Don Valley.

**Hotel/Conference Centre**

4.101 The UK Budget Hotel Survey\(^5\) provides an analysis of supply and demand trends in the sector. The survey found that, despite some difficult trading conditions across the UK, the market shows signs of continued growth:

- At 2003 there were approximately 980 branded budget hotels with
c. 63,000 rooms, representing increases of 4.9% and 10.6% on the previous year

- There was significant transaction activity within the sector, with Travel Inn Premier Lodge (known as Premier Travel Inn) reinforcing their position as a key player with 43% market share, followed by Travel Lodge (23%) and Express by Holiday Inn (20%)
- Overall reduction in average prices between 2002 and 2004, due in part to introduction of tiered pricing (with low prices at the bottom of the range) and a concentration of new development at the mid level, has skewed the average downwards
- Average occupancy in the sector is slightly above the average for UK regional hotels (69.4% compared to 69.2% in 2002) with city centre (excluding London) and provincial roadside locations enjoying an increase in occupancy between 2002 and 2004
- Forecast growth of approximately 6,000-6,300 rooms across the UK per annum, with operators seeming positive about market prospects
- Operators believe that network coverage is a key factor in establishing a strong and attractive offer, alongside price and amenities.

4.102 The Survey also identifies the site criteria sought by hotel operators, in summary:

- Significant population catchment (some hotel operators require 50,000 – 100,000 people, but where there a good communication links the importance of catchment size reduces)
- A strong business base and proximity to this source of potential demand
- Good tourist catchment
- Good access from a main route (motorway, dual carriage way or main A road)
- Visibility, especially from passing traffic
- Attractive price of land

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5 Deloitte and Touche LLP ‘UK Budget Hotel Survey 2004’
4.103 The increasing cost of development has resulted in the following trends in the sector:

- Development of larger hotels – over 150 bedrooms;
- Increasingly tailoring the hotel product to the site;
- Seeking to differentiate the hotel product from competitors;
- Developing hotels as part of a cluster of other complementary uses to create critical mass.

Other Leisure Facilities

4.104 The potential for other types of leisure development within the Upper Don Valley is difficult to assess due to the diverse market characteristics of the wide range of attractions in this sector. However, it is reasonable to assume some scope exists for leisure development in the Upper Don Valley due to the strengths of the location in terms of transport links, potential for visibility from major roads and in particular the scope for clustering uses around the central area of Penistone Road. For example there may be scope to exploit potential for links with Sheffield Wednesday Football Club and Hillsborough stadium through providing food and drink facilities.

4.105 The proposals for ‘Snow Mountain’ at the Ski Village would strengthen the leisure offer in the Upper Don Valley and may act as a catalyst for other leisure development expanding potential for linked trips. However, further research is required to understand the scale and nature of potential demand for such a major and specialist leisure facility in the UDV. There are also proposals to create a country park in place of the VIRIDOR tip which will further enhance the leisure offer of the Parkwood Springs area.

Potential for Leisure Development in the Upper Don Valley

4.106 The central area of the Upper Don Valley appears to satisfy many of the location requirements of hotel operators, notably:

- The Upper Don Valley is predominantly an employment area and therefore has a significant potential business catchment
- There is scope to create a ‘cluster’ of leisure uses around the Casino, Hillsborough Stadium, Hillsborough Leisure Centre and Sheffield College, which would enhance the catchment
- There is potential for visibility from a major road (Penistone Road)
- There are good road and public transport links (bus and tram) to the City Centre and surrounding areas
- There is land potentially available for development.
- Potential to strengthen Hillsborough Town Centre and improve its vitality and viability based on the development of the leisure cluster concept.

4.107 Based on the market trends identified in the UK Budget Hotel Survey and the characteristics of the Upper Don Valley there may be potential for a mid range or budget hotel, such as a Travel Inn or Premier Lodge. A detailed feasibility study would be required to confirm the market for such a facility, especially in view of proposals for a new hotel as part of ‘Snow Mountain’ and other pipeline schemes. However, our initial analysis would suggest that there is a fairly strong market for budget hotels nationally and the Upper Don Valley fulfills many of the site and market requirements. Furthermore, the proposed hotel proposed at Snow Mountain is thought to be targeting a different client base, catering for the higher end, rather than budget market.

4.108 A budget hotel development should be located on a busy main road (i.e. Penistone Road) to maximise accessibility and visibility, and close to a cluster of other leisure/education attractions to serve visitors to the area (i.e. centrally between Sheffield Wednesday, Hillsborough stadium, the casino and Sheffield College).

4.109 A hotel may incorporate conference facilities and would support the development of complimentary uses, particularly those that require critical mass of activity and that may not be sustainable as stand alone entities, but may be viable as part of a cluster of complimentary uses. Such uses may include a health and fitness club, family pub or restaurant.

**Leisure Market Summary**

- Main existing leisure destinations include City Centre, Lower Don Valley and Upper Don Valley/Ski Village
- Major proposals for Lower Don Valley to establish a ‘boulevard’ of sport and leisure to create a sport and leisure destination of regional importance
- Potential to build on existing leisure/education uses to create critical mass of activity and establish the area as a major leisure destination
- Strong and growing budget hotel market with few competing hotels located in the UDV
- Potential for clustering of complimentary leisure facilities e.g. health club, bowling alley, restaurants
- Potential for food and drink facilities in support of Sheffield Wednesday Football Club
- Major existing proposal for an indoor ski village in the UDV.

Residential Property Market

4.110 This section assesses Sheffield’s residential property market under the following headings:
- Existing housing profile
- Existing policy and initiatives
- Housing development pipeline
- Land availability
- Market demand
- Potential for residential development in Upper Don Valley
- Residential market summary.

Existing Housing Profile

4.111 Table 3.23 below illustrates the make up of existing residential properties across Sheffield. At 14%, Sheffield has a much lower proportion of detached housing than either the county, regional or national averages. It also has relatively few semi-detached houses (37%) compared to either South Yorkshire or Yorkshire and the Humber, albeit more than the average for England. On the other hand, at 30% it has a slightly higher proportion of terraces than either the county, regional or national averages. The proportion of flats/maisonettes, whilst almost in line with the national average at 18%, is also significantly higher than the average for South Yorkshire or Yorkshire and the Humber.

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6 Deloitte and Touche LLP ‘UK Budget Hotel Survey 2004’
Table 3.18
Accommodation Type

<table>
<thead>
<tr>
<th></th>
<th>Sheffield</th>
<th>South Yorkshire</th>
<th>Yorkshire &amp; The Humber</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>%</td>
<td>No</td>
<td>%</td>
<td>No</td>
</tr>
<tr>
<td>All Household Spaces</td>
<td>224,484</td>
<td>100</td>
<td>548,913</td>
<td>100</td>
</tr>
<tr>
<td>Detached</td>
<td>31,690</td>
<td>14</td>
<td>101,530</td>
<td>19</td>
</tr>
<tr>
<td>Semi-Detached</td>
<td>84,075</td>
<td>37</td>
<td>236,421</td>
<td>43</td>
</tr>
<tr>
<td>Terraced</td>
<td>67,381</td>
<td>30</td>
<td>143,937</td>
<td>26</td>
</tr>
<tr>
<td>Flat/Maisonette</td>
<td>41,199</td>
<td>18</td>
<td>65,989</td>
<td>12</td>
</tr>
</tbody>
</table>

Source: Census of Population 2001
Note: Refers only to unshared dwellings

4.112 Table 3.24 shows the mix of tenure, by household, across Sheffield. Most striking is the low percentage of owner occupation which, at 60%, lags behind the county, regional and national averages. This is compensated for by the relatively high proportion of households in social rented housing which, at 30%, is far higher than either the county, regional or national averages.

Table 3.19
Household Tenure

<table>
<thead>
<tr>
<th></th>
<th>Sheffield</th>
<th>South Yorkshire</th>
<th>Yorkshire &amp; The Humber</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>%</td>
<td>No</td>
<td>%</td>
<td>No</td>
</tr>
<tr>
<td>All Households</td>
<td>217,622</td>
<td>100</td>
<td>530,765</td>
<td>100</td>
</tr>
<tr>
<td>Owner Occupied</td>
<td>130,905</td>
<td>60</td>
<td>339,490</td>
<td>64</td>
</tr>
<tr>
<td>Social Rented</td>
<td>65,904</td>
<td>30</td>
<td>141,396</td>
<td>27</td>
</tr>
<tr>
<td>Private Rented</td>
<td>16,608</td>
<td>8</td>
<td>34,580</td>
<td>7</td>
</tr>
<tr>
<td>Other Rented</td>
<td>4,205</td>
<td>2</td>
<td>15,299</td>
<td>3</td>
</tr>
</tbody>
</table>

Source: Census of Population 2001

Existing Policies and Initiatives - Housing Strategy

4.113 The revised Sheffield City Housing Strategy 2004-2007 sets out the City’s policy and thinking to delivering successful neighbourhoods and housing within the City and represents a step change in direction that embraces the national policy agenda of sustainable communities to create successful and sustainable neighbourhoods where people choose to live. The strategy is underpinned by a number of interrelated themes which include (see overleaf):
4.114 At a local level the thrust of the Strategy is to support the ‘City Centre Living’ and ‘Closing the Gap’ Strategies to promote the growth of the population of the central area of the city and to close the gap between the deprived areas of the north and east of the city with those in the more affluent south.

4.115 In the UDV and adjacent neighbourhoods the strategy embraces the work of the HMR Pathfinder and Area Panels and supports the proposals set out in the Owleron and Southey Regeneration Framework and Neighbourhood Strategies/Masterplans to transform an area of social housing into a series of mixed tenure neighbourhoods that can match the quality of life experienced in Sheffield’s more affluent suburbs.

**SOAR/ Transform South Yorkshire Housing Market Renewal (HMR) Programme**

4.116 The Southey and Owleron Area Regeneration (SOAR) Board has been working in partnership with the City Council and other partners to regenerate the Southey and Owleron area. Neighbourhood strategies have been prepared for Foxhill, Hillsborough, Langley, Parsons Cross, Shirecliff and Southey. These are brought together in a Regeneration Framework
which covers the whole of the SOAR area. The proposals contained within these now form part of the North Sheffield Area Development Framework within the Transform South Yorkshire Housing Market Renewal Programme and have recently received cabinet approval under the category of Transformational Projects for the Southey and Owerton Wards.

4.117 Key sites have been assembled from a combination of existing Council-owned land and through the demolition of poor quality council housing in the neighbourhoods of Foxhill, Shirecliffe, Parson Cross and New Parson Cross where Masterplans have been prepared. The potential outputs from the redevelopment of these sites is summarised in the table below.

<table>
<thead>
<tr>
<th>Neighbourhood Area</th>
<th>Net site area (ha)²</th>
<th>Units to be Demolished</th>
<th>New Units¹</th>
<th>Projected Construction start¹</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shirecliffe</td>
<td>4.01 tbc</td>
<td>453</td>
<td></td>
<td>Jun 2006 - Mar 2008</td>
</tr>
<tr>
<td>New Parson Cross</td>
<td>9.47 na</td>
<td>441</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>37.08 tbc</td>
<td>2031</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source:  
1 Owlerton and Southey Neighbourhood Strategies, Roger Evans Associates, 2005  
2 Sheffield Urban Housing Potential Study 2005

4.118 The redevelopment of these sites is a priority for the City Council, HMR Pathfinder and SOAR board with commitment from all sides to regenerate the area and close the gap between the deprived areas of the north and east of the city with those in the more affluent south.

**Housing Development Pipeline⁷**

4.119 There are 9 major residential schemes (100 dwellings or more) in the planning pipeline in Sheffield. These schemes are concentrated around the City Centre, including a cluster of three within approximately 800 metres of the south of the Upper Don Valley area. There are some major schemes in outlying areas to the south of the City. There are a number of major residential schemes (over 100 dwellings) north of the City, (beyond Rutland Road). There are the Foxhill site, to the north of the Upper Don Valley study area is currently for sale for residential development, although planning permission has not yet been secured. Also, Flower Estate Site and the College Site in the New Parson Cross Masterplan all have developers appointed and one in pre-application discussions.

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⁷ Based on an analysis of planning applications with decisions made between April 2003 and March 2005 provided by Sheffield City Council.
4.120 There are 12 large residential schemes (50 dwellings or more) in the pipeline in Sheffield. These schemes are concentrated in the central and western area of Sheffield, but there are also schemes further afield, for example in the suburbs of Oughtibridge and Gleadless. There are no large residential schemes in the pipeline in the Upper Don Valley, the nearest being at Hope Works, Mowbray Street towards the south of the area.

4.121 Together these large and major schemes would provide a total of 2,479 dwellings, of these 62% (1,528) are flats, 21% are houses and 13% are specialist accommodation for the elderly. This split of dwelling types illustrates that the market appears to be moving towards providing new build apartments rather than traditional houses. This is probably due to a combination of changing socio-demographic trends which are resulting in smaller households and restricted availability of land as a result of planning policy which concentrates development within existing urban areas.

4.122 Residential development activity in Sheffield is further evidenced by development schemes identified on www.new-homes.co.uk and set out in Table 3.25 below. It shows is a clear pattern of smaller units including apartments towards the city centre and of larger 4 and 5 bed homes further away from the city centre.

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Postcode</th>
<th>Type of Units</th>
<th>Price Range</th>
<th>Developer</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Willows</td>
<td>S5 6EF</td>
<td>2 and 3 beds</td>
<td>£101,500 to £143,950</td>
<td>Barratt</td>
</tr>
<tr>
<td>Hafferty Court</td>
<td>S5 6HS</td>
<td>1 and 2 bed retirement apartments</td>
<td>£79,950 to £94,950</td>
<td>Jaguar Estates</td>
</tr>
<tr>
<td>Northside</td>
<td>S5 0OJ</td>
<td>1 and 2 bed apartments</td>
<td>From £103,000</td>
<td>Jaguar Estates</td>
</tr>
<tr>
<td>Church View</td>
<td>S6 4BD</td>
<td>3 beds</td>
<td>Price on application</td>
<td>Redrow</td>
</tr>
<tr>
<td>Dale Park</td>
<td>S8 0PS</td>
<td>2 bed apartments and duplex 4 bed apartments</td>
<td>£141,950 to £224,950</td>
<td>Persimmon</td>
</tr>
<tr>
<td>Millbrook Gardens</td>
<td>S8</td>
<td>3 and 4 beds</td>
<td>From £144,500</td>
<td>Ben Bailey Homes</td>
</tr>
<tr>
<td>Lodge Moor 1</td>
<td>S10 4LA</td>
<td>5 beds</td>
<td>From £496,999</td>
<td>David Wilson</td>
</tr>
<tr>
<td>Lodge Moor 2</td>
<td>S10 4LA</td>
<td>4 and 5 beds</td>
<td>From £269,500</td>
<td>David Wilson</td>
</tr>
<tr>
<td>Fitzilliam Court</td>
<td>S11 9GE</td>
<td>1 and 2 bed retirement apartments</td>
<td>From £164,450</td>
<td>McCarthy &amp; Stone</td>
</tr>
<tr>
<td>Highgrove</td>
<td>S11 7TB</td>
<td>1, 2 and 3 bed apartments, 5 and 6 bed detached</td>
<td>£257,750 to £1,000,000</td>
<td>Persimmon</td>
</tr>
<tr>
<td>Weetwood Gardens</td>
<td>S11 9SU</td>
<td>2 bed apartments and duplex 4 bed apartments</td>
<td>£162,950 to £255,995</td>
<td>Persimmon</td>
</tr>
<tr>
<td>Ashleigh Court, Gleadless</td>
<td>S12 2UU</td>
<td>2, 3 and 4 bed</td>
<td>£124,995 to £214,995</td>
<td>Westbury</td>
</tr>
<tr>
<td>Highgrove</td>
<td>S13</td>
<td>1, 2, 3, 4 and 5 beds</td>
<td>From £115,000</td>
<td>Ben Bailey Homes</td>
</tr>
<tr>
<td>Kings Court</td>
<td>S17 3</td>
<td>3, 4 and 5 beds</td>
<td>£251,950 to £455,950</td>
<td>Barratt</td>
</tr>
<tr>
<td>Badger Fields</td>
<td>S20 5ES</td>
<td>2 beds</td>
<td>£129,950 to £139,950</td>
<td>Bryant Homes</td>
</tr>
<tr>
<td>Chinewold Place</td>
<td>S21</td>
<td>2, 3, 4 and 5 beds</td>
<td>From £179,500</td>
<td>Ben Bailey Homes</td>
</tr>
</tbody>
</table>
Table 3.21
Residential Development Schemes in Sheffield

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Postcode</th>
<th>Type of Units</th>
<th>Price Range</th>
<th>Developer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heritage Park</td>
<td>S21 3UU</td>
<td>1, 2, 3, 4 and 5 beds</td>
<td>£67,000 to £95,000</td>
<td>Fairclough Homes</td>
</tr>
<tr>
<td>Abbey Fields</td>
<td>S25 3</td>
<td>1, 2, 3 and 4 bed homes</td>
<td>£120,500 to £167,950</td>
<td>Barratt</td>
</tr>
<tr>
<td>The Sycamores</td>
<td>S35 0ER</td>
<td>1 and 2 beds</td>
<td>Price on application</td>
<td>CALA</td>
</tr>
<tr>
<td>Glendale</td>
<td>S35 0AJ</td>
<td>Large detached houses</td>
<td>Price on application</td>
<td>Charles Church</td>
</tr>
<tr>
<td>Whitley Croft</td>
<td>S35 9ZS</td>
<td>4 and 5 bed detached</td>
<td>From £279,950</td>
<td>Jaguar Estates</td>
</tr>
<tr>
<td>Butterfields</td>
<td>S35 7AA</td>
<td>4 and 5 beds</td>
<td>£225,000 to £314,995</td>
<td>George Wimpey</td>
</tr>
<tr>
<td>The Sidings</td>
<td>S36 8</td>
<td>2, 3 beds</td>
<td>£123,500 to £155,500</td>
<td>Barratt</td>
</tr>
</tbody>
</table>

Source: www.new-homes.co.uk

Land Availability

4.123 The Sheffield Housing Land Survey, April 2004 estimates that overall, 243 hectares (600 acres) of land are identified for house building with a total capacity of 7,416 dwellings on all 459 sites, an increase of 851 dwellings on last year's figure.

4.124 The Sheffield Urban Housing Potential Study, 2005 provides a more detailed review of the potential for housing within the City through a more exhaustive look at the potential of sites for housing. The study indicates that the total potential is between 17,984 and 29,821 dwellings with the ‘best estimate’ of urban potential is 23,975 dwellings of which nearly 98% is located on previously developed sites. Of this potential approx a third maintain an outline or full planning permission with the remainder located on identified sites or as a result of windfalls.

4.125 The distribution of this potential is not even, with approx 4000 dwellings (16%) in the City centre and 2178 dwellings (.9 %) in Owlerston and Southey and approx 2000 dwellings in each of the North, Darnall, Manor, Castle, Woodthorpe, Nether Edge, and Broomhill and Heeley with the lowest potential in Broightside/Shiregreen with only potential for 313 dwellings.

Market Demand

4.126 The average price of a house in Sheffield in 2004 was £133,597 compared to only £121,139 across South Yorkshire and this difference is reflected across all house types. The majority of house sales in Sheffield were terraces, followed closely by semi-detached houses, broadly reflecting the make up of existing residential stock across the city. It is also interesting to note that, whilst there were far fewer sales of flats/maisonettes than of terraces, the average price of a flat/maisonette was much higher at £118,744 compared to just £110,765. This difference is reflected across South Yorkshire could be indicative of a mismatch between supply and demand of these types of properties and the premium payable for new flats/maisonettes.
Table 3.22
Average House Prices

<table>
<thead>
<tr>
<th></th>
<th>Sheffield</th>
<th></th>
<th>South Yorkshire</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Average Price (£)</td>
<td>No of Sales</td>
<td>Average Price (£)</td>
<td>No of Sales</td>
</tr>
<tr>
<td>Detached</td>
<td>£245,007</td>
<td>316</td>
<td>£203,164</td>
<td>1060</td>
</tr>
<tr>
<td>Semi-Detached</td>
<td>£128,332</td>
<td>728</td>
<td>£113,185</td>
<td>1942</td>
</tr>
<tr>
<td>Terraced</td>
<td>£99,252</td>
<td>788</td>
<td>£85,792</td>
<td>1898</td>
</tr>
<tr>
<td>Flat/Maisonette</td>
<td>£118,744</td>
<td>290</td>
<td>£110,765</td>
<td>425</td>
</tr>
<tr>
<td>Overall</td>
<td>£133,597</td>
<td>2122</td>
<td>£121,139</td>
<td>5325</td>
</tr>
</tbody>
</table>

Source: HM Land Registry (October to December 2004)

4.127 It is also interesting to consider house prices in Sheffield in the context of other regional cities. For example, the average price of a flat/maisonette in Sheffield is much lower than in Leeds, Manchester or Birmingham, perhaps reflecting the more established trend towards city living in these other cities. Sheffield also attracts lower prices for detached, semi-detached and (with the exception of Manchester) terraced houses which is perhaps indicative of the economic strength of these other cities compared to Sheffield and the upwards pressure this puts on house prices.

Table 3.23
Average House Prices in other Cities

<table>
<thead>
<tr>
<th></th>
<th>Sheffield</th>
<th>Leeds</th>
<th>Manchester</th>
<th>Birmingham</th>
<th>Newcastle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detached</td>
<td>£245,007</td>
<td>£266,841</td>
<td>£253,122</td>
<td>£293,027</td>
<td>£328,970</td>
</tr>
<tr>
<td>Semi-Detached</td>
<td>£128,332</td>
<td>£145,765</td>
<td>£130,621</td>
<td>£149,237</td>
<td>£154,150</td>
</tr>
<tr>
<td>Terraced</td>
<td>£99,252</td>
<td>£110,620</td>
<td>£77,137</td>
<td>£120,377</td>
<td>£134,446</td>
</tr>
<tr>
<td>Flat/Maisonette</td>
<td>£118,744</td>
<td>£151,617</td>
<td>£142,151</td>
<td>£128,137</td>
<td>£117,885</td>
</tr>
<tr>
<td>Overall</td>
<td>£133,597</td>
<td>£150,921</td>
<td>£117,008</td>
<td>£145,592</td>
<td>£145,386</td>
</tr>
</tbody>
</table>

Source: HM Land Registry (October to December 2004)

4.128 There is currently relatively little housing in the Upper Don Valley, which makes it difficult to assess market demand. However, the Wadsley Park Village development on the former Middlewood Hospital site and recent city living developments in the Kelham Island area to the north of the city centre provide useful indications of potential demand.

4.129 Wadsley Park Village was developed around 3 years ago and comprises a mix of detached houses, semi-detached houses, townhouses and apartments set within an attractive and green environment. The listed hospital building itself was also converted into high quality apartments. The S6 postcode is considered a good area but, according to local agents, still represents value for money. As a result, it tends to attract people from the traditionally popular south west of Sheffield (S10, S11 and S17 postcodes) who are looking for more space for their money in an attractive area with good schools provision (and the new college campus will further improve provision) and good accessibility as a residential location. Typical prices include (see overleaf):
- £100,000 for a 1 bed apartment
- £180-200,000 for 2-3 bed apartments
- £130-140,000 for a 3 bed townhouse
- £180-200,000 for a 3 bed detached
- £220-240,000 for a 4 bed detached
- £250-260,000 for 5 and 6 bed detached (still being developed).

