

Lower Don Valley Masterplan Framework : Economic Case

Completed by PricewaterhouseCoopers LLP

For and on behalf of British Land

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Final Report

Disclaimer

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Executive Summary

PricewaterhouseCoopers LLP (PwC) was commissioned by British Land to prepare an assessment of the economic rationale for regeneration of the Lower Don Valley, Sheffield.

Existing employment in the LDV is around 12,500. Aside from the retail related jobs (5,700), the remainder of the employment base is concentrated in the manufacturing, transport and utilities sectors. Many of these employment opportunities will be in low grade, low paid and unsustainable activities (particularly in the industrial sector).

The Masterplan proposals are anticipated to create substantial new employment and attract private sector investment. Net employment of 12,400 direct jobs and 3,100 indirect/induced jobs in the local economy are estimated. The generation of 15,500 net new jobs will be offset by the displacement of some existing activities on the development sites, some of which may be relocated elsewhere in Sheffield and some may cease trading altogether.

The creation of a sustainable community in the LDV is dependent on the development of sustainable businesses that are competitive. The Masterplan will create a high quality competitive business environment that allows these sustainable businesses to be attracted and flourish. In the process existing jobs will be replaced by new jobs that are more diverse, higher paid and more sustainable (eg: offices, destination leisure and modern retailing activities).

The LDV is characterised by a high level of SMEs, many of them serving local markets. The new economic activities will be more export oriented, serving customers/markets outside Sheffield (eg: destination leisure uses) which will improve the economic competitiveness of the area and drive up economic output and wages.

A high proportion of the new jobs will be accessible to local people subject to appropriate training and capacity building measures. The role of The Source could be extended to provide the platform for this. This is important given the high unemployment levels in and around the LDV, low average wage levels, and the mismatch of skills to employment opportunities.

The new economic base of LDV will support the wider sustainability of Sheffield as a city and underpin its role in the Yorkshire and the Humber region. For example, the new jobs will support the generation of an additional GDP of £269 million pa which represents around 4% of current GVA pa in Sheffield.

There is a clear and significant role for the Don Valley in supporting the economic and social regeneration of Sheffield and South Yorkshire. The Don Valley already represents a major focus for leisure, recreation and sporting investment. The Master Plan proposals offer a major opportunity to build on these developments, and truly establish the Don Valley as a 'Leisure and Sports Corridor' offering an exciting, high profile, nationally and internationally known, gateway to a new and revitalised Sheffield.

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1 Introduction

1.1 Scope

PricewaterhouseCoopers LLP (PwC) was commissioned by British Land to prepare an assessment of the economic rationale for regeneration of the Lower Don Valley, Sheffield. This report complements the work of a number of specialist consultants to undertake masterplanning, market analysis and destination branding as part of the Masterplan development process for the Lower Don Valley. This work needs to be underpinned by a sound assessment of the economic contribution of the Masterplan vision for the Lower Don Valley.

Our economic assessment has comprised a two phase process involving a number of interrelated components as follows:

Phase 1 : Baseline Development

- Review of baseline socio economic context of the Lower Don Valley in terms of labour market, demographic characteristics, education, housing, health, training etc. This task forms the evidence base for the economic assessment of the Lower Don Valley Masterplan, which are covered in the remaining tasks listed below;

Phase 2 : Economic Case

- Positioning of the Lower Don Valley regeneration within broader Sheffield City, Sub - Regional and Regional strategies / initiatives;
- Review of the social and economic contribution of various proposals for major regeneration developments in the Valley;
- Analysis of the contribution to economic competitiveness of Sheffield delivered through the Masterplan;
- Role of employment, housing and infrastructure proposals in creating sustainable communities in Sheffield;
- Economic gateway role of the Valley for wider regeneration; and
- Assessment of economic development linkages through supplier linkages, business clusters, and support to wider regeneration initiatives.

1.2 Approach

In developing this Report, we have reviewed information from a number of sources including

- Sheffield City Council
- Sheffield City Strategy 2002-2005
- Census 2001, ONS
- A number of web based sites

1.3 Structure of the report

This report is structured as follows:

- Section 2 covers the strategic context for the Lower Don Valley in terms of key national and local policies affecting economic regeneration and the area's development.
- Section 3 presents a socio economic baseline of the Lower Don Valley and surrounding areas and benchmark statistics against regional and national averages.
- Section 4 outlines the wider economic contribution of the Lower Don Valley and its role as a gateway to local economic development
- Section 5 estimates the economic impact of the Masterplan.
- Appendix A sets out the methodology for selecting the socio-economic indicators.
- Appendix B presents the detailed socio-economic statistics
- Appendix C outlines the strategic connections between the Lower Don Valley masterplan and Sheffield City strategies.

This Report has been undertaken on the basis of consultations with the various stakeholders as outlined above. However, no attempt has been made to audit or validate the information provided. It is therefore emphasised that our report findings are represented on this basis.

2 Strategic Context

2.1 Brief History of Sheffield

Sheffield is England's fourth largest City with a population of 513,234. It sits astride the Peak District Park and industrial South Yorkshire where fortunes were built on steel and coal, but which has seen decades of decline and rationalisation in its major employment sectors, particularly coal and steel and related industries. The problems and issues associated with this industrial decline and related social and community problems have long been recognised and considerable attempts have been made to address them.

For centuries, Sheffield people have worked to produce goods that have enjoyed worldwide recognition for quality. The "Made in Sheffield" name was renowned for excellence in steel production and metal manufactured products for items such as cutlery and tools. A hundred years ago "Sheffield was one of the World's most influential cities – underpinned by the quality of steel it produced which gave the city a competitive edge over rival producers" (*quote from One Great Workshop by English Heritage*).

Manufacturing has been a major employer in Sheffield for over two hundred years and as recently as 1970 employed half of the City's workforce. The recession of the 1970s culminated in a slump in world manufacturing capacity and a consequent decline in demand for steel. In the period 1971 to 1988 deindustrialisation reduced the manufacturing sector in the City to just 23% of total employment, with a loss of over 75,000 jobs. This left a legacy of dereliction, particularly in the Lower Don Valley, needing vast capital investment to redress the balance.

The last twenty years have seen a dramatic transition in the local economy that in turn has had enormous repercussions for working life and local communities. There has been a shift towards the service sector which has resulted in a process of adjustment and adaptation to different types of work, working patterns and employment opportunities. This transition has been achieved through a process of direct public sector intervention, private sector investment and community self help.

For Sheffield, and the surrounding sub-region of South Yorkshire, the demise of industry on such a scale, created a fundamental problem for the economy that could not be redressed without substantial additional financial support. Local resources from the City Council and other partners were insufficient to deal with the problems of this scale on their own.

As a first step towards tackling the regeneration in the local economy in the early 1980s, the Sheffield City Council prepared an economic regeneration plan, later to become the Sheffield Economic Regeneration Strategy. This plan focused specifically on two geographical areas: the Lower Don Valley, the City's major industrial area where most of the former jobs in steel and heavy engineering were concentrated and where dereliction was most immediately visible; and on the City Centre itself, where the Council wished to promote the development of new high-tech sectors for Sheffield.

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The Sheffield Economic Strategy which was developed from the Plan, sought to bring together the resources of the City, both public and private, in a series of programmes ranging from land-use and physical development to visitor development and research. Work on these programmes began during the mid-80s.

The strategy identified 4 main objectives in coping with the many influences on the City. These were to:

- Work towards the regeneration of the Sheffield economy;
- Influence the type of regeneration for a long-term future;
- Maximise the benefits of economic regeneration throughout the community; and
- Act as an enabler in private and public sector enterprises.

The role of Sheffield City Council was to direct resources to each of the four objectives, while also maximising the value of its own resources and additional resources from Central Government grants and European grant regimes. Funding was directed towards pump priming to start development, to carrying out specific projects, and to attract further resources and investment from the private sector.

In 1986, the City Council set up a committee to oversee the development and co-ordination of activities aimed at the regeneration of Sheffield's economy. This body, the Sheffield Economic Regeneration Committee (SERC) brought together a broad range of organisations including central and local government representatives, local business and industry, trade unions, educational establishments and community groups to exchange ideas and develop initiatives and projects.

In 1988, the area was recognised by the European Commission as an area requiring special assistance, when it approved an Integrated Development Operations Programme (IDOPS) for the Yorkshire and Humberside steel area. This programme assisted and supported a wide range of programmes aimed at addressing regeneration and economic development needs of the area and its communities.

Despite these recent improvements, Sheffield (along with Barnsley, Doncaster and Rotherham) collectively were designated as an Objective 1 area in 2000. This status recognised that the region's GDP per head is below 75% of the EU average.

The attainment of Objective 1 status led to an allocation of over £700 million of EU Structural Funding for the area and enabled it to be zoned as a Tier 1 area for the UK Government's Regional Selective Assistance ("RSA") grant scheme. Tier 1 status enables Sheffield businesses to secure the maximum level of state aid available in the UK.

2.2 The Creative Vision

As outlined above, in many respects Sheffield has already been successful at regenerating the City following the decline of its steel industries. However, given the huge reliance that the City had on that industry, Sheffield needs to continue its regeneration process.

In targeting future growth, Sheffield has developed strategic plans that are focussed on:

- Its role in the Yorkshire and Humberside economy;
- Its role in the South Yorkshire economy; and,
- Exploiting its indigenous strengths.

These strategic plans are supported by an over arching vision for the City's future called "Creative Sheffield". Launched at the 2003 Core Cities conference in Newcastle, Creative Sheffield sets out the City's ambition to sustain its economic recovery by being an "Innovative Producer" city.

2.2.1 An "Innovative Producer" City

The City's vision recognises that its original economic strength was built on innovation and that decline in the steel industry began when innovation stopped. It is, therefore, seeking to develop a more diverse economic base focused around the cross-cutting theme of innovation. Sheffield recognises that with successful innovation, its businesses will be able to create competitive advantage and hence be more commercially successful.

In developing its Creative Sheffield vision, the City also compared its vision to other examples of successful "innovative producer" cities across Europe, concluding that:

- Manufacturing can be successful in advanced countries – but only if leading edge knowledge is used creatively to make innovative and high value products;
- Cities which are successful manufacturing centres are recognised as places where leading edge knowledge institutions and businesses which play defining roles in specialised global markets can work together for market advantage; and,
- Effective civic leadership and high level partnership working are fundamental for creating the conditions in which strategic alliances between knowledge and business can flourish on the scale necessary to bring prosperity and a high quality of life to major cities and their regions.

2.2.2 The Sheffield City Strategy

Through its local strategic partnership, Sheffield First Partnership, the city has progressively refined its aims and objectives to underpin the success of the city. This process led to the launch of the Sheffield City Strategy 2002 – 2005. Integral to that strategy are the ten important factors of a successful city identified being:

- A strong economy;
- A well educated workforce;
- A vibrant city centre;
- Attractive, successful neighbourhoods;
- A healthy population;
- Low crime;
- Good transport systems;
- A good cultural and sporting sector;

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- Compulsion and inclusion; and,
- Well run, sustainable and well-regarded.

The city strategy also puts a high priority on creating the optimal conditions for translating leading edge knowledge into high volume products, namely supporting the Creative Sheffield vision for an “Innovative Producer” city.

Economically, this strategy is underpinned by the South Yorkshire partners and Yorkshire Forward’s “cluster strategy”. Based on five broad areas, each with the potential to develop knowledge based clusters on a significant scale, they are:

- Advanced manufacturing and metals;
- Environmental and energy technologies;
- Bioscience;
- Creative and Digital Industries; and,
- Business, Professional and Financial Services.

The city also has clear aspirations to develop its latent tourism potential. The existence of latent potential is highlighted by some of Sheffield’s key tourism attributes, such as:

- Its location on the edge of the Peak District and its own parks and leisure space, making it England’s “greenest city”;
- Its innovative Cultural Industries Quarter, and wider city cultural offering; and,
- Its City of Sport image, built on a foundation of major sporting events and facilities.

2.3 Background benchmarking Statistics

The success of the city’s response to the decline of steel and heavy engineering employment is highlighted by some of the performance data shown below.

2.3.1 Key Performance Data

- Since the mid 1990’s Sheffield has created 5,000 (net) new jobs per annum;
- Recent GDP data indicates that Sheffield’s GDP per head is increasing faster than most regional cities; and,
- Unemployment is falling faster than the national rate.

(Source: Sheffield City Council)

2.4 Key Regeneration Initiatives

The City has already undertaken a number of projects and identified further projects as key elements of the strategies above. Examples include:

Cultural Industries Quarter

- Established over ten years ago, the City was a pioneer in developing a focus for the development of its creative industries businesses.

City centre regeneration projects

- Sheffield established an Urban Regeneration Company (“URC”), Sheffield One, to develop a range of key city centre projects. Projects include:
 - New Retail Quarter;
 - City Hall and Precincts;
 - Heart of the City;
 - Sheffield Station;
 - Castlegate;
 - E-Campus.

Public Realm projects

- The City has strongly and successfully promoted the improvement of the “feel” of the City with projects such as the Winter Gardens, the Peace Gardens and the Millennium Galleries.

Advanced Manufacturing and Materials – The Advanced Manufacturing Park

- A high profile flagship development between Sheffield and Rotherham providing a focus for research based manufacturing;

Creative and Design – The E-Campus

- A new, city centre campus development to bring together leading digital businesses. The E-Campus will provide an environment to support South Yorkshire’s strong indigenous company base in the sector, with specialities including e-learning, software development and games.

Cross Cutting – The ‘Knowledge Starts’ Project

- A collaborative project between the city council and the two Universities to accelerate the number and quality of new businesses created from the research and intellectual capital of the Universities.

3 Baseline Socio Economic Assessment

3.1 Introduction

At the heart of the process for developing the Lower Don Valley (LDV) Masterplan is the need to deliver long term sustainable communities which integrates economic prosperity, social inclusion and quality of life. These three pillars of sustainability have defined the analysis of the social and economic positioning of the LDV and have shaped the selection of baseline socio-economic indicators.

This assessment sets out the baseline indicators upon which future sustainability can be appraised, and therefore presents a current snap-shot of the individual elements which are presented at a number of different spatial levels. We have presented the baseline socio-economic information at the following geographical areas:

- **Masterplan Area** comprising parts of the wards of Darnall, Burngreave and Brightside (see Figure 3.1);
- **Sheffield Study Area**, which includes the Masterplan area and adjacent wards on which impacts of the proposed development are expected: Brightside, Burngreave, Castle, Darnall, Firth Park, Manor, Nether Shire (see Figure 3.1);
- **Rotherham Study Area** comprising Rotherham wards that are also adjacent to the Masterplan area and on which impacts of the proposed development are expected: Boston, Central and Kimberworth (see Figure 3.1);
- **Sheffield and Rotherham** city council areas;
- **South Yorkshire**, which is designated an Objective 1 area and comprises the local authorities of Sheffield, Barnsley, Doncaster and Rotherham;
- **Yorkshire and the Humber** region;
- **England**.

The indicators selected to provide this baseline are considered the most appropriate according to these sustainability parameters and will help to underpin the development of the Masterplan. An overall appraisal of the socio-economic baseline is then presented in the form of a SWOT analysis.

3.2 Background Information

3.2.1 Geographical location

The LDV masterplan area is a highly industrial area to the South East of Sheffield city centre and bordering Rotherham. Most of the masterplan area lies in the ward of Darnall, with the remainder overlapping into Brightside and Burngreave wards as shown in Figure 3.1 below. However, there are several wards that are of close enough proximity to warrant

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inclusion in this socio-economic assessment as they are likely to be significantly impacted by any regeneration that takes place. These are the Castle, Firth Park, Manor and Nether Shire wards of Sheffield. Also included due to their proximity are data relating to the Boston, Central and Kimberworth wards of Rotherham. Therefore, the socio-economic baseline position has been established for the Masterplan area and wider study area covering nearby wards in Sheffield and Rotherham. These baseline positions have been compared with the baseline situation for the whole of Sheffield, Rotherham, South Yorkshire sub region, Yorkshire and the Humber region, and England.

3.2.2 Demographics

The wards in the Sheffield study area comprise seven of the 29 wards in Sheffield and 21% of Sheffield’s total population. It is therefore an important area in terms of population density. Paradoxically, the Masterplan area comprises a mere 2% of the total population of the Sheffield study area wards. The Rotherham area wards comprise 12% of the total Rotherham city population. In both cities, populations have declined by around 2% over the past decade. Both the Sheffield and the Rotherham wards appear to have a marginally younger population than their respective city and national averages, with a higher proportion of children under 16. Consequently, there are proportionately fewer people in the current working age groups and fewer older people.

Ethnic minority populations in the Sheffield study area varies significantly between wards, as shown in Table 3.1, with an exceptionally high proportion of ethnic minority groups evident in Burngreave, to an almost wholly white population in Nether Shire. However, overall ethnicity is 18.62% of the total Sheffield study area population, more than twice the Sheffield city average, with the major ethnic groups represented by Asian and African populations.

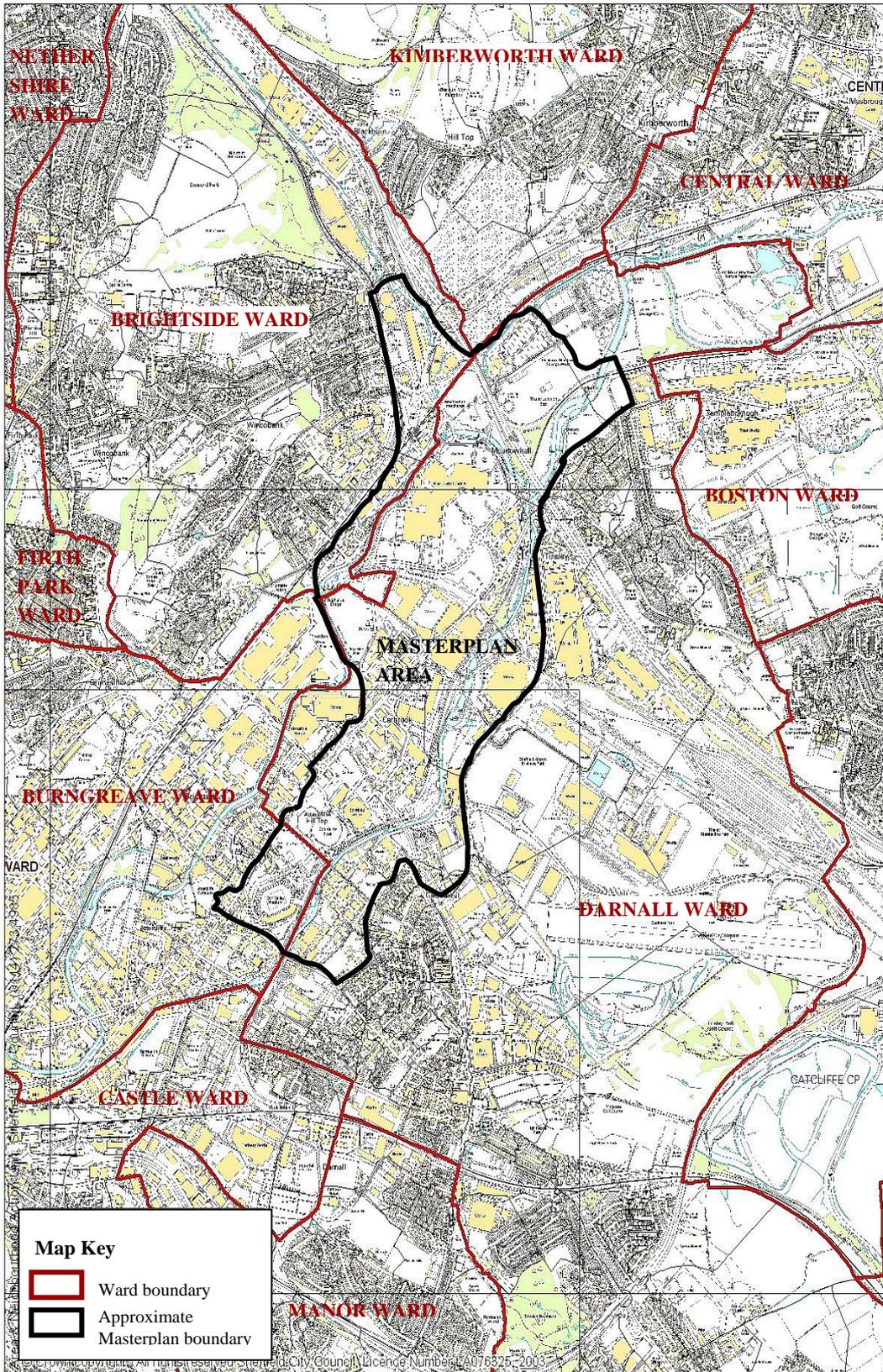
Table 3.1: Proportion of ward populations consisting of ethnic minority groups

	%
England	9.1
Sheffield	8.8
Brightside	9.2
Burngreave	41.5
Castle	18.7
Darnall	27.2
Firth Park	22.4
Manor	5.0
Nether Shire	4.2
Rotherham	3.1
Boston	15.2
Central	19.5
Kimberworth	1.2

Source: ONS, Census 2001

In the Rotherham Study Area, the average ethnicity population level is significantly lower at 11% although almost triple the overall Rotherham level of 3.1%.

Figure 3.1: Map showing Masterplan and Study areas



3.3 Social Inclusion

Disadvantage, or poverty, can be illustrated using the Index of Multiple Deprivation (IMD), which is presented at ward level. This index uses six indices to measure deprivation, demonstrating the concentration of issues within each ward. The severity of each issue serves as a useful indicator of poverty and therefore social inclusion of the area.

The wards in the Sheffield study area are rated among the 10% most deprived wards in the country with Burngreave and Manor rated among the 1% most deprived. In the Rotherham Study Area, the ratings for the 3 wards are marginally better although still in the bottom 25% of the index. The individual aspects of deprivation will be considered as part of the quality of life section.

Deprivation figures are not available specifically at the Masterplan area level, however, the extent of deprivation and therefore social inclusion in the surrounding wards should be a good representation of the circumstances within the Masterplan area.

Another good indication of social inclusion is considered to be voter turnout. Statistics show that for the Sheffield Study Area, turnout was poor in the 2003 local elections at around only 26%, lower than the city average and significantly lower than normally recorded at a national level (in 2001 voter turnout in England was 59.3%). Ward level statistics for Rotherham were not publicly available.

3.4 Economic Prosperity

A crude measurement of economic prosperity that is generally used is GDP or Gross Value Added (GVA). However, in the context of sustainable communities, other aspects of economic competitiveness that serve as indicators of prosperity are physical infrastructure, labour and business competitiveness.

3.4.1 Overall economy

In terms of the evaluation using GVA, Sheffield City delivered a higher level of GVA at £12,634 per head in 2001 than both South Yorkshire, and the Yorkshire and Humber region. However, despite its growth of 3.8% in 2000, the Yorkshire and Humber region was ranked 7th out of the 8 regions in England, significantly behind London, at £19,500 per head and the national average of £14,470. Therefore, in context, Sheffield appears to be a poor performer. GVA data is not available at ward level thus a more detailed analysis of the study area is not possible for this indicator.

3.4.2 Physical Infrastructure

Transport

Public transport networks are extremely good from the Sheffield city centre to the Masterplan area, especially following the development of the Meadowhall Centre. However, transport between wards, especially in the Sheffield Study Area, is poor, with

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public transport only serving a small proportion of the populations in these areas. Road access is also poor from the Sheffield study area to the Masterplan area, with regular heavy congestion exacerbating the problem. Thus, with the existing transport infrastructure, any regeneration in the Masterplan area may be out of reach of the neighbouring populations.

Land and premises

The Masterplan area is still considered the employment centre of Sheffield mainly due to the existence of decent land sites appropriate for industrial operations. However, these undeveloped plots are mainly in the hands of private landowners, who have a tendency to hold the land in anticipation of price rises. This behaviour appears to be increasing the value of suitable industrial land sites, albeit not significantly at present.

The Masterplan area appears to be an increasingly popular area for commercial business relocation, which has led to a shortage of suitable land and premises for this type of property. Conversely, in the Sheffield study area, there are a high number of small, cheap premises available which is fuelling an increase in the number of SMEs in these areas.

3.4.3 Labour competitiveness

This section considers the basic characteristics of the Sheffield study area in terms of the labour market, the labour demand and the composition and characteristics of the workforce, focusing initially on the youngest age groups who are the potential future workforce.

With respect to the Masterplan area, however, with few residents living within its boundaries and the relevant information available for analysis drawn from Census statistics, an analysis of its labour competitiveness is not appropriate. Of more relevance is the business competitiveness of the area, as it comprises mostly industrial and commercial properties, and this is analysed in the next section.

Education of the workforce

Education levels in both the Sheffield Study Area and the Rotherham Study Area are classified as poor. Indeed, as per the IMD rankings mentioned above, 9 out of the 10 wards reside among the bottom 5% of poorest educated in the country. This is supported by the individual ward data on qualification levels which show that at least for the Sheffield Study Area, the proportions of the working age population with no qualifications are almost 50% above the national level and almost half for those with NVQ level 3 or higher. The Rotherham Study Area, albeit better, is still a poor performer in this domain.

The proportions of full-time students of working age appear to be marginally lower than the national average in most cases. Indeed there appears to be an issue of early leavers which authorities in the study area are trying to rectify through the introduction of 16+ education. Schools on the other side of the Sheffield city centre are perceived to be of better quality, and if school children have the choice, they often to prefer to attend one of these.

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Table 3.2: Educational level comparatives for proportion of working age population with no qualifications and proportion with level 3 NVQ or higher

	% working population with no qualifications	% working population with NVQ level 3 and above
England	28.9	28.2
Yorkshire and The Humber	33.2	24.1
South Yorkshire	35.9	21.9
Sheffield	32.0	29.2
Rotherham	36.8	17.0
Sheffield study area	45.8	13.7
Rotherham study area	38.1	17.7

Source: ONS, Census 2001

Economic activity

In terms of the working age population, the proportion that is economically active suggest that apart from Brightside in the Sheffield Study Area and Kimberworth in Rotherham Study Area, each of the wards of interest have significantly lower levels of economically active populations at around 10% lower than the national average. On closer inspection, the key reasons for this appear to lie in the excessively high proportion of economically inactive groups who either stay at home or are permanently ill or disabled; levels that are in some cases almost double the UK and city averages.

Employment levels

Unemployment rates are also high, with each of the wards of interest showing higher levels than the national level of 3.4%. However, there are clear disparities between the wards with some, Castle and Manor, showing significantly high rates of almost triple the national rate.

In line with this, employment levels of the working age residents are in most cases very low which could largely be due to their poorer educational achievements. Occupational classification of jobs show that for the residents of both the Sheffield Study Area and the Rotherham Study Area, only 25% of employees fall in the managerial/ professional groups, almost 15% lower than the national average, with proportions of lower skilled workers nearly double.

Mismatch of skills to local jobs

Indeed, through discussion with Sheffield City Council, it appears that despite the existence of many high quality jobs in the Sheffield study area, competition is high from the rest of the city, and local residents generally lose out owing to a mismatch of skills. Considering that the average distance travelled to work by the working population in both areas is around 9km, this would appear to support this inference, suggesting that residents have to travel out of the local area to find employment.

Average income

With so many more residents in the Sheffield Study Area of lower occupational skill and educational attainment compared to the national average, plus the heavy competition for better paid jobs from residents in the rest of Sheffield, this has resulted in average income levels being significantly low. This is evidenced by the income index of the IMD which rates all the wards in the Sheffield Study Area within the bottom 10% of wards nationally in terms of average income and five out of the seven wards in the bottom 5%.

This is consistent with the high proportions of the Sheffield Study Area population that receive income support. With a national average of 10% and a city average of 11%, rates for the wards in the Sheffield Study Area are in all cases significantly higher. More than 25% of the Manor and Burngreave populations, for example, receive income support.

Table 3.3: Labour competitiveness shown at different area levels in terms of economic activity, rate of unemployment and proportion claiming income support

	% of population of working age	% working population economically active	% rate of unemployment	% working population claiming income support
England	72.3%	66.9%	3.4%	8.9%
Yorkshire and The Humber	72.0%	65.2%		9.7%
South Yorkshire	72.3%	62.6%		
Sheffield	72.9%	63.1%	4.2%	11.4%
Rotherham	79.9%	64.0%	4.0%	9.7%
Sheffield study area	69.4%	57.9%	6.5%	19.5%
Rotherham area	70.8%	62.0%	4.9%	13.7%

Source: ONS, Census 2001

3.4.4 Business competitiveness

Business competitiveness is analysed with respect to the Masterplan area (where data is available), as well as the Sheffield Study and Rotherham Study areas. Where possible, comparisons are made to regional and national figures.

Business population

In the Sheffield Study Area there were 2,335 businesses registered for VAT purposes, 96% of which were classified as small and medium sized enterprises (SMEs) according to the number of employees. This data excludes those businesses whose turnover does not exceed the VAT threshold, suggesting that the level of SMEs will likely in reality be even higher.

Since the Masterplan area is highly industrialised with very few residents located there, it can be expected that there would be more larger firms located here compared with the

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Sheffield Study Area. The figures for the Sheffield study area (Table 3.4) are largely consistent with this expectation, with two of the wards that overlap the Masterplan area (Darnall and Burngreave) having some, albeit very few, larger enterprises, and the adjacent wards consisting almost solely SMEs. The exception is Castle, part of which comprises the industrial area to the south of the Masterplan area.

Table 3.4: Numbers of VAT Registered Enterprises in the study and Rotherham areas

	% 1- 49 Employees	% 50- 249 Employees	% 250 or more Employees
Sheffield Wards			
Brightside	97.7	2.3	0
Burngreave	95.7	3.4	0.5
Castle	96.9	1.2	1.6
Darnall	94.3	4.1	1.6
Firth Park	100	0	0
Manor	100	0	0
Nether Shire	100	0	0
Rotherham wards			
Boston	92.3	5.1	2.6
Central	94.2	4.8	1
Kimberworth	100	0	0

Source: Inter-Departmental Business Register, ONS (Mar 2000)

From this it is clear that in most cases, there are fewer pillar companies to provide well paid work and act as economy leaders, although the dominance of smaller sized firms suggest that an entrepreneurial culture does exist although perhaps not to as greater extent as would first appear. Comparing the levels of self-employment in the study area, which is a good indicator of entrepreneurship, the average rate of 5% (which falls to almost 3% in Castle and Manor) is much lower than both the city rate of 6.23% and the national rate of 8.3%. Indeed, some wards within the study area are perceived to be more entrepreneurial than others such as Darnall, which has a large Asian population who have adopted a self-help culture.

Key sectors

It is estimated that there some 12,500 jobs currently located in the Masterplan area. The Masterplan area is the steel base of Sheffield as supported by the figures in the Table below, showing a high level of employment in the metal manufacturing sector especially compared to the city average. Dominant firms in the industry are Sheffield Forge Masters (currently downsizing) and Autokompu (EU’s biggest supplier of stainless steel) which have acted as key drivers for the local economy, especially in generating downstream activities. As an international activity Autokompu offers potential export growth opportunities in the future.

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Table 3.5: % of employees by industry sector (SIC 2 digit codes)

	Sheffield		Sheffield study area ¹		Rotherham area		Masterplan area ²	
	No.	%	No.	%	No.	%	No.	%
Extraction, Food, Textiles			977	1	544	2	40	0
Wood, paper, chemicals, plastic, metals, machinery			15,082	22	6,145	19	2,940	23
Computers, electrical, motor, furniture, recycling			2,493	4	757	2	388	3
TOTAL Manufacturing	36,176	16	18,552	27	7,446	23	3,368	27
Energy, water, construction			3,581	5	1,146	3	310	2
TOTAL Production	11,458	5	3,581	5	1,146	3	310	2
Retail, hotel, restaurant			19,967	29	5,827	18	5,724	46
Transport, postal, financial, Property, hire, computing, research, other business, public admin			6,335	9	4,260	13	1,295	10
			7,491	11	4,923	15	1,106	9
Education, health, social			9,718	14	8,183	25	342	3
Waste disposal, recreation, other services			3,157	5	1,148	3	385	3
TOTAL Services	182,812	79	46,668	68	24,341	74	8,851	71
Total	230,446		68,801		32,933		12,528	

Source: Annual Business Enquiry, 2000

The development of the Meadowhall Centre has been a major influence in diversification of the business sector, and in turn has attracted other important businesses to the area, notably Abbey National and Dixons since 1990. Other major employers in the LDV include Meadowhall Retail Park, Centretainment, Royal Mail Sorting Office, and Bekaert (formerly Tinsley Wire). This trend is also supported by the figures in Table 3.5.