4.130 When the development first came on stream about 3 years ago the properties all sold quickly, to both owner occupiers but also to investors, which resulted in prices becoming artificially inflated. As a result, sales have now slowed down and asking prices have had to be reduced on several occasions. However, this slow down is thought to be due to inflated prices and not because of a lack of demand.

4.131 The city living market started to emerge about 5 years ago with the conversion of old industrial buildings at Brooklyn Works and Cornish Place into high quality apartments with parking, gym facilities and a waterfront location. Since then, development has extended along the river front in both directions with developments at Bedford Street and Neepsend Lane and more recently the city centre itself has and is continuing to see significant residential development activity, both new build and conversion.

4.132 Developments in the Kelham Island area tend to attract professional singles and couples or investors and prices range from around £140,000 for a one bed apartment to £200,000 for a larger two bedroom apartment. Although this is a significant increase from a few years ago, there is a view that prices are stabilising in line with wider housing market trends. Having said this, agents consider the market is still in its infancy and the view is that there is considerable potential for further waterfront development moving away from the city centre.

**Potential for Residential Development in the Upper Don Valley**

4.133 In general, Sheffield has a low proportion of detached houses and relatively few semi-detached houses, but it has a much higher proportion of flats/maisonnettes and a relatively large number of terraced housing. Perhaps most striking, however, is Sheffield’s low percentage of owner occupation which, at just 60%, lags far behind the county, regional or national average.

4.134 There is a significant amount of residential development either underway or proposed in Sheffield, although none of these are located in the Upper Don Valley. Most of this pipeline development comprises apartments and there is also a significant amount of accommodation
for the elderly, providing a useful indication of the private sector developer perception of demand. There is also, unsurprisingly, a clear trend towards apartment development in the city centre and larger properties further away from the centre.

4.135 The thrust of the City’s housing policy is to support the ‘City Centre Living’ and ‘Closing the Gap’ Strategies to promote the growth of the population of the central area of the city and to close the gap between the deprived areas of the north and east of the city with those in the more affluent south.

4.136 The Urban Housing Potential Study recognises the potential for new housing close to the UDV with sites identified with a potential of approx 2700 dwellings in total. Of this potential the sites located in the Owlerton and Southey area are a priority within the SOAR/ HMR and Sheffield City Council Area Panel strategies and programmes.

4.137 There have been recent high quality developments at Wadsley Park Village and at Kelham Island. At Wadsley Park Village the product is mainly focused on larger family homes. Around Kelham Island and the city centre the residential development has focused more on city living style development and there is thought to be considerable potential for further waterfront development moving up to the valley away from the city centre.

**Residential Market Summary**

- Sheffield has a much lower proportion of detached housing (14%) than either the county, regional or national averages (23%)
- Sheffield has a low percentage of owner occupation (60%) which lags behind the county, regional and national averages (69%)
- Major pipeline schemes (50+ and 100+ units) could provide a more than 2.500 dwellings with a large proportion of bedsits/flats.
- Significant potential for new housing close to the UDV with sites identified with a potential of approx 2700 dwellings in total. Of this potential the sites located in the Owlerton and Southey area are a priority within the SOAR/HMR and Sheffield City Council Area Panel strategies and programmes.
- Average price of a house in Sheffield is currently £133,597 compared to only £121,139 across South Yorkshire the price differential is most significant for flats.
- Strong demand for City centre Living with majority of recent completions/approvals located in City Centre
• Two distinct markets exist as the context for the UDV – extension of City Centre Living close to the City Centre extending along the River Don and the more suburban markets of Middlewood/Wadsley Park Village

• Sheffield market is generally buoyant, properties at the lower end (smaller) sell most quickly

• Demand is concentrated in the City Centre and SW of the City, however as prices increase in these areas the NW of the City is emerging as a strong alternative.
5. Transportation Issues

Strategic Transportation Issues in the Upper Don Valley

5.1 JMP have undertaken a review of the transportation issues facing the Upper Don Valley as part of this commission. Our work has been based around the Plan 4 Travel report, consultation with Sheffield City Council [SCC] officers and site work focused on the specific issues of site access.

5.2 The A61 Peniston Road which is a main radial route into Sheffield City Centre is the main road link in the study area. The Clay Wheels Lane Industrial Estate and other Objective 1 sites are located within this core area of the Upper Don Valley.

5.3 In terms of the Upper Don Valley’s Physical Regeneration there are a number of major transport related schemes which are required to address existing conditions and which would greatly assist in the regeneration of the area. We are referring to these as strategic schemes for the valley as a whole. These schemes include:

- Bus priority on the A61 Penistone Road;
- Improvements to the Leppings Lane Junction; and
- The development of the UDV pedestrian and cycle network.
- A new bridge link from the north end of Clay Wheels Lane to Middlewood Road.
- The re-opening of the Stocksbridge rail line for passengers. We consider this to be a very long term prospect indeed and not something which will be the catalyst for regeneration needed in the Upper Don over the coming years.

Bus Priority - A61 Penistone Road

5.4 The A61 has been identified as a main gateway or ‘Gold Route’ into the city. On these routes the objective will be to reduce congestion of city buses and to keep vehicles moving. These routes will be anchored by Park and Ride sites and linked to the Quality Public Transport Corridors, and their appearance will be to provide a positive first impression on entering the city. The bus priority scheme for the A61 will be included in LTP2.
5.5 In summary the scheme proposes to re-shape and extend the existing services to better meet local needs:

- **Core** – These are the busiest bus routes of which Penistion Road is one, carrying over 1,500 passengers each day, and typically they would be recognised as First Group “Overground” services. Also typically, they would operate on a radial basis to and from the City Centre, using low floor buses. These are frequent commercial services upon which the Better Buses project seeks to encourage growth through a combination of frequency, traffic priority, simplicity in the network and marketing.

- **Complementary** – This network is a combination of some existing commercial and some supported bus services reaching into the residential areas and providing less direct, inter-community links and/or orbital routes. The Complementary network will be integrated with the Core network, but will be separately branded under these proposals, promoted by the South Yorkshire Passenger Transport Executive [SYPTE], and operate on a medium frequency.

- **Supporting** – This concept is being refined further. Using smaller vehicles and offering demand responsive elements, this network fills in the gaps in the Core and Complementary networks and will provide access to improved local interchange points.

- The nature of infrastructure proposals on Penistone Road are still being developed by SYPTE and SCC but as it is introduced services will be revised to take full advantage of improved the routes. To create this network it is proposed that an appropriate phased programme of service changes, based on key milestones, will be implemented. The scheme may well involve work which requires third party land although other than at the Leppings Lane Roundabout the basic nature and form of the road is unlikely to change.

- **Proposed Busses** - First Group are committed to using new low floor easy access buses on the north Sheffield Core network and are developing a new concept vehicle following customer focus surveys. This type of vehicle will be introduced progressively corresponding with the traffic priority
improvements and will represent a significant investment in buses to be operated in the area.

- Other Aspects - Real Time Information (RTI) - SYPTÉ’s RTI scheme has been operational from 2004 and allows users of services on this corridor to have access to RTI either by on-street information or to telephones or computers.
- Park and Ride - Potential site areas are being explored in line with South Yorkshire’s Park and Ride strategy.

**Leppings Lane Junction Improvements**

5.6 Leppings Lane is a major congestion hotspot on the A61 and is very difficult to negotiate for pedestrians, cyclists and mobility impaired people.

5.7 The level of congestion at this junction is such that successful modification will be key factor in opening up access to Clay Wheels Lane and other development sites in the corridor.

5.8 Within the Plan 4 Travel document several options for the reconfiguration of the Leppings Lane junction have been considered. An evaluation of the various options was made based on a scoring system that includes the criteria of traffic delay, land take, deliverability, and scope for the A61 Bus Priority.

5.9 The preferred scheme consists of replacement of the roundabout at Leppings Lane with a traffic signal junction and junction improvements and traffic management measures at other adjacent junctions, as illustrated in ARUP’s drawing. This is a major scheme which requires third party land but is considered to be within the scale of the issue currently at the junction, particularly when considered in the context of the scope for re-development in the corridor.

5.10 The scheme in Plan 4 travel is of course only a preliminary almost pre-feasibility layout. The development of the scheme clearly requires detailed appraisal work to be undertaken which may result in some relatively significant modifications to the layout. This work is likely to be undertaken as part of the bus priority scheme and or in conjunction with private developers through a Transport Assessment. We would however concur with the findings of Plan 4 Travel the preferred option is almost certainly better that the other options considered in the Report. On of the key issues the development of the design will need to consider is the degree to which third party land is required for the scheme.

5.11 The Plan 4 Travel scheme for the Leppings Lane junction incorporates an improvement to the access to Clays Wheels Lane. Given the proximity of these 2 junctions it is almost certain that
improvements to one will result in improvements to the other. Indeed it would be a missed opportunity not to link the two.

5.12 The improvement at the A61/Leppings Lane junction will be included in LTP2. Works at the junction will be included in the bus priority project but there will also be a scheme in LTP2 aimed at improving traffic flow patterns in north Sheffield. Improvements at Leppings Lane would also be a key element of this wider scheme.

The development of the UDV pedestrian and cycle network

5.13 SCC have a proposal to develop a network of walking and cycling routes in the UDV and a bid for funds for this network is being included in LTP2.

5.14 The A61 is currently a major barrier to walking and cycling in the valley. The river Don is an underdeveloped corridor that could provide good links to the key development sites, for walking and cycling. However footway parking, poor quality or undefined footways combined with a limited provision for cyclists do not encourage walking and cycling in the area.

5.15 Cycling is an efficient, environmentally friendly, space-saving and inexpensive means of transport. Despite Sheffield’s hilly topography cycling has many advantages over the use of private cars and should be encouraged. The current cycle network suffers from poor design and lack of integration.

5.16 As stated in the Plan 4 Travel document measures to encourage cycling in the study area are not extensive however a section of the Trans Pennine Trail and National Cycle Network, which runs along Tongue gutter, Sheffield Lake Dike and Deerlands Avenue in Parsons Cross is in place.

5.17 There are proposals for cycle routes to link the Don Valley to residential areas such as Foxhill, Southerly Green, Firshill and the Northern General Hospital. There are approximately 47,900 residents living in these areas. By having these linkage proposals in place accessibility to the potential employment areas situated in the Don Valley would be significantly improved.

5.18 The UDV walking and cycling network is therefore a very important scheme both within the context of existing linkages within and through the UDV and the regeneration of the Valley. Amongst many other important links it includes a footbridge link between Clay Wheels Lane and the Super tram terminus at Middlewood.

5.19 There is an on going study into the feasibility of providing a walking / cycling route along the Rivers Don and Loxley. These will form the Spines of the proposed network and therefore this
is an important piece of work. The other elements of the network linking into the surrounding neighbourhoods and sites within the valley are however just as important to allow the network to function as a local transport facility as well as a leisure / commuter route into the City centre.

5.20 The UDV walking and cycling network will be included as a scheme in LTP2.

**Claywheels Lane Bridge Link**

5.21 The congestion in the Leppings Lane area of the Valley is not confined to the A61. The western end of Leppings Lane at its junction with CatchBar Lane is also very congested and this congestion can have a significant impact on Super tram which runs on this corridor. For a number of years SCC have been considering a vehicular bridge link from Middlewood Road (the northern extension of Catch Bar lane) to Clay Wheels Lane which would provide an alternative route onto the A61, avoiding the Catch Bar Lane area.

5.22 The delivery of this link has in the past been focused on development on Clay Wheels Lane however the link will now be included in LTP2 as part of the wider scheme to improve traffic patterns in north Sheffield. Its status as a transport link is therefore higher now. The bridge link must be seen as part of the A61/Leppings Lane scheme as it would be pointless constructing it if improvements were not implemented at the A61 junction.

5.23 With the bridge in place the nature of Clay Wheels Lane would change significantly. Plan 4 travel suggests that it should be upgraded to a dual carriageway. We would be surprised if such a major improvement would be justified and improvements on Clay Wheels Lane should be focused on improving the existing single carriageway link. The nature of these improvements would probably be driven more by the development of sites adjacent to Clay Wheels Lane than it would by its transport function.

**Stocksbridge Rail Line**

5.24 The other transport issue of a strategic scale in the corridor is the potential to re-open the heavy rail line to passenger traffic. This is a long-term and aspirational project but one which has the potential to open the corridor up to a wider regional market. Any Strategy for the Valley must however be prepared on the basis that this does not happen (the balance of probability given current conditions in the rail industry is that it will not) but areas around potential stations in the valley should be protected. The Plan 4 Travel identified potential stations at Park Wood Springs (linked to the Ski Village) Owlerston (serving the leisure/education/employment area and Wadsley Bridge (reopening an old station). These stations would be very close together and if regional rail services were ever reinstated on this
line we would only expect one of these to be served. Stations in such close proximity would only be used by local services.

Development Site Focused Transport / Accessibility Schemes

5.25 In addition to the strategic transport schemes that have been discussed there are a number of transport initiatives and schemes which are required to support regeneration of the valley while not necessarily addressing existing transportation problems and constraints. We have dealt with these on an area by area basis and these are considered in section 10. In outline the main aspects of this include:

- Improving accessibility to and within Claywheels Lane including junction improvements to Penistone Road, the new bridge link to Middlewood Road and improved infrastructure along Claywheels Lane itself.

- Improving access to the (Tesco) Triangle site in the Wadsley Bridge area to encourage potential redevelopment of this important vacant site. This may need to be designed in tandem with the new junction at Leppings lane / Penistone Road.

- Improved access to sites within and across Hillfoot riverside to release development potential and make more effective use of land assets.

- Rationalisation of traffic, access and signage in the Neepsend area helping to attract new investment and create a more people friendly place.

- Improving access to Parkwood Springs and the Ski village.

- Considering in greater detail transportation proposals for the Ski Village.
6. Urban Design Audit for the Upper Don Valley

6.1 This section provides a summary of the urban design issues affecting the Upper Don Valley. The scale and extent of the study area dictates that the level of analysis assumes a strategic focus and concentrates on the main messages. Greater detail on particular areas and issues is provided in Part 2, the emerging Strategy.

6.2 Improving the urban design of the Upper Don Valley should be a priority for regeneration. Urban design is concerned with the quality of places. With good design, places work better for people. Good design can also boost confidence in an area by improving the environment, the outward appearance, and the image. Good urban design is also about understanding what is special about an area and how urban change can respond to and promote this. This summary provides a starting point for improving the urban design of the Upper Don Valley by focusing attention on the key issues. In order to draw out clear findings the summary is structured around a number of main themes and these include:

- The Landscape and Townscape Setting,
- ‘Riverscapes’ and Water Assets,
- Character and Sense of Place
- The Corridor and Gateways,
- Green spaces and Landscape Assets,
- Uses, Functions and Focal Points,
- Townscape and Built Fabric,
- Streetscape and Public Realm
- Main urban design priorities
6.3 Before focusing on these issues in some detail, it is useful to review the main urban design issues to emerge from the Claywheels Lane Study (Civic regeneration et al 2003). These include:

- Physical fabric reflects lack of investment and economic decline. Levels of vacancy and sites ripe for redevelopment bear this out and provide significant scope for change;
- Topography which encloses the valley and provides a unique setting for Sheffield Ski Village is vital to character;
- The importance and dramatic landscape of Parkwood Springs, which forms part of the South Yorkshire Forest;
- The significance of the River Don which has been neglected and needs to be rediscovered and opened up to walking and cycling;
- Constraints including power lines, gas pipelines, land-filled sites and poor access outside of Penistone Road;
- Poor gateways which need to be improved to mark a sense of arrival in Sheffield and the approach to the city centre;
- The value of the nearby tram links and the potential of the underused railway line as a re-opened passenger rail line;
- The importance of east west walking links and overcoming compounding barriers of the road, rivers, railway line and topography to link communities to places of work and recreation;
- Improve access to sites and in particular the ski village and Claywheels Lane.

The many faces of the Upper Don
The Study Area

6.4 The study area boundary is important to set the focus for this work, but should not limit the scope for integration with the wider context. Viewing the study area as a linear strip of development within the valley bottom neglects the potential benefits of nearby local communities and Hillsborough centre. The location of the City Centre at the foot of the valley and to the south of the study area also provides benefits for the place, beyond its immediate boundary. The A61 Penistone Road is a key approach to the city centre and movement corridor which extends through and beyond the study area. Sites adjacent to and on the frontage of the Penistone Road gain benefit from the high degree of prominence this road affords.

The Landscape and Townscape Setting

6.5 The transition from rural to urban character is extremely pronounced within the Upper Don. The valley ends need to be considered, not as end stops to the area but as points within the continuum between city and rural edge.

6.6 The northern edge of the study area touches the rural fringes of the Peak District, whilst to the southern edge merges into the varied heritage townscapes of Neepsend and Kelham Island. The quality of the heritage townscape in Kelham and Neepsend provides significant opportunities for regeneration in the south of the Upper Don. The relationship between land at Claywheels Lane and the rural edge is particularly important and at present the transition is sharply defined with often unattractive and derelict industrial development abutting high quality rural land and woodland.

6.7 The topography of the valley is an important part of the character of the Upper Don Valley. The steep valley sides to the east provide a striking backcloth to the main built up areas along the valley bottom and create a strong natural edge to the area.
‘Riverscapes’ and Water Assets

6.8 The rivers Don and Loxley offer limited contribution to the landscape setting at the present time and make-up the area’s hidden assets. The character and quality of the river both in its natural setting and in its urban contexts can be both striking and beautiful in the Upper Don.

6.9 The River Don has retained its sinuous and meandering form and despite development close to it remains in many cases a green corridor where nature sits side by side with industry. Measures over the recent past to clean up the river continue to pay dividends in terms of the quality of the water and the habitats the area provides. The Valley and the river experience significant changes in levels, which add to the interest and diversity of the waterscape. Where industrial development has intervened, weirs have been created, the most striking of which is at Niagara.

6.10 In addition to the Don the River Loxley is also important for the area. The Loxley provides a link into Hillsborough centre where a further weir provides an attractive, if underutilised resource. The confluence of the two rivers is important as this area provides a significant amount of water space which could contribute to a distinctive new focal point along the two rivers.

6.11 The waterscapes and character of the rivers change considerably through the valley. The river Don develops a more urban character towards Neepsend and Kelham, from a more rural and woodland setting at Claywheels Lane.

6.12 The urban ‘riverscape’ is characterised by buildings close to and often abutting the riverside, creating an intimate scale and strong relationship between townscape and the waterside. A number of fine older industrial buildings are identifiable within this area and the river forms an integral part of the character of these buildings and groups of buildings. The water space reflects the urban character and in places weirs retain the water to create a deeper and broader body of water, extending between river banks. The river is often more apparent and identifiable within the urban area, forming a more coherent part of the urban pattern.

6.13 The rural ‘riverscape’ is characterised by mature trees and a high quality landscape setting. The water space has more dynamic features of significant pools and riffles and the fast moving water creates noise and visual interest. Where woodland predominates the river is often in shade and enclosed by tree canopies. In many cases this green character extends, as a narrow strip alongside the river, through industrial areas.

6.14 In the central part of the valley, around Cadbury Bassett, Hillsborough College, Doncasters and Club Mill Road the character of the Don is more mixed and less distinctive. Here the
setting of the Don and the Loxley is generally poor, with limited views and access to the riverside. In many places, the rivers run behind industrial sites. The industrial character of the area contrasts with river corridors which offer improving ecological and amenity value. Even in this industrial area parts of the river retain a green and attractive setting, particularly on the eastern bank. Through regeneration, the ‘riverscape’ in this central area could be enhanced to improve quality and character.

Varied ‘riverscapes’
Character and Sense of Place

6.15 Despite this striking landscape setting and the presence of the two major rivers, there remains no collective character for the Upper Don Valley. It is instead a collection of separate destinations and attractions punctuating an area typified more generally by low grade employment buildings. More recent roadside commercial development has improved the impression of the Penistone Road corridor in places. Some destinations such as Hillsborough Football Stadium have a national profile and identity. More generally however, the Upper Don is less memorable.

6.16 For many people, the feature that helps to link the Upper Don together is Penistone Road. It will often be this route and site visible from this route which people will bring to mind when thinking about what this area means to them. For a great many people, the rivers and the industrial heritage will not feature. Focusing attention on the quality and condition of this corridor, in environmental and development terms will be important.

6.17 In truth, the Upper Don is not one place, but many places, linked by the rivers, streets and pedestrian routes. A number of character areas can be identified across the Upper Don, although the boundaries of these are often not distinct. These include:

- **North Neepsend**: A natural extension of the Kelham and Neepsend, this area is characterised by a traditional street pattern and a varied and dense urban fabric. A varied building palette of industrial heritage, mid 20th century commercial development and modern large floor plate buildings predominate. There are numerous gap sites which interrupt continuity and enclosure. The former Gas Works and remaining gas holder mark the northern extent of this area and are readily identifiable features. There is a general need to upgrade both the built environment, but also the public realm which is very poor in places.

- **Parkwood Springs**: Parkwood Springs is a vast area rising up the steep hillside to the east flank of the Upper Don. The area is varied and includes both formal and informal green space. Rock escarpments are identifiable in places. From the crest of this area panoramic views across Sheffield are possible. Sheffield Ski village takes advantage of this steep terrain. There are four main parts to Parkwood Springs, comprising the area occupied by Parkwood Tip (VIRIDOR), the area occupies by the
Ski Village, the Southey-Owlerton part of Parkwood Springs and Gannister Quarry open space (at the top of the Ski Village). The ‘Parkwood Springs Community Vision’ document contains some interesting concepts and ideas for the future of this area and the implementation of this Vision will provide a basis for change in this area.

- **Hillfoot**: The Hillfoot area comprises land within the valley bottom, extending from the edge of Parkwood Springs towards Penistone Road. From north to south the area includes land between Hillsborough College and North Neepsend. The area is characterised by modest and functional industrial and employment development, often of large scale and involved in steel fabrication. The Penistone Road frontage is a key feature within this area and the setting created by development in this location is often poor.

- **Owlerton Stadium and Hillsborough College**: The central part of the Upper Don Valley includes Owlerton Stadium and the new Hillsborough College. These buildings, along with roadside fast food outlets, provide colour and interest; particularly at night. These uses help to create a distinct role within the Upper Don. The large area of car parking facing Penistone Road undermines the townscape of the area and the hidden riverside is a missed environmental opportunity. The large numbers of people attracted to this area would benefit from a much improved environment.

- **Wadsley Bridge**: This includes a mix of development forms and open sites. The striking football stadium is a prominent feature in this area fronting onto Penistone Road. More generally, development is of a modest scale with a high proportion of cleared land and hard standing. The setting of Penistone Road through this area would benefit from improvement. The open land forms a series of gap sites. Land to the west of Penistone Road is typified by good quality terraced streets and this interface is important with whatever happens to the gap sites within this area.

- **Claywheels Lane**: Claywheels Lane extends from the Wadsley Bridge area northwards. The southern sites include a range of
employment developments some of which include food production and distribution. The setting to Penistone Road is in need of some improvement, as is infrastructure and public realm. The landscape is a key feature throughout this area and the river becomes more apparent further to the north. Built quality is generally mixed, although there are several modest Art Deco buildings of note. Development in the north of Claywheels Lane includes a range of functional employment buildings and sites. The area is dominated by the former Union carbides development. The monolithic scale of much of the engineering and buildings on the site, including the tall chimneys, contrast with pleasant rural land and woodland directly adjacent.

The Road Corridor and Gateways

6.18 Despite identifying these different character types, the Upper Don remains an important linear corridor. The quality, character and condition of this corridor need to be enhanced through the Strategy. This will be both a requirement for and function of regeneration, with the ambition to secure significant long term improvement. This is important because frontage sites present an important public face for the area. The scale, nature and quality of development, on these sites are vital. The design of public realm and landscape will also require consideration. It will be important to address both sides of Penistone Road when seeking corridor improvements within the Upper Don Valley and not just the land to the east which falls within the study area boundary.

6.19 Gateways to the Upper don and to the City of Sheffield require some improvement. The Upper Don provides a transition from surrounding residential areas to a specific city district. The uses’ forms and scale of development create an area which is distinctly different, and where improved branding would assist the businesses which locate there. Improving gateways to and a sense of arrival within the Upper Don, such as at Wadsley Bridge around the Leppings
Lane / Penistone Road junction, will help to promote this area. Developing the relationship with the city centre and adjacent City Quarters and neighbourhoods to the south will also be important; at Neepsend. Other destinations, such as Owlerston Stadium, the Barracks Shopping Centre and Hillsborough Football stadium could all benefit from improved settings.

6.20 At present Penistone Road provides an important transit link north-south into the city but in places acts to bisect employment land and communities, inhibiting pedestrian movements east-west. Whilst provision is made for pedestrian crossing along the road at present, further improvements could be made to create more direct and high quality pedestrian linkages.

Green Open Spaces

6.21 With the exception of Hillsborough Park, high quality amenity space is currently limited in the Upper Don. The recreation ground and open spaces to the crest of Parkwood Springs provide amenity to nearby residents, but are somewhat distant from the valley bottom. Niagara and Jubilee sports grounds provide amenity spaces to the north, but use of these facilities is limited. Allotments located at Wardsend Road North and Wardsend provide scope for local horticulture. Beeley Wood to the north of Claywheels Lane provides a rich and attractive woodland which is fully accessible to the public. The amenity potential of the riversides is not developed despite the improved ecological value and attractiveness of the river corridors.

6.22 Ongoing improvements to Hillsborough Park can help to uplift this corridor. The eastern edge of the park and the apron to Hillsborough Leisure Centre can be enhanced such that the road appears to pass through the Park at this point, rather than severing the two areas. The importance of Hillsborough Park needs to be reinforced as a primary City Park and a key landscape asset to the Upper Don. The scope to create a network of convivial spaces, at a number of scales; from the bus stop, needs to be investigated to create a more welcoming, pleasant and ‘useable’ public realm. With so much greenery and water within and around the area there is scope to create a greatly enhanced environment for all, not least for workers around their workplaces.
Uses, Functions and Focal Points

6.23 The Upper Don continues to be an important a major employment area within the City of Sheffield. Anecdotal evidence suggests that historically, the men of the surrounding areas were engaged in the steel industry, whilst many women were involved in food production such as bread baking.

6.24 Today, whilst the scale and nature of employment has changed, the principal function of the area, as working part of the city, remains the same. A range of specialist steel fabricators and engineering companies are located in the Upper Don. Many of these businesses are involved in advanced manufacturing and these could prove to become the catalysts for a ‘mini-cluster’ of advanced manufacturing companies in the Upper don valley. Commercial road side businesses such as car showrooms are also evident along Penistone Road. A range of other employment and industrial activities make up the land use mix. In addition, a number of major food production businesses are also located within the Upper Don Valley, including Cadbury Bassett and Fletchers Bread.

6.25 The study area has never been a major residential location and this is unlikely to change. The nature of industrial operations has acted to polarise land uses. Major established residential neighbourhoods are located to the east and west. More recently this has been complemented by an emerging city centre residential market which is beginning to be established to the south. A small number of properties were cleared some time ago close to the present location of the ski village. There are particularly sensitive residential interfaces close to Hillsborough football stadium and Hillsborough Park. The potential for new residential development to contribute to regeneration within the Upper Don Valley needs to be properly considered, including the appropriateness of new housing to specific locations in terms of planning policy, regeneration strategy, and loss of employment land and neighbourliness of other existing uses.

6.26 The land use mix includes a number of specialist uses and visitor destinations may need special focus, including:

- **Hillsborough Football Stadium**: home of Sheffield Wednesday, has a national profile and regularly attracts attendances in excess of twenty thousand people. This influx of local people, as well as people from across the county provides opportunities through regeneration. Improving the quality of the environment and the image of the area which is an important public face for the city is reinforced. In addition, and considering other stadium complexes across the Country, the lack of ancillary sport and
leisure facilities seems a missed opportunity.

- **Owlerton Stadium** is another facility which is unique in Sheffield for grey hound racing and speedway. The stadium is often in use three or more times a week and is a significant evening attraction. The stadium is the home of Sheffield Tigers Speedway, which competes nationally. The grey hound racing track is the only such venue in the city. Together these uses continue to provide a specialist leisure attraction and evening economy. This is supported and complemented by the Casino development. Opportunities to further enhance and consolidate this key destination with other complementary uses could help in the overall regeneration of the area, particularly the evening economy.

- Recent investment in the new **Hillsborough College** and the existing **Hillsborough Leisure Centre** provide strong education and healthy living anchors. The Leisure Centre and adjacent Hillsborough Park provide a major sports and recreation focus in the Upper Don Valley. Hillsborough College represents a significant boost for the area, creating a major new destination which will draw people regularly to this part of the valley. At present, the condition of the surrounding area and in particular Livesey Street creates a less than welcoming setting for the College. However, with improvements to the environment and the steady footfall of people walking to the college, new development opportunities may be possible to totally transform the image and identity of this area.

- **Sheffield Ski Village** is another major attraction and is highly visible. Despite relatively poor access and a less than attractive approach this facility provides a unique attraction so close to a major city centre. Proposals to bring this facility up to date to become ‘the best in Europe’ will help to reinforce the position of this key facility.

- At **Parkwood Springs** there is potential and strong commitment for a major urban park attraction. It is hoped this will be the subject of a separate masterplan, which will address amongst other things, the future of the Parkwood Springs Tip owned and operated by Viridor.
6.27 The district centre of Hillsborough is important to the Upper Don as this provides a range of High street shops and services and is a focal point for surrounding communities. The centre also provides access to Sheffield Supertram and includes the Barracks Business and retail centre. Central parts of the Upper Don enjoy close proximity to Hillsborough Centre and the facilities it offers. The relationship between uses and activities within the Upper Don and the centre need careful consideration to maximise mutual benefit. The new Hillsborough College strengthens this relationship.

6.28 Kilner Way to the north east of the study area is a small out of town retail estate and provides both a convenience and comparison offer. The quality of the retail environment is poor. Ancillary leisure in the form of a bowling alley has long since closed. The future role and purpose of Kilner Way needs proper consideration, as part of the Upper Don but also as part of the wider communities of Owlerton and Southey.

Townscape and Built Fabric

6.29 In general townscape quality in the Upper Don is low. The built environment tells a story of an area which has until recently lacked investment and where design quality has not been assigned a high priority in an area where fortunes have been depressed for a number of years. Penistone Road, an important approach to the city centre, is edged by a range of generally moderate and poor quality development.
6.30 With the exception of Neepsend there are few areas where street patterns and built development combine effectively to create a sense of place. With the exception of several key landmarks, buildings are typically of a standard design, reflecting function first and foremost. As a result, no overall character can be identified in terms of styles, materials, colours or details.

6.31 Whilst a number of older buildings have utilised stone in their construction, more generally, a range of modern materials and designs have been utilised. There appears to be some traditional of blue cladding and finishes to some employment buildings, such as Fletchers Bread and Trebor basset, perhaps reflecting the colours of the local football team and the cladding to the stadium. The signage and branding to the Basset factory provides interest and incident, despite being tucked away.

6.32 The form of the nearby Leisure centre and the finish to its steelwork underlines the variety of the corridor, where new buildings have tended to 'stand out' rather than 'fit in'. More recently, the contemporary design language of commercial road side showroom developments have added to this variety.

6.33 Despite the poor visual appearance of many businesses in Upper Don Valley, many companies are undertaking high end steel fabrication, often with skilled workforce and technology. The external appearance of buildings and sites belies the quality and precision of the products fabricated. Lifting environmental quality to celebrate this hi-technology area will be important in communicating a true sense of place. Major investment at Hillsborough College - previously a 'back-land' site demonstrates that where the scale of development is significant new focal points can be created. The quality of the architecture of this building is high and balances form and function well, relating to the industrial heritage of the area and providing a new vision for the future.
6.34 Industrial heritage offer a number of important landmark buildings. Many of these across the Upper Don have been developed in the Art Deco style. The tall white façade of the Hydro-Clarkson building, which occupies an imposing location along the Penistone Road Frontage and close to the River Don, is perhaps the most striking of these. The Samuel Osborn and Company building at Rutland Road is a fine example of a traditional cutlery works, with ornate and well maintained elevations. Other buildings of note include the Church of John the Baptist and the Old Crown Public House on Penistone Road close to Lowther Road and the railway bridges at Bardwell Road and Herries Road South.

**Streetscape and Public Realm**

6.35 The public realm is generally in poor condition across the Upper Don. The road improvements to the A61 Penistone Road have created a functional highway design, softened by modest planting, but lacking in real boulevard treatment. Secondary streets are particularly poor as are access roads into sites. The Livesey Street and Neepsend Lane areas are particularly poor and significant improvements are needed here. At present streetscapes in the Upper Don offers little attraction for the pedestrian and pleasant amenity areas are limited.

6.36 Boundary treatments and the edges of private developments abutting the public highway need significant improvement. This is particularly important facing onto Penistone Road where sites are highly visible. A coordinating framework may be the best approach to developing a consistent theme along this corridor for boundaries and landscape treatment. This has worked to good effect in parts of the Lower Don Valley. In some places the delineation of public and private spaces is unclear, with private underused spaces abutting the public highway. Theses spaces often look untidy and maintenance responsibilities are not always clear.
Main Urban Design Priorities

6.37 The main priorities moving towards the Physical Regeneration Strategy include:

- Strengthen the relationship between the Upper Don area and its rural edge to the north and its city interface to the south.

- Enhance the quality and condition of the rivers and river corridors. Improve pedestrian access to the rivers and along the river corridors.

- Enhance the landscape and townscape character of the river to the north and south respectively. Develop a suitable new character within central areas. Exploit weirs and other distinctive features.

- Strengthen the image and identity of the Upper Don Valley through new and high quality development and environmental improvements. The quality of the main Penistone Road Corridor is vital to achieving this. Co-ordinated and concerted landscape and townscape improvements are required.

- The importance of sites fronting onto main roads and in particular Penistone Road is reinforced. Sites within the interior of the area are unlikely to be regenerated whilst more prominent sites continue to look neglected. Frontage sites are therefore valuable and offer potential for major change to image and identity.
- Strengthen gateways to the Upper Don and the transition into the City Centre will also be important to improve identity and legibility. Developing a more identifiable brand for the upper Don is likely to also assist in promoting investment in the valley.

- Strengthen existing character areas across the Upper Don through physical appropriate improvement to townscape and streetscape and by considering future roles and functions.

- Secure the long terms improvement of existing open spaces across the Upper Don Valley and consider new opportunities for open spaces. Linking open spaces will also be vital towards creating a good quality network of amenity spaces. The rivers will be key features within this network.

- Significant improvements are required to the streetscape and public realm across the Upper if the true potential of the area is to be uncovered. Upgrading outmoded infrastructure and creating a more pedestrian friendly environment are priorities.

- Reconsider land uses, to create a more sustainable and appropriate land use mix. Using land in a more intensive and creative manner and considering new opportunities might create the basis for local regeneration benefits and help to transform the fortunes of the Upper Don Valley.

- Develop a stronger physical relationship between Hillsborough College and the nearby leisure uses to promote a more pleasant walking environment.

- Make the most of unique assets including Hillsborough Park, Hillsborough Football Stadium and Owlerton Stadium, Hillsborough College and Leisure Centre and the Ski Village.

- Conserve and enhance townscape heritage and landmark buildings within the Upper Don, considering opportunities for refurbishment and re-use where appropriate.

- Raise standards of design and development across the Upper Don Valley to improve the image and environment. The new Hillsborough College building should set the benchmark for this.
7. The Impact of a Waterfront Location on Development

7.1 After years of neglect the value of waterfront locations was rediscovered in the 1980s and waterfront development activity has continued ever since.

7.2 One of the first studies on the potential property uplift gained from a waterfront location was undertaken in 1993 by Garrod & Willis (University of Newcastle) who explored the uplift on the values of existing properties fronting, and in close proximity to, restored canals. Their key findings are summarised in the table below.

Table 3.29 Impact of Canal Restoration on Property Values

<table>
<thead>
<tr>
<th>Type of Property</th>
<th>Uplift Expected on Existing Property within 25m of the Canal</th>
<th>Uplift Expected on Existing Property between 25m and 225m of the Canal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executive (per house)</td>
<td>3% - 10%</td>
<td>1.5% - 5%</td>
</tr>
<tr>
<td>Basic (per house)</td>
<td>1.5% - 5%</td>
<td></td>
</tr>
<tr>
<td>Hi Tech/B1</td>
<td>3% - 10%</td>
<td>1.5% - 5%</td>
</tr>
<tr>
<td>Retail</td>
<td>1.5% - 5%</td>
<td>0.75% - 2.5%</td>
</tr>
<tr>
<td>Leisure</td>
<td>3% - 10%</td>
<td>1.5% - 5%</td>
</tr>
</tbody>
</table>

Source: Garrod & Willis (University of Newcastle) 1993

7.3 The findings of the Garrod & Willis study clearly shows the impact of a waterfront location, not just immediately adjacent to it but also up to 225m away albeit to a lesser extent. In particular, it shows that the potential uplift is greatest for higher quality residential and commercial properties and for leisure properties. The study also concluded that the average uplift in the value of new (as opposed to existing) residential properties beside canals was as much as 19%.

7.4 A further study undertaken by Wood & Handley in 1999 which focused on the regeneration of the Mersey Basin reinforced these findings, suggesting that there is a ‘stepping’ of the waterfront influence from office properties to leisure properties to residential properties, as illustrated below. The study reinforced the earlier findings of enhancements of around 20% on values of new residential properties with a waterside frontage.

Table 3.30 Uplifts of Values at the Mersey Basin

<table>
<thead>
<tr>
<th>Type of Property</th>
<th>Enhanced Values</th>
<th>Approximate Mean Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>10% - 40%</td>
<td>20%</td>
</tr>
<tr>
<td>Leisure</td>
<td>0% - 25%</td>
<td>10%</td>
</tr>
<tr>
<td>B1 Offices</td>
<td>0% - 15%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: Wood & Handley 1999
Subsequent studies by Syms and Ecotec over the last ten years have added further support to the case for waterfront restoration. The Syms study, which focused on Piccadilly Village in East Manchester, found that the impact of the waterfront manifested itself in the ease with which sales were achieved more than in the values themselves. Ecotec’s report ‘Economic Impact of Waterways Development Schemes’ in 2001 provided a more qualitative assessment of the impact of canal restoration schemes in a number of towns and cities:

- Leeds – where discussions with agents suggested that office rents along the waterfronts were comparable with other prime locations in the city.
- Chester – where local agents indicated a premium of 5-10% for waterside residential property.
- Market Harborough – where local agents considered waterside residential values to be generally higher than equivalent properties elsewhere in the town.
- Newark – where new residential properties along the canal have achieved premiums of 18% over average house prices.

The most recent study was undertaken by Lambert Smith Hampton in 2002 in order to assess uplifts in residential values in waterfront locations across Milton Keynes. Once again, it found that the average uplift for residential properties was in the region of 18%.

The following examples provide a qualitative illustration of the influence that a waterside location can have on property development

**Brindleyplace, Birmingham**

The regeneration of Brindleyplace in Birmingham was conceived back in 1987 when developers were invited to draw up a blueprint for 10.5ha (26 acres) of vacant land. An uncertain property market at the start of the 1990s meant that the project had a rocky start, but in 1992 outline planning permission was granted for a scheme which included 19 restaurants, shops and bars in Birmingham’s first purpose designed leisure venue overlooking the canals. The proposals also included 120 homes to encourage more people to live in the city and over 100,000m² (1.1 million ft²) offices which would create 6,000 jobs. Development commenced in 1993 with The Water’s Edge – a canalside scheme of shops, restaurants and bars which was officially opened in 1994.

The last seven years has seen large scale office development activity with just over 78,965m² (850,000ft²) in ten buildings, establishing Brindleyplace as a prime office location to rival the city centre. The area is now home to some of the city’s largest occupiers including Lloyds TSB, British Telecom, Vodafone, Deloitte and the Royal Bank of Scotland. Since its initial development, Brindleyplace has been able to command office rents close to those associated with the Colmore Row area of the city centre, which is generally regarded as the prime office pitch in the city. There have been no recent deals at Brindleyplace, but rents in the city centre have reached £280 psm (£26 psf). The success of these developments encouraged the successful mixed use redevelopment of the former Royal Mail sorting office located close by.
### Brindleyplace, Birmingham

Brindleyplace is now largely developed out and owners Argent have recently agreed a deal for the last plot of undeveloped land at what is now a £450m development totalling 148,640m² (1.6m ft²). The remaining 0.08ha (0.21 acre) site is to be turned into a 9,290m² (100,000ft²) hotel, restaurant, office and residential block.

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### Clarence Dock, Leeds

Located on the edge of Leeds city centre alongside the River Aire and the Royal Armouries Museum, the 92,900m² (1m ft²) Clarence Dock Project involves the redevelopment of a partially derelict former industrial site to create a mix of private and affordable residential units, offices, leisure facilities and retail outlets. The scheme is located about half a mile from the city centre but within level walking distance of it and will comprise 600 apartments, 18,580m² (200,000ft²) commercial space and 46,450m² (500,000ft²) leisure space all with a waterside setting. Work commenced on site in April 2002 and is due to be completed in 2007. The development will be linked to the city centre via the supertram.

Clarence Dock forms part of the wider East Bank regeneration area, which stretches from the south eastern edge of the city centre along the banks of the River Aire. As the city centre has experienced more and more development, demand for land has grown to such an extent that sites on the periphery are now being developed and the East Bank is one of the last available such areas. There are already a number of mixed use schemes in the pipeline in this area, including the Clarence Dock scheme which is still only partially developed.

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### Victoria Quays and Riverside Exchange, Sheffield

Although on the doorstep of the Upper Don Valley, it is important not to forget the success Sheffield has already seen in attracting waterside property development at Victoria Quays to the north east of the city centre.

Originally constructed as the terminus of the Sheffield and South Yorkshire Navigation in 1819, Sheffield Development Corporation initiated the restoration of Sheffield’s canal basin, which was renamed Victoria Quays, in 1993 after lying dormant for two decades. It was soon recognised as the most prestigious development site in Sheffield city centre, offering potential for a mixed use development of residential, commercial and leisure uses with a waterside setting.

As well as the redevelopment of the site’s Grade II listed buildings which have been converted into office, retail and residential space, there has also been significant new development which has helped to attract high profile occupiers including Nabarro Nathanson, Halifax and Parexel. These have recently been joined by Wilson Bowden’s Riverside Exchange scheme where 10,033m² (108,000ft²) has been pre-let to Irwin Mitchell in what is currently the largest scheme under construction in the city centre. These developments have effectively resulted in an extension of Sheffield’s prime commercial pitch, with the letting at Riverside Exchange achieving a top rent of £167psm (£15.50psf) in December 2003.

Victoria Quays is now widely regarded as a successful example of mixed use waterside development where historic buildings have been converted into luxury apartments and offices with shops and restaurants within the original arches. New high quality office developments have been accompanied by many of Sheffield’s luxury hotels including the Sheffield Hilton and the Holiday Inn.
7.8 All of these examples are different in terms of their location, scale and type of development. However, they have all been transformed from redundant industrial locations that turned their back on the water into vibrant new developments that embrace their waterfronts through good urban design. ‘The Value of Urban Design’ published by CABE in 2001 emphasises the importance of good urban design in adding economic value through:

- Producing high returns on investments (good rental returns and enhanced capital values)
- Placing developments above local competition at little cost
- Responding to occupier demand
- Helping to deliver more lettable area (higher densities)
- Supporting the ‘life-giving’ mixed-used elements in developments
- Creating an urban regeneration and place making dividend
- Differentiating places and raising their prestige
- Opening up investment opportunities, raising confidence in development opportunities and attracting grant monies.

7.9 The presence of a waterfront provides an ideal opportunity to build good design into development schemes and thus capitalise on the economic value of their location. This has certainly been the case in areas such as Brindleyplace in Birmingham, Clarence Dock in Leeds and at development that has already taken place at Victoria Quays in Sheffield. The various studies undertaken over the last ten years or so into the impact of a waterfront on development values supports this view, suggesting that such locations do indeed produce an uplift in property values both directly adjacent to the waterfront and nearby, particularly for residential development but also for leisure and commercial development.

7.10 The Upper Don Valley is extremely well placed to capture this potential with two rivers, the Don and the Loxley, both passing through the area. To the south, the waterfront environment supports the area’s potential to act as an extension to the city fringe residential and leisure developments already happening in the Kelham Island area and to provide an additional high quality business location outside of the main city centre core. Further to the north, the river potentially provides an attracting setting for residential or business space development. The presence of the waterfronts throughout the area may the catalyst needed to kick-start development, given appropriate public sector support, by increasing property values and therefore the financial viability of development.
8. Regeneration Perspectives

8.1 So far this baseline report has looked at a range of technical information which will inform the Physical Regeneration Framework. A number of context setting strategies, reports and projects have been considered and in the baseline work and in this section we develop this analysis by considering the Claywheels Lane/Upper Don Masterplan in more detail and contrast this with another regeneration perspective put forwards by developers and landowners already active in then Upper Don. It is important to recognise that unlike the Upper Don Study findings, which were supported in principal by Sheffield City Council, other regeneration perspectives have not been endorsed by the public sector. Nevertheless given the importance of involving the private sector in regeneration in the Upper Don Valley, it is worth understanding how developers are starting to think about regenerating the Upper Don.

8.2 The regeneration model identified in the Claywheels Lane/Upper Don Masterplan has been a starting point for the emerging Physical Regeneration Strategy. In developing the Strategy, proposals within the previous study have been refined, taking into account new issues and opportunities. This work has provided the opportunity for a reality check and, working in partnership with the City Council, the new Strategy should represent a more robust regeneration model.

8.3 There continue to be enquiries from developers regarding opportunities within the Upper Don Valley. Owners of sites and prospective developers are becoming alert to the opportunities which the Masterplan has identified. Depending upon their specific interest in the Upper Don, and in particular any land ownerships they may have, developers are seeking ways in which they might contribute to regeneration. MENTA (Upper Don Renaissance) is one such interest in the Upper Don. This organisation owns the UCAR site and is behind proposals for the redevelopment of the Sheffield Ski Village and has its own view on how regeneration in the Upper Don Valley could be acheived. Discussions with MENTA were based on the requirement for the consultant team to review development proposals at Claywheels Lane / UCAR and at Sheffield Ski Village, which formed an important part of the study brief. These discussions established that as well as looking at the two projects at Claywheels lane / UCAR and at the Ski Village, MENTA had given some consideration to wider regeneration issues in the Upper Don. It is important to recognise that there may well be other developers with their own regeneration perspectives, but consultations with such other developers was not part of the study brief within the baseline stage.
Claywheels Lane / Upper Don Valley Study Perspective

8.4 In February 2003, Civic Regeneration produced the Upper Don Valley Masterplan which identified a significant number of proposals which could contribute to the regeneration of the area. The masterplan was endorsed by Cabinet in November 2003. It should be noted that detailed delivery and site implications of the Masterplan were not considered as part of this work.