According to Sheffield Council, the SME's in the Sheffield study area are predominantly focused on serving residential population needs such as food and clothing although there also appears to be a high level of support for the steel industry with 22% of employees working in this sector. However, the poor transport access to the LDV masterplan area, referred to above, reduces the mobility of the population to the main industrial areas which is likely to increase reliance on local demand.

¹ Excludes the Nether Shire ward

² Statistics were derived from the postcode areas that overlap the Masterplan area: S91, S92 and S95. As they all extend beyond the masterplan boundaries, the statistics were apportioned to give a better representation of industry figures in the Masterplan area.

Inward investment

Due to its image as the employment centre of Sheffield, the Masterplan area has always been attractive for business relocation. Indeed, it still offers attractive investment opportunities for businesses particularly given the previously successful redevelopment, the presence of prestige facilities (such as the sports arena), its accessibility and proximity to the M1 and the provision of physical infrastructure.

However, an inhibiting factor at present is the shortage of commercial development land to support the growth in non-industrial sectors, as well as planning restrictions on the area around the motorway.

Overall competitiveness

The above indicators suggest that there is substantial room for improvement in terms of competitiveness. The current reliance on the steel industry could put the Sheffield Study Area in a very vulnerable position should the circumstances that prompted the last decline arise again. The domination of a few large firms and many SMEs makes the business population unbalanced, although with developments that have recently taken place, it is clear that the area can attract new sectors and increase the stock of medium and large firms.

The lack of availability of suitable land could pose a significant threat in the future and restrict the area's potential as an economic driver for the city.

3.5 Quality of life

In order to attain sustainability, non-economic factors represented by quality of life characteristics, need to be considered. Those factors considered to be most appropriate quality of life indicators are standard of health of population, housing and public service provision, included as part of the IMD indices, as well as levels of crime. As previously mentioned, due to these statistics being reported at ward level, the quality of life of residents in the Masterplan area is not considered.

Health of ward populations

Life expectancy levels are lower for the Sheffield Study Area than the city and national averages of 75 years for men and 80 for women. In some cases, notably, Manor and Burngreave, ages are as much as 5 years lower for both genders.

The levels of the Sheffield Study Area population that are classified as having a long term illness are also significantly higher than the national average of 18%, with Manor again noted as having 29% of its population classified as such.

These statistics are supported by the Index of health deprivation presented in the Table below, which shows that all the wards in the study area are ranked among the bottom 15% of wards in the country.

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Reasons for poor health are thought to stem from the extreme levels of poverty (see the social inclusion section). Indeed, considering the low levels of average income previously mentioned, particularly in the Manor and Burngreave wards, this certainly suggests that poor health could be poverty related.

Housing

Housing in the study area is mainly council owned, and is quite poor quality in many parts. From the index of housing deprivation below, all wards in both the Sheffield study area and the Rotherham area are in the bottom 20% nationally with the exception of Nether Shire which is ranked among the bottom 25%.

Geographical access to public services

Contrary to the other indicators, geographical access to public services scores relatively well on the deprivation index, especially in the Sheffield study area (see Table 3.6). This relates to for example health care, environment, and waste disposal services.

Crime

Crime statistics were only available at a city level, and showed that the level of petty crime was a significant issue at 37.1 crimes per 1000 people for Sheffield, and 27.8 crimes per 1,000 people for Rotherham.

For the Sheffield Study Area, perception of crime is very poor particularly in relation to the rest of the city, and crime rates in certain wards are especially bad. In fact, such is the scale of the problem in Burngreave, that the local authority has taken significant steps to reduce crime by locating more policemen in trouble spots, which has led to a reduction in petty crime levels in the ward.

Table 3.6: Indices of multiple deprivation for the study areas, showing ranking out of 8414 wards- the lower the score, the less deprived the ward is.

	Access to public services		Housing		Health	
	Ranking	Percentile placing	Ranking	Percentile placing	Ranking	Percentile placing
Sheffield	Top:		Bottom:		Bottom:	
Brightside	6572 nd	75%	1999 th	25%	924 th	15%
Burngreave	6032 nd	70%	1399 th	20%	343 rd	5%
Castle	7411 th	85%	1254 th	15%	511 th	10%
Darnall	5505 th	50%	930 th	15%	1179 th	15%
Firth Park	6867 th	75%	865 th	15%	409 th	5%
Manor	6058 th	70%	1568 th	20%	247 th	5%
Nether Shire	6957 th	80%	1948 th	25%	457 th	10%
Rotherham	Bottom:		Bottom:		Bottom:	
Boston	4479 th	50%	1331 st	20%	1170 th	15%

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Central	5136 th	50%	670 th	10%	312 th	5%
Kimberworth	3138 th	35%	3246 th	50%	1821 st	25%

Source: Indices of Deprivation for Wards in England, DETR 2000

According to the figures, of the aspects of deprivation considered poorest, education scored the worst, with all wards in the bottom 5% in the country. For income, employment, health and child poverty all wards in the Sheffield Study Area were rated in the bottom 15% of the most deprived wards. Paradoxically, in terms of geographical access to services, the Sheffield Study Area and Rotherham Study Area wards were ranked reasonably highly, with all in the top 50%.

3.6 Swot Analysis of the LDV Masterplan Area

A summary of the above socio-economic baseline information is presented in the following table showing the indicators in terms of competitive advantages, weaknesses, opportunities or threats. From this it becomes more evident how the separate indicators link together and how they may be impacted by the Masterplan.

<i>Competitive advantages</i>	<i>Weaknesses/ disadvantages</i>
<ul style="list-style-type: none"> ▪ Location next to the M1 motorway and proximity to Sheffield city centre. ▪ Excellent transport links from Sheffield city into the LDV masterplan area. ▪ Considered a centre of employment and attractive as location for inward investment. ▪ High level of access to public services in the wards in the study area. 	<ul style="list-style-type: none"> ▪ Poor transport links between the study area and the LDV masterplan area so poor mobility of labour force. ▪ Poor labour competitiveness especially compared to the rest of Sheffield; low levels of economic activity. ▪ Unbalanced business population, domination by a few large organisations and SMEs. ▪ Low income levels and high reliance on state benefits renders it difficult for populations in the study area to reverse the poverty cycle. ▪ High levels of petty crime in the area compared to Sheffield which may deter potential investors. ▪ Highest levels of deprivation in the country and poor quality of life for most residents in the study area.
<i>Potential Opportunities</i>	<i>Potential threats</i>
<ul style="list-style-type: none"> ▪ Evidence of improved perception of the masterplan area post development of the Meadowhall Centre. ▪ Good labour supply if able to match skills to better paid jobs. ▪ Evidence of some entrepreneurship in the adjacent wards. Availability of cheap, small premises could be capitalised to promote SME start-up in the study area and thus promote business competitiveness. ▪ The study area should qualify for significant investment under the Sheffield City Strategy which aims to focus on the most deprived 	<ul style="list-style-type: none"> ▪ Political barriers to development of industrial and commercially suitable land, especially with respect to land around the Motorway, planning of which is currently restricted by the Highways Agency. ▪ Unavailability of suitable premises for business relocation may restrict economic growth of the area. ▪ Lack of diversification of industry sectors- still heavy reliance on the steel industry which may make area vulnerable. Attempts to diversify in the past not been successful. ▪ Low levels of expectation and benefit culture in

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<p>areas with low educational levels above NVQ level 3, and those with poor health and high crime rates.</p> <ul style="list-style-type: none"> ▪ Transport links highlighted as being an area of investment under the plan, which should increase labour mobility. ▪ Potential to be significant economic driver for the city. 	<p>many of the adjacent wards may prevent residents from taking advantage of opportunities arising from the masterplan.</p> <ul style="list-style-type: none"> ▪ Poor health, housing and education are likely to increase necessity for further investment of scarce public resources in public services that despite current accessibility, do not appear to be reversing poverty trend.
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4 Economic Role of the Lower Don Valley

4.1 Introduction

The Lower Don Valley lies to the South East of Sheffield City Centre. It used to be the centre of the steel and heavy manufacturing industries. The area covers over 1,000 hectares in extent. By the mid-1980s, the scene had changed to an industrial ‘moonscape’ following the collapse of the steel industry and the economic recession. Sheffield’s unemployment rate trebled in three years. By this time almost 400 hectares of land in the Valley were either vacant, derelict or degraded, with millions of square metres of empty, often semi-derelict, buildings.

Today, the scene is changing dramatically, but substantial work still remains to be done. This transformation of the Lower Don Valley has been achieved with the assistance of a series of plans and initiatives, including the following:

- The "Employment and Environmental Strategy for the Lower Don Valley (1984)" – this focussed on consolidating traditional manufacturing industry in the heart of the Valley; reclaiming derelict industrial land for leisure and high technology industries; promotion of the area, pump-priming and infrastructure investment by the public sector, and the attraction of private sector interest;
- The draft "Lower Don Valley Local Plan" developed the land-use proposals further with options for the development of a ‘leisure corridor’, new employment parks, a ‘green’ framework, a selection of ‘flagship’ developments to act as catalysts;
- In 1988, the Government set up the Sheffield Development Corporation with £150million to spend over 5 to 7 years to regenerate an area of 900 hectares, including the Meadowhall site, the Canal Basin and the Airport as flagship projects. The Development Corporation produced a planning framework that identified a number of key development opportunities for the private sector to participate in the regeneration of the Valley. Key regeneration targets included:
 - Improving strategic infrastructure to act as a catalyst for further development;
 - Assembling new development sites;
 - Providing the urban equivalent of greenfield sites within a new landscape; and,
 - Creating 20,000 new jobs.

4.2 Current Position

All of these plans and initiatives focussed on developing, restoring and exploiting the Don Valley's assets. This included the river itself and the canal, a range of new and prominent large-scale developments, and the restoration and bringing back into productive use buildings of historic importance. Developments included new neighbourhood centres, linked by a clear structure of landscape, pedestrian and transport routes, to retain and enhance the strong local and community characteristics of the area.

A series of environmental programmes served to give the area a well-needed facelift. Vast areas have been reclaimed and ‘greened’ to provide a setting for new developments. High technology industries have been attracted – to new industrial parks including the Sheffield Technology Park. The new City airport was constructed, providing air links with European cities and other cities in the United Kingdom, but has since ceased commercial flights. The Supertram network was constructed to link the City Centre and the Lower Don Valley.

A leisure corridor was created along the length of the Valley. This included the construction of new sports stadia (on sites where steelworks once stood), and Europe’s largest out-of-town shopping centre now dominates the motorway entrance to the City at Meadowhall. Others projects have included a transport interchange, road construction and widening schemes, the creation of riverside and canal walkways, cycleways and linked footpaths.

Major Projects have included:

- **Meadowhall Regional Shopping and Leisure Complex** – this opened in 1990, and comprises over 130,000 square metres of shopping and leisure space and facilities. The initial development cost £400m;
- **Carbrook Hall Business Park** – this opened 1990/91, and comprised 11,500 square metres of offices, developed at a cost of £6.5m;
- **12 O’Clock Court** – this opened in 1990, and comprised 3,800 square metres of offices, developed at a cost of £6.5m;
- **Mayfield Business Park** – this opened in 1990, and comprised 5,000 square metres of industry, and was developed at a cost of £1.5m;
- **Sheffield Technology Park** – this opened in 1989, and included 3,000 square metres of property development, at a cost of £2.5m;
- **Amberley Business Park** – this open in 1990 and comprised of 3,500 square metres of industry and business infrastructure, at a cost of £1m;
- **Newhall Road Riverside Court** - this opened in 1991, and comprised of 5,100 square metres of industrial space, developed at a cost of £1.5m;
- **British Steel Trade Centre** – this opened in 1991, and was designed as a storage and distribution centre for stainless steel products. It was developed at a cost of £35m;
- **Restoration of Albion House** – this opened in 1991, providing 6,000 square metres of refurbished office accommodation, delivered at a cost of £1.4m;
- **Attercliffe Library and Baths** – these opened in 1991 and included 1,500 square metres of business space, developed at a cost of £1m.
- **Don Valley Stadium and Arena** – these were developed to support the attraction of the World Student Games Developments, and were opened in 1990/91. An international athletic stadium and indoor arena with related facilities were provided at a cost of £65m;
- **Sheffield Canal Improvements** - these were completed in 1991, and included improvements to bring the canal back to cruising standard and were designed to promote recreation, leisure and tourism development. Improvements cost £5m;
- **Five Weirs Walk** – these were completed in 1991 and involved the construction of public footpaths and cycleways along the length of the River Don, at a cost of £1m;

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- **Meadowhall Transport Interchange** - this opened in 1990 and provided a new mainline rail station and bus interchange, at a cost of £1m;
- **Supertram (Line 2)** – this opened in 1993, and links Meadowhall to Sheffield City Centre, and was delivered at a cost of £25m;
- **Sheffield City Airport** – this opened in 1996, providing internal business flights and short haul European destinations. This was developed at a cost of £15m;
- **Landscape Road Improvements** – delivered between 1992-1995, including a landscaped road corridor through the Valley providing high quality access to developments, at a cost of £15m;
- **Improvements to Meadowhall Road** – completed in 1990, and including the construction of a new railway bridge and widening of the existing Meadowhall Road to provide new access to a number of sites in the Lower Don Valley, at a cost of £14m;
- **Footpaths and Cycleways** – these opened between 1991 and 1995, and involved the creation of a new network of footpaths and cycleways to serve the Valley and provide links to neighbouring areas, at a cost of £1m;
- **Wicker Viaduct** – this opened in 1991, and involved the cleaning of gateway features to create an attractive entrance and promote development of the arches, and was delivered at a cost of £0.5m;
- **Sanderson's Weir Ecology Park** – this opened in 1991 and involved the development of a waterside ecology and sculpture park with associated 'Interpretation Centre', and was delivered at a cost of £0.1m;
- **Tinsley Park Open Space** – this opened in 1994, and comprised the development of 28 hectares of landscaped open space to the south-west of the City Airport, at a cost of £0.5m;
- **Muslim Cultural Centre** – this was opened in 1990, and involved the conversion of an existing school building, to provide 1,000 square metres of community space, at a cost of £0.5m;
- **Afro Caribbean Enterprise Centre** – the first phase of this opened in 1992, and included the provision of workshops, a bakery and retail outlet for the Afro Caribbean community to encourage small enterprises, and totalled 2,000 square metres of space, at a cost of £2.4m.
- **The Source** – a dedicated education and training centre opened in Spring 2003 for local businesses, retailers and the community based in Meadowhall.

An important key to the success of these regeneration projects throughout the Lower Don Valley to date has been the result of co-ownership of the problems of the Valley, co-operation by all sections of the community, including the European Community, co-ordination of all the activities in the Valley by the Sheffield City Council, the Sheffield Development Corporation, the Sheffield First Partnership and the commitment of all the partners. The continuation of such an approach is essential to ensure that the future of Sheffield continues to prosper.

A number of important lessons emerge from the Lower Don Valley experience to date including:

- The importance of a clear vision to provide direction for regeneration;

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- A planning framework to provide the opportunity to clearly state such a vision, a strategy, and targets for regeneration;
- The need to identify the key ‘players’ in the process of regeneration, including those who are responsible for bringing about the successful regeneration of an area, those who will help to fund it and those who will benefit; and,
- The importance of ensuring buy-in and co-ownership of the problems, with the co-operation of all the partners, proper co-ordination of all the activities, and last but not the least, the commitment of all the partners.

4.3 The fit of the Master plan

The fit and potential contribution of the proposed Master plan to the Lower Don Valley will be highly important to the regeneration of the area and its overall economic and social impact. In considering how the proposed Master plan meets Sheffield’s strategies and the Low Don Valley’s needs in particular, the fit has been considered in terms of three elements as follows:

- The environment;
- Infrastructure; and,
- Land use.

The following sections outline the synergies and complementarities between the proposals in the Master Plan and key strategies and development plans for Sheffield, South Yorkshire and the various communities in the Lower Don Valley. They outline how the proposed developments will support the key objectives and aims of the major players in the regeneration and re-development of Sheffield, at a local, sub-regional, regional and European level, and help create a new, vibrant, and sustainable economy for Sheffield and South Yorkshire.

4.3.1 The Environment

A key objective for the re-development of the Don Valley is the need to improve the natural environment and maximise the use of amenities and facilities, such as the river valley, to improve the quality of life in the area and create a more sustainable community.

In addressing issues related to the environment the Lower Don Valley Master Plan has a close synergy and complementary objectives and aims with a range of other strategies and programmes designed to support economic growth and environmental improvements in Sheffield, the Don Valley and wider in terms of South Yorkshire and the Yorkshire region. These links include the:

- Regional Economic Strategy;
- Sheffield Environment Strategy;
- South Yorkshire Transport Plan;
- South Yorkshire objective 1;
- Single Programming Document; and,

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- A range of local and community based initiatives, such as Groundwork Sheffield.

The Master Plan includes a range of initiatives and objectives linked to:

- Improving the water corridors, particularly to support the development of non-vehicular transport opportunities;
- Supporting the development of a ‘Green Business Park Programme’ across the Lower Don Valley;
- The reduction of air pollution and traffic congestion along the Don Valley / M1 Corridor; and,
- The increase in recycling and waste minimisation programmes, based on the expansion and development of schemes already operating in the Don Valley area.

4.3.2 Infrastructure

A key priority for the Master Plan is the recognition of the need to improve and enhance infrastructure provision across the area – to improve access to facilities and amenities, local employment opportunities and to remove other constraints to sustainable economic growth. A range of initiatives are under consideration ranging from substantial improvements in the provision and coverage of public transport systems, such as the Supertram, to bus and rail services and facilities, and the overall improvement in road networks, particularly to reduce congestion and environmental pollution, as well as potential to address housing and other residential requirements.

The Master Plan will offer opportunities for complimentary and enhanced delivery of key objectives and outcomes of a range of existing and proposed infrastructure developments and improvements across the Don Valley, into Sheffield City Centre and further a field into Rotherham. An important aim of these proposed activities is to assist in the delivery of substantial improvements in infrastructure provision outlined in local strategies and plans, including the:

- Regional Economic Strategy – addressing targeted regeneration activity to connect communities to economic opportunities;
- Single Programming Document for European funding, the South Yorkshire Transport Manifesto and Creative Sheffield objectives – by undertaking substantial improvements in road and rail infrastructure to improve transport links and access to the City Centre and the M1, as well as development of improved rail freight facilities (at the Tinsley Marshalling Yards), along with related benefits linked to reductions in congestion and other environmental impacts;
- Sheffield City Strategy – supporting programmes such as the Urban Bus Challenge for East Sheffield, improvements in local rail links and improvements in the coverage of the Supertram network; as well as linking to objectives related to property and site developments, including the Sheffield Business Park, the E-Campus, the Advanced Manufacturing Park at Waverley, Templeborough and sites linked to Magna;

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- Framework for Regional Employment and Skills Action – by increasing access to employment opportunities by removing transport constraints; and,
- Housing Market Renewal Pathfinder Prospectus (Transform South Yorkshire) – to support initiatives to improve housing stock, public realm and community opportunities outlined in the Prospectus.

4.3.3 Land Use

A key priority in many of the local strategies and plans are the issues related to land use, and restrictions on new developments, such as road congestion and poor access – particularly linked to the M1 junctions and related access roads. The Master Plan aims to address some of the key constraints and work in partnership with Sheffield City Council, the Sheffield First Partnership, and a wide range of local and community organisations, to deliver practical solutions to these issues. This will address a range of objectives and priorities included in the:

- Single Programming Document;
- South Yorkshire Spatial Study;
- Sheffield Unitary Development Plan and,
- Regional Economic Strategy.

The M1 Corridor has been identified as a ‘Strategic Economic Zone’, with eligibility for substantial European funding. The Master Plan will support a wide range of activities related to the development of employment land, to initiatives linked to the generation of a critical mass of businesses and industries to create sustainable business and employment opportunities along the Corridor, including targeted clusters, the improved provision of business advisory and support services, improved access to financial support. as well as a range of programmes to address recruitment and training needs. Initiatives will also include infrastructure projects covering sites, premises, improved access, and the development of the local ICT infrastructure. These initiatives will specifically address the provision of sites, training and transport improvements to help in the creation of the right environment for businesses to grow and expand. Initiatives will include a focus on the growth and development of SMEs, particularly relating to embedding the benefit of new investment to create sustainability.

Building on the long track record of successful re-development of brownfield sites throughout the Don Valley, and the access to substantial European funds, there is a clear opportunity to address regeneration needs that have been constrained by road congestion and access problems, by providing infrastructure enhancements to open up development sites and create new employment opportunities. The Don Valley has been highlighted in the South Yorkshire Spatial Study, the Single Programming Document and the Sheffield Unitary Development Plan, as having the potential to provide the quantity and range of land resources necessary to enable the sustainable re-development of Sheffield. This in turn could support wider regeneration and redevelopment across South Yorkshire, with links to developments in Rotherham at Waverley and Magna, and other sites at the Airport and elsewhere.

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A major role has been played to date in the process of regeneration of the Don Valley by the development and attraction of a range of sporting, leisure and tourism facilities and amenities. A wide range of local strategies, local plans and initiatives have focussed on the wider economic benefits that can be delivered by developments in these areas, including the:

- City of Sheffield Tourism Strategy 2003-2008;
- Sheffield City Strategy 2002-2005;
- Sheffield First Cultural Strategy;
- Regional Economic Strategy;
- Environment Strategy for Sheffield 2003;
- South Yorkshire Spatial Study; and,
- Single Programming Document.

As previously outlined, major success has been achieved in developing and attracting sporting, leisure and recreational facilities along the Don Valley corridor, and it is proposed to expand on this success to create an ‘axis of recreational and amenity potential between the City Centre and Meadowhall’, as well as encouraging the development of various heritage themes in and around Sheffield, building on its long and successful industrial history, and including a specific focus on the regeneration of the Don Valley. It will also be important to develop opportunities linked to visitors to Meadowhall shopping centre to increase their ‘stay’ and ‘spend’ in the area, and develop other marketing opportunities linked to the Centre to increase tourism visitor numbers, and the range and breadth of activities they undertake in the area, and thereby their spend with the Sheffield and South Yorkshire economy. There are also potential opportunities to be exploited linked to development of ‘water based’ amenities and facilities, including the Tinsley Marina, the canal and the river.

As in the past, there is an important need and role for local community groups and major players, to be actively involved in the continuing process of redevelopment, working with the City Council and others. Potential private sector partners could for example include Sheffield International Venues (operators of the Don Valley Stadium, Ice Sheffield, the Hallam FM Arena and the Don Valley Grass Bowl) and British Land (Meadowhall Centre Ltd). There is an important opportunity to utilise the value of high profile sporting and leisure facilities to complement City Centre developments while also extending Sheffield’s signature to the east. The involvement of local and community groups in this process is important to ensure equal access to employment opportunities and the reduction of inequalities and social deprivation.

A key issue in relation to land use, is the need to create new sites and properties to attract new business investment into the area, particularly in higher value added knowledge based clusters and to support the growth and development of existing businesses and sectors – including the leisure and tourism cluster, which is so strongly represented. Opportunities exist to re-develop sites along the Valley corridor from close to the City centre through to Meadowhall. It is important that these developments address mixed uses, from industrial to office, to retail and leisure, and potentially residential. These developments will support the aims and objectives of a wide range of existing strategies and programmes, linked to business growth and employment generation. These include the:

- Sheffield Corporate Plan;

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- Regional Economic Strategy;
- Sheffield City Strategy;
- Sheffield Learning Plan;
- City of Sheffield Tourism Strategy;
- Sheffield First Cultural Strategy;
- Single Programming Document;
- Framework for Regional Employment and Skills Action;
- South Yorkshire Spatial Study; and,
- Transform South Yorkshire Prospectus.

In turn these proposals will support a range of education, training and skills development, and innovation and competitiveness objectives bringing wider benefit to the City and local communities, and addressing and tackling a broad range of social and other inequalities.

4.4 Conclusion

There is a clear and significant role for the Don Valley in supporting the economic and social regeneration of Sheffield and South Yorkshire. Appropriate regeneration initiatives can also significantly improve the environment and quality of life of Sheffield (and Rotherham) residents, while at the same time improving employment, learning, leisure and recreational opportunities.

A major potential constraint on the development of Sheffield and South Yorkshire is represented by the road and transportation issues related to Junction 34 of the M1. This Junction and Meadowhall Road represent one of the major ‘gateways’ to the City of Sheffield. A programme of major redevelopment on sites in the Lower Don Valley, and particularly at Meadowhall, with improvements to the motorway junction and related road infrastructure, provides the potential to open up a range of new sites and employment opportunities in the immediate locality, along the Don Valley and into the centre of Sheffield itself – which can not be provided elsewhere. Additional benefit can also be achieved through links to other developments and initiatives, including the re-development of the City Airport as a high profile business park, and the Advanced Manufacturing Park at Waverley.

The Don Valley already represents a major focus for leisure, recreation and sporting investment. The last twenty years have seen substantial investment in leisure and sports facilities and amenities, such as the Don Valley Stadium, the Hallam FM Arena, Ice Sheffield, river and canal side walks, the Institute of Sport, and the development of sports technology expertise at Sheffield Hallam University, to name a few. The Master Plan proposals offer a major opportunity to build on these developments, and truly establish the Don Valley as a ‘Leisure and Sports Corridor’ offering an exciting, high profile, nationally and internationally known, gateway to a new and revitalised Sheffield.

The proposals will also positively address key objectives in achieving the vision of Sheffield becoming ‘*A successful, distinctive city of European significance, with opportunities for all*’, by:

- Helping to attract more day and short stay visitors to the area;

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- Increasing the spend of such visitors in the local community, in Sheffield City Centre, and across South Yorkshire;
- Providing a range of new, high quality, high profile, leisure, health and recreational facilities;
- Drawing in additional major sporting and leisure events and activities;
- Enhancing the profile and brand identity of Sheffield and South Yorkshire;
- Supporting the City's objective of becoming one of the Top Three leisure locations in the UK;
- Building on and enhancing the City's existing status as England's 'greenest city';
- Providing additional local facilities and amenities; and,
- Providing substantial new employment opportunities for local residents.

The Master Plan proposals for the Lower Don valley offer an exciting opportunity to achieve real and sustainable change in Sheffield and South Yorkshire.

5 Economic Impact of Masterplan

5.1 Introduction

The economic impact assessment has focused upon a range of wider economic benefits of implementing the Masterplan which are amenable to quantification. These benefits relate to the impact on employment as well as broader regional economic outputs. These wider impacts directly relate to the economic policy drivers for the Lower Don Valley which focus on the creation of sustainable high quality jobs, generation of economic wealth, and improvements in the area's economic competitiveness.

5.2 Employment impacts

5.2.1 Background

In economic analysis the type and numbers of jobs in an area are commonly regarded as the most important benchmark for evaluating its economic health and future prospects. Assessment of the economic base of the LDV and its surrounding area reveals the scale of the economic regeneration task and the important role the office, destination leisure and retail sectors are likely to play in securing future economic growth. The development of a major commercial and leisure development in the LDV supports the City's strategy to reverse the decades of economic decline and urban dereliction through the creation of new and sustainable employment opportunities. The redevelopment of the LDV will also underpin wider initiatives to improve the economic competitiveness of Sheffield, such as the creation of the digital industries cluster.

The development of major commercial floorspace will have employment and income generating effects upon the local economy, and will support the employment generating impacts of the regeneration initiatives in the LDV. In respect of job creation the nature of the employment opportunities arising in terms of the ability of the local labour force to take advantage of new employment prospects and bridge skill gaps are important considerations.

In evaluating these employment benefits, factors relating to both the quantity and quality of job creating potential are important. In particular, a distinction needs to be drawn between temporary and permanent employment opportunities.

5.2.2 Temporary Jobs

Direct Employment

Investment in developing commercial and residential floorspace, and the required site preparation and infrastructure to create a competitive business environment in the LDV, will create a number of construction jobs. The nature of such employment is inherently short term, and is a function of the scale and type of construction expenditure.

The direct expenditure involved will lead to increased output generated in the UK economy. The precise relationship between the capital expenditure and net output generated can only be determined through a detailed assessment of the input/output effects upon other economic sectors in the UK economy. In this way, the investment's contribution towards the UK economy in terms of value added or net output generated can be measured, and this output translated into employment created through reference to figures on GDP per employee in the construction sector.

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The methodology outlined above required a detailed knowledge of the capital expenditure programme and its effects upon the UK economy, which is not possible at this stage. Therefore, the temporary construction phase employment impact has been derived from reference to the experience of major capital works expenditure elsewhere.

Data from the Office for National Statistics (ONS) shows that in 1999 Gross Value Added (GVA) per construction worker in the UK was £36,800 (at 1995 prices). Allowing for inflation, this is equivalent to £42,773 in today's prices. This figure is, however, for all construction work and is an average for the full range of work carried out by the construction industry. Given the relatively labour intensive nature of the construction work for the proposed development compared with other capital works such as investment in rebuilding sewer systems or building new power stations, a ratio of one person-year per £45,000 of investment has been considered justified.

In calculating the number of temporary jobs likely to be created during the construction phase, we have first of all assessed the overall expenditure incurred by developers during the construction phase and then divided this figure by £45,000 /person-year.

Faithful and Gould have estimated that the development will cost in the region of £1,461 million. Using the ratio of one person-year per £45,000, it can be estimated that 32,500 person-years of employment will be created during the 10 year demolition and construction phase. Following the convention adopted by the Treasury that 10 person-years of employment can be taken as equivalent to one permanent full-time job created, it can be estimated that about 3,250 construction jobs will be created.

Indirect and Induced Employment

In addition to the construction employment generated by the Masterplan proposals themselves there will be increased local employment arising from the indirect and induced effects of this construction activity. Employment growth will arise locally through services and supplies to the construction process benefiting local suppliers of temporary buildings, materials and sub-contractors of subsidiary construction tasks. Also, construction workers and those employed in providing services to the construction process will spend some of their incomes locally, and this will generate further local employment.

The rate at which local employment is created in this way is established through the application of conventional employment multiplier techniques and the selection of an appropriate multiplier coefficient. The extent of the indirect and induced employment effects within the local economy is conditioned by the "leakage" caused by employing people from outside the impacted area. In determining this leakage, the following considerations are important:

- Size of the local area, since the smaller the geographical area the greater the leakage;
- The structure of the local economy and strength of its economic linkages, and hence the ability of the local economy to retain economic activity within its own boundaries;

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- The nature of the direct employment created, and hence the disposable incomes of the workers;
- Time period of evaluation, since over time it is expected that local businesses will adapt more fully to the demands made on their services and reduce the extent of leakages out of the local economy;
- The nature of the relationship between revenue and employment within a given enterprise, since in practice the extent to which secondary businesses can absorb a certain amount of additional demand without need for further recruitment will vary between businesses.

Considering indirect effects (i.e. firms purchases from each other) and induced effects (i.e. wages and net profits) together suggests that the overall multiplier is the inverse of the overall leakage out of the local economy (i.e. what does not leave the local economy must be retained). Thus, a leakage of say 60 percent implies a multiplier of 1.67 and leakage of say 40 percent implies a multiplier of 2.5. Multipliers for leakages 20 percent to 90 percent are given below.

Leakage and Multipliers

Leakage out of the economy (%)	Implied Multiplier
90	1.11
80	1.25
70	1.43
60	1.67
50	2.00
40	2.50
30	3.33
20	5.00

The complexity involved in assessing employment multiplier effects means that an accurate prediction is difficult without recourse to an intra regional input/output model. The data required to calibrate such a model for the impact of the retail schemes are simply not available, and therefore multipliers have been estimated on the basis of the findings of previous impact studies. On the basis of empirical research, therefore, it is considered that a local multiplier of 1.11 is appropriate for the construction phase, given the size of the area and the limited duration of this particular form of direct employment.

For the purpose of estimating the indirect and induced employment effect during the construction phase, the multiplier coefficient applies equally to construction workers recruited locally and those brought in from outside the local area. In both cases, these

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construction jobs represent new employment opportunities for the local economy, and it has been assumed that there are no negative employment effects during construction in Sheffield.

Total Temporary Employment

Temporary employment has been estimated for the construction works associated with the commercial and residential development schemes, as well as the infrastructure investment, which will generate additional temporary employment dependent upon the precise scale and type of capital investment undertaken. The results are presented in Table 5.1 below.

Table 5.1: Comparison of temporary local employment impacts

Type of Expenditure	Construction and Infrastructure Costs (£000)	Direct Employment (person years)	Multiplier Effect (person years)	Total Employment (person years)
Site preparation	125,000	2,778	306	3,084
Public realm	115,000	2,555	281	2,836
Development parcels	1,221,000	27,133	2,985	30,118
Total	1,461,000	32,466	3,572	36,038

As can be seen in the above table, we estimate that in total the construction process for the Masterplan will create 36,000 local person-years of employment, equivalent to 3,600 jobs. This represents a significant boost to the local and regional construction industry.

5.2.3 Permanent Employment

Direct Employment

Development of major new commercial floorspace will generate a number of permanent employment opportunities associated directly with the new business attracted to the area. The total number of new jobs created will depend upon the scale and mix of the scheme proposed, and the extent to which these represent net additions to the Sheffield and South Yorkshire sub-regional economy. In economic terms, the worthwhileness of the scheme is measured by the number of jobs created in the local economy, after taking into account additionality factors and the indirect/induced effects. In these terms the local economy has been defined as the Sheffield area, and the sub regional economy is defined as the South Yorkshire area.

These jobs represent employment opportunities that would be created and located at the commercial schemes, including work in the new prestige offices, leisure, hotel, industrial ancillary retail services. Based upon the breakdown of floorspace figures, the number of gross direct jobs has been estimated by adopting typical employment densities for different types of land uses, expressed in terms of square metres of floorspace per full time equivalent job. These employment density figures have been derived from experience in other redevelopment areas, including sites in Sheffield, Belfast, Cardiff, Liverpool, Manchester,

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Glasgow and London Docklands and reflect the English Partnership Guide to Employment Densities (July 2001).

On this basis therefore, it is estimated that the LDV Masterplan proposals will create around 18,770 gross permanent jobs (See Table 5.2). These are direct employment opportunities created on the new development sites within the Masterplan area once end uses have been attracted. Clearly it is unrealistic to anticipate that all these jobs represent totally new employment opportunities to the local economy.

The extent of additionality will vary according to the nature of the firm attracted to the LDV, in terms of whether the business originates from outside the region or from within the region. The level of additionality will vary according to the type of land use developed. It is assumed that the highest levels of additionality will relate to the destination tourism, leisure, hotel and prestige office activities. The lowest level of additionality will be associated with the new ancillary retail uses, which may involve a certain level of displacement within the Sheffield area. Once additionality in terms of those firms new to the LDV area is taken into account, total employment opportunities created by firms new to Sheffield are estimated at 17,410.

There is another dimension of additionality that we have taken into account. Inevitably, in the absence of the LDV redevelopment, a few of the commercial firms originating from outside the region would have relocated to Sheffield in any event. In particular the availability of competing sites elsewhere in Sheffield is strongest for the new retail, industrial and mixed business uses. For other activities, such as the prestige office and leisure activities, the quality of the product proposition on offer at the LDV combined with relative lack of competing sites elsewhere means that these activities are less likely to be attracted by alternative sites in Sheffield and would only locate in the redeveloped LDV within the Sheffield area. On these assumptions, it is estimated therefore that 12,400 jobs would be net additional to Sheffield.

Furthermore, it is also anticipated that the local recruitment factor for the new employment opportunities in the LDV will be high. A number of these new activities such as the prestige office and destination leisure will be specifically attracted by the potential to recruit from the local and sub regional economies. It is estimated that some 10,870 of these new jobs will be available for people residing in the South Yorkshire area.

Therefore, taking the impact of additionality fully into account, it is estimated that around 12,400 new permanent jobs will be created in the local economy through the direct employment impact of the LDV Masterplan proposals. This represents 66 percent of the total number of gross direct jobs generated.

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Table 5.3 : LDV Masterplan Area : Permanent Employment Opportunities

Development Quarter	Land use type	Amount of floorspace (m sq)	Employment density (sq m per worker)	Gross Jobs	% of firms new to LDV	Gross jobs originating from outside local economy	Additionality from assumption	Gross jobs new to the local economy	Local recruitment assumption	Net jobs new to local economy	Indirect and induced jobs (local)	Total jobs local	Indirect and induced jobs (sub reg)	Total sub reg jobs	Local economic output (£ million)	
Meadowhall (Area D)	New Retail	11,600		20	580	80	464	50	232	95	220	58	290	93	325	5.03
	Residential	150 units		-												
	Prestige Office (A1)	138,800		22	6,309	100	6,309	80	5,047	85	4,290	1,262	6,309	2,019	7,066	109.34
	Leisure (incl. Casino)	29,880		30	996	90	896	70	627	90	565	157	784	251	878	13.59
	Conference Centre	2,040		40	51	100	51	70	36	90	32	9	45	14	50	0.77
Sports & Leisure Hub (Area B)	Hotel (C1)	250		2	125	100	125	70	88	95	83	22	109	35	123	1.90
	Mixed Business/Industrial	33,940		40												
	Office	25,600		16	849	70	594	50	297	90	267	74	371	119	416	6.43
Athercliffe Village (Area A)	Office	25,600		16	1,600	90	1,440	70	1,008	90	907	252	1,260	403	1,411	21.84
	Institutional	3,150		20	158	90	142	60	85	90	77	21	106	34	119	1.84
	Hotel	160		2	80	100	80	70	56	90	50	14	70	22	78	1.21
	Destination Leisure	10,000		40	250	100	250	100	250	90	225	63	313	100	350	5.42
	Residential	1,080 units		-												
Industrial Zone (Area C)	Auxiliary retail (cafes etc)	8,070		15	538	80	430	70	301	95	286	75	377	121	422	6.53
	New Retail	10,000		20	500	80	400	50	200	95	190	50	250	80	280	4.33
	Improved Retail	13,870		-					0							
Totals	Office	3,100		16	194	90	174	70	122	90	110	31	153	49	171	2.64
	Residential	1810 units		-												
	New Retail (convenience / Improved Retail	10,500		18	583	80	467	50	233	95	222	58	292	93	327	5.05
	Residential	25,500		-												
	Prestige Office (A1)	51,685		22	2,349	100	2,349	80	1,879	85	1,598	470	2,349	752	2,631	40.71
Office Park	56,900		16	3,556	90	3,201	60	1,920	90	1,728	480	2,400	768	2,689	41.60	
Leisure (health/fitness)	4,800		90	53	70	37	50	19	95	18	5	23	7	26	0.40	
Totals					18,771		17,410		12,401		10,868	3,100	15,501	4,960	17,362	268.64

Indirect and Induced Employment

In estimating the total employment creation of the impact of the redevelopment of the LDV, it is necessary to add the indirect and induced jobs to the direct employment. The indirect employment effect arises from secondary business supplying goods and services to on site activities, which in turn create further economic activity by purchasing additional supplies. The induced employment effect results from increased local consumer expenditure arising from the creation of additional personal income derived from the spending of direct employees (businesses located on site) and indirect employees (supply chain).

The appropriate multiplier value with respect to both the indirect and induced employment effects of permanent employment created at these schemes is considered to be a long run value of 1.25 at the local economy level and 1.4 at the sub regional level. Clearly, the indirect and induced employment effect on the local and sub regional economies applies only to expenditure generated by the gross new jobs to Sheffield and South Yorkshire. Also, the multiplier value of 1.25 and 1.4 are long run figures, built up over a ten-year period as the local and sub regional economies adapts to the service demands of the development.

Total Permanent Employment

Permanent employment has been estimated for the operational phase for the LDV Masterplan proposals. On the basis of the job density ratios and multiplier values adopted, the permanent effect has been estimated as follows:

Table 5.2: LDV Masterplan Proposals – Permanent Employment Impacts

Area	Jobs New to the Local Economy	Indirect and Induced Employment	Total new Employment
Local	12,400	3,100	15,500
Sub Regional	12,400	4,960	17,360
Source: Consultants Estimates			

5.3 Regional GDP

Redevelopment of the LDV will increase regional Gross Domestic Product (GDP) through attracting increased retail expenditure, tourism activity and encouraging indigenous output growth. Average GVA per employee in employment in Sheffield is £17,330 in 2001 prices (ONS). Table 5.3 estimates that the LDV Masterplan proposals will generate 15,500 gross new jobs to the local economy, which will result in an increment to GDP of £269 million per annum. This represents 4.1% of current GVA pa for Sheffield. At a sub regional level the creation of 17,360 gross new jobs will result in an increment to sub regional GDP of £300 million per annum. These figures relate to local / sub regional GDP only, and assumes that the new employment opportunities will be taken up by people from the ranks of the unemployed or else by currently employed people whose jobs will be filled by other local people.

Appendix A: Sustainable Community Indicators

Sustainable community objective	Information required	Why relevant	Indicator	Source	Sheffield strategy	Critical Success Factor	Coverage
Economic Prosperity	GDP	Will indicate changes in economic activities	GDP/ GVA (Gross Value Added)	Objective 1 office for S. Yorkshire	Strong/ competitive economy	Economic diversity	Subregional level (unlikely to get ward)/ per industry sector
	Working population	to assess availability of labour to support regeneration in LDV	% of population of working age	ONS	Strong/ competitive economy	Social cohesion/ Economic diversity	Sub-regional/ Local/ ward
			% of population of working age who are economically active				
	Educational qualifications	To assess gaps in skill requirements to support regeneration in LDV	% population with no qualifications	ONS	Well-educated / competitive workforce	Economic diversity/ Innovation, capacity and skills/ Flexibility & integration	Sub-regional/ Local/ ward
			% population with level 3 NVQ and above				
			% population with level 4 NVQ				
	Average wage	Will indicate changes in welfare	Average income per capita	Earnings Survey-ONS	Well-educated / competitive workforce	Economic diversity	Sub-regional/ Local/ ward
	Unemployment rates	To assess availability of labour to support regeneration in LDV	% rate of unemployment	ONS/ SCC	Well-educated / competitive workforce	Economic diversity/ Innovation, capacity and skills/ Flexibility & integration	Sub-regional/ Local/ ward
			% claim of unemployment benefits				

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Sustainable community objective	Information required	Why relevant	Indicator		Source	Sheffield strategy	Critical Success Factor	Coverage
			VAT registration Business start-up rate	Regional trends- ONS/ Inland revenue?				
Number of SMEs	To assess entrepreneurship	SIC 2 digits	SCC ONS/ ODPM	Strong/ competitive economy	Economic diversity/ Innovation, capacity and skills/ Flexibility & integration	Sub-regional/ Local/ ward		
			IDBR database- ONS/ SCC					
Economic structure	To assess and understand key business sectors, trends and opportunities	Size of firm Employment by sector	ONS/ ODPM	Strong/ competitive economy	Economic diversity/ Innovation, capacity and skills/ Flexibility & integration	Local/ ward		
level of deprivation for area	Indicate level of deprivation at area level	Index of multiple of deprivation DETR Index of local conditions	ONS/ ODPM	Well-run, sustainable and well regarded/ attractive successful neighbourhoods	Social cohesion	Sub-regional/ local (may not get for ward)		
Aid to support income	An indication of deprivation at ward level	% working population claiming income support	ONS/ SCC	Strong/ competitive economy	Social cohesion	Sub-regional/ Local/ ward		
Population change	Indicate levels of outward/ inward migration (at moment appears to be negative) to indicate desire to live in area	% change in population	ONS/ census/ SCC	Attractive successful neighbourhoods	Flexibility and integration	Sub-regional/ Local/ ward		
Life expectancy	Indication of quality of life	Life expectancy age	ONS/ census/ SCC	Attractive successful neighbourhoods	Social cohesion	Sub-regional/ Local/ ward		

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Sustainable community objective	Information required	Why relevant	Indicator	Source	Sheffield strategy	Critical Success Factor	Coverage
	State of housing	Assess state of housing if regeneration creates increased demand in housing in area	Vacant dwelling/ unfit housing	ODPM/ SCC	Well-run, sustainable and well regarded/ attractive successful neighbourhoods	Social cohesion/Quality	Sub-regional/ Local/ ward
	Satisfaction with public services	Indicate state of public services wrt health, transport etc.	BVPI – satisfaction with public services	Audit commission/ SCC	Well-run, sustainable and well regarded/ Healthy population	Quality	Sub-regional/ Local
	Crime rates	Indication of improvement of area	Number of violent/ non-violent crimes- % changes	ONS/ Home office/ SCC	Low crime	Social cohesion/Quality	Sub-regional/ Local/ ward
	transport links	To assess ability of people in surrounding areas to reach regeneration area	Qualitative overview	SCC	Good transport system	Economic diversity/ quality	Sub-regional/ Local/ ward
	Voter turnout	Indicate achievement of part of sheffield strategy	% voter turnout	ONS	Cosmopolitan and inclusive	Stakeholder buy-in	Sub-regional/ Local/ ward?
	Participation in learning	To assess willingness of population to learn new skills	% people in training courses etc.	ONS/ SCC?	Well-educated / competitive workforce	Social cohesion	Sub-regional/ Local/ ward

Appendix B: LDV Baseline Socio-Economic Data

Economic Prosperity & Demographic Data (*Source:* ONS, Census 2001)

Information required	Indicator	England	Region (Yorkshire and The Humber)	Sub-region (South Yorkshire)	Sheffield	Rotherham	
GDP	GVA (Gross Value Added)	£14,800	£12,459	£10,633	£12,634	9270	
	Population	49138831	4964833	1266338	513234	248175	
Population	% population between 16- 24				13.38	9.96	
	number population between 16-24				68671	24718	
	% population between 25-64	53.05			51.16	53.42	
	% population older than 64	15.89			16.38	15.57	
Working population	number of population of working age (16 to 74)	35532091	3574331	916052	374143	198329	
	% of population of working age	72	72	72	73	80	
	number of working population employed	22441498	2182839	532106	218493	106489	
	% working population employed	63	61	58	58	54	
	% working population economically active	66.9	65.2	62.6	63.1	64.0	
	% working population economically inactive-retired	13.6				14.6	
	% working population economically inactive-looking after home/ perm sick or disabled	12 (Eng and Wales)				15.2	
	% working population employed	60.6 (Eng and Wales)				55.7	

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Information required	Indicator	England	Region (Yorkshire and The Humber)	Sub-region (South Yorkshire)	Sheffield	Rotherham
	% working population self employed	8.32	7.24	6.12	6.23	5.87
	% population full-time students of working age	5.1	5.2	5.3	8.1	3.4
Ethnic population	% ethnic minorities	9.1			8.8	3.1
	% working population with no qualifications	28.85	33.15	35.89	32.00	36.78
Educational qualifications	% working population with level 2 NVQ (as highest qualification)	19.36	18.03	17.23	16.01	18.76
	% working population with level 3 NVQ and above (as this ties in with Sheffield strategy)	28.24	24.1	21.94	29.21	17.03
	% working population with level 4 NVQ	19.9	16.38	14.48	18.83	11.5
Unemployment rates	% rate of unemployment	3.4 (eng and wales)			4.2	4

Economic Structure Data (Source: ONS, Census 2001)

	England	Region	Sub-region	Sheffield	Rotherham
	%	%	%	%	%
People aged 16-74 in employment working in:					
Managers and senior officials	15.26	13.26	11.75	11.82	11.87
Professional occupations	11.21	9.67	9.23	12.17	7.28
Associate professional and technical occupations	13.84	12.45	11.68	12.69	10.87
Administrative and secretarial occupations	13.39	12.3	11.91	12.64	12.13
Skilled trades occupations	11.55	12.65	13.03	12.15	13.18
Personal service occupations	6.89	7.28	7.63	7.31	7.74
Sales and customer service occupations	7.65	8.37	9.26	8.94	9.98
Process, plant and machine operatives	8.42	10.35	11.2	9.25	12.48
Elementary occupations	11.8	13.66	14.3	13.03	14.48

		Sheffield study area													
		Brightside		Burngreave		Castle		Darnall		Firth Park		Manor		Nether Shire	
		No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
People aged 16-74 in employment working in:															
Managers and senior officials		613	9	409	10	411	9	668	9	421	8	246	7	438	8
Professional occupations		277	4	424	10	382	8	436	6	325	6	104	3	216	4
Associate professional and technical occupations		641	9	600	14	457	10	700	10	510	9	245	7	503	9
Administrative and secretarial occupations		867	12	442	10	447	9	906	13	539	10	360	10	653	11
Skilled trades occupations		1099	15	486	11	629	13	1066	15	745	14	509	14	829	14
Personal service occupations		718	10	383	9	405	8	527	7	594	11	316	9	566	10
Sales and customer service occupations		780	11	335	8	516	11	744	10	538	10	349	10	663	11
Process, plant and machine operatives		924	13	536	13	575	12	1013	14	808	15	599	17	785	14
Elementary occupations		1212	17	667	16	964	20	1128	16	1021	19	880	24	1147	20
<i>(source: Census 2001)</i>															
Employee by industry sector:															
Extraction, Food, Textiles		219	4	269	1	49	0	435	2	2	0	3	0		
Wood, paper, chemicals, plastic, metals, machinery		1,958	17	6,471	33	1,213	8	4,689	20	22	2	729	25		
Computers, electrical, motor, furniture, recycling		136	2	1,526	8	154	1	647	3	28	2	2	0		

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		Sheffield study area													
		Brightside		Burngreave		Castle		Darnall		Firth Park		Manor		Nether Shire	
Construction	257	5	1,146	6	808	6	737	3	13	1	620	21			
Retail, hotel, restaurant	1,714	30	3,183	16	2,540	17	11,445	49	442	31	643	22			
Transport, postal, financial,	738	13	1,761	9	1,740	12	1,938	8	130	9	28	1			
Property, hire, computing, research, other business, public admin	737	13	2,871	15	1,460	10	2,080	9	174	12	169	6			
Education, health, social	635	11	1,708	9	5,657	39	499	2	533	37	686	23			
Waste disposal, recreation, other services	224	4	964	5	1,005	7	776	3	99	7	89	3			
Total	6,618		19,899		14,626		23,246		1,443		2,969				
<i>(source: Annual Business enquiry 2000, SIC 92)</i>															
Size of firms: Numbers, VAT Registered Enterprises															
1 to 49 Employees	215	98	900	96	310	97	580	94	70	100	75	100	95	100	
50 to 249 Employees	5	2	35	4	5	2	25	4	0	0	0	0	0	0	
250 or more Employees	0	0	5	1	5	2	10	2	0	0	0	0	0	0	
Total	220		940		320		615		70		75		95		
<i>(Source: IBDR, Mar 2000)</i>															

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	Rotherham area										
	Boston		Central		Kimberworth		LDV Masterplan area				
	Number	%	Number	%	Number	%	Number	%	Number	%	
People aged 16-74 in employment working in:											
Managers and senior officials	503	13.4	267	9.4	454	9.1					9.7
Professional occupations	502	13.4	148	5.2	250	5.1					5.3
Associate professional and technical occupations	473	12.6	254	9.0	465	9.4					8.7
Administrative and secretarial occupations	470	12.5	284	10.1	634	12.8					11.4
Skilled trades occupations	375	10.0	371	13.1	691	13.9					11.3
Personal service occupations	249	6.6	227	8.0	396	8.0					9.1
Sales and customer service occupations	310	8.3	311	11.0	608	12.2					12.5
Process; plant and machine operatives	378	10.1	428	15.1	664	13.4					14.7
Elementary occupations	490	13.1	542	19.1	805	16.2					17.2
<i>(Source: ONS Census 2001)</i>											
Employee by industry sector:											Note³
Extraction, Food, Textiles	46	0	494	3	4	0					40
Wood, paper, chemicals, plastic, metals, machinery	3,807	26	2,086	11	252	18					2,940
Computers, electrical, motor, furniture, recycling	415	3	341	2	1	0					388
Construction	179	1	910	5	57	4					310
Retail, hotel, restaurant	1,353	11	4,115	22	359	26					5,724

³ Statistics were derived from the postcode areas that overlap the masterplan area: S91, S92 and S95. As they all extend beyond the masterplan boundaries, the statistics were apportioned to give a better representation of industry figures in the masterplan area. Only.

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	Rotherham area									
	Boston		Central		Kimberworth		LDV Masterplan area			
	Number	%	Number	%	Number	%	Number	%	Number	%
Transport, postal, financial,	1,869		15	2,327	12	64	5	1,295	1	0
Property, hire, computing, research, other business, public admin	334		3	4,551	24	38	3	1,106	9	
Education, health, social	4,772		39	2,937	16	474	34	342	3	
Waste disposal, recreation, other services	162		1	851	5	135	10	385	3	
Total	12,937		100	18,612	100	1,384	100	12,528	0	0
<i>(source: Annual Business enquiry 2000, SIC 92)</i>										
Size of firms: Numbers, VAT Registered Enterprises										
1 to 49 Employees	180		92%	490	94%	80	100%			
50 to 249 Employees	10		5%	25	5%	0	0%			
250 or more Employees	5		3%	5	1%	0	0%			
<i>(Source: IBDR, Mar 2000)</i>										

Information required	Indicator	Sheffield study area								Rotherham area		
		Brightside	Burngreave	Castle	Darnall	Firth Park	Manor	Nether Shire	Boston	Central	Kimberworth	
Level of deprivation for area	Index of multiple of deprivation- score	48.31	71.51	63.36	50.05	66.95	70.79	55.58	40.56	68.31	31.16	
	Index of multiple of deprivation- rank of deprivation (out of 8414)	635	60	198	561	129	76	369	1083	108	1864	
	% ranking- bottom	10%	1%	5%	10%	5%	1%	5%	20%	5%	25%	
	Indices of multiple Deprivation, 2000, Income domain, Rank	611	123	283	757	163	94	401	1259	200	2066	
	% ranking- bottom	10%	5%	5%	10%	5%	5%	5%	15%	5%	25%	
	Indices of multiple Deprivation, 2000, Employment domain, Rank	1205	44	256	939	258	123	565	1157	211	2017	
% ranking- bottom	15%	1%	5%	15%	5%	5%	10%	15%	5%	25%		

Lower Don Valley Masterplan – Economic Case

Information required	Indicator	Sheffield study area								Rotherham area		
		Brightside	Burngreave	Castle	Darnall	Firth Park	Manor	Nether Shire	Boston	Central	Kimberworth	
	Indices of multiple Deprivation, 2000, Health domain, Rank	924	343	511	1179	409	247	457	1170	312	1821	
	% ranking- bottom	15%	5%	10%	15%	5%	5%	10%	15%	5%	25%	
	Indices of multiple Deprivation, 2000, Education domain, Rank	132	98	38	116	40	79	174	1006	67	1464	
	% ranking- bottom	5%	5%	1%	5%	1%	1%	5%	15%	1%	20%	
	Indices of multiple Deprivation, 2000, Housing domain, Rank	1999	1399	1254	930	865	1568	1948	1331	670	3246	
	% ranking- bottom	25%	20%	15%	15%	15%	20%	25%	20%	10%	50%	
	Indices of multiple Deprivation, 2000, Access domain, Rank	6572	6032	7411	5505	6867	6058	6957	4479	5136	3138	
	% ranking- top	25%	30%	15%	50%	25%	30%	20%	50%	50%	bottom 50%	

Lower Don Valley Masterplan – Economic Case

Information required	Indicator	Sheffield study area								Rotherham area		
		Brightside	Burngreave	Castle	Darnall	Firth Park	Manor	Nether Shire	Boston	Central	Kimberworth	
Aid to support income	Indices of multiple Deprivation, 2000, Child poverty index, Rank	1039	277	305	941	248	101	563	1033	292	2275	
	% ranking- bottom	15%	5%	5%	15%	5%	5%	10%	15%	5%	30%	
Life Expectancy	Numbers of working population claiming income support	1745	2380	1905	1950	2365	2160		910	1105	770	
	% working population claiming income support	14.9%	25.0%	19.1%	14.2%	20.7%	27.2%	0.0%	13.3%	19.6%	9.7%	
Health	Men (years)	73.0	69.9	72.6	73.6	70.5	70.6	73.3	73.0	69.9	72.6	
	Women (years)	80.2	74.5	80.6	79.5	77.6	75.9	78.6	80.2	74.5	80.6	
Voter turnout	% population with long term illness	20.9	25	23.2	22	24.7	29.3	25.4	22.5	24.3	20.6	
	% population in poor health	12.6	13.9	13.8	12.9	14.7	17.1	14.4	12	14.8	11.1	
	% voter turnout	28.70	28.9	26.9	28.3	25.4	22.3		turnout figures not give at ward level			

Appendix C: Strategic Connections

Theme	Activity	Strategy Link
Environment	Initiatives to reduce air pollution and traffic congestion in the Don Valley / M1 corridor	Sheffield Environment Strategy 2003 / South Yorkshire Local Transport Plan / Regional Economic Strategy – Objective 6
	Improvements to water corridors, particularly to support non-vehicular transport potential	Sheffield Environment Strategy 2003 / Groundwork Sheffield / Regional Economic Strategy – Objective 6
	Development of a ‘Green Business Park Programme’ in the Lower Don Valley	Sheffield Environment Strategy 2003 / Regional Economic Strategy – Objective 6
	Continued programmes for waste minimisation in the Don Valley	Regional Economic Strategy – Objective 6
Infrastructure	Corridor developments to link City Centre and wider developments including Sheffield Business Park, the E-Campus, the Advanced Manufacturing Park, and other sites such as Tinsley	Sheffield City Strategy
	Development of additional rail freight facilities at the Tinsley Marshalling Yards	Single Programming Document – Priority 5, Measures 27 and 30; Priority 6, Measure 31; and Priority 1, Measure 5.
	Supporting transport systems and use, including the Urban Bus Challenge bid for East Sheffield, to connect communities with areas offering employment growth, and improving accessibility to these opportunities	Sheffield City Strategy / Framework for Regional Employment and Skills Action / Regional Economic Strategy – Objective Five
	Improvements in links from the City centre to the M1 – to improve access and reduce congestion and environmental impacts	Creative Sheffield / South Yorkshire Transport Manifesto 2020 / Single Programming Document – Priority 6, Measure 31, links to Priority 5, Measures 27, 28, 29, and 30; and to Priorities 1 and 2
	Improvements in rail links for / between Sheffield and Rotherham focussed on Meadowhall junctions including the Midland Mainline Cross Over and local lines and further development of the Supertram	South Yorkshire Transport Manifesto 2020 / Sheffield City Strategy

Lower Don Valley Masterplan – Economic Case

Theme	Activity	Strategy Link
Land Use	Improvements to the M1 Junction 34 and associated junctions to reduce congestion and improve access – to facilitate planning consent for further site development in the Lower Don Valley. Would also support developments at Waverley (AMP), Sheffield Airport, Templeborough (Rotherham) and Magna (Rotherham)	Single Programming Document, Priority 6, Measure 31; and Priority 5, Measures 27 and 29; Priority 4A, Measure 19 and 4B, Measure 23; and Priority 3, Measure 16
	Meadowhall	City of Sheffield Tourism Strategy 2003-2008 / Single Programming Document – Priority 3
	Develop opportunities linked to Meadowhall shopping centre to increase local spend – tourism visitors, etc	South Yorkshire Spatial Study
	Opportunities to develop working relationship with Rotherham, to take advantage of obvious physical and function links related to the M1 and Meadowhall, Waverley (AMP), etc	
	Development of initiatives linked to housing market renewal and community redevelopment opportunities	Transform South Yorkshire Prospectus
	Destination / Amenities	City of Sheffield Tourism Strategy 2003-2008 / Sheffield City Strategy 2002-2005 / Sheffield First Draft Cultural Strategy / Regional Economic Strategy – Objective Six
Development of various heritage themes in and around Sheffield including a ‘storyline’ for regeneration of the Don Valley	City of Sheffield Tourism Strategy 2003-2008	
Support for initiatives to create an ‘axis of recreational and amenity potential between the City centre and Meadowhall, providing a setting for major sporting and leisure facilities in the Lower Don Valley’	Environment Strategy for Sheffield 2003	
Development of facilities and opportunities linked to the Tinsley Marina	Environment Strategy for Sheffield 2003	

Lower Don Valley Masterplan – Economic Case

Theme	Activity	Strategy Link
	<p>Linking into the work of the City Council to utilise the value of high profile sporting and leisure facilities in the Don Valley to compliment City centre developments and extend Sheffield’s signature to the east</p>	<p>Creative Sheffield</p>
	<p>Potential for funding of initiatives from Meadowhall and Sheffield International Venues (owners of the Don Valley Stadium, Ice Sheffield, Hallam FM Arena, the Don Valley Grass Bowl)</p>	<p>City of Sheffield Tourism Strategy 2003-2008</p>
<p>Business Growth</p>	<p>Continued development of brownfield regeneration from the City centre, through the Don Valley, to Rotherham – continuing the work of the Sheffield Urban Development Corporation – linked to a need to give direction to land use in the area and the ability to provide infrastructure enhancements to open up development sites and create new employment opportunities – link to use of Objective One funds. The Don Valley could provide the quantity and range of land resources necessary to enable the sustainable redevelopment of Sheffield. Link to opportunities in Rotherham including the Magna Centre and related sites.</p>	<p>South Yorkshire Spatial Study / Single Programming Document – Priority 5, Measures 27, 28, 29 and 30; Priority 6, Measure 31; Priority 4A and 4B, Measures 19, and 23; and Priority 1, Measure 5 / Sheffield Unitary Development Plan</p>
	<p>The M1 Corridor ‘Strategic Economic Zone’ – activities related to the development of employment land, to support the creation of a critical mass in businesses and industries to create sustainable business and employment opportunities. Measures can include infrastructure (sites, premises and access), recruitment and training (under Priority 3), the targeting of growth sectors (under Priority 1), the improved provision of business advisory services and financial support, and the development of the ICT infrastructure.</p>	<p>Single Programming Document – Priority 5 – Measures – 27, 28, 29 and 30; Priority 6 – Measures 31 and 32; Priority 1 – Measures 2, 3, and 5; Priority 2 – Measures 6, 7, 8, and 10; Priority 3A and 3B – Measures 11, 12, 13, 14, 16, 17 and 18; and Priority 4 – Measures 19, and 23.</p>

Lower Don Valley Masterplan – Economic Case

Theme	Activity	Strategy Link
	Support for initiatives ensuring equal access to employment opportunities, including employment and training programmes in Burngreave	Sheffield City Strategy
	Support for companies to utilise and develop new and innovative technologies and processes, including links to local universities and colleges	Regional Economic Strategy – Objective One and Two
	Community based learning in Manor and Castle wards through SPELL NE complementing local learning centres	The Sheffield Learning Plan
	Initiatives to support 'The Source' at Meadowhall to continue improvements in vocationally related learning and in ICT skills	Sheffield Corporate Plan 2003-2006
	Initiatives to improve educational attainment, access to learning and training opportunities, and for skills development	Regional Economic Strategy – Objective Four
	Initiatives to support the development of skills and expertise in key clusters	Regional Economic Strategy – Objective 1
	Tackling inequalities, such as high levels of unemployment in Burngreave Ward and low levels of educational attainment in Manor Ward	Sheffield City Strategy
	Sheffield's influence / role as the major urban centre and focus for specialist economic and cultural activity in South Yorkshire	South Yorkshire Spatial Study
	Addressing the provision of sites, training and transport improvements to help the creation of the right environment for business to grow and expand; key focus on the growth and development of SMEs – initiatives relating to embedding the benefit of new investment	Regional Economic Strategy – Strategic Aims (Environment, Businesses and People) and Objectives One and Two / Single Programming Document – Priority 1 – Measures 2, 3, and 5; Priority 2 – Measures 6, 7, 8, and 10; Priority 4A and 4B – Measures 19, 21, and 23; Priority 5, Measures 27, 29, and 30; and Priority 6 – Measures 31 and 32.

Transport & Infrastructure

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

Highway Network

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

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

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

However, despite the peak time congestion, using the existing flows and the maximum capacity estimates within the highway and public transport network, work undertaken for this Masterplan has identified some spare overall capacity within the network.

At present, it is clear that this is quite minimal within the highway network with capacity issues occurring at Junction 34, Sheffield Road and Meadowhall Road.