Civic Regeneration Concept

8.5 The Civic Regeneration concept is summarised as follows:

- Relocation of some businesses to UCAR/Claywheels
- UCAR/Claywheels major focus for high technology business/employment
- New dual carriageway bridge and junction at Claywheels Lane/Middlewood Road
- Creation of a mixed use Upper Don Urban Quarter around Hillfoot/Owlerton, based on a blend of housing and complementary business uses
- Leisure and education cluster focus at the heart of the Upper Don Quarter around the Owlerton Stadium and new Hillsborough College
- Extension of residential along the River Don - using values to remediate land
- Retention of an area to receive businesses decanted from Inner Relief Road (IRR) project
- General support for Ski Village proposals expansion
- Enhanced connectivity/accessibility
- A Strategy of existing development sites and potential opportunity sites identified
- Making the most of the Upper Don Valley landscape an integral part of proposals
- Accessibility issues identified at a strategy level - and backed up
by Plan 4 Travel (Arup May 2004) which goes into greater detail.

8.6 The Claywheels Lane / Upper Don Valley Study provided a platform on which to build. Proposals in the Upper Don Valley Study were never prescriptive and more detailed work through the Physical Regeneration Strategy provide a basis to progress ideas for the Upper Don Valley based on these earlier ideas.

Outline Critique – Civic Regeneration Concept

8.7 The Civic Regeneration Masterplan for the Upper Don Valley proposed a shift in the area’s established land uses, with employment uses being relocated to Claywheels Lane (including the UCAR site) from further down the valley to make way for an expansion of the residential market out of the city centre along the River Don. It supported the further development of the existing leisure/education cluster and the Parkwood Springs Ski Village proposals.

8.8 Three sub-areas were identified - Claywheels, Upper Don Urban Quarter and the Ski Village - each of which includes a number of identified development sites within a wider land use strategy. Using standard development density assumptions, we have estimated that development of these sites could potentially create 129,800m2 (1.4 million ft²) of employment floorspace, of which 119,200m2 (1.3 million ft²) would be in the Claywheels area and the other 10,600m2 (114,000ft²) within mixed use developments in the Upper Don Quarter.

8.9 Set in the context of historic employment floorspace completions across the whole of Sheffield, which average 47,300m2 (509,000ft²) per annum, this would provide around 2.5 years worth of Sheffield’s new supply. Of course, this assumes that all new development in Sheffield will be in the Upper Don Valley whereas, in reality, the Upper Don Valley will only attract a proportion of total new development because it will continue to face competition from other more established locations. Furthermore, there is already over 50 years worth of employment floorspace in the development pipeline (in addition to that already under construction), most of which is earmarked for sites in the Lower Don Valley, Junctions 35/35a and the city centre. We can also set this potential new supply in the context of employment floorspace take-up across the whole of Sheffield, which averages around 82,850m2 (892,000ft²). On this basis, the Upper Don Valley alone could absorb over 1.5 years worth of Sheffield’s take-up.

8.10 The indicative floorspace outputs given above should be considered as a minimum interpretation of the Civic Regeneration proposals, as they do not take account of the wider land use strategy proposed in the masterplan. It is difficult to estimate the total potential floorspace that could be created through this wider strategy. However, an indicative
interpretation of the Masterplan proposals suggest scope to provide in the region of 277,700m² (3 million ft²) of employment floorspace. This would be equivalent to as much as 6 years worth of Sheffield’s new completions or 3.4 years worth of Sheffield’s take-up.

8.11 Even assuming a 15-20 year time frame for implementation of the masterplan, the scale of employment proposed remains significant in relation to other areas within the city. Sheffield City Council’s view has been that employment land provision in the Upper Don should adopt just such a long term view and this is being considered through the forthcoming Sheffield Development Framework. However, it is our view that the scale and location of employment land provision in the Civic Regeneration Masterplan requires further refinement, which this study is provides in Part 5 of this document.

8.12 Sheffield City Council and Sheffield First for Investment believe that there are many reasons to be positive about Sheffield’s manufacturing sector. They point to the fact that many indigenous companies are investigating, specialising and “moving up the value chain” and the fact that the city is attracting high-quality inward investors. The employment future for the Upper Don must fundamentally address this high technology manufacturing sector. The long term view encouraged by SCC based on this positive prognosis may well see employment sites developed for valuable pioneering employment businesses, but it may take a long time to bring development forwards on all sites.

8.13 Implementation of the Civic Regeneration Masterplan would be heavily reliant on public sector support given the large scale business relocation proposed. Even if it could be funded without public sector support, for example through the residential values achieved from the sites, this would be likely only in the medium to long term as the residential market matures. The implementation of this strategy would also be extremely complex, simply because of the number of interests that would be involved, and it would be very difficult to avoid leakage of businesses away from the Upper Don Valley as they become footloose. Furthermore, whilst the Civic Regeneration masterplan recognises the potential for introducing high quality residential uses in the southern part of the valley, it perhaps over-estimates the extent to which ‘city fringe’ developments can reach up the valley and it fails to recognise the importance of the diversity of the housing offer and the need to encourage more suburban style family housing.

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8 Total industrial floorspace equals 25 years worth of pipeline development based on completions over the last 5 years. Office floorspace equals 28 years worth of pipeline development based on completions over the last 5 years. Source: PROMISlive
Other Regeneration Perspectives

8.14 Another perspective has come from developers MENTA who have begun to consider how the outputs identified in the Claywheels Lane/Upper Don Study can be delivered. However the manner in which MENTA proposes to deliver these outputs is significantly different from the strategy proposed by Civic Regeneration. MENTA proposal for the regeneration of the UDV is summarised below.

MENTA’s Concept

8.15 The MENTA concept is summarised as follows:

- Considers a number of existing businesses as fixed and Doncasters in particularly, as critically fixed
- Relocation of employment businesses to Claywheels from areas in the south of the study area seen as unviable
- UCAR site not seen as a desirable location for new or relocated employment uses even if a new bridge link from Middlewood Road is provided
- UCAR site proposed for residential-led development accessed by new bridge link.
- Proposals for a business/technology park focused around Doncasters and the A61
- Residential led mixed use extending along River Don between the city centre and the business/technology park
- Ski Village improved to provide indoor snow mountain concept including ancillary leisure and retail uses and business units
- Car sales focal point at Wadsley Bridge
- Scope for cross subsidy using values generated at UCAR.

Outline Critique of the MENTA Concept

8.16 MENTA’s proposals represent a challenge to planning policy within Sheffield City Council’s approved Unitary Development Plan (UDP) and to the land use proposals in the Civic Regeneration Masterplan. MENTA question the deliverability of the UCAR site as an employment location whether for new or relocated businesses and instead propose to
develop the UCAR site as an ‘urban village’ and use the value generated from this to cross-subsidise developments further down the valley. Such developments could include the Ski Village redevelopment, for which they have identified a significant funding gap. Major residential development at the UCAR also represents a significant challenge to Housing Market Renewal Strategy in Sheffield.

8.17 Based on a series of sites identified by MENTA, and using standard employment density assumptions, we have estimated that around 282,500m² (3 million ft²) employment floorspace could be generated. This estimate falls very much in line with indicative outputs identified by MENTA themselves and the outputs identified in the Civic Regeneration Masterplan. This includes 64,500m² (695,000ft²) at Claywheels and 139,000m² (1.5 million ft²) in the area around Doncasters, with further employment development in gap sites around Wadsley Bridge and business units associated with the ski village. Around major operational sites, such as Doncasters, a practical view has been adopted where key uses will be retained and consolidated with new employment sites brought forward where possible.

8.18 However, there are serious questions about the control and ownership of these sites which have been identified for employment development and their readiness for development including their accessibility. This includes around Doncasters where any new sites are likely to require significant improvements to access. Furthermore, Sheffield City Council have concerns that infrastructure works at Claywheels Lane, which as well as improvements to the strategic road network will be integral the regeneration of sites in this area, may not eligible for public funding given the residential and leisure dominance of proposals by MENTA at UCAR.

8.19 Set in the context of employment completions across the whole of Sheffield, which average 47,330m² (509,000ft²) per annum, this would provide around 6 years worth of new supply. Again, this assumes that all new development in Sheffield will be in the Upper Don Valley whereas, in reality, the Upper Don Valley will only attract a small proportion of total new development and there is already over 50 years worth of employment floorspace in the development pipeline, most of which is earmarked for sites outside the Upper Don Valley. In the context of the average take-up of employment space in Sheffield, which is around 82,850m² (892,000ft²) per annum, the employment floorspace created would provide around 3.4 years worth. The implications of MENTA’s proposals for residential development at UCAR are considered in greater detail in section 5.13.
8.20 A principal issue surrounding the MENTA proposals is the feasibility and viability of the Ski Village expansion proposals. Much more detailed work is required to understand the potential market demand for such a high profile facility in this location. Assessing both capital costs and the business plan for this project will be essential to ascertain the viability of this project.

Conclusions

8.21 The MENTA concept does offer an alternative property market solution to the area’s highest profile sites/projects, namely the UCAR site and the Ski Village. However, this solution is potentially a very ‘high risk’ strategy given the serious issues that the proposal gives rise to. Hence, developing a strategy based on the assumptions of the MENTA concept would appear, on the balance of all the evidence, unwise. The potential to use value from residential development at UCAR to cross-subsidise other projects such as the expansion of the Ski Village would merit careful consideration, however, this must be balanced against wider issues of securing public funding and new inward investment.

8.22 The Civic Regeneration concept hinges around the ability to relocate existing industry from the lower part of the valley to Claywheels lane and the UCAR site. This would be complex and potentially difficult to deliver ‘en masse’ with significant concerns over the cost to the public purse and the ability to retain businesses once they have been made footloose. Notwithstanding this, allowing new residential development in the southern part of the Upper Don around Neepsend may provide the incentive for the property market to deliver a more modest version of this concept with some ‘enabling’ public sector intervention. Whilst the scale of residential development is unlikely to be as substantial, as was originally envisaged in the Civic Regeneration concept, it could still be sufficient enough to deliver transformational change, in and around the Neepsend area. Beyond baseline the PRS will need to consider the scope for such significant land use change in Neepsend and balance all of the issues, including planning policy, existing owners and business’ aspirations. Consultation will be an important part of this process.

8.23 We have noted our concerns as to the scale and location of employment land provided in the Civic Regeneration Masterplan, based on our baseline analysis. We accept that more work will be needed on this issue and the SDF provides an opportunity to look into this more closely. In this context and taking into consideration the serious issues around loss of employment land and change of use in the Claywheels Lane area, it would appear prudent to consider employment proposals for this area as the leading prospect at this moment in time.

8.24 The Regeneration Strategy responds to this analysis and suggests a new way forward. This work will form a practical progression of the Civic Regeneration concept; revising, adding value and adding greater detail as appropriate.
More Detailed Assessment of Ski Village Proposals

Ski Village Proposals - Outline Transportation View

8.25 Based on information submitted with the Sheffield Ski Village planning application for the expansion of the site and the creation of a mix use development focused on a Snow Mountain concept the site is to include an indoor ski area, hotel development and associated retail/food facilities. Again based on information with the planning application it is envisaged that 70% of all visits (833,000 visitors) will occur between 1st October and March 31st with the remaining 30% (357,000 visitors) estimated to take place between 1st April and 30th September. 27% of visits are estimated to occur on the weekdays, with the remaining 73% occurring at the weekend. Based on these figures there could well be 12,000 visitors on a winter weekend.

8.26 As part of the development proposals a Gondola Cableway is to be introduced which would link Supertram to the development. This will link the Ski Village into the Supertram stop on Langsett Street. The ski village promoter believes that 33% of visitors would arrive by Supertram/Gondola, or on a busy weekend 3,600 people would arrive by Supertram. The supporting documentation for the Ski Village feasibility study predicts the following origin for it visitors:

- Sheffield post codes - 45%;
- Manchester, Oldham, Stockport - 4%;
- York, Harrogate, Hull - 4%;
- Leeds, Wakefield, Bradford - 9%;
- Derbyshire, Nottinghamshire, Lincolnshire - 5%
- Leicestershire - 2%
- Doncaster - 3%
- All other - 27% (Suspected to be principality non regular users).

8.27 These figures show that the majority of the people visiting the site are from Sheffield (45%). However it has been envisaged that the new ski facility will become a national attraction, and therefore it is anticipated that more people will travel from a wider catchment area.

8.28 A tram stop is located in close proximity to Sheffield train station and therefore it is possible that visitors will use the combined methods of transport of train, tram, and Gondola to reach the ski village. To promote this mode as a viable alternative to the car careful consideration
would have to be given to integrated ticketing policies, travel plans, parking provisions etc. Whether a 30% plus mode share can be achieved is probably open to question.

8.29 About 1000 car parking spaces are proposed in the development. Based on the promoters figures on a busy weekend this level of parking looks justified and probably represents a degree of demand restraint within the context on 12,000 visitors per day. However for much of the time such a large area of car parking would be substantially unused.

8.30 The planning application identifies 3 road access points to the Ski Village. The first is by the existing Neepsend Lane/Bardwell Road route the constraints of which are identified above. The second is from Oakham Drive as outlined above, however as it is presented in the application the third party land required for this access has the potential to become a ransom strip over the wider development of the area. The third is from Parkwood Road (the access to the landfill site) with a new link constructed back into the Ski Village immediately to the east of the railway over bridge. This access would clearly be shared with landfill traffic and we understand that the railway bridge is privately owned and the Ski Village developer may not have a right of access over it. There may well also be issues with levels which could constrain the construction of this access.

8.31 Access to Parkwood Springs/the Ski Village is clearly a complicated issue. SCC (and the applicant) need a full understanding of these issues, looking at highway operation (capacity and safety), land take and rights of access and buildability before planning approval is granted for the development.

8.32 We understand that the current position is that SCC will not ask for the detailed appraisal of highway access to be undertaken until reserved matters stage. In other words it would be a condition of an outline approval. We would recommend that this detailed work is undertaken as part of the outline determination process so there is a full understanding of the constraints and implications of access before approval is granted.

8.33 We would recommend SCC request a full Transport Assessment report from the applicant to support the outline application or undertake this work independently. This should build on the accessibility work presented in the existing document but focussed on justifying the mode split assumptions and parking provision. It should include detailed highway modelling of all proposed access routes and surrounding junctions possibly looking at the combined effects of the Ski Village and a Sheffield Wednesday home match. Access proposals should be presented in preliminary design form (1:500 scale) with levels where vertical alignment may be a constraint.
Ski Village Proposals - Outline Property Market View

8.34 This is an initial assessment of the Ski Village proposals based on information provided and a meeting with MENTA, the developers and operators of the proposed facility. The purpose of this section is to provide an initial assessment of the Snow Mountain proposals, outlining what we believe are the next steps required to truly understand the viability of the project from both a construction cost and revenue generation perspective. It is in no way intended to be an exhaustive review of the proposals.

Sheffield Snow Mountain Proposals

8.35 The proposed new Ski Village will be on the existing site of Sheffield’s Outdoor Ski Slope and will provide a 21st Century Indoor Skiing experience which will build on the success of facilities such as the Xscapes in Castleford and Milton Keynes. The leisure offer within the Ski Mountain at Sheffield is described as a true Alpine experience for both skiers and non-skiers. A planning application was made for the new facility in January 2005 and its consideration at Planning Committee is expected in September this year. As a result, it is felt that further comment on the nature of Ski Mountain in this report would duplicate information that is already available.

The Market for Ski Villages in the UK

8.36 The tourism market is continually changing and evolving and it is useful to consider some of current trends before exploring in more detail the market for ski villages:

- The family market remains the most important market with women often being the key decision makers.

- The over 55s ‘grey’ market is becoming increasingly important because of its increasing size and spending power and its growing interest in health/sports tourism.

- Whilst day trips dominate in terms of visitor numbers, it is the tourist market that dominates in terms of spend.

- Short breaks in the UK are becoming increasingly popular and the market is dominated by younger people.

- Activity breaks and sports/health tourism are becoming increasingly popular particularly amongst the ABC1 social groups.
• The conference market is moving towards smaller and shorter conferences.

8.37 The demand for specialist leisure facilities tends to be supply led and therefore difficult to estimate. However, a facility of sufficient scale, quality and distinctiveness such as a ski village could potentially draw out latent demand from residents and tourists within a 3 hour drive time catchment (significantly above the average 38 minutes typically travelled for a day trip and the average 88 minutes typically travelled for a stay).

8.38 The market for ski villages is dominated by young active males within the ABC1 socio-economic groups, but appeal to families is also critical to the success of any large commercial visitor destination. There are perhaps three main types of visits:

• Short Visits: Attracting regular users from a more local catchment area and not necessarily making use of supporting facilities.

• Day Visits: For which accessibility and travel time will be important in order to ensure 2-3 hours on the ski slope and for which supporting leisure uses including food and drink and retail will be an important element.

• Activity Breaks: For which the appeal of the destination as a whole will be crucial and therefore requiring a wide range of facilities both on and off site and including accommodation. The opening of a hotel near Xscape at Castleford is illustrative of the potential to attract overnight ski village related stays.

8.39 There may also be other types of visits depending on the mix of facilities in the scheme. For example, presence of a hotel and conference facilities will also attract the corporate market with the ski slope offering an attractive ‘downtime’ activity.

8.40 The success of associated retail, accommodation and food and drink is inherently dependent on the success of the ski slope itself, which is the main generator of footfall. However, the vibrancy and therefore success of the ski village as a whole is equally dependent on the range and quality of supporting facilities which encourage longer visits and greater spend and which provide the village with its ‘buzz’.

8.41 The viability of any new ski village proposal will also be dependent on other schemes with which it is competing. The Sheffield scheme will potentially be competing with existing similar schemes in Castleford (38 miles or 46mins), Tamworth (79 miles or 1hr 28mins) and Milton
Keynes (120 miles or 2 hrs 6 mins), all of which are within the potential catchment area of Sheffield and all of which have successfully established themselves as major leisure destinations. It is also interesting to note that, whilst the Snowdome in Tamworth is reasonably accessible via a major trunk road (the A5), the more modern developments at Castleford and Milton Keynes both have direct access, and good visibility, from motorways.

<table>
<thead>
<tr>
<th>Competing Schemes</th>
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<tr>
<td><strong>Xscape, Castleford</strong></td>
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<tr>
<td>Currently the UK’s largest</td>
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<tr>
<td>indoor real snow slope</td>
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<tr>
<td>2 climbing walls</td>
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<tr>
<td>Ice climbing</td>
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<tr>
<td>20 lane bowling alley</td>
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<tr>
<td>14 screen multiplex cinema</td>
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<tr>
<td>Skateboard park</td>
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<tr>
<td>Bars, cafes and restaurants</td>
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<tr>
<td>119 room Tulip Inn hotel</td>
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<tr>
<td>Conferencing for up to 800 people</td>
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<tr>
<td><strong>Xscape, Milton Keynes</strong></td>
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<tr>
<td>Two 175m real snow slopes and a</td>
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<tr>
<td>135m nursery slope</td>
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<tr>
<td>2 climbing walls</td>
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<tr>
<td>24 lane bowling alley</td>
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<tr>
<td>Off-road 4x4 Land Rover driving</td>
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<tr>
<td>experience</td>
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<tr>
<td>13 bars, cafes and restaurants</td>
</tr>
<tr>
<td>Meeting rooms and auditoriums</td>
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<tr>
<td><strong>Snowdome, Tamworth</strong></td>
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<tr>
<td>170 m real snow slope</td>
</tr>
<tr>
<td>200 m real snow cross-country track</td>
</tr>
<tr>
<td>Children’s snow play arena</td>
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<tr>
<td>Snowmobile track</td>
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8.42 There is currently a proposal for a ski village in Great Blakenham near Ipswich which, although unlikely to compete with Sheffield in geographical terms, provides an interesting indication of the direction in which such developments may be moving. The SnOasis project takes the well established Oasis concept a step further, with a winter ski resort theme instead of the more traditional tropical pool. It will create Europe’s largest indoor ski slope with a Winter Sports Academy, alongside 350 self-catering ski lodges, a 4-star 350 room hotel, a conference venue, an ice rink, a 9 hole golf course and other associated leisure uses including cinemas, restaurants, bars, cafes, bowling lanes and retail. Although not benefiting from direct motorway access, this is perhaps less critical given that 60% of visits are expected to be associated with staying tourists and just 17% associated with day visits (for which ease and speed of access is crucial).

**Analysis of the Proposals**

8.43 From a baseline review of the proposed scheme, the capital required for construction and infrastructure works including improvements to the local highway network and the proposed ski lift/gondola is a substantial sum. The justification for the £75 million is based upon the quality threshold and the scale of infrastructure/highways works required to improve access to the location. One of Menta’s key messages in the recently held meeting was related to the wider benefits to the local community of the scheme. Gleeds have provided a detailed cost
plan for the proposed development, which gives a breakdown of the different scheme elements. To truly understand the cost plan a detailed review by a Quantity Surveyor is recommended.

8.44 A key area of concern in our review of the detailed information provided by Menta is the lack of a Revenue Business Plan. There is a cost spreadsheet, which has been created for the purpose of identifying the funding gap for the scheme, but we feel that this does not go into the depth of detail required to truly assess viability. It would appear from discussions with Menta that the future success of the project relies very much on a traditional property development approach, i.e. the identification of lifestyle retail and leisure operators who will take institutional length leases at market rents. This will result in the development being valued on the quality of retailers secured and the level of rent paid.

8.45 The ski mountain itself will be the ‘leisure hook’ that will drive the visitor numbers to create a new retail/entertainment destination. Menta’s expected annual visitor numbers are between 1.25 and 1.5 million people, compared with nearly 5 million annual visitors to Castleford’s Xscape. The striking difference in visitor numbers is due to the assessment criteria used. At Castleford, of the 4-5 million annual visitors only 0.5 million utilise the skiing facility, whilst other visitors to the scheme go to experience the wider retail and leisure offer at Glasshaughton. At Sheffield, approximately 400,000 people per annum are expected to use the ski mountain – the other 1 million visitors are expected to come for the other retail/leisure/entertainment facilities on site. If the number of pure ski related visitors at 400,000 per annum is compared directly to the 250,000 people per annum using Sheffield’s existing outdoor ski slope (when operating at its maximum), the increase for a much more elaborate offer does not appear exceptional.

Conclusions

8.46 The proposed Ski Mountain development could provide Sheffield with a 21st century visitor attraction that would act as a catalyst to the regeneration of the Upper Don Valley. However, the success of the proposed scheme appears to rely on the quality and range of the retail/leisure offer that will surround the mountain. Menta have stated that once outline planning permission is achieved they will be able to demonstrate the true viability of the scheme by securing pre-lets with retail and leisure operators and that without the outline consent the assessment of viability can only be hypothetical. Menta’s ability to generate pre-lets on the proposed scheme would signify a certain level of market confidence. Nevertheless, we believe that further feasibility work will be required, especially if the scheme is likely to seek public sector gap funding which would require a ‘green book’ appraisal. We would recommend that there are a number of areas which require further work:
- Production of a revenue business plan
- An evaluation of the existing construction cost schedule
- A more detailed assessment of the national ski village market
- An assessment of the potential economic impact of the Snow Mountain proposals in line with Treasury Green Book guidance.