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

Supertram

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

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

Rail

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

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

Bus

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

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

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

Park & Ride

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

Pedestrian and Cyclist Pathways

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

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

Implications for the Masterplan

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

Transport SWOT

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

Transport Strategies

A number of strategic transport interventions will need to be employed to enable the full realisation of the masterplan. These will form the basis of a Transport Strategy which will need to take a multi modal approach that makes best use of the existing highway capacity, augments this with improvements to alternative modes of travel such as the bus, tram and softer modes, and manages demand for travel.

Through consultation with stakeholders and interested parties, there are 14 key strategy elements that have been identified and are summarised below:

1. Integrated land use, Soft Modes – mix of residential, employment etc.

This forms a key element of the transport strategy in that a mix of different development types will lead to differing travel demands, different peak periods for each land use type (e.g. residential peaks differ to that of leisure, industrial and to a certain extent office) and a greater opportunity for the interaction of developments. The master plan will aim to locate land uses in areas where interaction will be optimised. Within a mixture of uses there is the ability to increase trip linkages to certain land uses i.e. residential, work and retail. This will also provide the opportunity to shorten the length of trips and to encourage softer modes of travel, i.e. walking and cycling. These changes in travel behaviour are in accordance with emerging research by the DfT (Smarter Choices: Changing the Way we Travel; 2004) on the possibility influencing mode shift and the propensity to use softer modes given the provision of appropriate incentives and infrastructure. This would represent a significant change from existing travel patterns, but would reflect the intention of the proposed masterplan for the LDV.

It is evident from the Phase 1 capacity analysis of the area that internal movements within the master plan are very low (394 car trips in the AM and 455 in the PM peaks), hence there is a good opportunity to improve this situation through land use mix, improved environment (and safety), and the reduction of walk and cycle times between land use types.

2. Strategic Park and Ride (north / south of Junction 34);

The current P&R facility at the interchange shows that there is a substantial demand for Park and Ride (P&R) into Sheffield City Centre. This facility is often already full at the start of the morning peak (i.e. before 08:00). This, together with issues such as informal P&R from the Meadowhall shopping centre shows that there is potentially a large suppressed demand for P&R facilities within the area. As a result it is felt that P&R has a critical role to play within the transport strategy and promoting the use of more sustainable public transport modes.

A strategic approach has been adopted, providing P&R facilities at Junction 33 to the south and Junction 35 to the north. This would intercept Sheffield/Rotherham bound traffic earlier within their journey thus providing alternatives for the 1200 plus vehicles passing through the area from the north in the AM peak (to destinations in Sheffield and Rotherham) and in excess of 600 vehicular trips from the south (according to the Phase 1 Capacity study).

To augment this Park and Ride strategy additional benefits outside of the master plan area would also arise. Any facility at Junction 33 could feasibly run a bus service to Rotherham and one to Sheffield via the Airport business park (providing a benefit) through the Lower Don Valley to Sheffield city centre. In addition a facility at Junction 35 could also serve Rotherham and could utilise a dedicated link that runs parallel with the motorway to the Meadowhall Interchange into the Lower Don Valley and on into the city centre (this service could also link with the Airport Business Park, if desirable).

As yet specific sites have not been identified although SCC has commissioned reports for a countywide P&R strategy to be developed.

3. Local Park and Ride;

Whilst the strategic Park and Ride concept will cater for strategic motorway trips it will not be suitable for more local trips i.e. those originating in the master plan area or surrounding areas. Therefore, it is felt that in order to promote public transport, local park and ride should still be supported and augmented. These currently exist not only at the Meadowhall Interchange but also at Centertainment.

The Phase 1 study reported that there was in excess of 1400 vehicular trips east-west along the valley in the AM peak and approximately 1800 in the PM peak. A combination of local Park and Ride at locations off Sheffield Road and Meadowhall Road, in combination with Supertram extension and the development spine would mean that these trips will have a number of alternative means to travel between Rotherham and Sheffield. This may therefore lead to improvements in both capacity and attractiveness and should be linked to the local traffic management system so as not to encourage the strategic traffic to use these sites (i.e. notice would need to be given when these are full so as not to encourage the strategic traffic to travel further into the master plan area).

4. Supertram Extension (through to Rotherham);

The Supertram system has three routes known as the Yellow, Blue and Purple. Both the Yellow and Purple routes originate or end at Meadowhall Interchange (the Purple operating between 09:00 and 18:00 only). The Yellow route weekday frequency is approximately one tram

every 10 minutes and the Purple route frequency is approximately one tram every half an hour for the same time period. Weekend services follow a different timetable but a similar pattern of frequencies.

The existing Supertram route between the city centre and Meadowhall passes around the Lower Don Valley. This is deemed by a majority of the key stakeholders to be strategically poor. Stops are provided at mainly leisure destinations within the valley (i.e. Centertainment and the Arena/Don Valley Stadium) which are very peaked in terms of hours of operation (i.e. evening peaks). There is a lack of penetration of the key land uses such as residential communities or employment uses.

Currently South Yorkshire Passenger Transport Executive (SYPTTE) in association with SCC and RMBC have been investigating possible route extensions. This provides the opportunity to provide the area with a more comprehensive network. One of the proposed corridor extensions is from Meadowhall to Rotherham Parkgate via the town centre which would provide a significant benefit in terms of accessibility to the area. However, there would be concern if Meadowhall was to be located on a spur, as indicated by the initial route plans, rather than on the main through route. Recent discussions with SYPTTE and SCC have shown that this extension has the most robust business case and will therefore be the only extension promoted to the Government for funding.

The benefits of this extension to the master plan are that it gives greater emphasis to public transport for current trips from Rotherham to Sheffield and vice versa and provides a great opportunity to influence the mode shift of travellers to and through the masterplan area. This would provide some greater public transport relief to Junctions 34 north and south in terms of affecting the way that people travel through the area.

5. Supertram re-alignment (through the study area);

In order to achieve the greatest levels of penetration for the Lower Don Valley and access to the Supertram it is felt that the existing route is too isolated and does not currently support development aspirations. Therefore, it has been proposed within the master plan to divert the Supertram from its current stop at Centertainment through the study area (approximately along the route of Weedon Street) and into the existing interchange.

The re-alignment of the Supertram, dependent upon the locations of the tram stops, provides an ideal opportunity to make sure that inhabitants/workers/visitors to the masterplan area are never far away from a major form of public transport. This would result in the majority of the master plan area would be within a 400m walk of at least a tram stop and therefore linkages to the more strategic heavy rail network.

The additional benefit of the realignment of the Supertram provides the potential to increase development density and mix around the tram stops, in a sustainable manner which, together with restrained parking provision, will lead to an increased usage of the public transport provision in the area.

6. Local Bus shuttle to serve Interchange and major areas;

As with all strategies there needs to be a fully integrated approach taken to the master plan. Therefore, it is felt that to augment the mix of land uses it would be prudent to provide a dedicated bus service through the master plan area to link up with the surrounding communities.

Whilst the current bus provision is comprehensive it currently serves the strategic routes along the Meadowhall Road and Sheffield Road corridors, and does not penetrate the master plan sites, as there is currently no reason for it to do so. This will need to be adapted to a local development context through consultation with SYPTE and the bus operators. However, it is thought that a dedicated 'local' hopper type service will increase internal movements within the area and help to link up with the strategic transport providers at the interchange and other tram stop locations. This would provide a dedicated link to employment opportunities from the neighbouring communities of Tinsley, Darnall and Brightside. There may also be a role for a Demand Responsive Transit service that is a cross between a taxi and a bus which would add greater flexibility to the bus services.

7. Improved bus priority;

Bus priority is an important part of the existing strategy within the Lower Don Valley. The introduction of Gold and Silver bus routes have shown the areas that will be targeted for bus priority namely Sheffield Road (Gold) and Meadowhall Road (Silver). The 'fixed link' proposals were initially proposed to provide an element of bus priority for junction 34 south and the new development spine can be augmented to provide a high quality public transport route through the area.

The First Group are currently involved in trials of FTR vehicles with the potential to implement in Sheffield (unlikely to be LDV), Leeds and York. Such schemes would look to save 22 minutes on an existing 1 hour 44 minute bus route.

The provision of Park and Ride facilities to the north and south would also require bus priority measures to ensure that bus times are favourable to those of the car. The nature of the new development spine road (see below) will promote bus priority but also ensure that bus journeys are favourable in terms of journey time, where ever possible/feasible, to travelling by car.

It is not currently clear as to whether the DfT would consider a Quality Bus Corridor through the LDV as a major scheme and as such it is unclear as to the level of funding likely to be made available.

8. New development spine road;

The concept of the Sheffield to Rotherham link road is not a new one and was originally devised to help provide an alternative to local traffic from Rotherham / Sheffield and vice versa and to reduce congestion on junction 34 south, thus providing the opportunity to improve bus journey times through the junction. The other equally important reason behind this road is to open up the regeneration opportunities afforded by the land to the east of the Tinsley viaduct, namely the PowerGen site.

It should be noted however, that this type of scheme in the guise of the 'Fixed Link' has recently been rejected by the Government for funding as it was not felt that enough emphasis was given to Public Transport. The master plan concepts can revive this scheme, as not only a local access but also a potential high quality public transport route through the heart of the development area, and an extension of the initial 'fixed link' idea to run through the middle of the valley.

Whilst access to the major development sites is a key issue for this spine road, it will need to be maintained as a local access. There will also need to be a requirement for the eastern section of this road to carry strategic east-west traffic but this will need to be tied back into the strategic network as soon as possible. The need to prevent 'rat running' traffic and increase bus journey times is paramount, therefore, a series of bus gates and other bus priority measures will be required to ensure that the nature of the road is not compromised as a pedestrian and cycling friendly environment which will accommodate local access only.

It is also felt that the link underneath the viaduct could also run adjacent to any potential Supertram extension, thus promoting a truly public transport orientated corridor approach.

9. Rail Improvements;

There are a number of potential improvements to the local heavy rail services in the area; however, these will be governed by the SRA, Network Rail and the train operators. The rolling stock used on the local routes is of poor quality and does not have a large capacity. Running two/three car trains on a more frequent basis could be the start of the revitalisation of the rail network in the area. Services to the north are slow and not particularly direct although it is understood that SYPTE is investigating potential improvements to this line through Barnsley and beyond.

There are also a number of disused rail lines within the area that have been protected by the SRA and offer opportunities for enhanced rail provision in the future e.g. the Blackburn Chord, which may afford an alignment for the Supertram extension and the potential longer term development of Meadowhall Junction.

Generally, it is felt that rail initiatives should be seen as longer term aspirations as further and more detailed discussions will need to be had with SYPTE, Network Rail and the Train Operating Companies.

10. Intelligent Transport Strategy (ITS);

SCC are currently developing an Intelligent Transport Strategy that is looking at how to manage the highway network within Sheffield as a whole. The proposed ITS programme includes:

- Improved monitoring from Sub-Regional Traffic Control Centre (for Sheffield, Rotherham and Doncaster and linking with HA control centres in Wakefield, Nottingham and Manchester);
- All 'significant' junctions will be committed and monitored;
- Additional or Modified traffic signal control and VMS;
- Public Transport Priority and Bus Lane Enforcement;
- Traveller Information.

An initial phase of this strategy identifies the area around Meadowhall shopping centre as a prime opportunity for traffic management. This strategy relates to both the implementation of the VMS network which will provide the opportunity to control traffic through direction and control

of the traffic signals thus providing an intelligent traffic management system within the Lower Don Valley. This will provide benefits in terms of congestion, car park management and air quality.

The VMS scheme is now part of the South Yorkshire Intelligent Transport Systems (ITS) Strategy project, for which £12 million worth of Objective 1 and LTP Supplementary funding has been made available.

There are two levels of signing that will be used within the Lower Don Valley:

- Strategic Variable Message Signing- Information is provided to drivers within the overall motorway and road network such that drivers can make strategic route choice decisions based upon 'live' information presented to them;
- Tactical Variable Message Signing- Where specific information relating to car parks or event venues is displayed to provide both guidance and information relating to the availability or otherwise of car parking spaces.

It is anticipated that Intelligent Transport Systems would create 10% additional capacity on the road network and if radical measures were employed, it may potentially deliver a further 10% within the region.

11. Parking policy;

Parking policy will be a key element to the success of the transport strategy and this sits 'hand in hand' with a number of other initiatives, such as Park and Ride. In order to provide disincentives to driving into the study area then a package approach of limited parking availability and travel planning should accompany improvements to alternative modes of transport. Parking standards would be set relative to accessibility, for example, development around transport nodes would have limited parking availability, and type of use.

12. Travel Planning.

Travel planning will be especially important to the commercial elements of the master plan and this should be encouraged for the outset. The residential areas are harder to manage although issues such as Car Clubs and car sharing schemes should be encouraged. Currently, Meadowhall Centre has a travel plan and this should be built upon as part of the master planning process.

Whilst provision of infrastructure and services are important components of any transport strategy, use of alternative modes will only be maximised if travel plans provide clear information and incentives. Each individual development plot will have an opportunity to influence travel choice based on site specific travel plans, and this could be effectively drawn together as part of a more strategic approach to travel behavior in the LDV.

13. Strategic Highway Measures

SWYMBUS is examining ways in which some of the benefits of South West Yorkshire Multi Modal Study (SWYMMS) can be delivered at a lower cost. There are a number of key transport elements that the HA are currently considering in order to help traffic flow on the M1 Motorway, through the study area. These were originally derived as part of the SWYMMS. Further to discussions with the HA, the key elements to this study are now to be assessed as part of the Memorandum of Understanding Strategic Transport Initiatives (MOUSTI).

The principal objective of MOUSTI was to undertake a broad review of strategic transport initiatives in South Yorkshire as part of the Rotherham/Sheffield Motorway Corridor Study with the aim of identifying a package of potential transport interventions over the next 10 years. The initial stage of this work has been the examination of potential highway improvements at Junction 33 of the M1 and these have now been approved.

The second stage of this work is the examination of improvements at Junction 34. These improvements include Supertram and Quality Bus Corridor schemes and the assessment will take into account masterplan development traffic, committed development and objective 1 schemes. The final phase will involve assessment of the M18.

The strategic highway schemes considered and assessed are as follows:

M1 - VMS / Speed restrictions;

This is a proposal from SWYMMS that mirrors the current situation on the M25. This would manage speeds in order to enable the motorway to be able to cope with increased traffic. This may have issues relative to air quality and it is for the HA to complete any studies to consider this.

3 lanes on viaduct;

The reverting the Tinsley Viaduct to operate at its original 3 lane width would be undertaken in conjunction with the 4 lane widening of the M1 described below.

4 lane widening 30 - 42

The DfT has granted approval for the widening of the M1 from Junction 30 to 42 from 3 to 4 lanes at a cost of £995m, with construction work prioritised and expected to start in 2007. The will involve widening from Junctions 30-33 with a permanent 4th lane and from Junctions 33-49 through the use of the central reserve and hard shoulders, and with the provision of a rescue lane every 0.5km.

Road User charging;

The SWYMMS document highlights the need to apply an area wide road charging mechanism as the only way in which a significant reduction in the growth in traffic within the study area can be achieved.

As with any road charging scheme the level of cost will be central to its effectiveness and thus the impacts on the Lower Don Valley. No road charging scheme would be likely before 2011.

Road tolls may provide a stop-gap measure before an area wide congestion mechanism. This would be in order to control the levels of traffic using the widened roads.

14. Route Management Strategy (RMS)

Park and Share Sites

Draft Route Management Strategies currently being undertaken in South Yorkshire and considered by the Highway Agency have put forward the concept of implementing 'Park and Share' sites whereby motorists share journeys to their common destinations. These are being considered for motorway interchanges and service areas and have built upon the findings of SWYMMS.

High Occupancy Vehicle (HoV) Lanes

In accordance with SWYMMS and SWYMBUS, the RMS envisages widening the M1 to four lanes between junctions 30 and 42. As a means to maintain the spare capacity provided the strategy suggests the use of HOV lanes.

Strategy Testing and Outputs

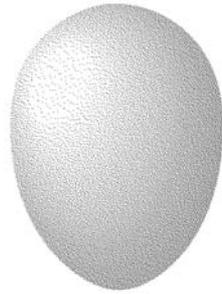
As a means of establishing the validity and viability of the masterplan in transport terms, a multi-modal transport spreadsheet model for the Lower Don Valley has been constructed. The model was developed using data from the EMME 2 Supertram Extensions Study demand forecasting model developed by SYPTE. This model was used as it was felt to be the best source of recent multi-modal demand and cost data, covering the study area in detail on a consistent basis for both highway and public transport trips. In conjunction, a development trip rate spreadsheet model has been used to calculate the number of likely trips, for all modes, resulting from the adoption of the Lower Don Valley masterplan. This work feeds directly into the demand forecasting model. This model then provides the basis for some iterative and strategic testing of a range of transport strategies.

Strategy Outputs

The greatest reduction in car driver mode share arising from the strategy testing occurs when emphasis is placed on enhanced public transport provision, car restraint and other 'soft' measures. Testing has also included the MOUSTI proposals focussing on Junction 34 and strategic highway proposals which include the widening of the M1 between junctions 30 and 42 and other highway improvements as a means of avoiding existing and worsening capacity constraints. This increase in the capacity of the highway network is broadly successful in its objective of reducing capacity problems but also results in an increase in through trips and therefore the number of vehicles on certain links within the study area (i.e. the M1 and Meadowhall Road). However, despite this increase in traffic volume, the improved capacity of the highway network still results in improved operational characteristics than when compared to a Base scenario for 2024 and a Base and Development 2024 scenario (with no Transport Strategy).

The results of the strategy testing therefore suggest that it is possible to accommodate to a large extent local and masterplan traffic in 2024 if public transport, car restraint, soft measures and highway measures are employed but that general background traffic growth is more problematic and far harder to mitigate against. Without a regional or national transport demand management strategy, which may include road user charging, any free capacity on the highway network will result in an increased number of vehicle trips through the area which will ultimately negate the additional capacity. These findings are in line with the SWYMMS study, which stressed the need for increased highway capacity and fiscal restrictions on car use as an integrated strategy that would ensure that increased highway capacity is 'locked in'.

For the reasons outlined above, transport measures / initiatives proposed including the increase in highway capacity, could deliver sufficient capacity to accommodate travel growth arising from the masterplan. However, it must be stressed that this strategy would not address the wider capacity issues that will, according to predicted growth, be prevalent throughout the South Yorkshire area in 2024.



LOCUM
DESTINATION
CONSULTING

**A Masterplan for the
Lower Don Valley,
Sheffield**

**Strategy for Destination
Development**

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1 Executive Summary

1.1 Current State Analysis

1.1.1 Sheffield – Past, Present and Future

- Historically reliant on steel manufacturing, Sheffield has seen major change since the region's rapid deindustrialisation in the late 20th century. Policy of the last two decades has focussed on regenerating the city centre and the Lower Don Valley, the former industrial centre of the city. However, there is still much work to be done: high levels of poverty across many of Sheffield's wards have led to the city gaining European Objective 1 funding
- Sheffield recognises the importance of a vibrant city centre, a strong cultural offer and high-quality sporting facilities to its economic competitiveness, social and environmental renewal, and its ambitions to become 'a diverse and vibrant city of European distinction'
- Benefiting from an unrivalled critical mass of sports facilities, sports science, sports medicine and sports engineering expertise, Sheffield has the facilities and commitment to stage a range of major sports events. Furthermore, the city has identified sport as a means of raising levels of activity and improving quality of life throughout the Sheffield
- Sheffield recognises that the tourism offer of the city is a 'well-kept secret'. By 2008, it aims to improve its competitiveness as a destination for sports tourism, conferences, short breaks and foreign leisure visitors

1.1.2 The Visitor Market Context

- The Yorkshire region receives 13 million staying visits¹ per year, most of which (12.2 million) are made by UK residents. The value of staying visits to the region is around £1.9 billion annually. Of the 13 million staying visits made to the Yorkshire region in 2002, the South Yorkshire sub-region received just under 2.3 million. 2.1 million visits were made by UK residents

¹ United Kingdom Tourism Survey (UKTS) & International Passenger Survey (IPS). Staying visits are trips of one or more nights.



(primarily from Yorks & Humber, North West Merseyside and the East Midlands) and 170,000 by visitors from overseas (most frequently residents of the USA, France and Germany). On the whole, visits to South Yorkshire in 2002 were shorter and of less value than in the rest of the region

- Little information is currently available about the volume and value of visits made to the city of Sheffield itself, although the International Passenger Survey top twenty most visited UK towns does not include Sheffield. Steps are being taken by Sheffield City Council's tourism department to ensure that further research is carried out into the volume and value of visits to the city – this should be an area of priority
- At national and regional level, Sheffield has few major visitor attractions. The city's most visited attraction in 2002 was the Millennium Galleries, receiving 172,000 visits. Data collected for a selection of leisure venues in the city suggests that Ponds Forge leisure venue received over one million visits over a period of one year from 2001 to 2002
- Popular visitor guide books give an indication of the quality of the food, drink and hotel offer in Sheffield alongside that of comparable cities. There appears to be a marked shortage of high quality hotel accommodation compared to Manchester, Leeds and Birmingham. In terms of restaurants, Sheffield enjoys several guide book entries, but fewer than Manchester and Leeds
- Sporting events play an important role in Sheffield – the 2002 Embassy World Snooker Championship brought almost £2.3 million to the city
- Sheffield competes most strongly as a visitor destination against the other English Core Cities in terms of sports venues of international standard. Given the quality of its sports venues, however, there is a deficit of international sports events – especially in athletics
- In comparison to the other Core Cities, it could be said that Sheffield has some areas of weakness: dedicated conference facilities and high quality hotel accommodation are key examples



1.1.3 Destination Audit of the Lower Don Valley

- Situated close to the M1, the Lower Don Valley is within easy reach of several of the UK's major conurbations: almost 8 million people live within an hour's drive of the area
- There is a significant level of visitor activity in the Lower Don Valley, generated by a series of high quality attractors. However, these tend to be disjointed and difficult to move between, especially for the pedestrian visitor. There is a marked lack of infrastructure and services to draw the attractors together, and, as a result, there is little in the way of a coherent destination 'package'
- The most successful attractor in the area is Meadowhall, one of the UK's leading shopping centres, which receives 31 million visits per year
- Catchment for visitor activity in the Lower Don Valley varies widely. Meadowhall focuses on a 10-mile catchment area based on conurbations clustered around the M1, while the sports venues range from a local catchment for minor events to international catchment for major events
- Other attractors tend to be sports and leisure venues, and are clustered in the Sports & Leisure Hub. Some of these, including the Don Valley Stadium and the Hallam FM Arena, are the legacy of investment for the 1991 World Student Games, hosted in Sheffield. Others, such as Ice Sheffield and the English Institute of Sport regional headquarters, have been developed more recently and are the result of Sport England and English Institute of Sport funding
- Management of the sports venues is, in the main, the responsibility of Sheffield International Venues (SIV), a division of the Sheffield City Trust, although the Hallam FM Arena is managed by Clear Channel Management
- The sports venues host a number of activities and events – these are sports events (ranging from community usage to international competition), music events (Hallam FM Arena) and private hire events (exhibitions and corporate hire)
- Other attractors include Valley Centertainment, a leisure complex comprising a multi-screen cinema, bowling alley and restaurants. The complex is popular locally, with the cinema receiving 1.5 million visits per year. The Sheffield &



Tinsley Canal and the Don River also run through the valley, attracting a number of walkers and canoeists.

1.2 Destination Development Strategy

1.2.1 The Role of Destination Thinking

- The development context within Sheffield and the Lower Don Valley is changing – the success of city centre investment as well as general renaissance of the region has led to a more buoyant market place
- While large-scale visitor attractions can play a role in regeneration, a number of factors, including the high-risk nature of such projects and the poor nature of the funding climate for large attractions, lead Locum to suggest that a *blended* approach to destination making may be more appropriate for the Lower Don Valley, combining more thoughtful development of associated sports, commercial and residential developments
- The emphasis will be on creating a sustainable and unique mixed-use destination, encouraging cross-fertilisation and integration of activities. Co-working between the property sector, the city, the universities and other partners will be vital

1.2.2 Developing the Four Districts

- The vision for the Lower Don Valley explored in this paper is based around four unique destinations corresponding to the distinct districts which make up the study area. These are:
 - Attercliffe Village – a vibrant, quirky and cosmopolitan environment, with a reputation as a centre for innovation, tolerance and creativity
 - Sports & Leisure Hub – a dynamic, coherent and integrated destination based around international-standard sports facilities, with a first-class events programme encouraging participation at all levels – from the local community to world-class athletes
 - Central Industrial Zone – a distinctive and modern working environment, flexible to the demands of new business and sensitive to



the area's rich industrial history, capitalising on the waterways and connected to Meadowhall and the Sports & Leisure Hub

- Meadowhall – a shopping and entertainment complex based around the existing Meadowhall centre and, possibly, incorporating a major casino development. The destination would make use of the waterfront to create an attractive environment with increased dwell-time, as well as offering training opportunities for the local community
- While the districts should be seen as separate destinations offering distinctive visitor experiences, they should have the following in common:
 - They should be safe and welcoming, visually appealing and animated by arts, festivals and events
 - They should be well connected, both internally and with adjoining communities
 - They should be accessible and easy to navigate for pedestrians and motorists alike
 - Above all, each should have a clear and resonant sense of place

1.2.3 Cross-Cutting Themes

- Four cross-cutting themes are outlined, intended to underpin and inform destination development across each of the four districts of the Lower Don Valley. These are themes which could play a role early on in the process of destination development – as well as enhancing the sense of place, they are a short-term means of signalling long-term change:
 - Capitalising on Industrial Heritage: the area's industrial history is identified as a means of enhancing the Lower Don Valley's sense of place. This could range from the preservation and integration of industrial icons into new development, to the animation and celebration of the Lower Don Valley's industrial past through art and events
 - Environmental Sustainability: an emphasis on environmental sustainability is recommended, both as a means of raising the standard of the destination itself (in particular, the public realm) and as marketing tool to raise public expectations of the area



- Animating the Waterways: the waterways running through the Lower Don Valley could contribute greatly to the destinations – this will rely on making them open, accessible, safe and animated, through boat moorings, cycling and walking, events, etc
- Community Benefit: each of the districts of the Lower Don Valley should provide benefit for the local community, in terms of accessibility and affordability, as well as opportunities for training and education

1.2.4 Destination Opportunities

- The 2003 draft gambling bill presents significant opportunity for casino development in the Lower Don Valley. At present, proposals by two operators are in play:
 - Sun International has proposed a development attached to the Don Valley Stadium
 - MGM Mirage, in association with British Land, has proposed a development at Meadowhall
- Large-scale sports retail would be an interesting complement to the Sports & Leisure Hub, but should be considered only in the light of existing provision in the city centre and would be subject to planning policy guidance
- A series of sports-related commercial leisure operators have been consulted in the course of this project:
 - Icons of Soccer, a multi-use 'entertainment centre' with a football theme, has expressed interest in developing in the Sports & Leisure Hub, and is seeking a six month exclusivity arrangement with Sheffield City Council. Locum would advise SCC to take this step and await the results of the feasibility study
 - Information about other operators, including specific site requirements, has been included
- A key area of opportunity is communication and collaboration with the Yes! Project, a £250 million leisure development in Rotherham, currently at planning stage. The project is a joint venture between Rotherham Metropolitan Borough Council, Rotherham Investment & Development Office (RIDO) and developer Oak Holdings plc.



- Potential sites for the development of hotels and commercial leisure are identified in each of the four districts. This is only a partial list, based on consultation carried out by Locum Destination Consulting



2 Introduction

2.1 The Lower Don Valley Master Plan

Urban Strategies Inc. has been commissioned by British Land in association with Sheffield City Council to prepare a master plan for the Lower Don Valley.

Locum Destination Consulting, sub-contracted by Urban Strategies Inc., is providing specific input regarding leisure and tourism-related elements of the master plan, assessing the present performance and future potential for development of the Lower Don Valley as a visitor destination.

2.2 The Destination Market Analysis

This paper is structured as follows:

- Section 3 summarises the context for development in Sheffield and the Lower Don Valley, paying attention in particular to strategies relating to consideration of Sheffield as a visitor destination
- Section 4 provides a baseline assessment of Sheffield's performance as a visitor destination in a national and regional context
- Section 5 provides a destination audit and SWOT analysis of the Lower Don Valley, including assessment of the destination's current performance
- Section 6 establishes principles for destination development in the Lower Don Valley
- Section 7 outlines a vision for the Lower Don Valley, based around four districts of the masterplan site
- Section 8 consists of cross-cutting themes, intended to underpin and inform destination development across the masterplan site
- Section 9 examines specific proposals for investment in the Lower Don Valley, including casinos and sports-related commercial operators, and identifies possible sites for development



2.3 Consultees

Exhibit 1 is a list of people consulted by Locum Destination Consulting during the course of the study.

Exhibit 1: Consultees

Name	Organisation
Ian Bateman	Bobby Charlton Soccer Schools
Heather Bald	British Waterways
Jane Neville-Smith	British Waterways
John Ruddick	British Waterways
Charles Bouillon	Decathlon
Charles Buddery	Dig For Fire
Alex Tilbury	English Institute of Sport
David Vickers	Hallam FM Arena
Elliot Halpern	IPL Holdings
Gail Stonier	Longley College
Christine Melia	Magna
Maddy Capron	Meadowhall
Lisa Snead	Mills Corporation
Steve Lewis	Oak Holdings Plc
Lee Atkinson	Powerleague
Richard Poundford	RIDO
Ed Pierce	Roko Soccer
Ben Benest	Sheffield City Council
Cllr Gill Furniss	Sheffield City Council
Inga Uhrenbacher	Sheffield City Council
John Mothersole	Sheffield City Council
Keith Crawshaw	Sheffield City Council
Paul Billington	Sheffield City Council
Nick Chaplin	Sheffield City Council
Scott Barton	Sheffield Events
David Fletcher	Sheffield First for Investment
Pat Smith	Sheffield International Venues
Steve Brailey	Sheffield International Venues
Sarah Webb	Sheffield International Venues
Paul Swales	Stadium
John Scribbins	Top Golf
Mike Jeffreys	Valley Centertainment



3 Sheffield – Past, Present and Future

3.1 Summary

This chapter provides a brief background of the city of Sheffield and summarises a range of strategies relevant to consideration of Sheffield as a destination.

- Historically reliant on steel manufacturing, Sheffield has seen major change since the region's rapid deindustrialisation in the late 20th century. Policy of the last two decades has focussed on regenerating the city centre and the Lower Don Valley, the city's industrial centre. However, there is still much work to be done: high levels of poverty across many of Sheffield's wards have led to the city gaining European Objective 1 funding
- Sheffield recognises the importance of a vibrant city centre, a strong cultural offer and high-quality sporting facilities to its economic competitiveness, social and environmental renewal, and its ambitions to become 'a diverse and vibrant city of European distinction'
- Benefiting from an unrivalled critical mass of sports facilities, sports science, sports medicine and sports engineering expertise, Sheffield has the facilities and commitment to stage a range of major sports events. Furthermore, the city has identified sport as a means of raising levels of activity and improving quality of life throughout the Sheffield
- Sheffield recognises that the tourism offer of the city is a 'well-kept secret'. By 2008, it aims to improve its competitiveness as a destination for sports tourism, conferences, short breaks and foreign leisure visitors

3.2 Background

With a population of around 600,000, Sheffield is a changing and ambitious city. Historically reliant on heavy industry and, specifically, the manufacture of steel, Sheffield has seen major changes since the region's rapid deindustrialisation during the 1970s and 1980s, as the city's economy has moved away from manufacturing to new areas such as the service sector.

Much progress has been made through policy of the 1980s and 1990s and, in particular, the Sheffield Economic Regeneration Strategy. This focused on regenerating the city centre and tackling the dereliction left in the wake of



industrial collapse, particularly in the Lower Don Valley, the city's major centre for heavy industry.

Public sector intervention has led to a vastly improved city centre, benefited by the Millennium Galleries, the Peace Garden, the Winter Gardens and, most recently, Millennium Place (part of a new phase of development costing £20 million). In the Lower Don Valley, a former centre for heavy industry, intervention has taken the form of investment in a series of international-standard sports facilities and Meadowhall, a major regional shopping centre.

There is still much work to be done – Sheffield's economy currently lags behind other UK cities and ten of Sheffield's 29 wards fall into the UK's most deprived 10% (see Exhibit 2). As a result, the city qualifies for European Objective 1 funding, the highest level of European funding available from the EU.

Sheffield has two universities, Sheffield University and Sheffield Hallam University. Considered one of the UK's best university cities educationally, the city also boasts a strong broader student offer: its sports facilities, public transport, shopping and nightlife all play a part in attracting students from across the UK and abroad, and nearly one in three students chooses to remain in the city after graduation². Of course, the city benefits from the significant visitor activity attached to the university.

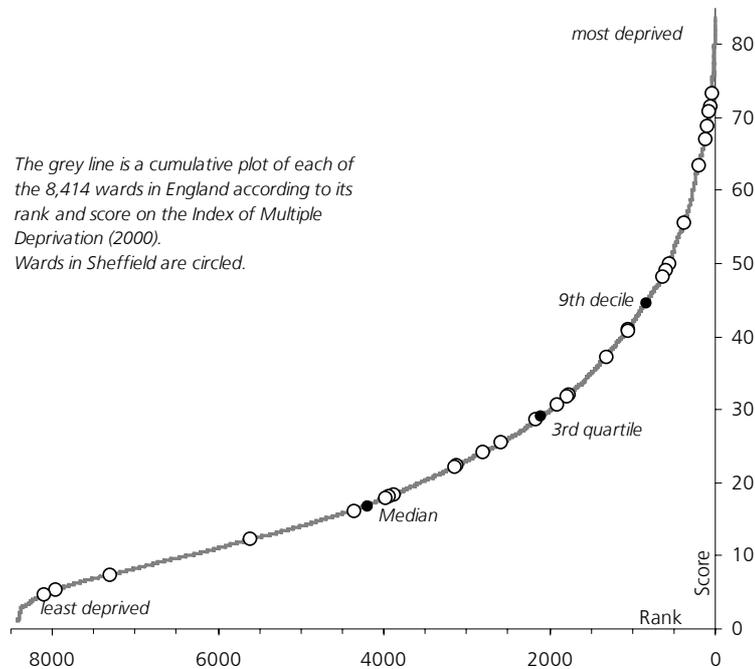
Increasingly, the public sector investment in Sheffield's facilities and public realm is being followed by private sector investment, as companies recognise Sheffield's potential as a great place to work and live. Inward investment rates have risen from 300 to over 2000 jobs per year³, and recent investors include Boeing.

² www.push.co.uk

³ Sheffield City Council: *What has the Council achieved/Not achieved to date?* www.sheffield.gov.uk



Exhibit 2: Positioning of Sheffield Wards on UK Deprivation Index



3.3 Sheffield City Strategies

3.3.1 Delivery Organisations

Responsibility for Sheffield’s strategic development lies with a series of partnerships bringing together the public, private, voluntary, community and faith sectors, under the overarching banner of the Sheffield First Partnership, the city’s official local strategic partnership. These partnerships are:

- Sheffield First For Learning
- Sheffield First For Work
- Sheffield First For Investment
- Sheffield One
- Sheffield First For Inclusion
- Sheffield First For Safety



- Sheffield First For Health
- Sheffield First For Environment

There are a number of strategies which have an impact on Sheffield's development as a destination, which are summarised below. They emphasise the shared vision to develop Sheffield a European City, to improve Sheffield's economy, to capitalise on and develop the already outstanding sports facilities in the city, and to cultivate a unique cultural offer.

3.3.2 Sheffield City Strategy

The Sheffield City Strategy (Sheffield First Partnership, 2003) outlines a comprehensive plan for the city's economic, social and environmental renewal, specifying actions for the period covering 2002-2005. It highlights ten goals, or 'Strategies for Success':

- A strong economy
- A well-educated workforce
- A vibrant city centre
- Attractive and successful neighbourhoods
- A healthy population
- Low crime
- Good transport systems
- A good cultural and sporting offer
- Cosmopolitan and inclusive
- Well-run, sustainable and well-regarded

The strategy places high importance on the role of culture and sport to the continuing regeneration of the city:

Sheffield will be recognised culturally as a diverse and vibrant city of European distinction. Culture will be critical to Sheffield's social and economic wellbeing, contribute substantially to the city's atmosphere and be central to the quality of life of each individual.



Policy challenges highlighted within the chapter, 'A good cultural and sporting offer' are especially relevant in the consideration of the Lower Don Valley as a visitor destination. These are:

- Ensuring all residents can use and enjoy our cultural (arts, sporting and leisure) assets
- Developing creative industries production as a key economic motor
- Positioning Sheffield as a city renowned for radical and unique cultural activities and for examples of sporting excellence
- Sustaining European-class cultural, sporting and leisure activities and institutions
- Building a stronger community through cultural, sporting and leisure activity which celebrates excellence and diversity
- Enhancing the city's character and atmosphere through the quality and design of its built and green environment

3.3.3 Creative Sheffield – a Distinctive European City in a Prosperous Region (Core City Prospectus)

Sheffield is one of eight Core Cities in England, with the aim 'to work in partnership with Government and other key stakeholders to promote the role of the Cities' as the drivers of regional and national economic growth and create internationally competitive regions'⁴. The other cities are:

- Birmingham
- Bristol
- Leeds
- Liverpool
- Manchester
- Newcastle
- Nottingham

⁴ Core Cities Mission Statement, www.corecities.com



Sheffield's Core City Prospectus, Creative Sheffield (Sheffield First Partnership, 2003), outlines a vision for Sheffield as an 'economic powerhouse in a green setting' and highlights practical policy changes and actions intended to 'make Sheffield a distinctive city in a broader national and international context', and to thereby increase its contribution to the competitiveness of the sub-region, the region and of the UK.

3.3.4 Sheffield Cultural Strategy

Subtitled 'Sheffield: A City Of European Distinctiveness', the cultural strategy (Sheffield First Partnership – draft for consultation, 2004) aims to ensure that 'culture, sport and leisure make Sheffield a great place for residents and visitors alike'. It highlights several important assets in the city, including the sports facilities in the Lower Don Valley, arguably the best and most extensive in a single location in Europe'. The strategy is currently at consultation stage, and will be published in 2004.

3.4 Sheffield Sports Strategies

Considerable and sustained investment has been made into Sheffield's sporting offer – the World Student Games of 1991 saw a wave of top-class facilities in the city centre and the Lower Don Valley. These, as well as two major football clubs and the Crucible Theatre's hosting of the World Snooker Championships, have established within the city a strong sporting heritage, reflected today in the recent completion of Sheffield Ice and the English Institute of Sport regional headquarters.

3.4.1 National City of Sport

In July 1995, the city was designated National City of Sport⁵ by the GB Sports Council, a status recognising its:

- commitment to bidding for and staging major sports events within a comprehensive sports strategy;

⁵ Other cities to achieve this status in the 1990s were Glasgow and Birmingham, prior to the termination of the scheme in the late 1990s



- ability to establish and implement comprehensive performance and excellence programmes, and community sports development initiatives;
- substantial investment in major sports facilities and other sports infrastructure;
- existence of strong partnerships with national sports organisations and others to implement the programme.

3.4.2 Sheffield Sports Strategy

Prepared for Sheffield City Council by Sheffield Hallam University in 2002, the Sheffield Sports Strategy makes clear the importance of sport to the city:

It generates around 6% of the city's wealth – almost three times the national average; employs around 6000 people; attracts 43% of the city population as regular participants; has attracted major external capital investment and is recognised as one of the fastest growing business sectors for the future.

The report assesses sports facilities and participation in Sheffield, and identifies the following strengths and weaknesses:

Strengths

- world-class facilities at Ponds Forge, the Arena and Don Valley;
- a proud record of delivering national and international sporting events – which have produced £38M additional spend in the city over the last 10 years;
- strong further and higher education programmes with over 1000 students studying sports-related courses every year;
- major inward investment planned – 'Ice Sheffield' project and the English Institute of Sport;
- unrivalled critical mass of sports science, sports medicine and sports engineering expertise;
- two emerging specialist sports colleges;
- innovative approaches to engaging low participant groups e.g. outreach community recreation services;



- successful sports teams including Sheffield Sharks, Sheffield Hatters and Steelers;
- a grass-roots passion for sport, perhaps best expressed through high participation and spectating in football;
- the emerging 'Sportslink' project which aims to capitalise on the business potential of the city's expertise in sports product design and engineering;
- significant commitment to sport across both the public sector, education sector, 'third sector' and the commercial/professional sectors

Weaknesses

- Sheffield is England's 25th most deprived authority and as such suffers from the inevitable impact of poverty on sports participation rates. For example, the number of sports visits per 1000 population in Sheffield is over 35% lower than the best performing towns and cities nationally, and 20% lower than the best performing major metropolitan areas;
- the city has major participation gaps amongst women/girls, young people aged 16-19, people with disabilities, low income families and black and ethnic minorities. The net result is an overall participation rate for the city of 43% which is significantly behind the best performing areas in England at 51%;
- the city has a significant number of overweight people – almost 170,000 people are overweight, of which almost 65,000 are obese!
- Sheffield has less sports facility provision than many of its big city counterparts such as Leeds and Birmingham. For example, there are over 40,000 people per facility in Sheffield, compared with an average of around 30,000 in the other major cities;
- similarly, the city spends considerably less on sports development programmes than comparable big cities – around 30% less;
- the local authority spend on sport – the major element of public sector funding for sport - has remained static and in some years decreased over the last decade;



- the investment in major sports events has declined in real terms in recent years and therefore the city has struggled to maintain its position in the events market;
- the city probably has the most diverse range of providers across the different sectors of any city in the UK. Whilst this has produced innovation and attracted inward investment, the city has not succeeded in developing a coherent and co-ordinated approach across the different agencies;
- sport has had only limited success in securing support and funding from the key non-sports sectors such as health and community safety;
- the city's voluntary and community sector in sport is extensive but reflects the national picture of being under-resourced, disparate and often focused on teams rather than clubs;
- the city has participated in high level initiatives e.g. Sport England national programmes but has insufficiently translated and adapted these to meet the differing local needs in the city's diverse communities;
- school sport – especially at primary level – is for many the primary motivator for involvement in sport. This is particularly true for girls and children from poor families. Sheffield, however, reflects the national problems of under-provision for sport and PE in schools – especially primary schools;
- research shows that the majority of young people have their most influential sporting experiences before the age of 9! The city does not have a coherent strategy for out-of-school sport for under 9s;
- Sheffield has not explicitly identified key priority sports and therefore has failed to adequately co-ordinate resources and activity within these sports to ensure both opportunities for lifelong participation in the sport and the smooth progression of talented individuals to high performance levels;
- Sheffield reflects the national picture of needing to ensure stronger links between school-based sport and sports activity in the community.

Key Challenges

- increasing the sports and physical activity levels of the least active to those of the most active;
- involving more people as volunteers, coaches and officials in sport;



- improving sports services by the key current providers in the city;
- developing 'pathways' for talented people into competition and sporting excellence;
- using sport to improve the quality of life – especially in the most deprived neighbourhoods;
- promoting and developing the economic impact of sport;
- maximising the resources available to sport from both sporting and non-sports sources.

Targets

- Aim for at least one national/international event in each target sport over the period 2003-5
- Generate an average of at least £2.5M income per annum from national/international events from 2002-5
- At least 2 events per year with major terrestrial TV coverage from 2002
- Attract 3 new sports bodies or key projects to city by 2005
- Attract Objective 1 funding to 'Sportslink' project by 2002
- Complete Ice Centre and EIS on time and on budget
- Conduct economic impact study of sport in city in 2004
- Strong profile for sport in Sheffield First Economic strategy 2002 and city publicity by 2003

NB The implementation of the strategy is currently due for annual review

3.4.3 Sportspulse

Funded by Objective 1 through the EU European Regional Development Fund, SportsPulse is a consortium combines the expertise and experience of two Universities with world-class research groups in sports technology, science, medicine and economics with key regional sport-based companies and business support organisations.

The idea behind the project is to confirm South Yorkshire as a world-renowned centre of excellence for the research, development and commercialisation of sports



products. Sportspulse is based at the Department of Mechanical Engineering of Sheffield University. Its aims are to:

- Facilitate a 'hothouse' forum for new ideas to thrive
- Introduce new technologies to the sports and leisure industry
- Enable new product commercialisation
- Create new business and jobs for the sector
- Generate innovative sports solutions
- Push the boundaries of science and technology in sport

3.5 Tourism Strategies

3.5.1 City of Sheffield Tourism Strategy

The Sheffield Tourism Strategy (Sheffield City Council, 2003) covers the period 2003-2008. The strategy sets a series of goals for the city to have achieved by 2008.

- Sheffield will be among the UK's top three locations for major sporting and other events and festivals
- Sheffield will be among the top ten UK conference destinations
- Sheffield will be among the top ten UK urban destinations for domestic short leisure breaks
- Sheffield will be among the top ten urban destinations in England for foreign leisure visitors to the country
- A major challenge identified in the strategy is to improve marketing of the tourism offer, much of which is described as a 'well kept secret'.

3.5.2 Sheffield Night-time Economy Strategy

The Sheffield Night-time Economy Strategy (Locum Destination Consulting, 2003) assesses the size, nature and opportunities for the night economy in Sheffield city centre. Estimating the number of people who use the city centre at night at 30,000, it outlines a vision for a safe, well-managed and 'civilised' night-time offer.



3.5.3 South Yorkshire Tourism Action Plan

The South Yorkshire Action Plan (Centre for Tourism & Cultural Change and Yorkshire Tourist Board, 2002) is a three-year prioritised Action Plan to be used by the South Yorkshire Objective 1 Programme Directorate to inform decisions about investment in the development of South Yorkshire's tourism industry. It also analyses the Objective 1 'Invest for Growth' programme and its suitability for tourism-related businesses.

Nine strategic objectives for South Yorkshire tourism are proposed:

- Inclusiveness
- Encouraging Economies of Scope
- Consolidation and Building on Existing Products
- Exploitation of Emerging Niche Markets
- Developing Creative and Productive Partnerships
- Developing Product Packaging, Promotion & Information
- Providing Business Support
- Providing Research Support
- Co-ordination and Leadership

A framework for action is proposed, identifying key priorities for action, with funding implications.

3.5.4 Yorkshire Business Tourism Research Study

Yorkshire Forward's Yorkshire Business Tourism Research Study (Ernst and Young, 2003) is an audit of the region's business tourism facilities (venues and accommodation), an assessment of market demand and national competition, an audit of booking and distribution channels and an overview of key projects to be taken forward.

The study identifies as Sheffield's main strength the range and reputation of the city's sporting venues. A proactive approach towards the marketing of sports-related meetings and conferences (perhaps with sports governing bodies) is advised.



However, it does not feature Sheffield as a strong business tourism area currently or in the future, based on low current provision of hotel beds and conference facilities.⁶

⁶ There are plans for a new 148 room, 4* hotel in the city centre (the Macdonald Hotel, scheduled for opening in 2005) and for refurbishment of the town hall to accommodate conferences



4 The Visitor Market Context

4.1 Summary

- The Yorkshire region receives 13 million staying visits⁷ per year, most of which (12.2 million) are made by UK residents. The value of staying visits to the region is around £1.9 billion annually. Of the 13 million staying visits made to the Yorkshire region in 2002, South Yorkshire⁸ received just under 2.3 million. 2.1 million were made by UK residents (primarily from Yorks & Humber, North West Merseyside and the East Midlands) and 170,000 by visitors from overseas (most frequently residents of the USA, France and Germany). On the whole, visits to South Yorkshire in 2002 were shorter and of less value than in the rest of the region
- Little information is currently available about the volume and value of visits made to the city itself, although the International Passenger Survey 'top twenty most visited UK towns' does not include Sheffield. Steps are being taken by Sheffield City Council's tourism department to ensure that further research is carried out into the volume and value of visits to the city – this should be an area of priority
- At national and regional level, Sheffield has few major visitor attractions. The city's most visited attraction in 2002 was the Millennium Galleries, receiving 172,000 visits. Data collected for a selection of leisure venues in the city suggests that Ponds Forge leisure venue received over one million visits over a period of one year from 2001 to 2002
- Popular visitor guide books give an indication of the quality of the food, drink and hotel offer in Sheffield alongside that of comparable cities. There appears to be a marked shortage of high quality hotel accommodation compared to Manchester, Leeds and Birmingham. In terms of restaurants, Sheffield enjoys several guide book entries, but fewer than Manchester and Leeds

⁷ Staying visits are trips of one or more nights

⁸ Visitor information collected by the International Passenger Survey and UK Tourism Survey is available for the Yorkshire region and the following sub-regional areas: North Yorkshire, South Yorkshire, West Yorkshire and East Yorkshire/North Lincolnshire



- Sporting events play an important role in Sheffield – the 2002 Embassy World Snooker Championship brought almost £2.3 million to the city
- Sheffield competes most strongly as a visitor destination against the other English Core Cities in terms of sports venues of international standard. Given the quality of its sports venues, however, there is a deficit of international sports events – especially in athletics
- In comparison to the other Core Cities, it could be said that Sheffield has some areas of weakness: dedicated conference facilities and high quality hotel accommodation are key examples

4.2 The Yorkshire Context

4.2.1 Domestic Visits to the Region

In 2002, the Yorkshire region received 12.2 million staying visits from UK residents, accounting for £1.6 billion of spending. This equates to 7.3% of all domestic staying visits made within the UK and 5.9% of spending (indicating that spend per domestic staying visit is lower in Yorkshire than the national average). The average length of domestic staying visits to the region in 2002 was 2.98 nights, shorter than the national average of 3.18 nights.

The volume, length and value of domestic visits to the region is shown in a national context in Exhibit 3.



Exhibit 3: Distribution of domestic visits in the UK, 2002

	<i>Trips</i>	<i>Nights</i>	<i>Spending</i>
	Millions	Millions	£ Millions
Cumbria	4.3	13.0	728
Northumbria	4.8	13.4	868
North West	14.5	39.3	2,316
Yorkshire	12.2	36.3	1,595
Heart of England	24.6	64.8	3,166
East of England	14.5	44.3	1,704
London	16.1	35.4	2,818
South West	21.0	87.1	3,901
Tourism South East	25.5	77.3	3,420
- Southern	14.6	45.8	2,065
- South East	10.9	31.5	1,355
TOTAL ENGLAND	134.9	415.8	20,787
Scotland	18.5	64.5	3,683
Wales	11.9	39.8	1,543
Northern Ireland	2.8	9.3	525
TOTAL UK	167.3	531.9	26,699

Source: United Kingdom Tourism Survey 2002

4.2.2 Overseas Visits to the Region

In 2002, a total of 860,000 staying visits were made to Yorkshire by overseas visitors, spending a total of £303 million. This equates to 3.6% of all staying visits made to the UK by overseas visitors, and 2.6% of spending, suggesting that the region is more competitive in the domestic visitor market than the overseas visitor market. Again, the average spend per staying visit to the region (£340) is lower than the national average (£480), although the average length of visit (8.72 nights) is greater than the national average (8.24 nights).

Exhibit 4 shows the number, length and spending of overseas visits for 2002 in a national context.



Exhibit 4: Distribution of overseas visits in the UK, 2002

	<i>Visits</i>	<i>Nights</i>	<i>Spending</i>
	Millions	Millions	£ Millions
Cumbria	0.18	1.0	41
Northumbria	0.53	3.9	169
North West	1.37	9.5	466
Yorkshire	0.86	7.5	303
Heart of England	2.59	21.1	881
East of England	1.66	13.6	616
London	11.60	75.4	5,788
South West	1.43	11.5	526
Tourism South East	3.85	31.4	1,504
England unspecified	0.07	0.4	19
TOTAL ENGLAND	20.54	175.3	10,313
TOTAL SCOTLAND	1.58	15.0	806
TOTAL WALES	0.86	6.6	252
NORTHERN IRELAND	0.28	1.7	126
Oil Rigs/Travelling	0.22	0.4	15
Isle of Man	0.02	0.2	5
Channel Islands	0.02	0.1	9
Other UK	0.01	0	2
Nil Nights	1.87	0	89
TOTAL UK	24.18	199.3	11,618

Source: *International Passenger Survey 2002*

4.2.3 Origin of Visitors to the Region

Domestic visits to Yorkshire are most frequently made by residents of Yorks and Humber (32%), followed by North West Merseyside (11%) and the East Midlands (10%). Overseas visits are most frequently made by residents of the USA (18%), France (11%) and Germany (11%). More information can be found in Exhibit 5.



Exhibit 5: Origin of Visitors to Yorkshire, 2002

	UK Residents		Overseas Residents	
	% of Trips		% of Visits	
Yorks & Humber	32	USA		18
North West Merseyside	11	France		11
East Midlands	10	Germany		11
South East	8	Australia		7
Eastern	8	Spain		5
North East	7	Netherlands		5
West Midlands	7	Irish Republic		5
South West	6	Canada		4
London	6	Italy		3
Scotland	5	Belgium		3
Wales	2	Norway		3
Northern Ireland	*	Other Countries		25
Total	100	Total		100

Source: United Kingdom Tourism Survey (UKTS)/International Passenger Survey (IPS)

4.2.4 Major Attractions in the Yorkshire Region

The Survey of Visits to Visitor Attractions 2002, published annually by VisitBritain, contains information about visitor numbers to attractions throughout the UK. The Yorkshire region's major paid and free visitor attractions are shown in Exhibit 6 and Exhibit 7. In 2002, the region's most popular attraction was York Minster in York, attracting in the region of 1.6 million visits.

Exhibit 6: Major Paid Admission Attractions in Yorkshire

Attraction	Location	Visits 2002	Visits 2001
Flamingo Land Theme Park & Zoo	Kirby Misperton	1,393,000E	1,322,000E
The Deep	Hull	750,000E	Not Open
Harewood House	Harewood	357,820	322,046
Cannon Hall Open Farm	Cawthorne	350,000E	100,000E
Dalby Forest Drive & Visitor Centre	Low Dalby	330,981	273,915
Magna	Rotherham	291,143	475,000
North Yorkshire Moors Railway	Pickering	290,000E	245,000E

Source: Survey of Visits to Visitor Attractions 2002



Exhibit 7: Major Free Admission Attractions in Yorkshire

Attraction	Location	Visits 2002	Visits 2001
York Minster	York	1,570,500E	1,600,000E
National Museum of Photography, Film & Television	Bradford	795,371E	874,000E
National Railway Museum	York	742,515	558,360
Lotherton Hall Estate	Aberford	650,000E	DK
Brymor Ice Cream Parlour	Masham	322,000E	188,769E
Royal Armouries Museum	Leeds	280,000	185,000
Leeds City Art Gallery	Leeds	233,330	239,919
Jorvik Glass	York	191,058	194,000

Source: Survey of Visits to Visitor Attractions 2002

4.2.5 Visits to South Yorkshire

The United Kingdom Tourism Survey (UKTS) and International Passenger Survey (IPS) provide more specific information about the volume and value of visits to South Yorkshire. Information about staying visits to South Yorkshire made by domestic and overseas visitors can be found in Exhibit 8 and Exhibit 9 respectively.

Exhibit 8: Domestic Staying Visits to Yorkshire, 2002

	<i>Trips</i>	<i>Nights</i>	<i>Spending</i>	<i>Average Nights</i>	<i>Average Spend</i>
	<i>Millions</i>	<i>Millions</i>	<i>£ Millions</i>	<i>Nights</i>	<i>£</i>
YORKSHIRE	12.2	36.3	1,595	2.98	131
North Yorkshire	5	16	766	3.20	153
West Yorkshire	3.4	8.6	424	2.53	125
South Yorkshire	2.1	4.7	193	2.24	92
East Yorkshire / North Lincolnshire*	1.8	6.9	213	3.83	118
ENGLAND	134.9	415.8	20,788	3.08	154

Source: United Kingdom Tourism Survey 2002



Exhibit 9: Overseas Staying Visits to Yorkshire, 2002

	Visits	Nights	Spending	Average Nights	Average Spend
	Millions	Millions	£ Millions	Nights	£
YORKSHIRE	0.86	7.5	303	8.7	352
North Yorkshire	0.34	1.8	95	5.3	279
West Yorkshire	0.3	2.4	100	8.0	333
South Yorkshire	0.17	2.2	74	12.9	435
East Yorkshire / North Lincolnshire*	0.09	1.1	33	12.2	367
ENGLAND	20.54	175.3	10,313	8.5	502

Source: *International Passenger Survey 2002*

South Yorkshire received 2.1 million domestic staying visits in 2002, staying a total of 4.7 million nights and spending £193 million., equating to 17% of total domestic staying visits to the region and 12% of total spending. Average spend (£92) and length of stay (2.2 nights) of domestic visits are lower in South Yorkshire than anywhere else in the Yorkshire region.

In 2002, there were 170,000 visits made to South Yorkshire by overseas visitors, staying a total of 2.2 million nights and spending a total of £74 million. Unlike domestic visits, overseas visits to South Yorkshire are, on average, longer (12.9 nights) than the rest of the region, and more valuable, with an average spend of £435.

4.3 The Sheffield Context

NB This excludes information about visitor activity in the Lower Don Valley, which is covered later.

4.3.1 Top Towns Visited by Overseas Residents

The twenty most popular towns and cities among overseas visitors to the UK are shown in Exhibit 10. As may be expected, London received significantly more visits than any other UK town in 2002. Sheffield does not feature in the list, although York and Leeds, also in the Yorkshire region, are both present. Significantly, Birmingham, Manchester, Glasgow, Cardiff and Bath, all of which compete strongly with Sheffield as sporting cities, all feature within the top twenty towns visited by overseas residents.



Exhibit 10: Top Towns Visited by Overseas Residents, 2002

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

Source: *International Passenger Survey 2002*

4.3.2 Attractions in Sheffield

The Survey of Visits to Visitor Attractions 2002 contains very few Sheffield attractions compared to other UK cities. The city's most popular visitor attraction is the Millennium Galleries, receiving over 172,000 visits in 2002.

A complete list of Sheffield entries can be found in Exhibit 11.

Exhibit 11: Visits to Sheffield Visitor Attractions, 2001 and 2002

Attraction	2002	2001
Millennium Galleries	172,337	191,918
Heeley City Farm	80,000	60,000
Sheffield City Museum and Mappin Gallery	73,211	88,114
Graves Art Gallery	53,999	54,047
Bishop's House	8,448	7,221
Traditional Heritage Museum	4,700	4,800

Source: *Survey of Visits to Visitor Attractions 2002*

4.3.3 Other Leisure Venues

Sheffield City Council has carried out some baseline work in assessing the number of visitors to venues that do not feature in the *Survey of Visits to Visitor Attractions*



2002. These include cinemas, some of the city centre sports venues and the Hallam University Student Union.

Ponds Forge sports club is shown to be a highly significant venue for Sheffield, receiving over one million visits over a year period 2001-2002. Details can be found in Exhibit 12.

Exhibit 12: Attendance at Sheffield Leisure Venues

Venue/attendance	1999/2000	2000/2001	2001/2002
Ponds Forge	948,430	967,400	1,070,161
City Hall	297,885	313,077	326,481
Sheffield Theatres	323,770	344,586	334,549
Showroom ⁹	105,000	105,000	105,000
Site Gallery	19,000	30,000	Not available
Odeon	327,977	334,508	323,503
Sheffield			
Hallam University Student Union	152,000	177,000	Not available

Source: Sheffield City Council Baseline Report, 2002

4.3.4 Sporting Events in Sheffield

An economic impact assessment of the 2002 Embassy World Snooker Championship was carried out by Sheffield Hallam University's Sport Industry Research Centre. The annual event has been held at the Crucible Theatre for the past 27 years. Defining the economic impact of the event as 'the net change in Sheffield's economy as a result of hosting the 2002 World Snooker Championship', the report concluded that the economic impact of the event on the city was £2.26 million. The largest single area of expenditure was on accommodation with the event generating nearly 18,000 commercial bed-nights in the city.

The annual World Snooker Championship is the city's most lucrative sporting events in terms of economic impact. In recent years, only one-off events such as

⁹ These figures are an average across the three years. Cinema attendance at the Showroom has hovered around 105,000, with only minor fluctuations in numbers over this period.



Euro '96 (£5 million) and the 6th FINA World Masters' Swimming Championships 1996 (£4.5 million) have achieved greater economic impacts.

An overview of the event's economic impact can be seen in Exhibit 13.

Exhibit 13: 2002 World Snooker Championship - Economic impact summary

Category	Amount £s	Percentage of Total Impact	Commercial Bed-Nights
Players & Entourages	82,639	4%	731
Officials	68,751	3%	666
Sponsors / VIPs	87,615	4%	531
Media	283,990	13%	3,390
Spectators	1,544,323	67%	12,468
Contractors	17,997	1%	183
Sub Total	2,085,315	92%	17,969
Organisational Spend	174,777	8%	
Total Economic Impact	2,260,092	100%	

Source: An evaluation of: the economic impact, place marketing effects, and visitors' perceptions of Sheffield, Sport Industry Research Centre, Sheffield Hallam University, 2002

4.3.5 Visitor Activity in Sheffield City Centre

Since the beginning of 2004, footfall has been monitored at two pedestrianised streets in the city centre, Fargate Street and Pinstone Street. Over the period from January to March 2004, an average of 222,000 pedestrian visits were made per week to Fargate Street pedestrian area, and an average of 107,000 pedestrian visits per week to Pinstone Street pedestrian area. Weekly figures for this period are shown in Exhibit 14.

Exhibit 14: Pedestrian visits to Sheffield City Centre, Jan- March 2004

Week	Thousands of pedestrians per week													Average
	1	2	3	4	5	6	7	8	9	10	11	12	13	
Fargate St	203	189	209	200	212	239	230	208	198	215	298	185	306	222
Pinstone St	113	112	111	103	108	111	115	102	111	93	103	106	109	107

Source: Sheffield City Council



Visits to both pedestrians areas were at their highest on Saturdays, with Wednesday being consistently the busiest weekday.

4.3.6 Hotel Occupancy in Sheffield

TRI Hospitality Consulting Research has carried out a study of the supply and performance of hotels in Sheffield¹⁰. The report identifies seven hotels in the city of 3-4 star standard, of which six are branded hotels. These hotels are shown in Exhibit 15.

The average number occupancy for 3-4 star hotels in Sheffield in 2003 was 76%. Average room rate was £56.

Exhibit 15: Sheffield 3- and 4-Star Branded Hotels, 2003

Hotel / Affiliation	AA / RAC Star Rating	Number. of Bedrooms	Occupancy (%)	Average Room Rate (£)
Hilton Sheffield	4	128	83	67
Marriot Sheffield	4	114	75	65
Holiday Inn Royal Victoria	4	99	73	62
Novotel	3	144	85	52
Moat House	3	95	70	45
Holiday Inn West	3	139	68	42
Average		120	76	56

Source: TRI Hospitality Consulting Research

The report highlights a series of other key points:

- Room occupancy levels have remained relatively static over the last five years
- Average room rates have shown a consistent growth pattern
- TRI envisage that rooms revenue yield will improve in 2004 with the continued redevelopment and rejuvenation of Sheffield city centre and surrounding areas

¹⁰ TRI Hospitality Consulting Research, Proposed Hotel, Conference Centre and Health Club at Meadowhall, Sheffield, Draft, January 2004



4.3.7 Food, Drink and Accommodation in Sheffield

An indication of the quality of the city's provision of food, drink and accommodation can be gained by consulting popular visitor guides. While this is not by any means an exact science, it is a means of gauging the quality of the sector as it is perceived by the visiting public and, as importantly, by the opinion-formers – the reviewers.

Exhibit 16 contains the number of Sheffield entries in the Good Hotel Guide 2004, the Good Food Guide 2004 and the Good Pub Guide 2004. This is benchmarked against four comparable cities – Leeds, Manchester, Liverpool and Birmingham.

There is a marked lack of Sheffield entries in the Good Hotel Guide 2004, which only features one Sheffield hotel, Westbourne House. This is the lowest score among the cities in question, and is likely to indicate a lack of high quality hotels in the city. The Good Food Guide 2004 contains 6 entries for Sheffield, on a par with Liverpool and slightly better than Birmingham. However, Leeds and Manchester appear to have a more highly developed food offer, gaining 9 and 14 entries respectively. Sheffield's three entries in the Good Pub Guide 2004, however, place the city second only to Manchester (4 entries).