## Land Use Proposals for the UCAR Site

8.47 The UCAR site is an important issue to Claywheels Lane and the Upper Don. There are different views on how this site might contribute to the Upper Don Valley. As noted earlier in this baseline, the owners of the site MENTA are proposing significant residential development on this site and subsequently submitted a planning application to Sheffield City Council late 2005 which included major residential development. This application has brought into focus the policy and regeneration issues related to new residential development on the UCAR site. Determination of this planning application will help to clarify future change in this area. However, waiting for the outcome of this process is not an option for the regeneration of the Upper Don or for this study. This short section provides an overview of the main issues relating to this development proposal.

8.48 Based on our research and consultations two broad scenarios for developing the UCAR site are apparent and have been considered. The first scenario assumes regeneration in line with present Unitary Development Plan (UDP) policy and wider regeneration strategy, including Housing Market Renewal). The second scenario considers a proposal to introduce significant residential development at UCAR. The former is effectively the approach adopted in the Upper Don Masterplan and the latter the approach taken by MENTA. It is important to recognise that a simple choice between these two scenarios is not easy.

## Scenario 1 - Development in line with Planning Policy and Regeneration Strategy

8.49 There are clear benefits of an employment/business and industry led development at UCAR and these include:

- In line with existing planning policy and continues the traditional role of the area for employment;

- Provides potential for good quality business and industrial space;

- Favoured option of Sheffield First for Investment (Sheffield’s inward investment
company), retaining the biggest employment site in north Sheffield;

- Provides scope to accommodate businesses potentially affected by redevelopment further down the valley as well as from other high profile sites; and,

- Potential to relocate existing unattractive employment uses / developments to the north of the railway line and to the north-west in Beeley Wood to the UCAR site.

8.50 There are, however, a number of risks associated with this approach namely:

- This area is easier to redevelop than other parts of the UDV, but early new employment development here might soak up demand and impact upon the ability to regenerate the Hillfoot Riverside area;

- Locational disadvantages for employment uses in this area;

- Concerns exist that demand for employment/business uses in this area may not be sufficiently proven with reliance on pre-lets likely;

- Higher quality uses would require the improved access from new bridge link to Middlewood Road; and,

- Conflict with site owner’s aspirations.

**Scenario 2 - Development Contrary to Planning Policy and Regeneration Strategy**

8.51 There are a number of potential benefits from residential development at the UCAR site and these include:

- Potential to radically transform the area with limited public assistance;

- Potential to generate value which might be re-invested elsewhere in the Upper Don Valley; and

- Landowner commitment.

8.52 However the risks associated with this approach are significant and include:

- Residential use contrary to the adopted planning policy of the Sheffield UDP;

- Planning application may be refused or called in, with subsequent appeal and
public inquiry adding to the timescales for delivery;

- Detrimental impact on Housing Market Renewal strategy and implementation across North Sheffield; and,
- Loss of the largest employment site in north Sheffield and impact on employment land supply.

8.53 In relation to these to scenarios it is important to consider planning policy, housing market renewal strategy and employment land issues, which are all covered in outline in the remainder of this section.

Housing Policy / Housing Market Renewal Strategy

8.54 Currently the area is designated for employment uses in the adopted planning policy of the Sheffield UDP. These policies are saved, under the new system for development plan preparation, and are therefore remain the primary consideration in determining planning applications. In terms of housing supply, SCC have suggested that it is unlikely that this site is needed to provide capacity for new housing development to meet the likely housing requirement, in the forthcoming revised Regional Spatial Strategy. This issue needs to be fully explored beyond this report.

8.55 Claywheels Lane is bordered on its north-east side by the North Area Development Framework (ADF), which is an area targeted by the City Council for Housing Market Renewal (HMR) investment. Through a range of interventions, the programme aims to make a significant step change in the housing market with a vision of creating garden city neighbourhoods that will rival the best in the city.

8.56 Recent housing redevelopment in Sheffield has not and will not take place in isolation from surrounding communities. Extensive consultation and masterplanning has identified how essential it is to develop new housing opportunities alongside sustainable patterns of retail and community facilities within thriving and vibrant neighbourhood centres and in a way that maximises the use and enjoyment of the area’s parks and open spaces.

8.57 SCC has indicated that because of its close proximity to the North ADF, housing development on the UCAR site and at Claywheels Lane has the potential to detract from, undermine and potentially jeopardise important investment in the North ADF and dilute Housing Market Renewal strategy.
Employment Land Issues

8.58 The Sheffield UDP seeks to provide land for employment and economic development across Sheffield and in the Upper Don Valley. At present the UDP identifies the UCAR site and large parts of Claywheels Lane for employment uses.

8.59 The UCAR site represents the main source of vacant employment land within the Upper Don Valley. Sheffield City Council and its partners including Sheffield First for Investment take the view that this site remains important as an employment location and a viable long term proposition, and that as such it can contribute to the wider regeneration of the Upper Don Valley. The loss of this employment land would need to be considered at a city as well as Upper Don Valley scale.

8.60 The emerging Sheffield Development Framework will need to identify land for employment uses for the next 15 years and in doing so will make key recommendations on the future of these sites. Understanding in greater detail the nature of existing employment land supply and demand will be important to this process. Whilst our initial work has raised concerns over the potential demand for sites at Claywheels Lane and UCAR, this will need to be tested further in due course to determine an informed approach.

8.61 The idea of residential development proposal by the owners of the UCAR are not surprising, given the high returns on investment from housing development and a market view that there would be sufficient demand to support housing in this area. This however should not necessarily be the overriding consideration when determining the future of this important site.

Conclusions

8.62 It is clear that whilst the UCAR site remains one of the largest regeneration opportunities within north Sheffield. Securing the remediation and appropriate re-use of this site should be a strategic priority. However, there are other priorities in the Upper Don, and many sites which are of greater prominence and impact in terms of the image and identity of the Upper Don Valley.

8.63 The residential solution is (as has been noted elsewhere in this baseline) potentially very ‘high risk’ strategy. As a result it is an approach which cannot be relied upon to deliver regeneration and which in any event, may not present the best win for the site or for the Upper Don. Discussion with Sheffield City Council planners have suggested that it is likely to be considered premature for this Strategy to promote a non employment future for this site in advance of the Sheffield Development Framework, which will be based on significantly greater levels of detail..The difference in opinion between MENTA and the public sector create
potential for long term uncertainty as well. The situation may be clarified with the determination of the existing submitted planning application, or by ongoing work towards the Sheffield Development Framework. However, it would be unwise to base the regeneration of the Upper Don Valley on proposals which remain uncertain and which is unlikely to be supported by the key public sector stakeholders, namely Sheffield city council and Renaissance South Yorkshire.
9. Opportunity Sites

9.1 There are a number of existing vacant sites and underused land across the Upper Don. The contribution that these sites can make to the regeneration is influenced by a number of factors including their size, location, prominence and ownership. This section of the report looks in some detail at this range of opportunity sites. Plan 2 identifies 36 potential opportunity sites. Plans 3 and 4 illustrate existing uses and the relative prominence of these sites respectively.

9.2 For each of the 36 sites identified, a pro-forma of technical information has been prepared which includes:

- Site location,
- Current land use,
- Historical land use (where known)
- Surrounding land uses
- Topography
- Landscape
- Ground Conditions (where known)
- Service Information (where known)
- Access arrangements
- Related sites
- Built form assessment
- Site prominence
- Planning issues
- Upper Don Valley Study / Masterplan Message
- Site ownership (where known)

9.3 The pro-formas will be provided separately to this document so that they can be updated and expanded as sites are investigated further. It is envisaged that over time additional information will be added including ownership details. Sheffield City Council may wish to use the pro-forma to record site information as it comes forwards after the consultancy commission has concluded, to provide a working tool for the regeneration of sites and areas.
### APW Site

**Site Reference No.** 1

| **Site Location:**  
| Claywheels Lane Development Area  
| Plot at the end of Beeley Wood Lane cul-de-sac |

| **Current Land Uses:**  
| Industrial – APW Sheffield |

| **Historical Land Uses:**  
| Unknown |

| **Surrounding Land Uses:**  
| Woodland and River Don. Close to UCAR site |

| **Topography**  
| Level site. Land on the other side of the river is higher by around 5m |

| **Landscape:**  
| Adjacent to attractive protected Beeley Wood creating high quality landscape setting |

| **Ground Conditions:**  
| Unknown |

| **Services Information:**  
| Unknown |

| **Access Arrangements:**  
| Vehicles via Beeley Wood Lane. Footpath across southern boundary |

| **Related Sites:**  
| 2 |

| **Site Area:**  
| 1.66 ha |

| **Built Form Assessment:**  
| **Description:**  
| Industrial sheds. 2 storey stone building of vernacular character |

| **Quality:**  
| Vernacular buildings worthy of retention |

| **Occupied/Vacant?**  
| Occupied |

| **Site Prominence:**  
| - Focal Point/Gateways: No  
| - Main Road Frонтage: No  
| - River Frontage: Yes |

| **Planning Issues/UDP Allocation:**  
| No designation. Surrounded by Area of Natural History Interest and borders a Waterway. Within South Yorkshire Forest boundary |

| **UDV Masterplan Message:**  
| None specific to the site. Improved vehicular route along Claywheels Lane and Beeley Wood Lane. Bridge link across River Don from Middlewood Road |

| **Site Ownerships:**  
| Unknown |
**Former UCAR site**  
*Site Reference No. 2*

**Site Location:**  
*Claywheels Lane Development Area*  
Large site on the north side of Beeley Wood Lane, bound to the north by the railway line

**Current Land Uses:**  
Derelict industrial – former UCAR works

**Historical Land Uses:**  
Industrial (UCAR)

**Surrounding Land Uses:**  
Woodland to the west and south. Industry and sports ground to the east. Farmland to the north

**Topography:**  
Level site. The railway line and land to the north are at a significantly higher level than the site

**Landscape:**  
Adjacent to Beeley Wood to east and open countryside to north and west, creating attractive landscape setting

**Ground Conditions:**  
Unknown. Likely contamination. Remediation underway at present

**Services Information:**  
Unknown

**Access Arrangements:**  
Vehicle entrance road off Beeley Wood Lane / from Claywheels Lane at south-East corner of site

**Related Sites:**  
3 / 4

**Site Area:**  
14.01 ha

**Built Form Assessment:**  
**Description:**  
Large scale functional industrial buildings  
Some partially demolished  
Chimney stacks dominant feature

**Quality:**  
No buildings of significant townscape value

**Occupied/ Vacant?**  
Vacant and derelict

**Site Prominence:**
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: No

**Planning Issues/ UDP Allocation:**  
General Industry Area with Special Industries  
Adjoins Area of Natural History Interest to the south  
Railway is Proposed Strategic Cycle/ Footpath

**UDV Masterplan Message:**  
Redevelopment for industry  
Improve on-site vehicular route  
Improve access - Claywheels Lane / road and foot bridge link across River Don from Middlewood Road

**Site Ownership:**  
MENTA
Glacier Arm
Site Reference No. 3

Site Area: 4.71 ha

Site Location:
Claywheels Lane Development Area
Irregular, triangular plot on the south side of Beeley Wood Lane, bound to the south by the River Don.

Current Land Uses:
Industrial - Glacier Arm/ Arundel Works – aggregate recycling

Historical Land Uses:
Unknown

Surrounding Land Uses:
Industry to north and east
Middlewood Park housing
Riverside to south

Topography:
Site slopes downhill slightly towards the river

Landscape:
Little landscape value as site is fully developed
The riverside to the south is important
Open recreation space across the river

Ground Conditions:
Unknown - some contamination likely

Services Information:
Unknown

Access Arrangements:
Off Beeley Wood Lane

Built Form Assessment:
Description:
Industrial sheds

Quality:
None

Occupied/ Vacant?
Occupied

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

Planning Issues/ UDP Allocation:
General Industry Area with Special Industries
Strip of the south part of the site alongside river is Area of Natural History Interest

UDV Masterplan Message:
Improve Claywheels Lane route and bridge link across River Don from Middlewood Road
Riverside walkway

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes
Airflow
Site Reference No. 4

Site Area: 2.48 ha

Site Location: Claywheels Lane Development Area
Rectangular plot on the north side of Beeley Wood Lane and the west side of Limestone Cottage Lane, bound to the north by the railway line

Current Land Uses:
Vacant – overgrown sports field, pavilion demolished

Historical Land Uses:
Limestone Hall Farm Sports Ground

Surrounding Land Uses:
Industry/employment uses

Topography:
Site falls significantly from north to south down the valley side
Railway to north above on embankment

Ground Conditions:
Unknown

Services Information:
Unknown

Access Arrangements:
No current access on to site

Related Sites:
2 / 3

Built Form Assessment:
Description: N/A.
Quality: N/A
Occupied/Vacant? Vacant

Site Prominence:
- Focal Point/Gateway: No
- Main Road Frontage: No
- River Frontage: No

Planning Issues/UDP Allocation:
General Industry Area with Special Industries
Railway is Proposed Strategic Cycle/Footpath

UDV Masterplan Message:
Key development site for employment led mixed use
Improve Claywheels Lane route and bridge link from Middlewood Road

Site Ownerships:
Unknown.

Landscape:
Site presently grassed with some small trees, not of high landscape value
**Underhill Lane**  
*Site Reference No.* 5

**Site Location:**  
*Claywheels Lane Development Area*  
Plot to the north of the railway line, either side of Limestone Cottage Lane.

**Site Area:**  
5.55 ha

**Current Land Uses:**  
Industrial and derelict office/industrial  
Mix of low end manufacturing uses  
Cleared site to the east of Limestone Cottage Lane

**Historical Land Uses:**  
Industrial/office

**Surrounding Land Uses:**  
Open fields to the N and W, industry and sports ground to S. Industry and woodland

**Topography:**  
Site slopes steeply up hill from S to N. Site bound by railway line beyond which is steep escarpment to valley bottom.

**Landscape:**  
Site is fully developed  
No real landscape value.  
To north and north-west open undulating pasture land

**Ground Conditions:**  
Unknown

**Services Information:**  
Unknown

**Access Arrangements:**  
Off Underhill Lane and Limestone Cottage Lane

**Related Sites:**  
Relatively self containe although overlooks 2 / 3 / 4

**Built Form Assessment:**  
*Description:*  
Art deco brick building, modern industrial sheds, derelict office/industrial buildings

**Quality:**  
Mosty buildings of little value. Art Deco building of some value – not listed

**Occupied/Vacant?**  
Prominent vacant batchelers development  
Remainder of site largely occupied

**Site Prominence:**  
- Focal Point/Gateway: No  
- Main Road Frontage: No  
- River Frontage: No

**Planning Issues/UDP Allocation:**  
General Industry Area with Special Industries  
Railway is Proposed Strategic Cycle/Footpath  
Within South Yorkshire Forest boundary. Adjoins Area of Natural History Interest to the east

**UDV Masterplan Message:**  
Within area for employment led mixed use.

**Site Ownerships:**  
Unknown- likely to be a number of ownerships.
**Hague site**  
*Site Reference No.* 6

**Site Location:**  
*Claywheels Lane Development Area*  
Irregular plot to the north of Claywheels Lane running from Limestone Cottage Lane in the west up to Fletchers factory in the east, bound to the north woodland to the south of the railway line.

**Site Area:**  
4.01 ha

**Current Land Uses:**  
Small employment units.  
Former factory.  
Vacant land adjoining former factory.  
Jubilee sports ground and clubhouse  
(2 full size football pitches / cricket pitch)

**Historical Land Uses:**  
Unknown – Likley that sports pitch original use

**Surrounding Land Uses:**  
Woodland and railway line to the north.  
River Don and open space at Middlewood Park to the south east.  
Industry to the west and south west

**Topography:**  
Site slopes downhill slightly towards the river.  Sports Ground is level

**Landscape:**  
Sports ground includes 2 full size football pitches and is in good condition.  
Remainder of little landscape value

**Ground Conditions:**  
Unknown

**Services Information:**  
Unknown

**Access Arrangements:**  
Off Claywheels Lane  
New units and cottage off Limestone Cottage Lane

**Related Sites:**  
7

**Built Form Assessment:**

**Description:**  
Modern units for manufacturing uses.  
2/3 storey brick art deco factory building.  
Clubhouse

**Quality:**  
Factory building derelict, but of some quality

**Occupied/ Vacant?**  
Modern units and sports pitches in use  
Factory building vacant

**Site Prominence:**

- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: No

**Planning Issues/ UDP Allocation:**  
General Industry Area with Special Industries  
Strip of the south part of the site alongside river is Area of Natural History Interest

**UDV Masterplan Message:**  
Redevelop Hague and Jubilee sites as key development sites  
Improve Claywheels Lane route  
Access improvements and bridge links across River Don

**Site Ownerships:**  
Unknown.
<table>
<thead>
<tr>
<th><strong>Niagara Forge</strong></th>
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<tbody>
<tr>
<td><strong>Site Reference No.</strong></td>
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</table>

### Site Area:

| 2.38 ha |

### Site Location:

*Claywheels Lane Development Area*

Irregular plot to the south of Clay Wheels Lane bound to the north and west by the River Don.

### Current Land Uses:

Industrial – United Crane Services.

### Historical Land Uses:

Unknown.

### Surrounding Land Uses:

River Don forms the north and West boundary of the site. Open space, housing and sports ground lie beyond the river.

### Topography:

Level site - falling to meet river

### Landscape:

Site hidden behind mature trees and hedge. Trees on site merit further investigation to ascertain quality. River and weir here offer striking setting.

### Ground Conditions:

Unknown – Existing / former industrial operation suggest potential issues

### Services Information:

Unknown

### Access Arrangements:

Off Claywheels Lane

### Related Sites:

6

### Built Form Assessment:

**Description:** Industrial buildings

**Quality:** Poor

### Occupied/ Vacant?

Semi-occupied.

### Site Prominence:

- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

### Planning Issues/ UDP Allocation:

General Industry Area with Special Industries. Eastern corner of site is designated Open Space Area.

**UDV Masterplan Message:**

- Redevelop Niagara Forge as a key development site
- Improve Claywheels Lane route
- Access improvements including bridge links across River Don from Middlewood Road Riverside walkway

### Site Ownerships:

Unknown
**Peniston Road North / Rail Sidings**

*Site Reference No. 8*

**Site Area:**

| 6.00 ha |

**Site Location:**

*Claywheels Lane Development Area*

This site is rises to the west of Penistone Road and is bounded to the north by the railway line and to the south by a significant change in level. The site is wider towards Penistone Road and long and thin extending back alongside the railway line to the north-west.

**Current Land Uses:**

Mix of uses fronting Penistone Road including a public house, private residence and funeral directors. Employment/industry/steel works to the interior and a higher level. Some vacant land to narrow back of site.

**Historical Land Uses:**

Industrial / railway sidings

**Surrounding Land Uses:**

Residential area to the north (on the other side of the railway track). Industry to the south and east. Industry and sports ground to the west.

**Built Form Assessment:**

| Description: |
| Low rise detached properties fronting Penistone Road. Industrial buildings to rear of site |

| Quality: |
| Mixed |

| Occupied/Vacant? |
| Occupied |

**Topography:**

Changes of level across the site. Higher levels to the North-west with sharp fall in gradient down to Penistone Road. Frontage & Claywheels Lane

**Landscape:**

Trees planted along escarpment. Some of which are not native. These shield views up to site

**Ground Conditions:**

Unknown – Existing industrial use suggest issues

**Planning Issues/UDP Allocation:**

*General Industry Area with Special Industries.*

*Eastern corner of site is designated Open Space Area.*

**UDV Masterplan Message:**

New railway station at Penistone Road junction identified as long term possibility. Employment led mixed use identified as preferred future

**Access Arrangements:**

Off Penistone Road. Access to the rear of the site immediately before the railway bridge

**Services Information:**

Unknown

**Site Prominence:**

- Focal Point/Gateway: Yes
- Main Road Frontage: Primary
- River Frontage: No

**Site Ownerships:**

None – relatively self contained as a result of topography / rail line

**Related Sites:**

6 / No others specifically
## Penistone Road Gateway

**Site Reference No.** 9

### Site Location:

*Claywheels Lane Development Area*

Irregular plot to the south of Claywheels Lane, at the junction with Penistone Road, bound to the south by Leppings Lane

### Current Land Uses:

Mix of uses including housing and small independent industrial/manufacturing/distribution units/vehicle maintenance premises/Petrol station/retail unit

### Historical Land Uses:

Unknown.

### Surrounding Land Uses:

Industry to the north, south and east

Niagara sports ground to the west

Residential area (terraced housing) to the south

### Topography:

Level site.

### Landscape:

Limited landscape on site at present

Individual mature trees are present.

### Ground Conditions:

Unknown

### Services Information:

Unknown

### Access Arrangements:

One way in/out access from gyratory linking Penistone Road to Claywheels Lane

Considered to be sub-standard

### Related Sites:

Wider/indirect relationship to sites within Claywheels Lane by virtue of creation of gateway.

### Site Prominence:

- Focal Point/Gateway: Yes
- Main Road Frontage: Primary
- River Frontage: No

### Built Form Assessment:

#### Description:

Residential uses domestic character

Industrial units functional

Retail unit functional and setting very poor

#### Quality:

Generally range of poor/average quality functional development

### Occupied/Vacant?

Mostly occupied

### Planning Issues/UDP Allocation:

Fringe Industry and Business Area.

Penistone Road is Strategic Road.

### UDV Masterplan Message:

Northern half of site is key development site for employment led mixed use. No specific message for southern half of the site.

Improve Claywheels Lane route, key CWL access and image improvements at Penistone Road junction.

### Site Area:

3.84 ha

### Ground Conditions:

Unknown

### Services Information:

Unknown

### Access Arrangements:

One way in/out access from gyratory linking Penistone Road to Claywheels Lane

Considered to be sub-standard

### Related Sites:

Wider/indirect relationship to sites within Claywheels Lane by virtue of creation of gateway.
Kilner Way Retail Park
Site Reference No. 10

Site Area: 3.82 ha

Site Location:
Wadsley Bridge Gap Sites
Retail warehouse estate at Kilner Way, off Penistone Road, bound by railway to west

Current Land Uses:
Retail warehouse estate
Including Somerfield/Halfords/Glynn Webb Bingo Hall
Former bowling alley/ entertainment centre

Historical Land Uses:
Unknown

Surrounding Land Uses
Surrounded to north, south and east by residential areas
Industry to the west across Penistone Road

Built Form Assessment:
Description:
Retail warehouse sheds

Quality:
Poor

Occupied/ Vacant?
Retail park occupied.
Superbowl vacant derelict building.

Topography:
Site has been terraced to create 2 levels.
Former Superbowl at lower level
Retail estate at upper level
Very steep escarpment rising to East

Ground Conditions:
Unknown.

Services Information:
Unknown.

Access Arrangements:
Off Penistone Road for retail estate – all way movements
Super bowl access immediately next to railway line – limited access

Planning Issues/ UDP Allocation:
Designated Retail Park.
Penistone Road is Strategic Road. Railway is Proposed Strategic Cycle/ Footpath.
Within South Yorkshire Forest boundary.
Adjoins housing area.

Site Prominence:
• Focal Point/ Gateway: No
• Main Road Frontage: Primary
• River Frontage: No

UDV Masterplan Message:
None.