Exhibit 16: Sheffield Guidebook Entries, 2004

Title	Entries	Sheffield Entries	Leeds	Manchester	Liverpool	Birmingham
Good Hotel Guide	1	Westbourne House	4	4	2	3
Good Food Guide	6	Blue Room Brasserie, Carriages, Greenhead House, Rafters, Richard Smith at Thyme, Slammers	9	14	6	5
Good Pub Guide	3	Fat Cat, New Barrack, Three Acres	1	4	2	2

Source: The Good Hotel Guide 2004, Ebury Press, London, 2003; The Good Pub Guide 2004, Ebury Press, London, 2003; The Good Food Guide 2004, Which? Books, London, 2003

4.3.8 The Need for More Research

At present, there is little information available about the volume and value of visits made to Sheffield. Measures are being taken by the tourism department of



Sheffield City Council to ensure that more data is available in these areas. We would recommend the bottom-up STEAM economic impact model as a means of carrying out this research.

Similarly further research about visitors' reasons to visit Sheffield, length of stay, perceptions of the city etc would undoubtedly be beneficial in the future.

4.4 How Does Sheffield Compare to the Other Core Cities?

Sheffield competes most strongly as a visitor destination against the other English Core Cities in terms of sports venues of international standard. Given the quality of its sports venues, however, there is a deficit of international sports events – especially in athletics. Reasons for this are discussed elsewhere.

In comparison to the other Core Cities, it could be said that Sheffield has some areas of weakness: dedicated conference facilities and high quality hotel accommodation are key examples.

Exhibit 17 benchmarks Sheffield against the seven other English Core Cities in terms of:

- Catchment (30 and 60 minutes' drive time)
- Accommodation (3+ star hotels)
- Arts & Culture (performance venues, galleries and museums)
- Conferences & Events (indicative lists of facilities and events in 2004)
- Sports Facilities of International Standard (able to host international events)
- Airport Access



	Newcastle-Gateshead	Birmingham	Manchester	Sheffield	Liverpool	Leeds	Nottingham	Bristol
Theatre	Theatre Royal, Playhouse, Live Theatre, Opera House	Hippodrome, Repertory Theatre, The Drum, Alexandra Theatre	Palace Theatre, The Lowry, Royal Exchange, Opera House	Crucible, Lyceum, Studio	Empire, Royal Court, Liverpool Playhouse, Everyman Theatre	Grand Theatre, West Yorks Playhouse, Carriage Works Theatre*	Nottingham Playhouse	Bristol Hippodrome
Art Museums/Centres	Laing, Baltic, Waygood Gallery	City Museum & Art Gallery, Museum of Art	Manchester City Art Galleries, Whitworth Art Gallery	Millennium Galleries, Graves Art Gallery	Tate Liverpool, The Lowry	Leeds City Art Gallery	Castle Museum & Art Gallery	City Museum & Art Gallery, Arncliffe
Other Museums	Discovery, Hancock	National Motorcycle Museum	Manchester Museum, Man Utd Museum, Museum of Science & Industry	Sheffield City Museum	Liverpool Museum, Liverpool FC Museum, Merseyside Maritime Museum	Royal Armouries	Wollaton Hall	Empire and Common-wealth
Attractions (+50,000 visitors)	7	7	8	7	15	8	6	9
Conferences & Events								
Examples of events in 2004	Great North Run, Norwich Union Grand Prix, Pirelli International Rally, RSC Winter Season	Crufts, British International Motor Show, Birmingham International Jazz Festival, DFS Classic Tennis Tournament, ArtsFest 2004, Gardeners World Live	Olympic Trials & AAA Championships, Commonwealth Film Festival, Great Manchester Run, Futuresonic	Embassy Snooker World Championships, World Indoor Bowls, World Firefighters' Games	Grand National, Mersey River Festival, International Beatle Week, Creamfields, Africa Oye, Liverpool Pops	Fashion Leeds 2004, Fete des Fleurs, Ice Cube, Leeds International Concert Season	British Squash Open, Nottingham Goose Fair, Riverside Festival, Europe+ Festival, Now Festival	Ideal Home Show, Audley Harrison Fight, England vs. NZ Cricket ODI, Organic Food Festival
Dedicated conference centre - name	None	NEC, ICC, NIA	G Mex	None	None	None	None	None



	Newcastle-Gateshead	Birmingham	Manchester	Sheffield	Liverpool	Leeds	Nottingham	Bristol
Dedicated conference centre - max capacity	None	12,000, 2,000, 12,500	5,000	None	None	None	None	None
Dedicated exhibition centre capacity	None	200,000 m ² , 3,050m ² ,	12,500m ²	None	None	None	None	None
<i>Sports Venues of International Standard</i>								
Athletics	Gateshead International Stadium	Unknown	Manchester Regional Arena	EIS Sheffield, Don Valley Stadium	Unknown	Unknown	Unknown	Unknown
Cricket	Chester-le-Street	Edgbaston	Old Trafford	None	None	Headingley	Trent Bridge	The County Ground
Cycling	None	Wheels Circuit	Manchester Velodrome	None	None	None	None	None
Football	St James Park	Villa Park, City Ground	Old Trafford, City of Manchester	Hillsborough, Bramall Lane	Anfield, Goodison Park	Elland Road	City Ground	None
Ice Rinks of Olympic Size	None	None	None	IceSheffield	None	None	National Ice Centre	None
Swimming pools of Olympic Size	None	None	Manchester Aquatics Centre	Ponds Forge	None	Leeds International Pool	None	None
Watersports	None	None	None	None	None	None	Holme Pierpoint	None
<i>Airport Access</i>								
Continental Destinations Served by Scheduled Air Services	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes



5 Destination Audit of the Lower Don Valley

5.1 Summary

- Situated close to the M1, the Lower Don Valley is within easy reach of several of the UK's major conurbations: almost 8 million people live within an hour's drive of the area
- There is a significant level of visitor activity in the Lower Don Valley, generated by a series of high quality attractors. However, these tend to be disjointed and difficult to move between, especially for the pedestrian visitor. There is a marked lack of infrastructure and services to draw the attractors together, and, as a result, there is little in the way of a coherent destination 'package'
- The most successful attractor in the area is Meadowhall, one of the UK's leading shopping centres, which receives 31 million visits per year
- Catchment for visitor activity in the Lower Don Valley varies widely. Meadowhall focuses on a 10-mile catchment area based on conurbations clustered around the M1, while the sports venues range from a local catchment for minor events to international catchment for major events
- Other attractors tend to be sports and leisure venues, and are clustered in the Sports & Leisure Hub. Some of these, including the Don Valley Stadium and the Hallam FM Arena, are the legacy of investment for the 1991 World Student Games, hosted in Sheffield. Others, such as Ice Sheffield and the English Institute of Sport regional headquarters, have been developed more recently and are the result of Sport England and English Institute of Sport funding
- Management of the sports venues is, in the main, the responsibility of Sheffield International Venues (SIV), a division of the Sheffield City Trust, although the Hallam FM Arena is managed by Clear Channel Management
- The sports venues host a number of activities and events – these are sports events (ranging from community usage to international competition), music events (Hallam FM Arena) and private hire events (exhibitions and corporate hire)



- Other attractors include Valley Centertainment, a leisure complex comprising a multi-screen cinema, bowling alley and restaurants. The complex is popular locally, with the cinema receiving 1.5 million visits per year. The Sheffield & Tinsley Canal and the Don River also run through the valley, attracting a number of walkers and canoeists.
- An overview of the Lower Don Valley's visitor assets can be found in Exhibit 19, below.



Exhibit 19: Overview of visitor assets in the Lower Don Valley

Attractor	Description	Uses	Management	Visits	Catchment
<i>Meadowhall</i>					
Meadowhall	Major regional shopping centre	Retail	Meadowhall	31 million visits per year (repeat visit factor 50)	Local to regional
The Source	Training and fitness centre	Training / conferences /health club	Meadowhall	60,000+ per year	Local to regional
<i>Sports Venues</i>					
Don Valley Stadium	25,000-capacity athletics stadium	National / international athletics events, concerts, exhibitions, corporate	SIV	230,000 visits per year.	Local to international
Hallam FM Arena	12,500-capacity indoor arena	Concerts, sport, entertainment, corporate, exhibitions	Clear Channel	800,000 visits per year.	Local to regional
Don Valley Bowl	Purpose-built open-air showground	Outdoor sports events, concerts and fireworks displays	SIV	'After Dark' fireworks display attracts 15,000 visitors	Local to regional
English Institute of Sport	Regional centre for the UK EIS network	Professional sports training, regional and national sports events and community sports teams; some corporate hire	SIV	Unknown	Local to international
IceSheffield	Twin Olympic-size ice-rink	General leisure use and potential to host national / international games	SIV	Unknown	Local to international
Woodbourn Road Stadium	Athletics stadium	Local sports training and Powerleague 5-a-side football	SIV	150,000 visits per year (repeat visit factor 50)	Local
<i>Other</i>					
Valley Entertainment	Leisure park incorporating cinema, bowling alley, restaurants	Leisure use	THI Management	UGC cinema receives 1.5 million visits per year	Local to regional
Sheffield & Tinsley Canal / Don River	Waterways stretching from Meadowhall to city centre	Walkers follow the 'Five Weirs Walk' from the city centre to Meadowhall; canoeists use both waterways	N/A	Unknown – small interest groups	Local

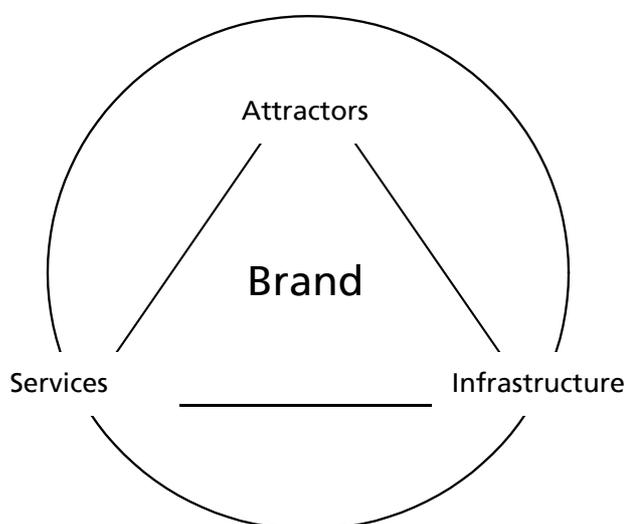


5.2 Assessment of the Lower Don Valley Destination

5.2.1 Destination Ingredients

Every destination is made up of four key ingredients:

Exhibit 20: Locum Destination Ingredients



- **Attractors** – there are several important attractors in the Lower Don Valley, bringing people to the area from local, regional, national and international catchments. Attractors, including Meadowhall and a series of sports venues, have been the subject of major public and private investment, and are of a very high quality.
- **Services** – services are limited in the study area. Provision of food & drink is, by and large, restricted to fast-food restaurants, at Valley Entertainment, Meadowhall and the Sports & Leisure Hub. There is little or no collaboration between visitor venues and providers of services and no packaged visitor offer.
- **Infrastructure** – while attractors are served by road and Supertram facilities, there is a marked lack of pedestrian linkage both into and within the study area. While physically close, (particularly in the sports hub), attractors give the impression of being separate entities – the current infrastructure does



not draw the attractors together in a coherent visitor offer. Other elements of the visitor infrastructure, such as public toilets and signage, are weak.

- Brand – The Lower Don Valley has two clear areas of brand strength: Meadowhall has considerable equity as a retail brand, and the sports cluster. However, it appears that, in the case of the sports facilities, the brand is not as strong as the product – many consultees described the collection of venues as a ‘well-kept secret’. This is an area for development.

Later in this chapter, each *attractor*, as shown in Exhibit 19, is examined in detail.



5.2.2 Destination SWOT Analysis

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> • Meadowhall brand profile and market • International-standard sports facilities on single site • Good public transport • Rich industrial history of area; some steelworks still operational • Iconic Forgemasters building • Some good built heritage in Attercliffe • Good access from M1 • Large catchment population • Distinctive cooling towers by M1 serve as gateway • The Sheffield and Tinsley Canal and the Don River • 'Arm's length' model adopted by SCC to manage sports facilities encourages commercial approach 	<ul style="list-style-type: none"> • No 'sense of place' • Lack of internal linkages • Lack of linkage with neighbouring communities • Poor pedestrian environment • Poor gateway to the city • Canal and river are 'hidden' • Some facilities are underused • Poor perception of some facilities, eg Don Valley Stadium, as 'white elephant' • Neglect of built heritage • Contamination of land
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • BW interest in waterfront development • High demand for waterfront environments • Demand for niche / specialist retail • New gaming legislation • University interest in sports facilities • Other educational interest in sports facilities (schools, colleges et al) • Growing interest in industrial history¹¹ • Growing interest in and demand for professional sports facilities • Objective 1 status • Sheffield wants to capitalise on its industrial history 	<ul style="list-style-type: none"> • Competition from the Yes! Project entertainment development in Rotherham • Major casino operators could choose to invest elsewhere • Growing attraction of city centre could compromise development in the study area • M1 traffic volume could threaten development • Gateway architecture could threaten road safety • Lack of Yorkshire Forward interest in Sheffield

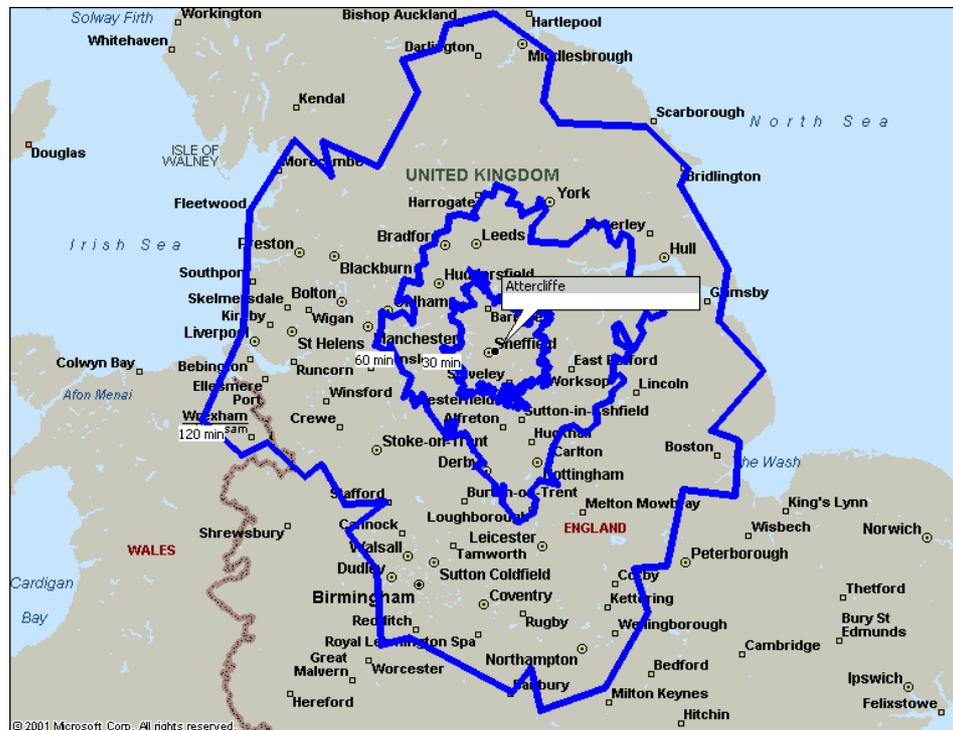
¹¹ See section 8



5.2.3 Catchment

The Lower Don Valley's geographical position is enviable: within easy reach of the M1 and in striking distance of some of the UK's major conurbations, 6 to 8 million people live within 60 minutes' driving time. Exhibit 21 gives statistics for the resident population within 30 minutes', 1 hour's and 2 hours' drive of Attercliffe village.

Exhibit 21: Driving Distances



Driving distance	Population
Within 30 minutes	1,352,477
Within 1 hour	5,758,918
Within 2 hours	20,220,840

Source: MS Mappoint 2001



5.3 Meadowhall

5.3.1 Meadowhall Shopping Centre

Opened in 1990, Meadowhall is one of the UK's leading shopping centres, receiving 31 million visits per year. Repeat visits are high: the average visitor to Meadowhall makes 50 trips to the shopping centre per year, spending an average of two hours on site with each visit. The presence of Sainsbury's at the centre contributes to the high frequency of return visits, as a number of visitors will go to Meadowhall for weekly grocery shopping.

Much of Meadowhall's visitor base is local - 60% of visitors to the shopping centre travel less than ten miles. Other visitors tend to come from areas clustered around the main arterial routes across the wider catchment area.

Visitors tend to be young working women with children, and 84% of all visitors travel to the shopping centre by car. The average spend per party is between £107 (at off-peak times) and £180 (at peak times).

5.3.2 The Source

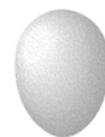
The Source is a multi-million pound training centre adjacent to Meadowhall shopping centre. The Source is a partnership between Meadowhall, Sheffield City Council and British Land, providing nationally accredited training at all levels, serving both businesses and the local community. The Source includes a dedicated IT suite, classrooms, conference facilities, gym, crèche and employment advice centre.

The Source receives in excess of 60,000 visits per year, primarily from residents of Sheffield and Rotherham.

5.4 Sports Venues

5.4.1 Background: The 1991 World Student Games Legacy

In 1991, Sheffield was host to the World Student Games, the world's largest multi-sport event after the Olympics. In preparation for the games, a number of world-class sports facilities were built in the late 1980s. These included the Don Valley



Stadium, Ponds Forge International Sports Centre, Sheffield Arena and Hillsborough Sports Arena.

The 1991 facilities were built by Sheffield for Health Ltd, a joint public and private board given the task of managing the games and, subsequently, three of the major 1991 venues (Don Valley Stadium, Ponds Forge and Hillsborough Sports Centre).

After the 1991 World Student Games, Sheffield for Health Ltd became Sheffield International Venues Ltd (SIV), a division of Sheffield City Trust. Management of the three major venues was placed into the hands of SIV, contracted to the City Council to meet certain standards of financial performance. The fourth major venue, Sheffield Arena, was initially managed by SMGI, and subsequently by Clear Channel, subcontracted to the Sheffield City Trust.

The economic failure of the 1991 World Student Games left Sheffield a financial legacy which is still highly relevant. The debt incurred by the city council in building the venues is still being paid off, a factor which places economic constraints on development opportunities in coming years. Furthermore, the economic failure of the games has had a significant negative effect on public perception of the larger sports facilities. Only now are the longer-term regeneration benefits of the 1991 facilities becoming more widely recognised.

5.4.2 The Don Valley Stadium

Built at a cost of £29 million and completed in 1990, the Don Valley Stadium is the UK's largest athletics stadium, with a capacity of 25,000. The reputation of the stadium has been tarnished by the financial failure of the 1991 World Student Games, and is perceived by many as an expensive 'white elephant' for the city. The city council is still responsible for servicing the considerable debt outstanding on the cost of the stadium.

The stadium is operated at a loss of £750,000 per year. While £250,000 of this operating loss is directly associated with running the stadium, the remaining £500,000 is attributable to SIV overheads.

Activities at the Don Valley Stadium fall in to three categories:

- Events – includes exhibitions, fairs, concerts and sporting events
- Exclusiv – conference / meeting room hire



- Daily usage – includes visits made to the fitness suite, indoor bowls, gymnastics facilities, 'full-throttle' mini-car racing

The number of visits made to the Don Valley Stadium over a period of one year is shown in Exhibit 22.

Exhibit 22: Visits to Don Valley Stadium 2003-2004

Dates	Events	Exclusiv	Daily Usage	Total
01/04/03 - 27/04/03	8,200	1,808	6,382	16,390
28/04/03 - 25/05/03	17,850	1,451	6,353	25,654
26/05/03 - 29/06/03	10,900	1,411	7,713	20,024
30/06/03 - 27/07/03	14,600	2,041	5,964	22,605
28/07/03 - 24/08/03	11,050	365	5,658	17,073
25/08/03 - 28/09/03	12,000	850	3,717	16,567
29/9/03 - 26/10/03	10,744	1,000	6,697	18,441
27/10/03 - 23/11/03	16,200	1,074	6,335	23,609
24/11/03 - 28/12/03	5,250	1,623	6,993	13,866
29/12/03 - 25/01/03	7,250	850	6,785	14,885
26/01/04 - 22/02/04	8,150	1,153	7,570	16,873
23/02/04 - 04/04/04	10,700	1,045	9,968	21,713
Annual Total	132,894	14,671	80,135	227,700

Source: Sheffield International Venues

Events held at the Don Valley Stadium include sporting events (athletics, rugby etc), concerts, computer / antique fairs, etc. Exhibit 23 is a calendar for events at the stadium in 2004. It gives an indication of the breakdown of event days at the stadium across the sub-categories of sports, entertainment and exhibitions.



**Exhibit 23: Don Valley Stadium Public Events
Calendar 2004**

Date	Event	Type
03.04.04 to 04.04.04	Computer Fair	Exhibition
10.04.04	Sheffield Postcard Fair	Exhibition
11.04.04 to 18.04.04	The Games 2 TV Show	Entertainment
24.04.04	Festival of Athletics	Sport
24.04.04 to 25.04.04	Computer Fair	Exhibition
02.05.04	Sheffield Marathon 2004	Sport
08.05.04	Rotherham Titans RUFC v Newcastle Falcons	Sport
09.05.04	Race for Life	Sport
15.05.04 - 16.05.04	Yorkshire AAAs Athletics Championship	Sport
21.05.04	Sheffield Eagles v Dewsbury (H)	Sport
23.05.04	Antiques Fair	Exhibition
05.06.04 - 06.06.04	Computer Fair	Exhibition
06.06.04	Sheffield Eagles v Workington	Sport
20.06.04	Sheffield Eagles v Barrow	Sport
01.07.04	Barnsley Schools Athletics Day	Sport
03.07.04	Sheffield City Athletics Finals	Sport
03.07.04 - 04.07.04	Computer Fair	Exhibition
04.07.04	Sheffield Eagles v Swinton	Sport
11.07.04	Sheffield Eagles v Chorley	Sport
23.07.04	Sheffield Eagles v York	Sport
25.07.04	Antiques Fair	Exhibition
31.07.04 to 01.08.04	Computer Fair	Exhibition
01.08.04	Sheffield Eagles v Gateshead	Sport
07.08.04 to 08.08.04	Relay for Life	Sport
22.08.04	Sheffield Eagles v Hunslet	Sport
28.08.04 to 04.09.04	World Firefighters Games 2004	Sport
12.09.04	Sheffield Eagles v London	Sport
18.09.04	Sheffield Postcard Fair	Exhibition
19.09.04	Antiques Fair	Exhibition
25.09.04 to 26.09.04	Britbowl - American Football	Sport
09.10.04	Cancer Research - Biggest PINK Aerobathon	Sport
10.10.04	Bonsai Exhibition	Exhibition
14.10.04	South Yorkshire Construction Exhibition	Exhibition
16.10.04 to 17.10.04	Full Throttle BRCA National Juniors Championships	Sport
20.11.04	The Roger Albert Clark Rally 2004	Sport
28.11.04	Antiques Fair	Exhibition



First Class Athletics Events at the Don Valley Stadium

As one of the UK's best athletics tracks, the Don Valley Stadium has been host to several major national and international sports events. However, there is fierce competition in the UK for major athletics events, as the number of first class events is outnumbered by the number of stadia competing to host them. London's Olympic bid will serve to emphasise this.

First class athletics events are televised, and attract major publicity for the host city. They attract in the region of 8 to 10 thousand spectators from local to national, and sometimes international catchment.

First class athletics events are subject to a hosting fee (paid by the local authority) of around £70,000, with a further £30,000 payable in the form associated costs such as the provision staff and secondary facilities. Although there is no direct benefit to the local authority for hosting these events, the wider economic benefit is well documented: the 9th IAAF World Indoor Championships, held in March 2003 at Birmingham's National Indoor Arena, resulted in a financial boost of at least £3.7 million to the city and surrounding area.¹²

The large capacity of the Don Valley Stadium can serve as a disadvantage when competing for these events, as rows of empty seats do not make good television.

Other Sports Events at the Don Valley Stadium

The Don Valley Stadium hosts various other sports events, such as local athletics events, some Rotherham Titans and Sheffield Eagles rugby matches and specialised athletics events, including the World Firefighters Games 2004. It is the start and end point of the annual Sheffield Marathon.

The Don Valley Stadium serves as an important training venue for a range of sports, and is used every day in this context.

Entertainment Events at the Don Valley Stadium

As well as sports events, the Don Valley Stadium has staged large-scale outdoor pop and rock concerts, including Michael Jackson, the Rolling Stones and the Spice Girls. As a music venue, the stadium is capable of hosting 52,000 spectators. In

¹² www.uk sport.gov.uk



recent years, the stadium has suffered from a decline in music events as trends have moved away from stadium tours in favour of established summer festivals across the UK.

In 2003 and 2004, the stadium played hosted to Channel 4's reality TV show, The Games. The show featured a series of celebrities competing against one another in athletic events over the course of a week, living in a purpose-built village, also at the Don Valley Stadium. Sports events were held in the stadium and also used facilities in the neighbouring EIS. The show attracted 2.5 million viewers¹³.

Exhibitions and Fairs at the Don Valley Stadium

The stadium has a strong programme of special interest exhibitions including antique fairs, computer fairs and vintage car rallies. These attract visitors from across the region.

Corporate Hire at the Don Valley Stadium

Exclusiv is a business to business service offered by SIV. At the Don Valley Stadium, facilities are provided for:

- Conferences
- Banqueting
- Corporate Hospitality
- Team Building
- Business Facilities

Clients included an array of private and public sector organisations, including South Yorkshire Police, Sheffield City Council, various educational bodies, various sports bodies, a range of consulting firms, supermarkets, restaurant chains and others.

Daily Usage of the Don Valley Stadium

Public facilities available at the stadium include:

¹³ The Guardian



- Fitness suite
- Gymnastics
- Indoor bowls
- Athletics training facilities
- 'Full-throttle' mini-car racing

These are offered to the public as 'pay-as-you-go' services.

5.4.3 The Hallam FM Arena

Formerly the Sheffield Arena, the Hallam FM Arena was completed for the 1991 World Student Games at a cost of £32 million. The 12,500-capacity arena was designed to be a flexible events space, capable of hosting pop concerts, boxing competitions, basketball matches, volleyball matches, ice hockey matches, ice shows and exhibitions. Managed by Clear Channel Entertainment, the venue is the only of the major 1991 venues to operate at a profit.

The Hallam FM Arena is dominated by music events, a fact reflected by its recent music radio rebranding. In this context, it is host to major artists such as Cher, Dire Straits and Ronan Keating. However, sports events are still frequent, including hosting the British Open Showjumping Championships and the Harlem Globetrotters. Alongside music and sports, the venue hosts family shows such as Disney on Ice. Exhibitions take at the arena, but tend to be less in demand, due to the aspect of the vast amount of tiered seating which is not used at such events.

The Hallam FM Arena receives 800,000 visits per year, across a total of 150 event days. This equate to approximately 280 days of venue use, once set-up and rehearsals are taken into account. The visitor profile varies greatly according to the type of event. While ice hockey games attract a largely local visitor base (80% from Sheffield and Rotherham), major pop artists will attract a greater proportion of visitors from further afield (only 30-40% from Sheffield and Rotherham).

Visitors attending evening shows at the arena tend to arrive in the Lower Don Valley in the early evening, watch the show and leave. There is little time spent before or after the activity itself, especially on weekdays. There are no joint offers between the arena and restaurants on the adjoining Valley Centertainment complex, as the venue offers fast food on site.



5.4.4 Don Valley Bowl

With a 30,000 capacity, the Don Valley Bowl is a purpose-built 6.6 hectare grass-covered events space built for the 1991 World Student Games, designed to hold open-air shows, exhibitions, sports matches, concerts and other events. The grass surface of the bowl is specially designed to avoid water-logging, allowing all-season and all-weather events.

The venue has hosted some large-scale and high-profile events, including BBC Radio 1 outdoor music events.

The Don Valley Bowl is also used for the annual After Dark event, a major community fireworks display held in November by Sheffield Events. After Dark attracts in the region of 15,000 people for the evening event, primarily from Sheffield, and uses the Hallam FM Arena box office. These events are generally smoothly-run and trouble-free. The supertram tends to be congested on such occasions – this would be alleviated by a more staggered arrival and departure of the public.

5.4.5 English Institute of Sport

Completed in 2003, the English Institute of Sport (EIS) is the largest of nine regional multi-sport hub sites of the UK's EIS network. With a total cost of £28 million, the institute was funded by a £24 million National Lottery / Sport England grant, as well as a significant contribution from British Land. Consisting of a 200-metre indoor athletics track, netball, basketball, judo, boxing and table tennis, as well as sports medicine and sports science facilities, the institute is a regional base for the delivery of services to athletes and a world-class training facilities.

Elite Training at EIS

The EIS provides elite training facilities for individuals and teams:

- Lottery-funded athletes from across the region
- Elite teams from across the country eg Olympic preparation

Teams tend to be made up of 10-20 people staying a weekend or a week. Occasionally, a lack of hotel accommodation in Sheffield leads to teams being unable to use EIS Sheffield as a training base.



Sports Events at EIS

Since opening in late 2003, the EIS has hosted several major competitions:

- English Table Tennis Championships
- AAA Athletics Championships
- The Games (reality TV, co-hosted with Don Valley Stadium)

Major events have a significant national and international catchment.

Local Use of EIS

Efforts are being made to increase local usage of facilities at EIS:

- EIS is working with partners to establish community sports programmes (martial arts and table tennis are already underway)
- The Valley Health & Fitness Centre at the EIS offers public membership.
- The newly created Longley College, due to open in September 2004, will have a specialism in sports and will base various of its activities at the EIS

Management of EIS

The potential for the future management of the EIS to be undertaken by SIV is under discussion at present. Sheffield City Council is keen to ensure that the operating business plan for the EIS is sufficiently robust to avoid the necessity for council subsidy. The limited corporate hire programme of the EIS would become part of Exclusiv.

5.4.6 Woodbourn Road Stadium

The Woodbourn Road Athletics Stadium is a synthetic 400-metre athletics track opened in 1987. Operated by SIV, it is used primarily for community sports events and training, as well as serving as a complementary venue for larger events at the Don Valley Stadium. The stadium has a bar and changing facilities on site.

As well as athletics facilities, the Woodbourn Stadium is adjoined by a 5-a-side football complex which was opened in 1992 under the name Pitch Soccer, consisting of ten AstroTurf pitches. It is now operated by Powerleague, the UK's leading 5-a-side football business, with 20 venues across the country. The land is



owned by Sheffield City Council, and leased on a commercial basis to Powerleague.

Open daily, Powerleague operates local leagues from Sunday to Thursday evening, and hosts private bookings on Fridays and Saturdays. Powerleague Sheffield receives in the region of 150,000 visits per year, mostly made up of social teams from Sheffield.

5.4.7 IceSheffield

Completed in 2003 at a cost of £15.7 million IceSheffield features two Olympic size ice rinks and seating for more than 1500 people in a state-of-the-art sports facility. The venue was funded by a £13.7 million grant from Sport England, with a further £2 million from a loan underwritten by Sheffield City Council. The venue is home to a number of ice hockey clubs, and provides training facilities for figure skating and speed skating. It also hosts large competitions such as the national university ice hockey championships. IceSheffield is managed by SIV.

Since opening in early summer 2003, visitor numbers to IceSheffield have been lower than anticipated.

5.5 Other

5.5.1 Valley Centertainment

Opened in 1998, Valley Centertainment is an 18,000m² entertainment complex, consisting of a 20-screen cinema, 27-lane bowling alley, restaurants and nightclubs. Anchor tenants of the complex are UGC Cinemas First Leisure Nightclub and City Centre Restaurants.

The UGC cinema at Valley Centertainment is the sixth largest cinema in the UK, receiving 1.5 million visits per year. The success of the cinema has been compounded by the secure nature of the site. Heavy surveillance encourages visitors to feel confident to leave their cars on-site while at the cinema.

Visitors to Valley Centertainment come primarily from Sheffield, Rotherham and Barnsley and, for the most part, travel by car. The complex receives 42,000 car visits per month (100,000 people).



Valley Centertainment suffers from a lack of car parking space, a situation which has worsened since new developments such as IceSheffield have taken up space which was formerly available. A park & ride programme is operated from Valley Centertainment's carpark, allowing car parking spaces for 200 cars on a daily basis. In reality, as the scheme is unpoliced, the number of cars using the carpark tends to be higher.

5.5.2 Canal and River

The Sheffield and Tinsley Canal and the Don River attract a number of visitors, including walkers, cyclists, anglers and canoeists. The 'Five Weirs Walk' is a well-known walk, tracing the River Don from the city centre to Meadowhall. The walk has been improved by the 2002 completion of the Cobweb Bridge, a footbridge spanning the gap underneath the Wicker Arches, crossing the Don. A popular route for canoeists follows the River Don from Victoria Quays to the Tinsley Viaduct, returning to the city centre along the canal.

Much of the waterfront in the Lower Don Valley is inaccessible, and a concerted cleaning operation is required if the waterways are to play their part in fulfilling the potential of the area. The regeneration of the Victoria Quays is the first stage in this process.



6 The Role of Destination Thinking

6.1 Summary

- The development context within Sheffield and the Lower Don Valley is changing – the success of city centre investment as well as general renaissance of the region has led to a more buoyant market place
- While large-scale visitor attractions can play a role in regeneration, a number of factors, including the high-risk nature of such projects and the poor nature of the funding climate for large attractions, lead Locum to suggest that a *blended* approach to destination making may be more appropriate for the Lower Don Valley, combining more thoughtful development of associated sports, commercial and residential developments
- The emphasis will be on creating a sustainable and unique mixed-use destination, encouraging cross-fertilisation and integration of activities. Co-working between the property sector, the city, the universities and other partners will be vital

6.2 The Role of Destination Thinking in Regeneration

It is clear that the development context within Sheffield and the Lower Don Valley is undergoing significant change. Not only is the area experiencing market pressures associated with success in central Sheffield following investment initiatives, but there is significant expectation with respect to the future of the area and the renaissance of the region more generally. Whilst the impact of this expectation can be seen in the buoyancy of the thinking and market place – be it speculative development, the scale of interest in casinos or the rise in land values – it can also be tracked according to the number of masterplan and urban design programmes currently in play.

6.3 The Role of a Large-Scale Visitor Attraction

There is no doubt that a large-scale visitor attraction can play an important role in the regeneration and redevelopment mix. Not only does an iconic development generate footfall and local interest, but it creates national PR and acts as an attractor for associated investment. Good examples include the Lowry at the



Quays, the Baltic in Gateshead, Tate Modern in London, The International Centre for Life in Newcastle.

Despite the immediate appeal of this approach for the Lower Don Valley it is worth reflecting momentarily on the implications of setting a strategy that demands a large-scale visitor attraction:

- Developments of this type are characterised by their high cost in capital terms (and consequently high risk). In addition, their revenue position is inherently weak owing to high running costs without a matching ability to generate revenue on a similar scale. There is almost always a need for large-scale public investment in *both* capital and revenue terms
- The funding climate for the development of 'trophy' destinations is poor and worsening. The primary source of funding for similar developments in the past decade has been the National Lottery and the probability of attracting Lottery funding of a sufficient scale is low
- Accepting that an iconic destination comes at a high cost (both capital and revenue) and that the necessary public sector funding is not forthcoming, the feasibility of this approach must be in doubt

Equally, it should not be forgotten that just the other side of the M1 are two examples of lottery funded attraction developments and here the verdict on one is poor (Doncaster's Earth Centre), whilst the jury is still out on the second (Rotherham's Magna).

Large-scale visitor attractions are not, therefore, without their challenges both from a capital funding and revenue perspective. They are certainly not the panacea they were five or seven years ago. Equally, as intimated above, they are not the only solution to the question of generating footfall, creating a sense of place and critical mass and delivering a destination.

Having had the chance to spend some time in the area, examining the specifics of a series of sites and considering the range of alternative options available to British Land and the city, Locum is of the view that the way forward may lie in an alternative, broader-based approach to the creation of a destination for the study area that combines more thoughtful development of associated sports, commercial and residential developments in a *blended* approach to destination making.



6.4 Creating a Destination: Some Contextual Thinking

What is going to make the difference in the Lower Don Valley?

What is of critical import in the delivery of success is the integration of an offer that has a unique role to play, not only in a regional context but in a national one. This mix should on the one hand seek to deliver life, animation and attractiveness to an area currently much in need of a new dimension and on the other offer a economically sustainable blend of activities that is differentiated from all the other 'me too' masterplan developments.

There must be a focus on full and genuine cross fertilisation of ideas and integration of activities. The destination development process needs management. And constant attention if it is to thrive. In this case there is a demand for co working between the property sector, the city, the universities and others to drive this forward both strategically and pragmatically.

Striking the right *balance* between a unique, high quality commercial / residential offer and a vital and engaging mix of, say, sporting activity has become the *sine qua non* of the latest generation of visitor destinations. A strong and appealing commercial offer – consistent and sympathetic with an overarching strategy – supported by events and activity programmes that will re-launch the area and bring life and, in turn, drive values.

6.5 The Opportunity

It would appear that the Lower Don Valley is well positioned to seize this next generation of destination thinking and integrate it into current masterplanning and investment initiatives in a fashion that ensures it is set at the core of plans rather than as an add-on at the periphery. This positioning is key.

Sheffield has a burgeoning reputation as a young, innovative and forward thinking conurbation. Success in education, sport, media, design, architecture and the arts all bode well.

Without wishing to pre-empt further thinking downstream, we would urge that rather than found a destination strategy on a single stranded iconic development that the way forward is to look to a more multi-layered plan that builds off the strength of the existing assets. In this regard the Don Valley Stadium, Meadowhall and a strategically sound location play a vital role.



6.6 The Destination Effect

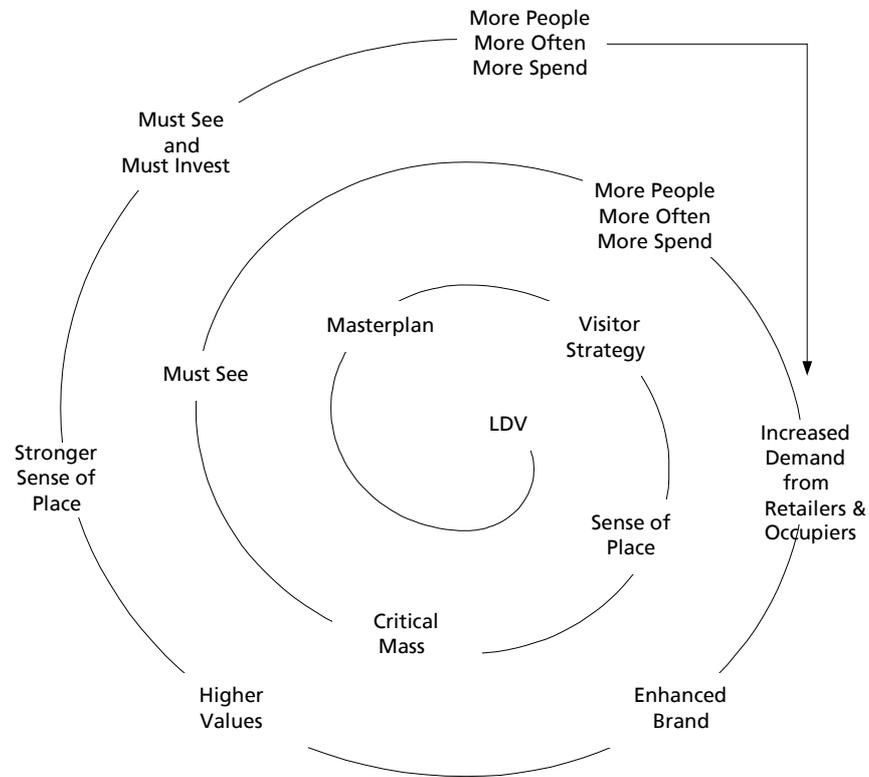
Over time creation of a 'must visit' mix in and around the Lower Don Valley, boasting a critical mass of high-quality sporting activities, venues and educational institutions, all complemented by an appropriate mix of high quality commercial activities (delivered to a standard commensurate with the vision), will lead to more people spending more time and more money within the area (which in turn will lead to higher commercial values).

The Lower Don Valley will have created a differentiated 'must see' (must do, must play) destination that does not ape other locations and cannot be easily replicated (existing reputation, facilities, site geography can contribute strongly here). The existing brand will be strengthened, contributing to a faster and more sustainable increase in values, and ensuring long-term financial sustainability.

Locum has articulated this dynamic effect as the Destination Effect, and this is shown graphically at Exhibit 24 below. What this graphic seeks to illustrate, is that unlike many traditional destination developments, the throughput and economic spin-offs do not plateau. Rather, the upward growth fuels the economic multiplier that ensures continued growth over time. This growth expresses itself in traditional ways, such as house prices and rent roll, and also in terms of geographic spread and branded spin-off.



Exhibit 24: The Destination Effect



Critically, the key to embarking on the 'virtuous spiral' is a four-fold commitment:

- 1 To developing a genuinely integrated destination.
- 2 To creating the right physical environment for a differentiated destination.
- 3 To letting and managing with a strong, long-term vision.
- 4 To phasing and flexibility over time.

The rewards for creating, implementing and sustaining such an approach are potentially large. However, it should be noted that the pursuit of this model has a different risk profile from that associated with traditional commercial leisure led solutions. Almost certainly it will have a lower level of initial return than a more traditional, and more immediately market-driven, approach.

However, what is clear is that the market is becoming wearied by the tired, *box leisure*-led solutions that are being delivered by the market place. The long-term perspective is, to our minds, dominated by the prospect of more imaginative, more interactive and more involving mixed use schemes. Indeed, the assets in play in the



Lower Don Valley – the Hallam FM Arena, Don Valley Stadium, English Institute of Sport, etc – all point in this direction.

6.7 Getting the Logic Right

Notwithstanding the need to adopt a bold stance towards the development, this alone will not underwrite the success of the destination in its entirety. Success will be driven by a range of other factors that will combine to bind the area. These factors will include, inter alia:

- A first-class, formal and informal events and activities programme (using the stadium and arena).
- The creation of a first class urban fabric that 'humanises' the spaces within the area (look at the pain of Brent and the relationship with Wembley).
- The need to give special consideration and thought to the inter-relationship of different spaces within the central area and the manner in which they work to 'capture' the visitor and improve dwell times.
- The integration of high quality public art to 'soften' the space and create point of interest (cf. Cardiff Bay Inner Harbour).
- High quality and consistent signage to ensure fluency of movement and the eradication of confusion around what is acknowledged to be a complex and daunting area.



7 Developing the Four Districts

7.1 Summary

- The vision for the Lower Don Valley explored in this chapter is based around four unique destinations corresponding to the distinct districts which make up the study area. These are:
 - Attercliffe Village – a vibrant, quirky and cosmopolitan environment, with a reputation as a centre for innovation, tolerance and creativity
 - Sports & Leisure Hub – a dynamic, coherent and integrated destination based around international-standard sports facilities, with a first-class events programme encouraging participation at all levels – from the local community to world-class athletes
 - Central Industrial Zone – a distinctive and modern working environment, flexible to the demands of new business and sensitive to the area’s rich industrial history, capitalising on the waterways and connected to Meadowhall and the Sports & Leisure Hub
 - Meadowhall – a shopping and entertainment complex based around the existing Meadowhall centre and, possibly, incorporating a major casino development. The destination would make use of the waterfront to create an attractive environment with increased dwell-time, as well as offering training opportunities for the local community
- While the districts should be seen as separate destinations offering distinctive visitor experiences, they should have the following in common:
 - They should be safe and welcoming, visually appealing and animated by arts, festivals and events
 - They should be well connected, both internally, and with adjoining communities
 - They should be accessible and easy to navigate for pedestrians and motorists alike
 - Above all, each should have a clear and resonant sense of place
- Visitors to the Lower Don Valley should be able to move freely from one district to another, each of which should have its own brand, or collection of



brands. We do not recommend a strong 'Lower Don Valley' brand, but rather a series of market-focussed brands clustered in the Lower Don Valley which are part of and contribute to the Sheffield city brand. Some potential ideas for brand development are outlined in Exhibit 25.

Exhibit 25: Destination Brands in the Lower Don Valley

District	Brand Characteristics
Attercliffe Village	Modern, creative, tolerant and cosmopolitan
Sports & Leisure Hub	High quality cluster of sports venues offering unique sporting environment. Mix of grass-roots and world-class participants. Umbrella brand for events and individual venues
Central Industrial Zone	New and well-developed location for regional business headquarters
Meadowhall	Meadowhall's brand is already strong

7.2 Attercliffe Village

Attercliffe's rich history is evident in the high quality of the built environment of the village. In parts, however, buildings show sign of age and neglect, while in other parts, new restoration efforts are taking place, primarily associated with bars and clubs.

Attercliffe has gained a reputation as a centre for the gay community, adult entertainment, and the sex industry. To an extent, this has become a Attercliffe's brand – this is the image projected by shop fronts along Attercliffe Road, and the image associated with Attercliffe among Sheffield residents. For most, it is seen as a brand with primarily negative connotations, a seedy district lined with dubious establishments.

A careful and tolerant approach to the development of Attercliffe's product and brand could yield some important returns in the longer term. Attercliffe's reputation as Sheffield's 'seedy Soho' could, if developed correctly, be turned into an altogether more sophisticated and sanitised offer, a fun and accessible product and brand, which, while retaining its 'naughty' aspect, loses its 'cheapness', 'seediness' and perceived danger. A tolerant approach today could pave the way for an edgy, classy and cosmopolitan Attercliffe of tomorrow.

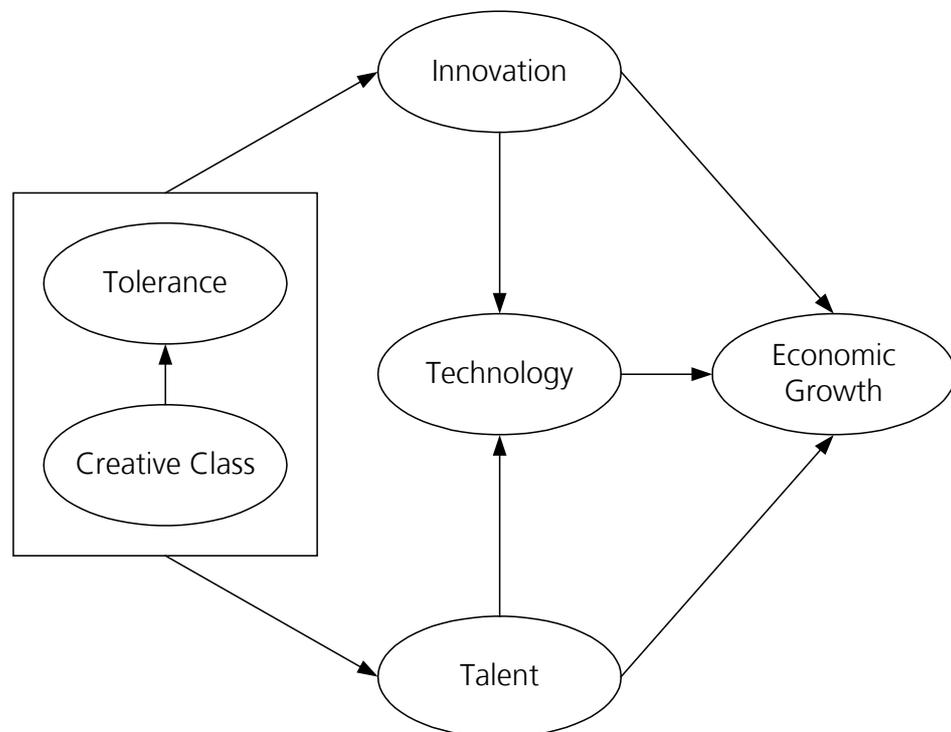


The economic and regenerative benefits of social tolerance (openness to new people and ideas / low barriers to entry) are documented in the US academic Richard Florida's book, *The Rise of the Creative Class*¹⁴. A tolerant, diverse and open-minded society, i.e. one which welcomes immigrants, bohemians and gays (described by Florida as 'the canaries of the Creative Age'), is frequently associated with high levels of innovation and creativity - a high concentration of what Florida names the 'creative class' (measured by number of patents registered per head of population, research and development budget as a percent of GDP, etc).

The presence of a strong creative class holds key economic benefits: strong innovation capacity and strong hi-tech industrial sectors are crucial to cities or nations generating new commercial products, new wealth and new jobs.

The relation between tolerance, creativity and economic growth is shown in Exhibit 26.

Exhibit 26: Tolerance, Creativity & Economic Growth



¹⁴ The Rise of the Creative Class, Richard Florida, Basic Books, New York, 2002



Source: *Europe in the Creative Age*, Richard Florida and Irene Tinagli, Demos, 2004

Based on Florida's methodology, the UK thinktank Demos has compiled a creativity index¹⁵ of the 40 largest cities in the UK. The study, entitled the Boho Britain Creativity Index, is based on three quantifiable criteria:

- Number of patent applications per head of city population
- Number of residents who are not categorised as 'white British'
- Number of services provided to the gay and lesbian community in the city.

The results are shown in Exhibit 27.

¹⁵ Boho Britain: Creativity, Diversity and the Remaking of our Cities, Demos, 2003



Exhibit 27: Boho Britain Creativity Index

Rank	City	Rank	City
1	Manchester	21	Newcastle/Gateshead
2	Leicester (2=)	22	Oldham (22=)
3	London (2=)	23	Southampton (22=)
4	Nottingham	24	Bolton (24=)
5	Bristol	25	Hull (24=)
6	Brighton and Hove	26	Belfast (26=)
7	Birmingham	27	Stoke-on-Trent (26=)
8	Coventry	28	Stockport
9	Cardiff	29	Rochdale
10	Edinburgh	30	Walsall
11	Leeds	31	Plymouth
12	Glasgow	32	Salford
13	Milton Keynes (13=)	33	Doncaster
14	Sheffield (13=)	34	Wakefield
15	Aberdeen	35	Wigan
16	Wolverhampton	36	Wirral
17	Liverpool	37	Rotherham
18	Bradford	38	Dudley
19	Derby	39	Barnsley
20	West Bromwich	40	Sunderland

Source: *Boho Britain Creativity Index, Demos*
(www.demos.co.uk)

The most 'creative' city in the UK, according to Demos, is Manchester. The city of Manchester competes strongly in each area measured by the study: it has the most patent applications per head of population in the UK, the fourth highest proportion of non-'white' British origin, and has the second highest level of provisions for the gay and lesbian community in the UK.

Sheffield's position of 13th in the creativity index indicates that the city is performing well (ahead of, for example, Liverpool), but that more could be done to nurture creativity in the city. Specifically:

- Sheffield performs strongly in terms of patent applications per head of population (11th out of 40). Its universities and creative / industrial tradition may contribute to this high level of innovation
- Sheffield is relatively weak in terms of ethnic diversity – it ranks only 21st out of 40 in proportion of non-'white British' origin population



- Sheffield ranks 19th out of 40 for provisions for the gay and lesbian community, significantly lower than Manchester, Liverpool, Leeds and Nottingham. This may be considered an area for development.

Manchester is a clear example of the economic benefits of social tolerance. The city's Gay Village, located in the heart of the city, is one of Europe's largest gay and lesbian communities, and consists of pubs, bars, clubs and shops, as well as community services and offices. Office accommodation tends to house creative and hi-tech industries – the following list is indicative of the business profile of the area:

- Musicians Union (regional headquarters)
- Communiqué Public Relations
- Media Mission Ltd (design agency)
- Manchester Metropolitan University
- Multimedia Marketing.Com Ltd (internet marketing)

The Gay Village has become a valuable asset to Manchester, both in terms of its contribution to the city's economic growth and also its contribution to the city's image and brand.

Attercliffe has the potential to develop as a centre for the creative community in Sheffield – indeed, this is a change that is already underway. Several of Attercliffe's bars are undergoing refurbishment, and, crucially, one of the region's major advertising agencies, Dig For Fire, relocated in April 2004 to Attercliffe's Players' Café, a former village school. Dig For Fire's move was made for a number of reasons, including ease of access, parking space, the building's iconic status and, significantly, the desire to add value to the agency's brand by being part of a culturally interesting and talked-about location.

7.3 The Sports & Leisure Hub

The sports and leisure facilities in the Lower Don Valley hold enormous potential for the future development of the destination product and brand. As one of the country's leading clusters of sporting venues, they play a vital role in supporting Sheffield's aspiration to be a European city. The decision to locate the regional English Institute of Sport in the Lower Don Valley is both a reflection of the



strategic importance of the Lower Don Valley as a regional sporting hub, and a catalyst for further development.

While Sheffield clearly has the necessary assets in the Lower Don Valley to be a sporting city of national and international significance, it appears that, at present, the contribution of these assets to the Sheffield brand is less than it could be. While the collection of facilities may be good enough to contend with Manchester, Birmingham, Glasgow, Cardiff, Bath and Loughborough, Sheffield's cluster of venues lacks the coherence that would enable it to punch its weight. The challenge is no longer to invest in major sports venues, but rather to consolidate, animate and raise the profile of what is already there.

Much of the work required will be based on creating and improving the infrastructure that will draw the elements of the sports hub together. The aim would be to create a coherent and complete destination, where visitors can participate, eat, drink and relax, moving freely from one venue to another (the 'Village Park' concept). The mixture of visitors would be unique – ranging from top athletes to community sports teams, individuals wishing to keep fit and families on leisure days out. The focus would be on sport at every level, contributing to Sheffield City Council ambitions to 'motivate the least active'¹⁶ at the same time as providing facilities for athletes at the pinnacles of professional participation

Residential development could play a role here – the idea of creating purpose-built accommodation for athletes training at the hub is a possibility for consideration.

Development in the hub could include changes to the Don Valley Stadium. There is the possibility to 'carve off' extraneous seating capacity in order to create a street-facing plot for the development of a leisure attraction such as a casino, hotel or another commercial use. Plans for the conversion of the stadium's grandstand into corporate hire space are also under discussion. These opportunities deserve further exploration.

7.3.1 Making Connections

Creation of sense of place at the Sports & Leisure Hub will rely on the creation of connections within the hub and from the hub outwards. The vision for the Sports & Leisure Hub is of an environment where visitors can walk safely from one world-

¹⁶ *City on the Move*, Physical Activity Strategy for Sheffield (Final Draft), Sheffield City Council



class facility to another, and where the visitor can spend time enjoying the spaces between the venues as much as the venues themselves. Similarly, the Sports & Leisure Hub should be open and accessible by foot to the neighbouring residential communities, which will call for bridging the tramline.

This is partly an issue of infrastructure (see Exhibit 20) and partly one of services - creating better, safer and more welcoming linkages will encourage development of restaurants and bars, which will be an integral part of the visitor offer. The waterfront could play a valuable role in this.

One possibility is to make the existing car-dominated transport routes into pedestrian-friendly areas. This need not be at the expense of vehicle access – the Boulevard Project in Camden, London, is a project aiming to add a pedestrian element to busy streets. In Camden, the Boulevard Project includes the following actions¹⁷:

- New footway surfaces
- Improved street lighting
- Improving shop frontages
- More trees
- Better drainage
- Removing unnecessary street furniture
- Reviewing our enforcement activities
- Tackling graffiti and flyposting on street furniture
- Better facilities for people with disabilities

These principles, where applicable, should be followed on routes in and around the Sports & Leisure Hub.

The Don Valley Bowl is a crucial piece of public realm linking venues, an area where visitors can spend time between activities, especially in summer. Animation of the Bowl, which has previously taken the form of the After Dark fireworks display and Radio 1 events is a means of showcasing the sport and leisure hub's unique environment. The management of the Don Valley Bowl by SIV could

¹⁷ www.camden.gov.uk



contribute to the potential for its animation, and would bring a regularised approach to the management of the cluster of venues.

7.3.2 Boulevard of Sport

A thematic approach to the development of connections in and around the Sports & Leisure Hub could pay dividends in terms of the creation of sense of place. One possibility would be to create the UK's first Boulevard of Sport. Along the lines of Hollywood's Walk of Fame, the Boulevard of Sport would reflect the excellence of the sports facilities and would trumpet Sheffield's City of Sport status. The public realm would play a vital role, using sport-related public art to capture the visitor's imagination. Squares could be situated at points along the boulevard, each taking as its theme a major sport (Football Square, Tennis Square), and using public art to pay tribute to a sporting hero. Football Square, for example, could have a Nelson's Column-like statue of Bobby Charlton or Pele, captured in the motion of kicking a ball.

The whole destination – the attractions, the streetscape, the restaurants and even the road names – would create a strong and unique sense of place.

7.3.3 Developing the Sports & Leisure Brand

While the sports venues and facilities in the Lower Don Valley are undoubtedly of a quality to compete at national and international level, the brand and reputation of the cluster is weaker than many of its rivals. Loughborough, bolstered by decades of sporting excellence, and Manchester, strengthened by its hosting of the 2002 Commonwealth Games, both appear to have a stronger sporting brand, whether it be for sporting expertise or major sports events.

Sheffield has the potential and the ambition to raise the profile of its assets and to exploit them at the highest level. Clearly, the proximity of the venues, and the potential to make a coherent and exciting destination around and among them holds major potential in brand terms, which can be translated into economic benefit for the city.

The art of the possible is demonstrated by Dubai Sports City¹⁸, a current development in Dubai which aims to 'draw the biggest brands...[to create] a hot-

¹⁸ www.dubaisportscity.ae



ticket environment where hotels, retail and commercial outlets, businesses and service providers can flourish'. Components of the masterplan include, among others:

- Indoor and outdoor multipurpose stadium complex
- Sports academies (Butch Harmon School of Golf, Manchester United Soccer Schools, International Global Cricket Academy)
- Luxury Villas
- Apartment buildings
- Canal townhouses
- Waterfront housing
- Pedestrian Walkways
- Spa and health clubs
- Cafés and restaurants, etc

The Dubai Sports City brand is not only about the sports facilities planned, excellent as they are. It is a holistic destination brand, incorporating the pedestrian walkways, cafés and restaurants as much as the stadia themselves.

The aim should be to capitalise on the quality and proximity of the Lower Don Valley sports venues by creating a strong and visible brand / sense of place along the lines of Dubai Sports City¹⁹. It should be evident to those passing by (commuters, Sheffield residents travelling on the Supertram, et al) that this is a world-class complex of facilities hosting a wide range of events which bring visitors and economic benefit to the city. Elements contributing to the destination brand could include:

- creation of a Boulevard of Sport as described above
- physical 'gateways' on the Attercliffe Road and the tram line / canal route, which could include landmark bridges

¹⁹ To a lesser extent, Manchester Sportcity is taking this initiative forward, through the development of a hotel and visitor centre to complement sports facilities



- screens at gateway points displaying the events programme for the week across all the venues (including both public and private events).

Implementation of this approach would signal the first step in transformation of this area, and contribute to Sheffield's image as a sporting city. Again, this requires allocating resources to a delivery vehicle (either existing or new) and empowering that vehicle to develop detailed implementation proposals within the context of the Masterplan.

Depending on the best route for SCC to deliver these 'environmental' improvements, it could be advantageous to establish a public / private partnership for ongoing management and maintenance of the Sports & Leisure Hub, involving SIV, Valley Centertainment, British Waterways and any future occupiers (which could include universities, hotels, commercial leisure operators, etc). A Business Improvement District model could also be useful.

The importance of a varied programme of events and activities (including private events and conferences) across the Sports & Leisure Hub, both to the Hub itself and to the broader Sheffield brand, cannot be overestimated. The hosting of major (televised) events can yield a significant boost to the Sheffield city image and brand for residents as well as potential visitors or investors. The sports facilities on offer open the door to a range of possibilities, from international athletics events to world ice hockey championships. The use of all venues under SIV and Clear Channel Management (including the grass bowl) should be maximised.

While the sports facilities of the Lower Don Valley are integral to Sheffield's potential to host major single or multisport events, they are not the answer in themselves. A coherent and joined up destination and strong sports and leisure brand will also be vital. A significant commitment from SCC will be needed to realise these ambitions too, as almost all major events entail a staging fee.

Responsibility for managing and delivering the events programme will lie with Sheffield International Venues. Supporting SIV to further develop and deliver a high-visibility programme of events may require additional capacity and resources within the organisation, as well as joint working to ensure that opportunities to link with activities in the city centre and with event venues in Rotherham (including Magna) are exploited.

It is possible to generate revenue support for managing and delivering this events programme through a number of methods in addition to direct subsidy from the



city council, including negotiated arrangements with developers (whether a casino, hotel or other partner).

7.4 Educational Opportunities at the Sports & Leisure Hub

There is significant potential for schools, colleges, universities and other educational institutions to make use of the Sports & Leisure Hub, both in terms of sports competition facilities, and also in terms of facilities for training, research and development, sports science, sports medicine, etc. Possibilities range in scope from use of facilities by college or university groups and teams, to an integrated 'sports campus'.

At present, facilities in the Sports & Leisure Hub and, in particular, the EIS, are used by a number of educational institutions, including Sheffield Hallam University and the new Longley College. Due to open to students in September 2004, Longley College is a new 6th Form College, serving North East Sheffield, constructed on the site of the former Firth Park Grammar School. The college offers a specialism in sports, and has arrangements in place to use the EIS for activities.

Sheffield Hallam University has expressed an interest in working with the City Council to extend their present activities the EIS in order to develop an educational offer which capitalises on the world-class sports facilities in the Lower Don Valley. There may be additional interest from other educational institutions in South Yorkshire, and the possibility of a joint venture.

The opportunity for an educational partner, or multiple partners, to help transform the Sports & Leisure Hub is a significant one, and we recommend that it is pursued with a feasibility study soon. This is likely to be a longer-term project, and should be considered as a strong second phase anchor development. The first phase of activity in the Sports & Leisure Hub will be more commercial in character.

Sheffield Hallam and other education sector partners are likely see the potential value to be exploited in the world-class sports facilities available in the Lower Don Valley. Education facilities will bring with them the vibrancy of student life, residential and retail development to support a student population, and also a boost in the effort to develop a powerful new sports destination brand.

University courses in the following areas could be relocated to the Lower Don Valley on a new 'Sports & Leisure Campus':

- Health and well-being



- Sports medicine
- Sports management
- Hospitality and catering.

The strong relationship between a new university faculty and the English Institute of Sport could unlock funding opportunities within Sport UK as well as higher education funding bodies. Potential models for this approach include Norwich Sports Village, in which the University of East Anglia is partnered with Sport England.

The new Sports & Leisure Campus could also foster incubator units and research / consultancy businesses. A good model of a themed incubator is Technium, in Wales, which is revenue funded by Objective 1. Encouraging students to live locally and start small businesses in the Lower Don Valley after graduation could have a significant regenerative effect on Attercliffe Village.

7.5 Central Industrial Zone

The Central Industrial Zone has an extremely rich industrial history, which is evident in the icon of the Forgemaster plant. Consequences of industry in the area, though, include the contamination of land and a largely poor built heritage.

The emerging vision for the Central Industrial Zone focuses on mixed-use development, anchored by offices. It should be of a location flexible to demands of new business. The area should offer a high quality environment for the location of offices at the level of regional headquarters. This will involve creating a unique environment, in which the area's industrial heritage is used to create a distinctive place brand. As the area is decontaminated and developed, it is highly desirable that industrial icons are preserved, as they will hold considerable equity in the future.

Linkages will be fundamental to development in the Central Industrial Zone. Pedestrian linkages (including to Meadowhall) will provide workers with an environment to enjoy, and will give the area a real sense of place. This will be greatly increased by a focus on the waterways running through the area. Improved linkages to neighbouring community areas will help to make the area less isolated, and will give it a greater sense of integration and 'belonging' .



7.6 Meadowhall

Meadowhall attracts very significant footfall into the Lower Don Valley – the challenge for the Masterplan is to extend dwell-time and encourage greater cross-fertilisation with the surrounding area as the visitor offer develops. The Source – a fitness centre and community facility developed by British Land – establishes the potential for extension beyond the mall’s footprint.

There is considerable potential to develop the retail district beyond the walls of the shopping centre, to create a more sophisticated and welcoming environment that will encourage pedestrian movement. This could include making accessible the waterfront, which is currently ‘hidden’ behind the shopping centre. Street level pedestrian linkage south from Meadowhall to new office locations will open up the shopping centre as part of wider development.