Related Sites:
None – Relatively self contained

Site Ownerships:
Unknown.
**Hillfoot Works Frontage**  
*Site Reference No. 11*

**Site Location:**  
Wadsley Bridge Gap Sites  
Vacant plot fronting Penistone Road, north of the Leppings Lane junction

**Site Area:**  
0.55 ha

**Current Land Uses:**  
Hard standing / storage space

**Historical Land Uses:**  
Industrial

**Surrounding Land Uses:**  
Industry and distribution to south and east including steel distribution  
Fitness First leisure centre immediately to north

**Built Form Assessment:**  
*Description:* n/a  
*Quality:* n/a

**Occupied/ Vacant?**  
Occupied but appears underused

**Site Prominence:**  
- Focal Point/ Gateway: Yes  
- Main Road Frontage: Primary  
- River Frontage: No

**Topography:**  
Site slopes downhill from north to south

**Landscape:**  
Existing hard standing area – no landscape  
Boundary is poor

**Ground Conditions:**  
Unknown

**Services Information:**  
Unknown

**Access Arrangements:**  
Penistone Road

**Planning Issues/ UDP Allocation:**  
General Industry Area without Special Industries  
Penistone Road is Strategic Road

**UDV Masterplan Message:**  
None specific for site  
Access image improvements for CWL/ Penistone Road junction

**Site Prominence:**  
Focal Point/ Gateway: Yes  
Main Road Frontage: Primary  
River Frontage: No

**Site Prominence:**  
Focal Point/ Gateway: Yes  
Main Road Frontage: Primary  
River Frontage: No

**Related Sites:**  
CL-I

**Site Ownerships:**  
Hillfoot Group.
Wardsend Road

<table>
<thead>
<tr>
<th>Site Reference No.</th>
<th>12</th>
</tr>
</thead>
</table>

**Site Area:**  
1.28 ha

**Site Location:**  
*Wadsley Bridge Gap Sites*  
Allotment gardens and vacant land at the end of Wardsend Road North, bound by the railway to the east

**Current Land Uses:**  
Vacant land

**Historical Land Uses:**  
Unknown

**Surrounding Land Uses:**  
Industrial/ employment uses to south and west (some vacant). Allotment gardens to the north west  
Residential area to the north-east and east, on other side of railway track

**Built Form Assessment:**  
- **Description:** n/a
- **Quality:** n/a
- **Occupied/ Vacant?** Vacant

**Topography:**  
Gentle slope with site located part way up valley side beneath railway embankment

**Ground Conditions:**  
Unknown

**Services Information:**  
Unknown

**Access Arrangements:**  
Wardsend Road.  
Footpath crosses the site from the residential areas to the north-east

**Related Sites:**  
None – relatively self contained

**Site Prominence:**  
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: No

**Planning Issues/ UDP Allocation:**  
Planning application submitted for live/work units  
Designated General Industry Area without Special Industries. Railway is Proposed Strategic Cycle/ Footpath

**UDV Masterplan Message:**  
None specific

**Site Ownerships:**  
Duke of Norfolk
Penistone Road Triangle

Site Area:
3.68 ha

Site Location:
Wadsley Bridge Gap Sites
Large plot bound by Penistone Road, Herries Road and Herries Road South

Current Land Uses:
Predominately vacant land / hard standing
Mix of small scale industrial and employment uses along Herries Road South, including motor repair / maintenance
Hard standing used for match day parking
Some small scale specialist retail (jewellery)

Historical Land Uses:
Industrial

Surrounding Land Uses:
Industrial/employment to south and north.
Terraced housing and Hillsborough Football Stadium to the west

Topography:
Level site. River spur crosses the north of the site.

Landscape:
Copse of trees facing Leppings Lane
Roundabout of some value
Brook running across site needs consideration

Ground Conditions:
Former industrial uses suggests potential issues

Services Information:
Unknown

Access Arrangements:
Penistone Road / Herries Road South, although both constrained and improvements will be required

Related Sites:
14 / Proximity to SWFC Stadium an advantage

Built Form Assessment:

Description:

Quality:
Poor with the exception of Art Deco building which has landmark column features. Potential for re-use

Site Prominence:
- Focal Point/Gateways: Yes
- Main Road Frontage: Primary
- River Frontage: No

Planning Issues/UDP Allocation:
Majority of the site is designated Fringe Industry and Business Area
To north brook and copse of trees close to Penistone Road and Herries Road, is designated Open Space Area

UDV Masterplan Message:
North triangle is key development site.
Key access improvements at Penistone Road/Leppings Lane junction.
No message for remainder of the site.

Site Ownerships:
Tesco
<table>
<thead>
<tr>
<th>Herries Road Corner Site</th>
<th>Site Area:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Reference No. 14</td>
<td>1.61 ha</td>
</tr>
</tbody>
</table>

**Site Location:**
Wadsley Bridge
Large corner plot bound by Herries Road / Herries Road South

**Current Land Uses:**
Timber merchant / steel fabricators

**Historical Land Uses:**
Industrial

**Surrounding Land Uses:**
Industrial / vacant

**Built Form Assessment:**
**Description:**
Warehouse sheds.

**Quality:**
Poor

**Occupied/ Vacant?**
Existing buildings are occupied

**Topography:**
Level site.

**Landscape:**
Limited intrinsic value

**Ground Conditions:**
Former industrial uses suggests potential issues

**Services Information:**
Unknown

**Access Arrangements:**
From Herries Road

**Site Prominence:**
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: No

**Planning Issues/ UDP Allocation:**
Majority of the site is designated Fringe Industry and Business Area

**UDV Masterplan Message:**
North triangle is key development site. Key access improvements at Penistone Road/ Leppings Lane junction. No message for remainder of the site.

**Site Ownerships:**
unknown

**Related Sites:**
13 / 15
### Herries Road East

**Site Reference No.** 15

**Site Location:**
*Wadsley Bridge Gap Sites*
Irregular plot fronting Herries Road

<table>
<thead>
<tr>
<th><strong>Current Land Uses:</strong></th>
<th>Wholesalers operating from building</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Historical Land Uses:</strong></td>
<td>Unknown - depot/ distribution warehouse</td>
</tr>
<tr>
<td><strong>Surrounding Land Uses:</strong></td>
<td>Industrial/ employment uses to south and west&lt;br&gt;Hallam FM offices and cvar park to the north&lt;br&gt;Residential area and Oxspring Dam on other side of railway track to nort-east</td>
</tr>
</tbody>
</table>

| **Site Area:** | 0.76 ha |

<table>
<thead>
<tr>
<th><strong>Topography:</strong></th>
<th>Site reasonably level. Steep slope uphill to the north of the site</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ground Conditions:</strong></td>
<td>Unknown</td>
</tr>
<tr>
<td><strong>Services Information:</strong></td>
<td>Unknown</td>
</tr>
<tr>
<td><strong>Access Arrangements:</strong></td>
<td>Herries Road and Wardsend Road</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Built Form Assessment:</strong></th>
<th><strong>Description:</strong> Large building with loading bays&lt;br&gt;Car parking/ circulation space to front</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quality:</strong></td>
<td>Building has some unique features, but is extremely run down</td>
</tr>
<tr>
<td><strong>Occupied/ Vacant?:</strong></td>
<td>Wholesalers semi-occupied&lt;br&gt;Hallam FM buildings occupied</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Site Prominence:</strong></th>
<th><strong>Focal Point/ Gateway:</strong> Yes&lt;br&gt;<strong>Main Road Frontage:</strong> Secondary&lt;br&gt;<strong>River Frontage:</strong> No</th>
</tr>
</thead>
</table>

**Planning Issues/ UDP Allocation:**
Designated General Industry Area without Special Industries<br>Railway is Proposed Strategic Cycle/ Footpath<br>Within South Yorkshire Forest boundary

**UDV Masterplan Message:**
None specific for site. Within area for employment led mixed use

**Site Ownerships:**
Unknown

**Related Sites:**
14
### Herries Road South

**Site Reference No.**: 16

<table>
<thead>
<tr>
<th>Site Area:</th>
<th>3.05 ha</th>
</tr>
</thead>
</table>

**Site Location:**

*Wadsley Bridge Gap Sites*

Large irregular shaped plot fronting Herries Road South up to Penistone Road and including the River River Don frontage

**Current Land Uses:**

Wholesale retail (carpet/ flooring; office furniture; and meat) fronting Herries Road South

Industrial/ employment uses

Significant gap site on Herries Road South frontage used for surface car parking

**Historical Land Uses:**

Unknown

**Surrounding Land Uses:**

Industrial/ employment uses to north.

Industrial units and Bassetts premises to south and west

Hillsborough Football Stadium to the east,

**Topography:**

Level site. River to southern boundary.

**Landscape:**

Proximity to River is key.

**Ground Conditions:**

Unknown.

**Services Information:**

Unknown.

**Access Arrangements:**

Herries Road South/ Rawson Spring Road.

**Planning Issues/ UDP Allocation:**

Majority of site designated General Industry Area without Special Industries

North-west corner of site (junction of Penistone Road and Herries Road South) designated Fringe Industry and Business Area

**UDV Masterplan Message:**

None specific on site

Partially within leisure cluster area

Riverside walk

**Site Prominence:**

- Focal Point/ Gateway: Yes
- Main Road Frontage: Primary
- River Frontage: Yes

**Built Form Assessment:**

*Description:*

Generally large shed buildings.

*Quality:*

Average/poor.

**Occupied/ Vacant?**

Generally fully occupied.

**Site Ownerships:**

Unknown

**Related Sites:**

14 / 15 / 16
### Penistone Road. / River Don
**Site Reference No.:** 17

#### Site Location:
*Wadsley Bridge Gap Sites*
Plot on east side of Penistone Road, bound by River Don and Dutton Road/ Leisure Centre

#### Current Land Uses:
Small independent industrial/ employment uses including - car sales lot / car repair / maintance / trade counter

#### Historical Land Uses:
Unknown

#### Surrounding Land Uses:
Industrial/ employment use to north and west
Leisure Centre to the south
Residential properties and Hillsborough Park to the east across Penistone Road

#### Topography:
Level site. River bounds site to north and east.

#### Landscape:
River is key asset to the rear of the site
Proximity to Hillsborough Park also an asset

#### Ground Conditions:
Unknown

#### Services Information:
Unknown

#### Access Arrangements:
Short entrance roads (dead ends) off Penistone Road

#### Related Sites:
Proximity of Hillsborough Park / Hillsborough Leisure Centre & River Lon is important

<table>
<thead>
<tr>
<th>Site Area:</th>
<th>2.12 ha</th>
</tr>
</thead>
</table>

#### Built Form Assessment:
**Description:** Mix of employment buildings

**Quality:** Poor quality on an important frontage

#### Occupied/ Vacant?
Mainly occupied, but some uses are temporary

#### Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: Primary
- River Frontage: Yes

#### Planning Issues/ UDP Allocation:
Designated Fringe Industry and Business Area. Penistone Road is a Strategic Road and is a Proposed Traffic Calming Area

#### UDV Masterplan Message:
None specific for site
Within leisure cluster area
Riverside walk

#### Site Ownerships:
Unknown – Likely to be various
Former Allied Bakery
Site Reference No. 18

Site Area: 1.11 ha

Site Location:
Wadsley Bridge Gap Sites
Rectangular plot off Lowther Road, on east side of Penistone Road

Current Land Uses:
Large building former bakery now vacant

Historical Land Uses:
Allied Bakeries

Surrounding Land Uses:
Industrial/employment uses to north and west

Built Form Assessment:
Description: Brick factory building
Quality: Poor

Occupied/Vacant?
Part occupied, part to let

Site Prominence:
- Focal Point/Gateway: No
- Main Road Frontage: Primary
- River Frontage: No

Topography:
Level site

Ground Conditions:
Unknown

Services Information:
Unknown

Access Arrangements:
Lowther Road and Beulah Road off Penistone Road

Planning Issues/UDP Allocation:
Designated Fringe Industry and Business Area
Penistone Road is a Strategic Road

UDV Masterplan Message:
None specific on site
Within leisure cluster area
Riverside walk

Related Sites:
Proximity to nearby specialist employment uses of note

Site Ownerships:
Unknown
### Owlerton Stadium Frontage site

<table>
<thead>
<tr>
<th>Site Reference No.</th>
<th>19</th>
</tr>
</thead>
</table>

#### Site Location:

*Leisure and Education Campus*
Plot on north side of Livesey Street with frontage to Penistone Road.

#### Current Land Uses:
Surface car parking for adjoining leisure uses, vacant/derelict building at S part of site. Major junction for Livesey Street/Penistone Road.

#### Historical Land Uses:
Unknown.

#### Surrounding Land Uses:
Owlerton stadium – Speedway / Greyhound racing
Casino adjacent to stadium
Hillsborough College a major new destination
Employment uses to north

#### Topography:
Level site.

#### Landscape:
River is a major asset adjacent to site
Very limited green assets

#### Ground Conditions:
Unknown.

#### Services Information:
Unknown.

#### Access Arrangements:
Livesey Street, off Penistone Road.

#### Site Prominence:
- Focal Point/Gateway: Yes
- Main Road Frontage: primary
- River Frontage: Yes

#### Planning Issues/UDP Allocation:
Majority of site is designated Open Space Area
Section of the site to the south of Livesey Street is designated General Industry Area with Special Industries

#### UDV Masterplan Message:
Car park is key development site.
Key image improvement at Penistone Road/Livesey Street junction
Key access improvement at Livesey Street/Doncaster Lane
Improved pedestrian route to Club Mill Road and on to Southey Green and Parkwood Springs

#### Built Form Assessment:

**Description:**
Older buildings to riverside frontage

**Quality:**
Riverside buildings are in poor condition and offer no real townscape value

#### Occupied/Vacant?
Vacant

#### Site Area:
2.29 ha

#### Site Ownerships:
Dave Allen.

#### Related Sites:
21 / 22 / 26
## Owlerton Stadium Service Area

**Site Reference No.:** 20

### Site Area:

**1.43 ha**

### Site Location:

*Leisure and Education Campus*
Plot on south side of Livesey Street.

### Current Land Uses:
Uses ancillary to the Stadium operation

### Historical Land Uses:
Unknown

### Surrounding Land Uses:
New Sheffield College building to south
Greyhound stadium to the west
Bassetts to the north-west

### Topography:
Level site

### Landscape:
No vegetation
River beyond sub station

### Ground Conditions:
Unknown

### Services Information:
Unknown
Electricity pylon opposite site

### Access Arrangements:
Livesey Street

### Related Sites:

19

### Built Form Assessment:

**Description:**
Surfaced car park

**Quality:**
N/A

### Occupied/ Vacant?
Occupied

### Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: No

### Planning Issues/ UDP Allocation:

**Designated General Industry Area without Special Industries**

**UDV Masterplan Message:**
Improved pedestrian route to Club Mill Road and on to Southey Green and Parkwood Springs
Improved vehicle route from Livesey Street to Club Mill Road (bridge link).
Within education/ training cluster

### Site Ownerships:

Dave Allan
**Reg Vardy Site**  
*Site Reference No.  21*

**Site Area:**
1.36 ha

**Site Location:**  
*Leisure and Education Campus*
Irregular shaped plot to the east of Penistone Road, bound by the River Loxley.

**Current Land Uses:**
New and used car sales  
Reg Vardy and Citroen car sales

**Historical Land Uses:**
Unknown

**Surrounding Land Uses:**
River Loxley and weir to east  
Industrial/employment uses to south/east  
Greyhound stadium and car park to north

**Topography:**
Site isolated from surrounding land by the river and main road

**Landscape:**
Limited landscape value.  
Importance of riverside underlined

**Ground Conditions:**
Unknown

**Services Information:**
Unknown

**Access Arrangements:**
Off Penistone Road

**Built Form Assessment:**
**Description:**
Car sales lots / premises

**Quality:**
Newer premises – average  
Older premises- poor

**Occupied/Vacant?**
Occupied

**Site Prominence:**
- Focal Point/Gateways: No  
- Main Road Frontage: Primary  
- River Frontage: Yes

**Planning Issues/UDP Allocation:**
Designated as General Industry Area without Special Industries.

**UDV Masterplan Message:**
Key development site for Livesey Street Gateway.  
Within education/training cluster.  
Key image improvement at Penistone Road/Livesey Street junction.  
Improved pedestrian route to Club Mill Road and on to Southey Green and Parkwood Springs.

**Site Ownerships:**
(likely) Reg Vardey

**Related Sites:**
19 / 22 /26
### Former Firth Rixon Site / SCC Council Depot

<table>
<thead>
<tr>
<th><strong>Site Area:</strong></th>
<th>2.75 ha</th>
</tr>
</thead>
</table>

#### Site Location:
**Leisure and Education Campus / Hillfoot Riverside**
Irregular shaped plot to the south of Livesey Street bound to south and west by River Current

#### Current Land Uses:
Former Industry/ Employment - north of site Industry, including scrap yard - south of site

#### Historical Land Uses:
Frith Rixson steel works / manufacturers

#### Surrounding Land Uses:
Industrial/ employment uses to east, south and west
New college building to north east
Greyhound stadium and car park to north

#### Topography:
Level site. Bound by River to west

#### Landscape:
Limited landscape quality reflecting former and existing industrial use
Riverside is key asset

#### Ground Conditions:
Unknown. Industrial uses suggest issues

#### Services Information:
Unknown

#### Access Arrangements:
New access road to eastern boundary. Difficult to access south half of site (private land)

#### Related Sites:
19 / 21 / 23 / 24

#### Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

#### Planning Issues/ UDP Allocation:
Designated as General Industry Area with Special Industries

#### UDV Masterplan Message:
Key development site (Doncasters Lane) Within education/ training cluster

#### Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

---

**Site Ownerships:**
Firth Rixon / Sheffield City Council
### Doncasters / Independent forgings

**Site Reference No. 23**

<table>
<thead>
<tr>
<th>Site Area:</th>
<th>7.29 ha</th>
</tr>
</thead>
</table>

#### Site Location:
*Hillfoot Riverside*
Bound by River Loxley and River Don and Hillsborough College

#### Current Land Uses:
- Doncasters Steel works- manufacturing
- Independent Forgings steel works
- Small business / employment units

#### Historical Land Uses:
Steelworks

#### Surrounding Land Uses:
- Industrial/ employment uses
- New college building to north

#### Built Form Assessment:
**Description:**
Industrial buildings

**Quality:**
Poor / average quality functional buildings

**Occupied/ Vacant?**
Occupied, but understood not to full capacity

#### Topography:
Level site. Southern most point of site is at the confluence of the Rivers Don and Loxley.

#### Ground Conditions:
Unknown. Industrial uses suggest issues

#### Services Information:
Unknown.

#### Access Arrangements:
Enterance is over bridge over River Loxley to south of the site across land that is within site 23. This is main entrance and visitor entrance to site.
Second road access for goods and distribution from Livesey street / Peacock estate road

#### Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: No
- River Frontage: Yes

#### Planning Issues/ UDP Allocation:
- Designated as General Industry Area with Special Industries

#### UDV Masterplan Message:
None specific for the site
Key access improvement at Livesey Street/ Doncaster Lane

#### Site Ownerships:
- Doncasters / Independent Forgings / others unknown

---

**Related Sites:**
22 / 24 / 25
**Hillfoot / Penistone Road**  
*Site Reference No.* 24

**Site Area:** 8.17 ha

**Site Location:**  
*Hillfoot Riverside*  
Irregular shaped plot between River Loxley/ River Don and Penistone Road.

**Current Land Uses:**  
Industry/employment uses  
New employment units at Penistone Road frontage  
Former metal works premises at Hobson Avenue/ Penistone Road. Car show rooms

**Historical Land Uses:**  
Unknown – likely to be industriial

**Surrounding Land Uses:**  
Industrial/employment uses.

**Topography:**  
Level site. River hidden at the back of sites.

**Landscape:**  
Little of value – riverside is key asset

**Ground Conditions:**  
Unknown

**Services Information:**  
Unknown

**Access Arrangements:**  
Penistone (old) Road, off Penistone Road (A61)  
Access to Doncaster’s across site

**Related Sites:**  
21 / 22 /23 / 32

**Built Form Assessment:**  
**Description:**  
Car showrooms and forecourts all quite new.  
New modern units, single storey  
Vacant building- 1960s 3 storey

**Quality:**  
Good quality car showrooms and new units. Everything else poor

**Occupied/Vacant?**  
Part / mainly occupied

**Site Prominence:**  
- Focal Point/Gateway: No
- Main Road Frontage: Primary
- River Frontage: Yes

**Planning Issues/UDP Allocation:**  
Designated as General Industry Area without Special Industries

**UDV Masterplan Message:**  
None specific on site  
Within leisure cluster

**Site Ownerships:**  
Unknown – But Likely to be in multiple ownership
<table>
<thead>
<tr>
<th><strong>Club Mill Rd./ River Don</strong></th>
<th><strong>Site Area:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Site Reference No.</em> 25</td>
<td>3.66 ha</td>
</tr>
</tbody>
</table>

| **Site Location:**  
*Hillfoot Riverside*  
Irregular narrow plot either side of Club Mill Road, between River Don and railway line |

| **Current Land Uses:**  
Industrial / employment uses |
| **Historical Land Uses:**  
Unknown. |

| **Surrounding Land Uses:**  
Industrial / employment uses  
Landfill at Parkwood Springs to east, on other side of railway track  
Vacant land to the north (private section of Club Mill Lane) |

| **Built Form Assessment:**  
**Description:**  
Industrial buildings, generally poor condition, some vacant  
**Quality:**  
General Poor industrial buildings  
Old Silver Smith ruins of heritage interest  
**Occupied/ Vacant?:**  
Part occupied |

| **Topography:**  
Southern most point of the site is at the confluence of the Rivers Don and Loxley |

| **Landscape:**  
Attractive green areas at waterside an asset, although area let down by persistent fly-tipping and rusting hulls of machinery |

| **Ground Conditions:**  
Unknown |

| **Services Information:**  
Unknown |

| **Access Arrangements:**  
Currently only half the site is accessible on Club Mill Road  
Club mill Road is a cul de sac with private land preventing access through to Livesey Street |

| **Planning Issues/ UDP Allocation:**  
Designated as General Industry Area with Special Industries |

| **UDV Masterplan Message:**  
Key development site (Club Mill Road) – leisure cluster  
Improved access for Club Mill Road- link across River to Livesey Street  
Improved pedestrian route Livesey Street through site to Parkwood Springs Riverside walkway |

| **Site Prominence:**  
- Focal Point/ Gateway: No  
- Main Road Frontage: No  
- River Frontage: Yes |

| **Related Sites:**  
23 / 24 / 32 |

| **Site Ownerships:**  
Unknown |
B&Q site on Penistone Road
Site Reference No. 26

Site Area: 1.96 ha

Current Land Uses: B&Q store, Employment use

Historical Land Uses: Unknown

Surrounding Land Uses: Industrial uses to east
Hillsborough Barracks shopping park to the south

Topography:
Level site. River Loxely runs through the site. Barracks wall borders the site to the south, beyond which the level is higher.

Landscape:
Riverside running through heart of site is a missed opportunity. Some mature good quality trees. Significant wasted space including redundant bridge.

Ground Conditions:
Unknown

Services Information:
Unknown

Access Arrangements:
Penistone Road, entrance to Hillsborough Barracks. There is a redundant local vehicular bridge crossing on this site.

Related Sites:
19 / 21

Built Form Assessment:
Description: Old style (smaller) B&Q store
Employment shed style development

Quality:
Both average to Poor in quality

Occupied/Vacant?
Occupied

Site Prominence:
- Focal Point/ Gateway: Yes
- Main Road Frontage: Primary
- River Frontage: Yes

Planning Issues/UDP Allocation:
Part of site in existing employment use, designated as a fringe industry and business area
Wider site including existing B&Q and barracks designated for retail uses

UDV Masterplan Message:
Suggests key improvements to image in this area and improved east-west connections

Site Ownerships:
B&Q / other unknown
Rutland Rd. / Penistone Rd. / River Don Site

Site Reference No. 27

Site Area: 4.38 ha

Site Location:
Neepsend Gateway
Plot bound by the River Don, Rutland Road and Penistone Road

Current Land Uses:
Industrial/employment uses
Vacant industrial works at Pensitone Road
Distribution/warehouse sheds in estate at Rutland Way

Historical Land Uses:
Unknown

Surrounding Land Uses:
Industrial/employment uses surrounding site

Topography:
Level site. River Don forms northern boundary to the site

Landscape:
Limited existing value but river is major asset

Ground Conditions:
Unknown

Services Information:
Unknown

Access Arrangements:
Off Penistone Road and Rutland Way, off Rutland Road

Built Form Assessment:
Description:
Rutland Way- estate of modern distribution sheds
Individual buildings of quality to note

Quality:
Penistone Road frontage generally poor and appearing semi derelict
Art Deco tall block – Hydro-Clakson is an important landmark
Samual Osborn & Co building another landmark on the riverside

Occupied/Vacant?
Penistone Road buildings vacant
Rutland Way estate occupied

Site Prominence:
- Focal Point/Gateway: Yes
- Main Road Frontage: Yes
- River Frontage: Yes

Planning Issues/UDP Allocation:
Designated as General Industry Area without Special Industries
Penistone Road and Rutland Road are Strategic Roads

UDV Masterplan Message:
None specific for site
Key access and image improvements at Rutland Road and Penistone Road junction
Riverside walkway

Site Ownerships:
Unknown – but likely to be fragmented

Related Sites:
28 / 29 / 30
### Canon Brewery / Riverside

**Site Reference No.**  28

**Site Area:**  2.68 ha

---

**Site Location:**  
*Neepsend Gateway*  
Irregular plot bound by Bardwell Road, Neepsend Lane, the railway line and Rutland Road.

---

**Current Land Uses:**  
Industrial/ employment uses, including -  
Independent indoor skateboard park  
Brewery  
Manufacturers (cutlery) backing on to river.

**Historical Land Uses:**  
Unknown

**Surrounding Land Uses:**  
Industry and employment uses surrounding the site

---

**Topography:**  
Level site.

---

**Landscape:**  
Level site

---

**Ground Conditions:**  
Unknown

---

**Services Information:**  
Unknown

---

**Access Arrangements:**  
Rutland Road, Neepsend Lane, Boyland Street, Bardwell Road

---

**Related Sites:**  
27 /29

---

**Built Form Assessment:**  
**Description:**  
Former Brewery buildings occupy the site creating a hard edge to surroundings streets, with tall imposing lifeless frotages.

**Quality:**  
Average to poor development quality offering limited townscape value  
Appears to be limited scope for re-use (require further investigation)

---

**Occupied/ Vacant?**  
Vacant.

---

**Site Prominence:**  
- Focal Point/ Gateway:  
  - No
- Main Road Frontage:  
  - Secondary
- River Frontage:  
  - No

---

**Planning Issues/ UDP Allocation:**  
Site is designated General Industry Area with Special Industries. Railway is Proposed Strategic Cycle/ Footpath  
Rutland Road is a Strategic Road

---

**UDV Masterplan Message:**  
Former brewery is key development site.  
Neepsend Lane realignment  
Key access and image improvements at Rutland Road and Penistone Road junction  
Riverside walkway

---

**Site Ownerships:**  
Former Brewery and land to north owned by James Hey Pension Trustees  
Site adjacent to river unknown
<table>
<thead>
<tr>
<th align="left"><strong>National Grid</strong></th>
<th align="left"><strong>Site Area:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td align="left"><em>(formerly Secondsite)</em></td>
<td align="left">6.30 ha</td>
</tr>
<tr>
<td align="left"><strong>Site Reference No.</strong></td>
<td align="left">29</td>
</tr>
<tr>
<td align="left"><strong>Site Location:</strong></td>
<td align="left"><strong>Built Form Assessment:</strong></td>
</tr>
<tr>
<td align="left"><em>Neepsend Gateway</em></td>
<td align="left"><strong>Description:</strong></td>
</tr>
<tr>
<td align="left">Plot bound by the railway line, Parkwood Road, Bardwell Road and Neepsend Lane.</td>
<td align="left">For most part an open site framed by tall brick built boundary wall</td>
</tr>
<tr>
<td align="left"><strong>Current Land Uses:</strong></td>
<td align="left">Several domestic scale properties of some including a traditional pub</td>
</tr>
<tr>
<td align="left">Cleared former gas works site</td>
<td align="left">To the east larger scale employment shed address Bardwell Road</td>
</tr>
<tr>
<td align="left">Elevated gas pipes run through south part of site</td>
<td align="left"><strong>Quality:</strong></td>
</tr>
<tr>
<td align="left">Works building on Bardwell Road</td>
<td align="left">Limited townscape quality</td>
</tr>
<tr>
<td align="left"><strong>Historical Land Uses:</strong></td>
<td align="left"><strong>Occupied/ Vacant?</strong></td>
</tr>
<tr>
<td align="left">Gas works</td>
<td align="left">Vacant</td>
</tr>
<tr>
<td align="left"><strong>Surrounding Land Uses:</strong></td>
<td align="left"><strong>Site Prominence:</strong></td>
</tr>
<tr>
<td align="left">Industrial/ employment uses to east, west and south. Railway line to north</td>
<td align="left">• Focal Point/ Gateway: No</td>
</tr>
<tr>
<td align="left"><strong>Topography:</strong></td>
<td align="left">• Main Road Frontage: secondary</td>
</tr>
<tr>
<td align="left">Small fall across site</td>
<td align="left">• River Frontage: No</td>
</tr>
<tr>
<td align="left"><strong>Landscape:</strong></td>
<td align="left"><strong>Services Information:</strong></td>
</tr>
<tr>
<td align="left">Open site with limited existing value</td>
<td align="left">Major overground gas pipeline bisects southern part of the site and is a major constraint</td>
</tr>
<tr>
<td align="left"><strong>Ground Conditions:</strong></td>
<td align="left"><strong>Access Arrangements:</strong></td>
</tr>
<tr>
<td align="left">Significant contamination likely</td>
<td align="left">Off Parkwood Road and Neepsend Lane</td>
</tr>
<tr>
<td align="left">SecondSite are progressing with remediation but unclear as to progress and specification of treatment and therefore potential end uses possible</td>
<td align="left"><strong>Planning Issues/ UDP Allocation:</strong></td>
</tr>
<tr>
<td align="left">Require additional information</td>
<td align="left">Designated as General Industry Area with Special Industries</td>
</tr>
<tr>
<td align="left"><strong>Services Information:</strong></td>
<td align="left"><strong>UDV Masterplan Message:</strong></td>
</tr>
<tr>
<td align="left">Major overground gas pipeline bisects southern part of the site and is a major constraint</td>
<td align="left">Part of key development site (Neepsend Lane) – leisure cluster. Neepsend Road realignment through site New railway station at Parkwood Road Image improvements at junction with Penistone Road</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Site Prominence:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Focal Point/ Gateway: No</td>
</tr>
<tr>
<td>• Main Road Frontage: secondary</td>
</tr>
<tr>
<td><strong>Site Prominence:</strong></td>
</tr>
<tr>
<td>• River Frontage: No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Planning Issues/ UDP Allocation:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Designated as General Industry Area with Special Industries</td>
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</table>

<table>
<thead>
<tr>
<th><strong>UDV Masterplan Message:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Part of key development site (Neepsend Lane) – leisure cluster. Neepsend Road realignment through site New railway station at Parkwood Road Image improvements at junction with Penistone Road</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Site Ownerships:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>SecondSite Properties (formerly lattice Properties)</td>
</tr>
</tbody>
</table>
**Toledo / Apollo Works**  
*Site Reference No.* 30

<table>
<thead>
<tr>
<th><strong>Site Area:</strong></th>
<th>1.97 ha</th>
</tr>
</thead>
</table>

---

**Site Location:**  
Neepsend Gateway  
Narrow plot bound by River Don and Neepsend Road.

**Current Land Uses:**  
Industry/employment

**Historical Land Uses:**  
Unknown

**Surrounding Land Uses:**  
Industrial/employment uses. River and Penistone Road

**Topography:**  
Flat site. River Don borders site

**Landscape:**  
No landscape value beyond riverbank

**Ground Conditions:**  
Unknown

**Services Information:**  
Unknown

**Access Arrangements:**  
From Neepsend lane

---

**Built Form Assessment:**

**Description:**  
Industrial shed buildings, with limited relationship to river/street

**Quality:**  
Large floor plate industrial building in reasonable condition but with limited townscape value/quality

**Occupied/Vacant?**  
Occupied by existing businesses

**Site Prominence:**
- Focal Point/Gateway: No
- Main Road Frontage: Primary
- River Frontage: Yes

**Planning Issues/UDP Allocation:**  
Designated as General Industry Area with Special Industries

**UDV Masterplan Message:**  
None specific for site  
Within leisure cluster area  
Riverside walk  
Image improvements at junction with Penistone Road  
Improved pedestrian routes to east-west

**Site Ownerships:**  
Flo Drive Properties Ltd. / Shepherd  
(confirm)

---

*Insert photo*
**Former Neepsend Gas Works**  
*Site Reference No.* 31

**Site Location:**  
*Neesend Gateway*  
Triangular plot Neepsend Road, Parkwood Road and Fairfield Road.

**Current Land Uses:**  
Gas works, including gas storage tower  
Other industrial/employment uses – sheds on Fairfield Road

**Historical Land Uses:**  
Industry

**Surrounding Land Uses:**  
Industrial/employment uses

**Topography:**  
Site slopes uphill from south to north

**Landscape:**  
No real landscape quality at present

**Ground Conditions:**  
Former gas works likely to be major contamination issues

**Services Information:**  
Existing overground gas pipeline and other infrastructure a major issues  
Existing gasometer is a serious constraint

**Access Arrangements:**  
Taken from adjacent road including Neepsend Lane / Parkwood Road

**Built Form Assessment:**  
**Description:**  
Industrial sheds and gas works  
Some smaller scale domestic properties

**Quality:**  
Average/Poor

**Occupied/Vacant?**  
Part occupied

**Site Prominence:**
- Focal Point/Gateway: No
- Main Road Frontage: Secondary
- River Frontage: No

**Services Information:**  
Existing overground gas pipeline and other infrastructure a major issues  
Existing gasometer is a serious constraint

**Planning Issues/UDP Allocation:**  
Designated as General Industry Area with Special Industries

**UDV Masterplan Message:**  
Part of key development site (Neepsend Lane) – leisure cluster  
Improved access for Club Mill Road and Neepsend Road realignment through site  
Improved pedestrian routes to east-west  
New railway station at Parkwood Road  
Image improvements at junction with Penistone Road

**Site Ownerships:**  
Transco

**Related Sites:**  
29 / 20 /32

**Site Area:**  
3.29 ha
**Parkwood Road / Former Clifton Steel Works**  
*Site Reference No. 32*

**Site Area:**  
3.41 ha

**Site Location:**  
*Neesend Gateway*  
Irregular plot bound by Club Mill Road, Parkwood Road and Fairfield Road.

**Current Land Uses:**  
Industry/employment uses  
Significant amount of vacant employment land – some partially cleared  
Landfill in north part of the site (contained behind high wall)  
Fairfield Inn public house

**Historical Land Uses:**  
Industrial works  
Bunker for holding fuel arriving by train

**Surrounding Land Uses:**  
Industrial/employment uses to north, south and west.  
Gas works to east.  
River Don follows the eastern boundary of the site (alongside Club Mill Road)

**Built Form Assessment:**  
*Description:*  
Industrial shed buildings  
Stone built works buildings  
Traditional pub building

*Quality:*  
Average/poor quality  
Traditional works building/pub some value

*Occupied/Vacant?*  
Some employment space in use, but mainly vacant land/cleared sites  
Pub is open

**Topography:**  
Site is generally flat with 2 distinct levels  
Low level drops to riverside and is essentially flat  
Upper terrace is made ground formed by brick retaining wall to Hoyland Road Land

**Ground Conditions:**  
Fill used to create this upper level is unclear  
Part of this area was former landfill site so contamination can be expected  
May inhibit lowering site to level grade

**Services Information:**  
Unknown

**Access Arrangements:**  
Fairfield Road, off Penistone Road

**Related Sites:**  
24 / 25 / 31

**Planning Issues/UDP Allocation:**  
Designated as General Industry Area with Special Industries.

**UDV Masterplan Message:**  
Improved access for Club Mill Road  
Improved pedestrian routes to east-west  
New railway station at Parkwood Road  
Image improvements at junction with Penistone Road  
Riverside walkway

**Site Prominence:**  
- Focal Point/Gateway: No  
- Main Road Frontage: Primary  
- River Frontage: Yes

**Site Ownerships:**  
Unknown.
### Ski Village & Adjacent Sites

**Site Reference No.** 33

| **Site Area:** | 13.93 ha |

| **Site Location:**  
*Parkwood Springs*  
Plot bound by the railway line, Douglas Road, Vale Road and Mount Road, |

| **Current Land Uses:**  
Ski Village, including dry ski slopes and chalet building and car park  
Industry, including steel works, in southern part of the site on Wallace Road |

| **Historical Land Uses:**  
Residential to south no cleared |

| **Surrounding Land Uses:**  
Industrial/employment uses to east and south  
Parkwood Springs industrial estate to east  
Landfill at Parkwood Springs to north |

| **Topography:**  
Steep slopes facilitating ski slope |

| **Landscape:**  
Setting to ski village is striking and in reasonable quality  
Land filling and associate traffic undermine quality  
Fly-tipping is apparent and reduces quality |

| **Ground Conditions:**  
Unknown. |

| **Services Information:**  
Unknown. |

| **Access Arrangements:**  
Off Douglas Road / from bardwell Road under railway bridge |

| **Site Prominence:**  
- Focal Point/Gateway: No  
- Main Road Frontage: No  
- River Frontage: No |

| **Planning Issues/UDP Allocation:**  
Ski Village is designated as Open Space Area  
Site of Special Scientific Interest adjacent to the site to the east  
North part of site designated Open Space Area, with part allocated as a Waste Disposal Area  
Area between Vale Road and railway designated Business Area  
South part of the site is Fringe Industry and Business Area  
Within South Yorkshire Forest boundary  
Area of Natural History Interest - Vale Road |

| **UDV Masterplan Message:**  
Improve ski village and develop ‘Crag climbing centre’  
Railway station and cable car at Parkwood Road South part of site for business park  
Improved pedestrian links  
Image improvements at Rutland Road |

| **Site Ownerships:**  
Sheffield City Council (SCC) own significant amount of open land  
Ski Village has long lease from SCC  
Employment land requires investigation |

| **Related Sites:**  
27 / 28 / 29 /35 |
Upper Rutland Road
Site Reference No. 34

Site Location:
Parkwood Springs
Upper Rutland Road West

Current Land Uses:
Employment uses – depot buildings

Historical Land Uses:
Unknown

Surrounding Land Uses:
Vacant land (steep incline) to north-west
Residential area to north-east
Industry and employment uses to south

Built Form Assessment:
Description:
Linear strip of employment development stepping up the hill

Quality:
Poor / average quality

Occupied/ Vacant?
Mostly Occupied

Site Prominence:
- Focal Point/ Gateway: No
- Main Road Frontage: Primary
- River Frontage: No

Ground Conditions:
Unknown

Services Information:
Unknown

Access Arrangements:
Off Rutland Road

Planning Issues/ UDP Allocation:
Designated Fringe Industry and Business Area
Railway is Proposed Strategic Cycle/ Footpath
Rutland Road is a Strategic Road

UDV Masterplan Message:
Pedestrian link north-west
Image improvements at Rutland Road

Site Ownerships:
Unknown.

Site Area:
1.55 ha

Topography:
Steep hillside with development stepping up the hill on a series of small terraced plots
Good views down into valley bottom.

Landscape:
Limited landscape quality, with some informal planted areas / grassed areas to frontage of Rutland Road
**Oakham Drive Corner Site**  
*Site Reference No.* 35

**Site Location:**  
*Parkwood Springs*  
Rectangular plot at the south eastern corner of the Oakham Drive Industrial Estate bound by the railway line and Rutland Road

**Site Area:**  
0.87 ha

**Current Land Uses:**  
Vacant land

**Historical Land Uses:**  
Unknown

**Surrounding Land Uses:**  
Industry and employment uses surrounding the site (Parkwood Springs Business park)

**Topography:**  
Level site

**Landscape:**  
Open site with grass and naturally regenerated small trees  
Little amenity / ecology value

**Ground Conditions:**  
Unknown

**Services Information:**  
Unknown

**Access Arrangements:**  
Oakham Drive, off Rutland Road

**Related Sites:**  
33 / 34

**Site Prominence:**  
- Focal Point/ Gateway: Yes  
- Main Road Frontage: Secondary  
- River Frontage: No

**Built Form Assessment:**  
**Description:**  
Adjacent buildings of reasonable if derivative form  
Site undeveloped

**Quality:**  
n/a

**Occupied/ Vacant?**  
Vacant

**Planning Issues/ UDP Allocation:**  
Designated Fringe Industry and Business Area. Within South Yorkshire Forest boundary  
Railway is Proposed Strategic Cycle/ Footpath  
Rutland Road is a Strategic Road

**UDV Masterplan Message:**  
Part of Business Park  
Improved pedestrian links N-S and E-W  
Image improvements at Rutland Road junction  
Railway station and cable car at Parkwood Road are proposed

**Site Ownerships:**  
Unknown.
**Parkwood Business Park / Oakham Drive ‘Back Site’**

**Site Reference No.** 36

**Site Location:**
Plot at the back of Parkwood Business Park terminating vista along Oakham Drive. Occupies a strategically important location between Oakham Drive and Ski Village.

**Site Area:** 0.39 ha

**Current Land Uses:**
Industrial / semi vacant

**Historical Land Uses:**
Industrial

**Surrounding Land Uses:**
Industry and employment uses surrounding the site

**Topography:**
Land steps up in height to the west

**Landscape:**
No landscape present on site

**Ground Conditions:**
Unknown

**Services Information:**
Unknown

**Access Arrangements:**
Oakham Drive, off Rutland Road

**Related Sites:**
33 / 34

**Built Form Assessment:**
**Description:**
Adjacent buildings of reasonable if derivative form
Site undeveloped

**Quality:**
n/a

**Occupied/ Vacant?**
Vacant

**Site Prominence:**
- Focal Point/ Gateway: Yes
- Main Road Frontage: Secondary
- River Frontage: No

**Planning Issues/ UDP Allocation:**
Designated Fringe Industry and Business Area. Within South Yorkshire Forest boundary
Railway is Proposed Strategic Cycle/ Footpath
Rutland Road is a Strategic Road

**UDV Masterplan Message:**
Part of Business Park
Improved pedestrian links N-S and E-W
Image improvements at Rutland Road junction
Railway station and cable car at Parkwood Road are proposed

**Site Ownerships:**
Unknown.
9.4 Sites across the upper Don Valley is generally characterised by the following themes:

- Many sites requiring access and infrastructure improvements to unlock their true potential

9.5 Several highly prominent sites which remain for a variety of reasons undeveloped

- A number of sites benefitting from riverside settings which could add value, but many of which are poorly accessed at present
- Many sites requiring access and infrastructure improvements to unlock their true potential
- Many poor quality and underused sites edging the primary commercial frontage along Penistone Road
- Sites within the interior of the study area which require greater prominence, improved visibility and improved accessibility
- A limited number of large scale sites in single ownerships
- Limited public sector land holdings
10. Appendices

A - Hotels

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>Number of Beds</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Top of the Range (over £80)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beauchief Hotel</td>
<td>161 Abbeydale Road South Sheffield S7 2QW</td>
<td>50</td>
<td>AA 3 Star</td>
</tr>
<tr>
<td>Charnwood Hotel</td>
<td>10 Sharrow Lane Sheffield S11 8AA</td>
<td>22</td>
<td>AA 3 Star</td>
</tr>
<tr>
<td>Hilton Sheffield</td>
<td>Victoria Quays Furnival Road Sheffield S4 7YA</td>
<td>128</td>
<td></td>
</tr>
<tr>
<td>Holiday Inn Royal Victoria Sheffield</td>
<td>Victoria Station Road Sheffield S4 7YE</td>
<td>97</td>
<td>RAC 4 Star</td>
</tr>
<tr>
<td>Novotel Sheffield</td>
<td>50 Arundel Gate Sheffield S1 2PR</td>
<td>144</td>
<td>AA 3 Star</td>
</tr>
<tr>
<td>Sheffield Marriott Hotel</td>
<td>Kenwood Road Sheffield S7 1NQ</td>
<td>101</td>
<td>AA 4 Star</td>
</tr>
<tr>
<td>Sheffield Park Hotel</td>
<td>Chesterfield Road South Sheffield S8 8BW</td>
<td>95</td>
<td></td>
</tr>
<tr>
<td>Staindrop Lodge Hotel</td>
<td>Lane End Chapeltown Sheffield S35 3UH</td>
<td>31</td>
<td>ETC 3 Star</td>
</tr>
<tr>
<td>Whitley Hall Hotel</td>
<td>Elliott Lane Grenoside Sheffield S35 8NR</td>
<td>20</td>
<td>AA 3 Star</td>
</tr>
<tr>
<td>Cubley Hall</td>
<td>Mortimer Road Penistone Sheffield S36 9DF</td>
<td>12</td>
<td>AA 4 Diamonds</td>
</tr>
<tr>
<td>Hotel Bristol</td>
<td>Blonk Street Sheffield S1 2AU</td>
<td>127</td>
<td>AA 3 Star</td>
</tr>
<tr>
<td>Rutland Hotel</td>
<td>452 Glossop Road Sheffield S10 2PY</td>
<td>62</td>
<td>AA 3 Star</td>
</tr>
<tr>
<td>Name</td>
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</tr>
<tr>
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<td>-----------------------------------------------</td>
<td>----------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Westbourne House Hotel</td>
<td>25 Wesbourne Road Broomhill Sheffield S10 2QQ</td>
<td>10</td>
<td>AA 5 Diamonds</td>
</tr>
<tr>
<td>(Mid Range £41-£60)</td>
<td></td>
<td></td>
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<tr>
<td>Cutlers Hotel</td>
<td>Theatreland - George Street Sheffield S1 2PF</td>
<td>46</td>
<td>AA 2 Star</td>
</tr>
<tr>
<td>Fox House</td>
<td>Hathersage Road Longshaw Sheffield S11 7TY</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>The Garrison Hotel</td>
<td>Hillsborough Barracks 635 Penistone Road S6 2GB</td>
<td>43</td>
<td>AA 3 Star</td>
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<tr>
<td>Grosvenor House Hotel</td>
<td>Charter Square Sheffield S1 3EH</td>
<td>82</td>
<td></td>
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<tr>
<td>Hillsborough Hotel</td>
<td>54-58 Langsett Road Sheffield S6 2UB</td>
<td>6</td>
<td>ETC 2 Star</td>
</tr>
<tr>
<td>Hunter House Hotel</td>
<td>685-691 Ecclesall Road Sheffield S6 2UB</td>
<td>24</td>
<td>AA 3 Diamonds</td>
</tr>
<tr>
<td>Ibis Sheffield City Centre</td>
<td>Shude Hill Sheffield S1 2AR</td>
<td>95</td>
<td></td>
</tr>
<tr>
<td>The Lindrick</td>
<td>226 Chippinghouse Road Sheffield S7 1DR</td>
<td>19</td>
<td>ETC 3 Diamonds</td>
</tr>
<tr>
<td>Mosborough Hall Hotel</td>
<td>High Street Mosborough Sheffield S20 5EA</td>
<td>24</td>
<td>AA 3 Star</td>
</tr>
<tr>
<td>Nether Edge Hotel</td>
<td>19-23 Montgomery Road Sheffield S7 1LN</td>
<td>28</td>
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<tr>
<td>Travel Inn - City Centre</td>
<td>Angel Street Sheffield S3 8LN</td>
<td>160</td>
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<tr>
<td>Premier Lodge</td>
<td>Sheffield Road Sheffield S9 2YL</td>
<td>89</td>
<td></td>
</tr>
<tr>
<td>Travel Inn</td>
<td>Attercliffe Common Road Sheffield S9 2LU</td>
<td>101</td>
<td></td>
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<tr>
<td>Name</td>
<td>Location</td>
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<td>Rating</td>
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<td>-----------------------</td>
<td>-----------------------------------------------</td>
<td>----------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Low range (£30-£40)</strong></td>
<td></td>
<td></td>
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<tr>
<td>The Briary</td>
<td>12 Moncrieffe Road Nether Edge Sheffield S7 1HR</td>
<td>10</td>
<td>RAC 4 Diamonds</td>
</tr>
<tr>
<td>Critchleys</td>
<td>6 Causeway Head Road Dore Sheffield S17 3DT</td>
<td>3</td>
<td>AA 3 Diamonds</td>
</tr>
<tr>
<td>Etruria House Hotel</td>
<td>91 Crookes Road Sheffield S10 5BD</td>
<td>10</td>
<td>ETC 3 Diamonds</td>
</tr>
<tr>
<td>Hardwick House</td>
<td>19 Hardwick Crescent Sheffield S11 8WR</td>
<td>3</td>
<td>RAC 3 Diamonds</td>
</tr>
<tr>
<td>Lindum Hotel</td>
<td>91 Montgomery Road Nether Edge Sheffield S7 1LP</td>
<td>11</td>
<td>ETC 3 Diamonds</td>
</tr>
<tr>
<td>Psalter House</td>
<td>17 Clifford Road Brincliffe Sheffield S11 9AQ</td>
<td>1</td>
<td>ETC 4 Diamonds</td>
</tr>
<tr>
<td>Quarry House</td>
<td>Rivelin Glen Quarry Rivelin Valley Road Sheffield S6 5SE</td>
<td>2</td>
<td>AA 4 Diamonds</td>
</tr>
<tr>
<td><strong>Budget (under £30)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Abbey View House</td>
<td>168 Prospect Road Totley Rise Sheffield S17 4HX</td>
<td>2</td>
<td>ETC 3 Diamonds</td>
</tr>
<tr>
<td>Hillside</td>
<td>28 Sunningdale Mount Sheffield A11 9HA</td>
<td>2</td>
<td>ETC 3 Diamonds</td>
</tr>
<tr>
<td>Ivory House Hotel</td>
<td>34 Wostenholm Road Sheffield S7 1LT</td>
<td>8</td>
<td>ETC 3 Diamonds</td>
</tr>
<tr>
<td>Parklands</td>
<td>113 Rustlings Road Sheffield S11 2AB</td>
<td>3</td>
<td>AA 3 Diamonds</td>
</tr>
<tr>
<td>Riverside Court Hotel</td>
<td>4 Nursery Street Sheffield S3 8GG</td>
<td>66</td>
<td>ETC 3 Diamonds</td>
</tr>
<tr>
<td>Tyndale</td>
<td>164 Millhouses Land Sheffield S7 2HE</td>
<td>3</td>
<td>ETC 3 Diamonds</td>
</tr>
</tbody>
</table>
### Name | Location | Number of Beds | Rating
--- | --- | --- | ---
Others | | | 
Priory Lodge Hotel | 40 Wostenholm Road Sheffield S7 1LJ | | 3 Star

---

**B - Conference Centres**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description of location</th>
<th>Description of facility</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>City Centre Venues</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A&amp;G Passenger Boats</td>
<td>City Centre</td>
<td>Based on the water in the Victoria Quays complex. Suited to smaller events.</td>
<td>52</td>
</tr>
<tr>
<td>Sheffield City Hall</td>
<td>City Centre</td>
<td>Landmark building currently undergoing refurbishment. Comprises 5 halls and VIP room.</td>
<td>50-2,346 Max 3,768</td>
</tr>
<tr>
<td>Conference 21 at Sheffield Hallam University</td>
<td>City Centre</td>
<td>High specification audio-visual equipment, computer suites and video conferencing. Range of accommodation including air conditioned lecture theatres and smaller meeting rooms.</td>
<td>10-450 Max 1,256</td>
</tr>
<tr>
<td>Cutlers Hall</td>
<td>City Centre</td>
<td>Listed building high quality facility with 3 halls, two rooms and a small suite.</td>
<td>10-600 Max 1,510</td>
</tr>
<tr>
<td>Cutlers Hotel</td>
<td>City Centre</td>
<td>Boutique hotel for meetings or celebrations offers suite, lounge and 3 small break out rooms.</td>
<td>10-80 Max 130</td>
</tr>
<tr>
<td>Gatecrasher One</td>
<td>City Centre</td>
<td>Recently refurbished building in ground of the Old Roper &amp; Wreaks Steelworks. State of the art lighting, sound, visual and IT facilities makes venue ideal for fashion shows and filming.</td>
<td>50-1,500</td>
</tr>
<tr>
<td>Grosvenor House Hotel</td>
<td>City Centre</td>
<td>Conference facilities within the hotel include 7 suites catering for meetings and conferences.</td>
<td>40-400 Max 720</td>
</tr>
<tr>
<td>Hilton Sheffield</td>
<td>City Centre</td>
<td>Four star waterside hotel able to host a range of events from conferences to dinner dances and reunion weekends.</td>
<td>30-250 Max 810</td>
</tr>
<tr>
<td>Holiday Inn Royal Victoria</td>
<td>City Centre</td>
<td>Listed building providing conference facilities in ballroom and 10 suites.</td>
<td>20-400 Max 820</td>
</tr>
<tr>
<td>Hotel Bristol</td>
<td>City Centre</td>
<td>Modern contemporary hotel providing conference facilities in 4 rooms.</td>
<td>20-40 Max 80</td>
</tr>
<tr>
<td>MegaCentre</td>
<td>City Centre</td>
<td>Recently refurbished facility including main concert hall and</td>
<td>10-700 Max 1,080</td>
</tr>
<tr>
<td>Venue</td>
<td>Location</td>
<td>Description</td>
<td>Capacity</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Millennium Galleries</td>
<td>City Centre</td>
<td>Hosts major exhibitions of visual art, craft and design.</td>
<td>15-175</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 350</td>
<td></td>
</tr>
<tr>
<td>Novotel</td>
<td>City Centre</td>
<td>Modern conference and banqueting facilities.</td>
<td>10-200</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 500</td>
<td></td>
</tr>
<tr>
<td>Ponds Forge International centre</td>
<td>City Centre</td>
<td>Sports and leisure complex with conference, exhibition and banqueting facilities, including the International Hall and four other rooms.</td>
<td>40-2,000</td>
</tr>
<tr>
<td>Sheffield Theatres</td>
<td>City Centre</td>
<td>The Crucible, Lyceum and Studio auditoria are available to hire for full of half day conference events. Smaller space is also available in the theatre's rehearsal rooms and bars.</td>
<td>Lyceum 1,110</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Crucible 980</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Studio 395</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 2,475</td>
<td></td>
</tr>
<tr>
<td>Sheffield Town Hall</td>
<td>City Centre</td>
<td>Grade 1 listed building providing conference facilities in the Reception Suite which may be subdivided and 5 boardroom style meeting rooms.</td>
<td>35-200</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 375</td>
<td></td>
</tr>
<tr>
<td>Sheffield United Football Club</td>
<td>City Centre</td>
<td>Football Club offers a variety of suites for hosting conferences including the Platinum Suite and Carlsberg and Millennium suites with views over the ground plus 31 executive boxes.</td>
<td>20-300</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 700 (exc. boxes)</td>
<td></td>
</tr>
<tr>
<td>St Mary’s Conference Centre</td>
<td>City Centre</td>
<td>Converted church providing a first class conference venue suitable with a large events catered for in the Nave and Hall and seven smaller meeting rooms.</td>
<td>12-150</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 478</td>
<td></td>
</tr>
<tr>
<td>The Showroom and Workstation</td>
<td>City Centre</td>
<td>This is a major regional centre for media production and exhibition including 4 cinemas, business space and conferencing facilities which include 3 conference rooms and 2 exhibition areas in addition to a variety of smaller meeting rooms.</td>
<td>12-80</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 222 (exc. Cinemas)</td>
<td></td>
</tr>
<tr>
<td>Travel Inn Metro Sheffield</td>
<td>City Centre</td>
<td>The hotel provides conference facilities for small groups.</td>
<td>30</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 60</td>
<td></td>
</tr>
</tbody>
</table>

**Edge of Centre Venues (1-5 miles)**

<table>
<thead>
<tr>
<th>Venue</th>
<th>Location</th>
<th>Description</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sheffield Chamber of Commerce</td>
<td>Lower Don Valley 1 mile from City Centre</td>
<td>5 suites and boardroom. Suits variety of events and formats. High quality facility with IT facilities.</td>
<td>12-60</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 144</td>
<td></td>
</tr>
<tr>
<td>University of Sheffield</td>
<td>2 miles from the City Centre</td>
<td>The University has a range of conference facilities from small meeting rooms and libraries to foyers and dinning halls.</td>
<td>10-400</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 2,657</td>
<td></td>
</tr>
<tr>
<td>Beauchief Hotel</td>
<td>4.5 miles from the City Centre</td>
<td>Traditional hotel catering for private parties and conferences up to 100 people.</td>
<td>4-100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 144</td>
<td></td>
</tr>
<tr>
<td>Gateway Meeting Place</td>
<td>4 mile from city centre 2 miles from the M1 J34</td>
<td>Victorian building providing modern conference facilities in four rooms with wireless Internet facilities, access to telephones and ISDN points, and state of the art audiovisual equipment.</td>
<td>10-70</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max 130</td>
<td></td>
</tr>
<tr>
<td>Venue Name</td>
<td>Location</td>
<td>Description</td>
<td>Capacity</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>---------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Broomgrove Conference and Training Centre</td>
<td>2 miles from the City Centre</td>
<td>Grade II listed building providing training, conference and meeting facilities across 8 rooms from the ballrooms to stables and library.</td>
<td>8-90 Max 200</td>
</tr>
<tr>
<td>Centre in the Park</td>
<td>2 miles from city centre 8 miles from the M1 J33</td>
<td>A multi functional building, designed, planned and run in partnership with the local community. It has a wide variety of good value rooms for hire with crèche and catering facilities.</td>
<td>Max 100</td>
</tr>
<tr>
<td>Charnwood Hotel</td>
<td>1 mile from the City Centre</td>
<td>Hotel providing conference facilities for up to 100 people.</td>
<td>Max 100</td>
</tr>
<tr>
<td>Don Valley Stadium</td>
<td>Lower Don Valley 4 miles from the City Centre</td>
<td>The stadium has a wide range of meeting rooms to cater for up to 1200 people. Ideal for product launches, exhibitions, trade shows and conferences whilst also catering for smaller meetings in 7 smaller rooms.</td>
<td>20-1,200 Max 1,610</td>
</tr>
<tr>
<td>Ice Sheffield</td>
<td>Lower Don Valley 4 miles from the City Centre</td>
<td>Ice centre provides conference facilities for up to 110 people.</td>
<td>Max 110</td>
</tr>
<tr>
<td>Kelham Island Museum</td>
<td>0.75 miles from the City Centre</td>
<td>Set on a historic island on the River Don, this working museum offers an informal setting for business and social including receptions, corporate hospitality and seminars.</td>
<td>Max 225</td>
</tr>
<tr>
<td>Marriott Sheffield</td>
<td>1.5 miles from the City Centre 8 miles from the M1</td>
<td>Luxury hotel set in 12 acres of parkland close to the Peak District providing a range of facilities for conferences including a large hall and 11 other meeting rooms of varying sizes.</td>
<td>8-250 Max 577</td>
</tr>
<tr>
<td>Owleton Stadium</td>
<td>Upper Don Valley 3 miles from the City Centre</td>
<td>This recently refurbished stadium provides conference facilities for up to 200 people.</td>
<td>Max 200</td>
</tr>
<tr>
<td>Rutland Hotel</td>
<td>1.5 miles from city centre 9 miles from the M1 J33</td>
<td>Hotel set in its own grounds provides conference facilities in four suites.</td>
<td>30-100 Max 220</td>
</tr>
<tr>
<td>Sheffield Park Hotel</td>
<td>5 miles from city centre 8.5 miles from the M1 J33</td>
<td>Modern conference suites are highly flexible and suitable for a wide range of needs. Accommodation includes Devonshire Suite (500 delegates), Cavendish and Talbot (245 and 200 delegates) plus a range of smaller meeting rooms.</td>
<td>30-500 Max 1,279</td>
</tr>
<tr>
<td>Sheffield Wednesday Football Club</td>
<td>5 miles from the City Centre</td>
<td>Sheffield Wednesday's conference centre is spacious, adaptable, comfortable and modern offering excellent facilities.</td>
<td>Max 300</td>
</tr>
<tr>
<td>The Source at Meadowhall</td>
<td>4 miles from city centre 0.25 miles from the</td>
<td>The Source at Meadowhall is a purpose built meeting and</td>
<td>21-150 Max 473</td>
</tr>
</tbody>
</table>
M1 J34 | conference venue. It has 16 suites, varying in size and uses from luxurious meeting rooms in a variety layouts, to our lecture theatre seating 150 delegates all with video / multi media facilities.

### County Houses & Out of Centre Venues (over 5 miles)

<table>
<thead>
<tr>
<th>Venue</th>
<th>Location Details</th>
<th>Description</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Magna</td>
<td>6.5 miles from the City centre 0.5 miles from the M1 J34</td>
<td>Magna also provides both huge and small rooms combined with the unique flexible use of four pavilions based around the elements, Earth, Air, Fire, Water.</td>
<td>120-1,600 Max 3,130</td>
</tr>
<tr>
<td>Aston Hall Hotel</td>
<td>8 miles from the City Centre Close to J31 M1</td>
<td>18th century Country House Hotel within its own landscaped gardens. Three function rooms available for conferences meeting and functions.</td>
<td>30-350 Max 430</td>
</tr>
<tr>
<td>Brookfield Manor</td>
<td>12 miles from the City Centre</td>
<td>Historic 17th century country house set in 90 acres of private parkland and bordered by the Peak National Park. The centre has a range of meeting rooms that are ideal for corporate events coupled with organised outdoor training activities.</td>
<td>Max 75</td>
</tr>
<tr>
<td>Ringwood Hall Hotel</td>
<td>15 miles from city centre 3 miles from the M1 J30</td>
<td>Grade 2 listed building set in 29 acres of parkland and gardens providing a good range of meeting rooms that are ideal for corporate events coupled with organised outdoor training activities.</td>
<td>20-250 Max 430</td>
</tr>
<tr>
<td>Tankersley Moor</td>
<td>8 miles from city centre 0.25 miles from M1 J36</td>
<td>17th century hotel and spa resort provides 11 versatile conference rooms and suites.</td>
<td>15-400 Max 1,085</td>
</tr>
<tr>
<td>Whirlowbrook Hall</td>
<td>5 miles from city centre 11 miles from the M1 J33</td>
<td>Set in landscaped gardens close to the Peak District National Park. The Hall offers 7 rooms suitable for conferences and corporate events.</td>
<td>10-100 Max 269</td>
</tr>
<tr>
<td>Whitley Hall</td>
<td>6 miles from the City Centre 3 miles from the M1 J33</td>
<td>16th century country house set in its own grounds caters for smaller conference events.</td>
<td>Max 70</td>
</tr>
</tbody>
</table>

### C - Other Major Leisure Attractions
<table>
<thead>
<tr>
<th>Leisure Facility/Attraction</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sports Stadia</strong></td>
<td></td>
</tr>
<tr>
<td>Hillsborough</td>
<td>Sheffield Wednesday Football Club’s Hillsborough ground is located approximately 3 miles north of the City Centre on Penistone Road. Hillsborough. Conference facilities are available; three suites (two of which accommodate up to 250 people), a lounge for smaller seminars, and a restaurant.</td>
</tr>
<tr>
<td>Bramall Lane</td>
<td>Bramall Lane is Sheffield United Football Club’s ground. The stadium is bounded by Bramall Lane, Cherry Street, John Street and Shoreham Street, north west of the City Centre. The stadium has a capacity of circa 30,000. The stadium is available for private functions catering from between 10-400 people and has conference and banqueting facilities with three function suites (plus 31 private boxes). There is also a weekly nightclub at one of the bars in the stadium. Blades Enterprise Centre is a managed business facility built in 2001 (£3.5 million) at the corner of the pitch. The centre is operated by Forsyth and provides high tech accommodation for forty small-medium sized businesses on flexible terms.</td>
</tr>
<tr>
<td>Sheffield United Academy, Shirecliffe, Sheffield S5 4SU</td>
<td>Academy has indoor and outdoor synthetic sports pitches for hire. The Academy also has a Forsyth Business Centre providing 5,000ft business space.</td>
</tr>
<tr>
<td>Sheffield Hallam FM Arena</td>
<td>Award winning entertainment venue which seats 12,000 and hosts over 100 events per year, including concerts and major trade exhibitions. Sheffield Steelers Ice Hockey team are also based at the arena and attract over one million visitors every year.</td>
</tr>
<tr>
<td>Don Valley Stadium</td>
<td>Award winning stadium which hosts a variety of sporting and entertainment events. With 52,000 capacity (25,000 seated) and over 400,000 attendances per year, Don Valley is widely regarded as the best outdoor concert venue outside London.</td>
</tr>
<tr>
<td>Don Valley Bowl</td>
<td>Purpose built open-air showground which is often used in conjunction with the main stadium and the arena.</td>
</tr>
<tr>
<td><strong>Multi-screen Cinemas</strong></td>
<td></td>
</tr>
<tr>
<td>UGC Cinema Valley Centertainment S9 2EP</td>
<td>20 screen cinema located to the south of Meadowhall Retail Park at Valley Centertainment.</td>
</tr>
<tr>
<td>Vue Cinema Rear of the Oasis, Meadowhall S9 1EP</td>
<td>11 screen cinema complex located at the Meadowhall Shopping Centre</td>
</tr>
<tr>
<td>Odeon Arundel Gate S1 1DL</td>
<td>City centre cinema</td>
</tr>
<tr>
<td>The Showroom Paternoster Row S1 2BX</td>
<td>The Showroom and Workstation represent a major regional centre for media production and exhibition, located within Sheffield's Cultural Industries Quarter, an area contributing to regeneration strategies</td>
</tr>
</tbody>
</table>
through the promotion of cultural and media businesses. The Showroom is one of the largest independent cinemas in the country with four screens, a multi-purpose educational apace (60 seat), catering facilities. The Showroom also functions as an event and conference venue, and as an industry standard preview theatre for film makers.

<table>
<thead>
<tr>
<th><strong>Bowling Alleys</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hollywood Bowl</td>
<td>26 lane bowling alley located to the south of Meadowhall Retail Park at Valley Centertainment.</td>
</tr>
<tr>
<td>AMF Bowling Sheffield Sicy Avenue Firth Park Sheffield S5 6NF</td>
<td>24 lane bowling alley</td>
</tr>
<tr>
<td>Fastlane Bowl Richmond Road, Handsworth, Sheffield, South Yorkshire S13 8TB</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Theatres</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sheffield City Hall 1930's art deco classical concert hall in the City centre. The Hall is currently undergoing a £12.5million refurbishment, but is due to reopen in October 2005. The Oval Concert Hall is a 2,300 seat auditorium used for rock, pop, ballet, comedy and symphonic music. City Hall also has a ballroom and memorial hall used for hosting events (from conferences to comedy).</td>
<td></td>
</tr>
<tr>
<td>Crucible Theatre 980-seat Crucible auditorium</td>
<td></td>
</tr>
<tr>
<td>Lyceum Theatre 1068-seat listed building</td>
<td></td>
</tr>
<tr>
<td>Studio Theatre Opened in 1971 and refurbished in 1994, the Studio Theatre has a capacity of up to 400.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Casinos</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grosvenor Casino Queens Rd Sheffield S2 4DF</td>
<td></td>
</tr>
<tr>
<td>Napoleons Casino &amp; Restaurant 17, Livesey St Owlerston S6 2BL</td>
<td></td>
</tr>
<tr>
<td>Napoleons Casino &amp; Restaurant 844, Ecclesall Rd Ecclesall S11 8TD</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Sports Centres/Facilities</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Edge Climbing Centre John Street,</td>
<td>Climbing wall and bouldering room for beginners through to experienced climbers. Located neat to Sheffield United’s ground.</td>
</tr>
</tbody>
</table>
Bramall Lane, Sheffield, South Yorkshire S2 4QU

The Foundry Climbing Centre
45 Mowbray Street, Sheffield, S3 8EN.

A series of climbing walls to suit all abilities. Hosts events and provides courses. Located north west of the City Centre.

Sheffield Ski Village and Adventure Mountain Vale Road

Europe’s largest all season ski resort with superb virtual snow. Catering for all levels of ski, snow boarding and snow blading.

Ice Sheffield

Opened early in 2003 and comprises two Olympic size ice rinks, conference facilities and function room, gym, dance studio, café, bar and restaurant.

Verdon Street Recreation Centre

Located in the Burngreave area of East Sheffield the centre provides recreational activities for the local community including health and fitness classes and youth clubs. The Centre is to benefit from some refurbishment in the near future.

Ponds Forge International Sports Centre

Holds over 300 events and attracts more than 1.3 million visitors a year. Comprises of Olympic size swimming pool, international sports hall, regional size leisure pool, health and fitness centre and nightclub. Centre also has conference and banquet facilities accommodating up to 1,200 people in its International Hall and Skyline Suites.

Hillsborough Leisure Centre
Beulah Road Penistone Road Sheffield S6 2AN

A major £1.3 million re-development in October 2002 makes this venue Sheffield’s most popular local leisure centre with an attendance of 600,000 per annum and Fitness Unlimited membership of over 2,000. Facilities now include a leisure pool, training pool, regional size sports hall and purpose-built dance studio, café bar, creche and health & beauty spa with sauna, relaxation areas, steam and treatment rooms.

Concord Sports Centre

Located close to the Wincobank area of Sheffield. It attracts over half a million people every year and includes: nine purpose-built 5-a-side football pitches, 25m pool and teaching pool, indoor bowls hall, double court sports hall, health and fitness suite, function room and dining facilities.

Woodburn Stadium

The stadium offers a 400 seat stand with a total capacity of 20,000 and parking for 400. The stadium has an eight land track, long jump pit and various infield activities. Other facilities available include: PA system with radio microphone, catering & bar facilities, floodlights and full event management. The venue is used, amongst others, for university competitions, Sheffield Eagles reserve games, Worlds Student Games and the Special Olympics.

Sheffield Sports Stadium Ltd
Owerton Stadium, Penistone Rd, S6 2DE

Originally built in 1929 the Owleton Stadium hosts some 260 greyhound race meetings every year and is home to Sheffield Tigers speedway team. The stadium became part of the Sheffield based A & S Leisure Group in 1991 and has since had a £3,000,000 refurbishment and enjoys over 300,000 visits a year ranking sixth in size of the Country’s 30 N.G.R.C. Greyhound tracks.

Golf Courses

There are three major golf courses operated by Play Golf Sheffield, Tinsley Park, Birley Wood and Beauchief.