There are possibilities to provide training opportunities related to retail and leisure in and around Meadowhall. These could make use of facilities at The Source, or take the form of placements in Meadowhall’s shops or management centre. Provision of training opportunities would serve the local community, and contribute to Sheffield’s ambitions for a ‘well-educated workforce’²⁰. Partners may include universities, colleges and schools in the city, as well as others.

There is a large site for potential development to the north of the Meadowhall shopping centre, which has unparalleled access in its proximity to the motorway and transport interchange. This site would be suitable for a casino / hotel / conference development, other large-scale commercial leisure uses, or a stand-alone hotel / conference facility.

A public competition to turn the cooling towers into a landmark public art project should be an early action from the Masterplan.

²⁰ Sheffield City Strategy – see 3.3.1



8 Cross-Cutting Themes

8.1 Summary

- Four cross-cutting themes are outlined, intended to underpin and inform destination development across each of the four districts of the Lower Don Valley. These are themes which could play a role early on in process of destination development – as well as enhancing the sense of place, they are a short-term means of signalling long-term change
 - Capitalising on Industrial Heritage: the area's industrial history is identified as a means of enhancing the Lower Don Valley's sense of place. This could range from the preservation and integration of industrial icons into new development, to the animation and celebration of the Lower Don Valley's industrial past through art and events
 - Environmental Sustainability: an emphasis on environmental sustainability is recommended, both as a means of raising the standard of the destination itself (in particular, the public realm) and as marketing tool to raise public expectations of the area
 - Animating the Waterways: the waterways running through the Lower Don Valley could contribute greatly to the destinations – this will rely on making them open, accessible, safe and animated, through boat moorings, cycling and walking, events, etc
 - Community Benefit: each of the districts of the Lower Don Valley should provide benefit for the local community, in terms of accessibility and affordability, as well as opportunities for training and education

8.2 Capitalising on Industrial Heritage

The industrial history of the Lower Don Valley has considerable potential to shape future development of the four districts, and to add value both to the destination product and brand. The preservation of industrial heritage can add a depth and interest to a modern environment which holds very wide appeal – both to the



growing number of visitors with a specific interest in industrial sites²¹, and to a wider audience (the recent interest in warehouse conversions with 'original features' bears testament to a growing (albeit passive) interest in the UK's industrial past).

Industrial icons, if preserved, will undoubtedly contribute to the Lower Don Valley's sense of place – the Forgemaster site is a striking example of visible industrial history, which has the potential to enhance future development around it.

The preservation of heritage structures opens a range of possibilities for reuse which will hold considerable interest for visitors, residents and investors. Of course, residential or office development (the sort of 'warehouse apartments' mentioned above, or Dig For Fire's conversion of the Players' Café) is the most obvious form of reuse, but is not by any means the only, or the most innovative.

Germany's Ruhr region has experienced considerable success in opening its former industrial wastelands up to new uses and new visitors. The Ruhr Triennale, a music and arts festival based taking place throughout the Ruhr, is an example of the innovative use of arts, culture and events to reinvigorate derelict industrial sites and buildings. Taking place in disused warehouses, mills and factories, the festival brings the venues to life through the use of art, music and lighting.



²¹ European Route of Industrial Heritage Masterplan, 2001 p.42, www.erih.de



Similarly, Oberhausen's Gasometer²² is an art gallery and exhibition / events space in a converted gas holder. The venue, which supplied gas to the surrounding industrial heartlands for most of the 20th century, was closed in 1988. Options discussed for the structure included demolition, conversion to an indoor golf course, a high-bay warehouse or even a planetarium. The eventual conversion of the structure into 'the world's most unusual exhibition hall' took place in 1993 / 1994. Today, Gasometer is an independent and self-sustaining organisation operating a successful exhibition programme.

Magna has showcased some of the possibilities of large-scale conversion of industrial sites. While we would not recommend any further development of a similar scale, we would urge that the theme of preservation / reuse of industrial heritage plays a role in development in the Lower Don Valley, possibly using arts / events as a means of animating derelict sites. A key opportunity, mentioned above, is the potential for a public art competition at the cooling towers by the M1, serving to generate publicity as well as creating a striking piece of gateway architecture.

²² www.gasometer.de



8.3 Environmental Sustainability

Sheffield City Council has articulated the aspiration for environmental sustainability to be an overarching principle of development in the Lower Don Valley. This can be delivered only through policy decisions, and the availability of subsidy / incentives to businesses locating in the Lower Don Valley.

Whilst there is no easy way to quantify the long-term benefit of sustainable development, we can observe an increasing interest in environmental issues by consumers – whether visiting exemplary projects, supporting corporates who market their ‘green’ credentials, or buying organic food from farmers’ markets.

Given the industrial history of the Lower Don Valley, and the negative environmental image associated with heavy industry, a highly publicised focus on ‘green’ development would be a useful tool for transforming expectations and encouraging new visitors to the attractions of the Lower Don Valley.

Sustainable development, it should be noted, often has a marketing impact that is disproportionate to the number of people that actually engage with it. For example, rural activities have been prioritised in a number of regions, including the North East, North West, and South West, as well as Scotland and Wales, not because they are a significant value generator in their own right (either in terms of tourist volume or tourist expenditure), but because they communicate the region’s countryside assets to the wider marketplace. That the North Devon Coast is widely known as the premier surfing destination in the UK says something about the quality of its beaches and coastline, irrespective of the fact that only a small niche market of enthusiasts actually do any surfing. Similarly, the re-branding of New Zealand made much of the ‘extreme’ adventure sports like hang-gliding and bungee jumping, because they provide the right imagery, not because they attract large numbers of high-spending participants.

We recommend taking this theme beyond a policy outlining sustainability requirements for new developments, and use it to approach key aspects of the Lower Don Valley’s public realm. This would include prioritising projects which give the public access to waterways. Another technique, which has been used to good effect in the Ruhr Valley, is the creation of new urban parks and forests. This literal ‘greening’ of a post-industrial area would thematically connect the Lower Don Valley with the western part of Sheffield and the Peak District, helping to ‘knit together’ the city brand (an essential task which is discussed elsewhere in this report).



8.4 Animating the Waterways

There is potential to make more of the long stretches of river and canal which are currently hidden to the visitor. This may include the provision of more safe moorings along the water, as well as an ongoing emphasis on maintaining a clean river / canalside environment. Waterfront areas for eating and drinking could play an important role in creating a sense of place in the Lower Don Valley. Many cities in the UK, such as Birmingham (see Brindleyplace) and Manchester (see Salford Quays) have realised the potential of waterfront environments in this way.

Another possibility would be the development of walking / running / cycle routes along the canal towpath, with Sustrans²³ / the National Cycle Network and British Waterways. Use of the waterfront for health and fitness activities would have synergy with the sports activities available at the Sports & Leisure Hub, and could provide a useful resource for training athletes as well as Sheffield residents.

British Waterways have considerable experience in the animation of under-used waterways, and are currently developing and pioneering several innovative projects to this end. These include waterfront accommodation 'pods', which are being developed for potential use as university campus accommodation, and the 'amphibus', a vehicle for visitor leisure rides on land and water. British Waterways should be a key partner in the development of the waterways in the Lower Don Valley.

8.5 Community Benefit

The vision for the Lower Don Valley outlined in this section would be significantly enhanced by the ability of each district to attract and welcome a mixture of people - of all ages, backgrounds and abilities, both from the local community and from further afield. Much of the attraction of the Lower Don Valley would lie in the mix of people - for example, in the Sports & Leisure Hub, amateur sports participants would be able to rub shoulders with competing professionals, each enjoying access to high quality facilities and training adapted to individual needs. Attercliffe Village could be a vibrant and cosmopolitan centre for people of all sorts of backgrounds and cultures.

²³ www.sustrans.org.uk



The environment in each district would be safe, accessible to local communities and family-friendly. Attractions and facilities could be used to provide community benefit in its various forms: leisure, employment and opportunities for learning and training.

With this in mind, we recommend that the following principles inform development of each of the districts:

- Strong physical connections with local communities
- Transport links allowing easy access to those who own cars, and those who do not
- Training opportunities for people of all backgrounds and ages, including schools, colleges, universities and lifelong learning
- Entertainment for people of all ages
- A range of high-quality food and drink offers to suit all budgets
- Accessibility for disabled peopleSports participation for all ages and abilities (not only in the Sports & Leisure Hub, but also at The Source at Meadowhall, and along the river and canal), contributing to Sheffield's ambitions for a 'healthy population'²⁴

²⁴ Sheffield City Strategy – see 3.3.1



9 Destination Opportunities

9.1 Summary

- The 2003 draft gambling bill presents significant opportunity for casino development in the Lower Don Valley. At present, proposals by two operators are in play
 - Sun International has proposed a development attached to the Don Valley Stadium
 - MGM Mirage, in association with British Land, has proposed a development at Meadowhall.
- Large-scale sports retail would be an interesting complement to the Sports & Leisure Hub, but should be considered only in the light of existing provision in the city centre and would be subject to planning policy guidance
- A series of sports-related commercial leisure operators have been consulted in the course of this project:
 - Icons of Soccer, a multi-use 'entertainment centre' with a football theme, has expressed interest in developing in the Sports & Leisure Hub, and is seeking a six month exclusivity arrangement with Sheffield City Council. Locum would advise SCC to take this step and await the results of the feasibility study.
 - Information about other operators, including specific site requirements, has been included
- A key area of opportunity is communication and collaboration with the Yes! Project, a £250 million leisure development in Rotherham, currently at planning stage. The project is a joint venture between Rotherham Metropolitan Borough Council, Rotherham Investment & Development Office (RIDO) and developer Oak Holdings plc.
- Potential sites for the development of hotels and commercial leisure are identified in each of the four districts. This is only a partial list, based on consultation carried out by Locum Destination Consulting.



9.2 Casino Development Opportunities

9.2.1 Gambling in the UK

The anticipated change in UK gambling laws has led to a flurry of plans and discussions about the possible development of large-scale casinos in UK.

The process has passed through four stages:

- The Report of the Gambling Review Body chaired by Sir Alan Budd (the 'Budd Report'), issued in 2001;
- A response by the Department of Culture Media and Sport, entitled *A Safe Bet for Success*, issued in early 2002;
- A Report by the Select Committee on Culture Media and Sport, issued in July 2002.
- A draft bill was published in November 2003 (and updated in February 2004), outlining plans for 'a managed relaxation of outdated restrictions and greater choice for adult gamblers, balanced by greater emphasis on social responsibility and protection of the vulnerable, particularly children.'

A Joint Committee of both Houses of Parliament reported to Parliament in April 2004. The Government is currently considering its report and will introduce the Bill into Parliament as soon as Parliamentary time becomes available.

There has already been significant interest from major international casino operators in sites all over the country, and local authorities are responding with efforts to secure the best proposals within their territory. Inevitably, the vast majority of these proposals will not come to fruition.

Sheffield City Council has had at least four casino proposals to date. There are others in Rotherham and Doncaster. For a large-scale development to be approved by all relevant public bodies, and considered worthwhile by the casino operator, a single site in South Yorkshire will need to be selected and a single proposal taken forward for a casino of the magnitude proposed.

The Lower Don Valley meets a number of key criteria for casino development:

- It is in a good position geographically, offering a casino operator sufficient catchment to support a large-scale development



- Motorway access is excellent, and public transport is available (particularly important for workers)
- There are sites of sufficient size available
- The residential population (likely to object to casino development) is small
- Proximity to retail and other leisure activities is beneficial
- The possibility of developing a casino / hotel / conference complex is feasible, both in market and physical terms
- The area is likely to meet possible central government criteria for permitting very large-scale casino development only where it will have the most impact as a regeneration catalyst.

In Locum's view, Sheffield has a good chance of delivering a casino development in the Lower Don Valley. However the timescale for decision-making will extend well beyond this Masterplan study, and it is important that a casino is not considered a key anchor or financial driver of essential work specified in the Masterplan.

Having said that, we recommend that Sheffield City Council select its preferred proposal and pursue it not only with the preferred partner, but also with Yorkshire Forward and the ODPM, to ensure the greatest chance of securing the benefits a casino will bring (see PwC's paper, Meadowhall Casino Development, Sheffield, December 2003 (draft)).

9.2.2 **MGM Mirage**

MGM Mirage is the leading international gambling operator, with an annual turnover in excess of \$4 billion, and 17 resorts and casinos worldwide. MGM Mirage has considerable experience of developing large-scale resort casinos, including projects which have included an element of community regeneration.

MGM's preferred site for consideration in the Lower Don Valley is owned by British Land, situated north-east of Meadowhall shopping centre, adjacent to the M1. The proposed development consists of casino entertainment resort facility of approximately 30,000m² and costing £200 million to £250 million. The casino will include bars, restaurants and, potentially, a hotel and conference centre, spa and bowling alley.



9.2.3 Sun International Casinos

Founded in 1983, Sun International is the leading resort and casino operator in southern Africa, receiving 40,000 daily across its properties, including 17 mass-market casinos. Many of their past developments are integrated with, or have synergy with sports and leisure entertainment complexes.

9.3 Sports-related Commercial Leisure Operators

A number of commercial leisure operators have been consulted in order to gain an overview of product / market fit for the Lower Don Valley. Some of these are with Sheffield City Council, while others are new suggestions. We have addressed all proposed projects as of April 2004.

9.3.1 Icons of Soccer

Icons of Soccer is a new concept for a football hall of fame, intended to be created in England, prior to being rolled out on a global basis. It is owned by IPL Holdings of the USA, and has secured significant financial backing. The concept is endorsed by FIFPro, the international professional football players' association. IPL Holdings are aware (as we all should be) of the difficulties attached to developing major football-themed attractions, and of recent high-profile failures in the UK. As a result, Icons of Soccer is envisaged as an 'entertainment centre with a football theme' rather than a 'football-themed attraction'. This reflects the holistic vision at the project's heart.

The anchor of the complex is a large high-quality hotel and conference centre, following a soccer theme. The hotel would provide hi-tech rooms with computer terminals, suitable for business trips as well as family and leisure visits. The envisaged target price for the hotel offer would be £80-£120 per night.

The hotel and conference centre is accompanied by a football visitor attraction composed of various elements, including:

- Hall of fame exhibition, looking at history of sport, players of the past etc
- Physical activity area, providing physical, football-related challenges
- Events area for hosting player appearances, live shows, TV broadcasts etc.
- 5-a-side stadium for tournaments



- Hi-tech video games area
- Sports retail space, including branded goods.

The concept relies on the combination of the hotel, conference centre and attraction forming a 'honeypot', gaining the critical mass needed to generate footfall.

The holistic approach to the concept adopted by ILP Holdings takes into account the potential for the visitor attraction element of the scheme to underperform, in the style of other football attractions developed in the UK in recent years. This is, of course, a vital part of the scheme, but the success or failure of the scheme is not dependent on footfall alone, but rather on other key revenue streams.

- A major part of the project is associated online content. This will be available on the internet, but will offer a subscription package to access exclusive material. It is envisaged that this will be a key revenue stream.
- The value of the Icons of Soccer brand is envisaged to become its most important revenue stream. Becoming a 'Hard Rock Café' of the football world, the brand will generate income in joint promotions with international businesses such as Kellogg's, etc.
- Commercial sponsorship has been identified as a potential revenue stream. The benefits to the sponsor will be access to the hotel and conference facilities, as well as the benefit of association with a major international brand.

ILP Holdings is currently seeking a six month exclusivity arrangement with Sheffield City Council, at which point they will take forward a full feasibility study. Given the thematic synergy with the sports hub, Locum would advise SCC to take this step and await the results of the feasibility study.

The Icons of Soccer project should be thought of as a 'themed entertainment complex' rather than (simply) a visitor attraction, which is unlikely to succeed on its own. This entertainment complex, or indeed any alternative proposal which also includes sport-themed hotel, catering and retail, would contribute significantly to the mix of facilities within the Sports & Leisure Hub.

The Icons of Soccer project demands a two acre site, with additional space for parking (could be shared with other facilities). One site which has been proposed is the grass bowl, which we would not recommend to SCC, given its value as event



space. The site potentially opened up for development by a reduction in seating capacity of the Don Valley Stadium would be a possibility (although also in consideration for educational or casino uses). Another potential is the Darnall Works site on the other side of the canal.

9.3.2 Top Golf

Top Golf, operated by Baydrive Ltd, is a new leisure activity based on a mixture of golf and bowling. At present, two centres have been opened in the UK, one at Watford and the other at Chigwell. Further expansion is planned in the UK at a rate of two centres per year. Baydrive's initial focus is on locations in the South-East, and subsequently to develop in the best residential areas within the UK. Sheffield is considered a target in the mid to long-term.

The player hits a golf ball into any of eleven targets on a ten acre outfield. The ball's proximity to the target, tracked by a microchip inside the ball, is converted to points which are displayed on a monitor in each driving bay.

The structure consists of 55 covered driving bays on two floors, all driving onto the same outfield. The outfield, made from synthetic grass, is outdoors. The driving range is accompanied by a 10,000 square feet (929m²) pavilion, which offers a variety of food, drink and 3,300 square feet (307m²) of specialist golf retail.

Baydrive considers potential sites based on the following requirements:

- The available space for development should be 3.5 - 4 hectares (8.5-10 acres)
- The location should have a catchment of 250,000 people within 15 minutes
- The location should also have a catchment of 750,000 people within 30 minutes
- A North to South orientation is preferable. This is to avoid direct sunshine in the player's eyes at any time of the day.
- A slight downwards slope from North to South (or from the player to the outfield) is preferred, in order to allow the targets on the outfield to be visible to the player.

The concept of Top Golf has a reasonable synergy with other attractions in the Lower Don Valley, and especially with the Sports & Leisure Hub. The driving range would also provide a welcome addition to the visual aspect of the immediate surroundings. This is an option for further consideration.



9.3.3 JJB Soccerdomes

JJB Soccerdomes is a 5-a-side football providers, operated by the major sports retailer, JJB Sports. At present, there are three Soccerdomes, in Wigan, Derby and Manchester. The playing surface, FieldTurf, is a revolutionary new synthetic playing surface which resembles real grass. The largest of the existing Soccerdomes is in Manchester, with 22 5 and 6-a-side pitches.

The process of finding and developing a new Soccerdome is carried out by Stadium Ltd. They informed Locum Destination Consulting that the qualifying requirements for a new site are:

- The site must be of at least 10 acres
- The site must have excellent access
- The site must have A1 and B2 planning consent
- The conurbation must be of a sufficient size to support the development
- The target price for a site is £150,000 per acre.

The idea of developing a JJB Soccerdome in the Lower Don Valley has considerable potential, as the concept has a great deal of synergy with other venues in the Sports & Leisure Hub, and the requirements of the developer would apparently be met by the land available. However, there are two major considerations to be addressed if this idea is to be taken any further:

- Powerleague, the UK's leading provider of 5-a-side sites and leagues, operates a 10-pitch facility at the Woodbourn Stadium (see paragraph 5.4.7)
- JJB Soccerdome is developing a new dome at Parkgate in Rotherham, on a site that they own. They would need to be certain that any new Soccerdome development in the region would not compromise the success of this site. It is possible that the size of the conurbation would support further development, but this would require further investigation

9.3.4 Bobby Charlton Soccer Schools

Bobby Charlton Soccer Schools have run coaching for young footballers for 26 years, and have nurtured, among others, David Beckham. As such, the equity of the brand is considerable.



The organisation offers a range of training possibilities, from weekly lessons to residential courses, which attract young players from all over the world. Facilities used by Bobby Charlton Soccer Schools include Manchester's JJB Soccerdome. Bobby Charlton Soccer Schools are not involved in capital projects, but can be approached with a view to holding coaching courses in new or existing football venues.

Bobby Charlton Soccer Schools would be a welcome addition to the high-level coaching facilities in the Lower Don Valley. This could be considered as part of a potential Soccerdome development.

9.3.5 Xscape

Xscape is a large-scale entertainment complex, consisting of real snow-covered slopes, climbing walls, bowling lanes, a cinema, interactive games, restaurants and shopping. At present, two complexes have been opened in the UK – one in Milton Keynes and, more recently, one in Castleford, Leeds.

The Xscape concept would have considerable potential for the Lower Don Valley in terms of product fit and space available. However, the presence of Xscape in Leeds and the Sheffield Ski Village mean that it would be unlikely that the area could support an Xscape development.

9.4 The Yes! Project, Rotherham

The Yes! Project (Yorkshire's Entertainment Sensation), billed as 'ONE of Britain's most ambitious leisure and tourism developments' is currently in development at a site adjacent to the Rother Valley Country Park in Rotherham. The £250 million project is set to include entertainment, high-tech, extreme sport and other leisure pursuits. A 'West-End' style theatre, hotel spa resort and some cafés / retail are planned. The project is a joint venture between Rotherham Metropolitan Borough Council, Rotherham Investment & Development Office (RIDO) and developer Oak Holdings plc, and will be developed with private sector funds. The project is currently at planning stage.

There is clearly a strong potential for overlap in content between the Yes! Project and development in the Lower Don Valley. Given the proximity of the destinations, care should be taken to ensure that the developments complement one another and act in a mutually beneficial, rather than damagingly competitive, way. There is



a potential for the developments to achieve a sense of critical mass – this should be the aim.

9.5 Sports Retail

Sports retail would be an interesting and, probably, acceptable use of land within the Sports & Leisure Hub. This could take the form of large-scale 'try & buy' sports retail. The idea would be to establish a large sports retail outlet allowing customers to test goods in real or simulated conditions. This could involve large-scale water features for testing kayaks, or computer-simulated golf courses for testing clubs.

A significant factor to be taken into the consideration of this option is the presence in the city centre of a large Decathlon outlet, offering a range of 'try & buy' possibilities. Decathlon is the world leader in full range sports retail.

Sports retail in the Lower Don Valley would need to be ancillary to leisure use, and all proposals would be subject to PPG6²⁵ and, specifically, sequential testing.

9.6 Potential Sites for Development

9.6.1 Hotel Sites

A recent report for British Land (TRI Hospitality Consulting, January 2004) establishes the current provision and potential demand for hotel development in Sheffield. There is a significant gap at the higher end of the market for new hotel developments. Synergies with existing and proposed uses in the Lower Don Valley are evident.

Some sites would be appropriate for larger scale conference hotels (likely to be branded) and others for smaller 'boutique' or independent development. Potential hotel sites include the following, highlighted in Locum's consultation meetings:

- Within mixed-use development in Central Industrial Zone (on the model of Brindleyplace)

²⁵ Planning Policy Guidance 6: Town centres and retail development, Department of the Environment, 1996, p6



- North of Meadowhall, adjacent to the motorway (as part of casino development or independently)
- Within the Sports & Leisure Hub
 - Physically attached to the stadium (as part of casino development or Icons of Soccer, or neither)
 - On the triangle site over the tram line from the Arena, facing the canal (SCC ownership, currently overflow car park)
 - On the Darnall Works site, facing the canal (BW / SCC ownership)
 - On the site between Shepcote Road and the canal, south of Tinsley locks
- In Attercliffe Village
 - On the Spartan Works site, which is a BW development priority
 - On Attercliffe Road.

Further development of Sheffield's hotel and conference facilities strategy should be undertaken in discussion with Rotherham (and in particular the Yes! Project) and Doncaster, and clearly differentiated from Harrogate. In Locum's view, the Lower Don Valley provides both existing facilities and sites for development which could significantly enhance the Sheffield business tourism product by complementing planned development in the city centre.

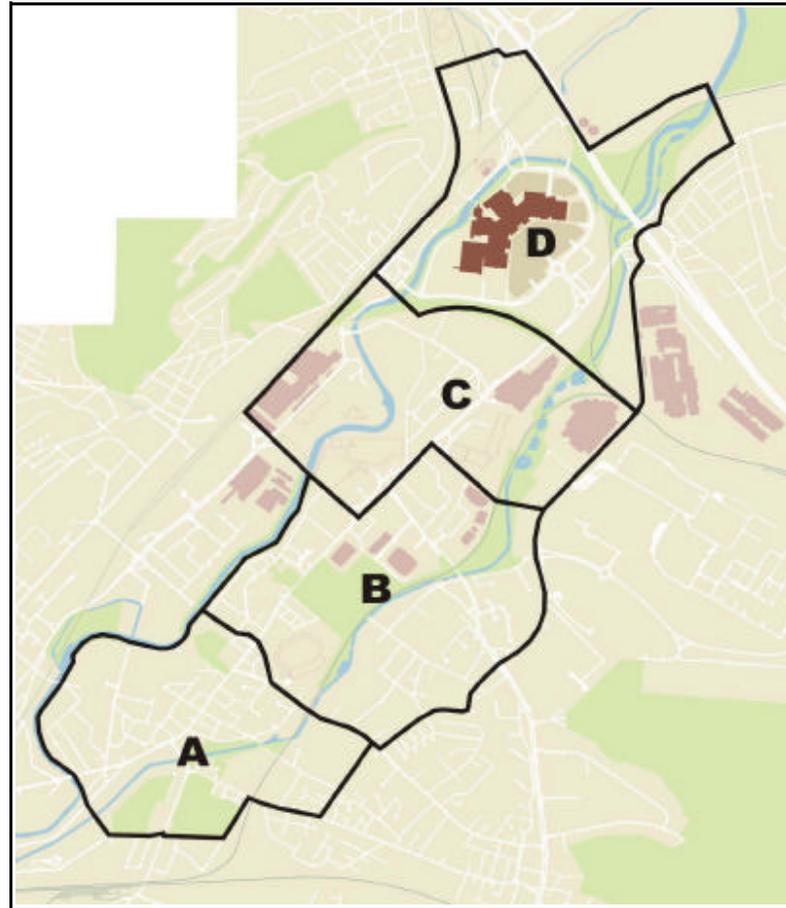
9.6.2 Commercial Leisure Sites

The sites mentioned above, as well as others in the Lower Don Valley, are also potential sites for commercial leisure development. Some commercial leisure development would be linked thematically with existing sports facilities, e.g. the Icons of Soccer project. Other possible development such as pubs, restaurants, etc could be located in any or all of the four districts of the Lower Don Valley. Waterside sites are particularly desirable for these uses, and BW is well-placed to act as a development partner for sites wholly or partially in their ownership.



All information, analysis and recommendations made for clients by Locum Destination Consulting are made in good faith and represent Locum's professional judgement on the basis of information obtained from the client and elsewhere during the course of the assignment. However, since the achievement of recommendations, forecasts and valuations depends on factors outside Locum's control, no statement made by Locum may be deemed in any circumstances to be a representation, undertaking or warranty, and Locum cannot accept any liability should such statements prove to be inaccurate or based on incorrect premises. In particular, and without limiting the generality of the foregoing, any projections, financial and otherwise, in this report are intended only to illustrate particular points of argument and do not constitute forecasts of actual performance.

DISTRICTS



SUMMARY OF COSTS

DISTRICT	A	B	C	D	Sub-total
SITE PREPARATION	£34,785,430	£27,143,680	£38,328,350	£24,856,100	£125,113,560
PUBLIC REALM	£18,792,610	£14,053,403	£56,173,245	£25,905,130	£114,924,388
DEVELOPMENT PARCELS	£137,176,600	£108,534,700	£438,799,463	£340,428,175	£1,024,938,938
TOTAL	£190,754,640	£149,731,783	£533,301,058	£391,189,405	£1,264,976,886

Note: Calculations and costing are for internal use only. Resulting numbers serve as a preliminary estimate for the purposes of evaluating economic and transport impacts.



British Land



URBAN STRATEGIES INC.

Lower Don Valley
Masterplan Framework
Area and Cost Calculations

Urban Strategies Inc.
 September 22, 2004

DISTRICT A

	LAND AREA (m2)	FOOTPRINT/ DIMENSION	GFA (M2)	No. OF UNITS	UNIT COST	COST	15% CONTINGENCY	TOTAL	ASSUMPTIONS
TOTAL AREA FOR SITE PREPARATION	464,970								
Site Preparation & Remediation				464,970	£60	£27,898,200	£4,184,730	£32,082,930	
Flood Protection						£2,350,000	£352,500	£2,702,500	
Relocation of Non-conforming Uses						£0	£0	£0	
Sub-total								£34,785,430	
PUBLIC REALM	204,690								
Primary Streets ROW	19,400			970	£3,000	£2,910,000	£436,500	£3,346,500	Attercliffe Road @ 20 m ROW width
Secondary Streets ROW	73,350			4,890	£2,300	£11,247,000	£1,687,050	£12,934,050	Residential streets @ 15 m ROW width
Informal Open Spaces	75,990			75,990	£15	£1,139,850	£170,978	£1,310,828	landscape, lighting, benches, signage
Community & Linear Parks	33,110			33,110	£5	£165,550	£24,833	£190,383	Landscape, play areas, park furniture, lighting, etc.
Waterway Improvements (River Don)		1,300 m		1,300	£170	£221,000	£33,150	£254,150	Pathway
Waterway Improvements (Canal)		800 m		800	£290	£232,000	£34,800	£266,800	Pathway; boardwalk
Squares & Plazas	2,840			2,840	£150	£426,000	£63,900	£489,900	High quality hard & soft surfaces, lighting & furniture
Sub-total								£18,792,610	
DEVELOPMENT PARCELS	260,280								
Residential	226,320			1,132	£90,000	£101,844,000	£15,276,600	£117,120,600	moderate urban density @ 50 units/hectare
New Retail			10,000	10,000	£700	£7,000,000	£1,050,000	£8,050,000	re-use of existing Attercliffe Road building stock
Office	6,220	1,555 m2	3,110	3,110	£1,350	£4,198,500	£629,775	£4,828,275	assume 25% coverage; 2 storeys avg
Retail (Improvements to Existing)	27,740	13,870 m2		13,870	£450	£6,241,500	£936,225	£7,177,725	convenience & companion retail; food & drink
Sub-total								£137,176,600	
TOTAL								£190,754,640	

NOTE:

Existing high street retail not included in land area calculations
 Area calculations and quantities estimated are for discussion purposes only
 Retail defined as A1 and A3 uses

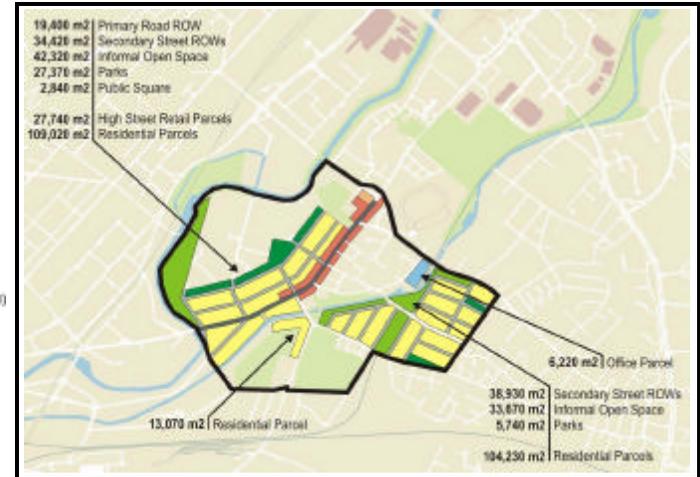
Indicative Construction Costs

Exclusions:

- All fees/VAT/Surveys
- Fitting out of retail
- CAT2 office fit-out
- Hotel FF&E
- Relocation costs
- Inflation

Legend

- Residential
- Retail
- Leisure
- Institutional
- Office
- Mixed Use
- Prestige Office
- Mixed Business & Industrial
- Dedicated Parking
- Public Realm (squares & plazas)
- Public Realm (water's edge, non-structured)
- Public Realm (community & linear parks)
- Primary Streets
- Secondary Streets
- Supertram Diversion/Extension
- Bridge



Lower Don Valley
Masterplan Framework
Area and Cost Calculations

Urban Strategies Inc.
 September 22, 2004

DISTRICT B

	LAND AREA (m2)	FOOTPRINT/ DIMENSION	GFA (M2)	No. OF UNITS	UNIT COST	COST	15% CONTINGENCY	TOTAL	ASSUMPTIONS
TOTAL AREA FOR SITE PREPARATION	362,970								
Site Preparation & Remediation				362,970	£60	£21,778,200	£3,266,730	£25,044,930	
Flood Protection						£1,825,000	£273,750	£2,098,750	
Relocation of Non-conforming Uses						£0	£0	£0	
Sub-total								£27,143,680	
PUBLIC REALM	152,140								
Secondary Streets ROW	58,100			3,873	£2,300	£8,907,900	£1,336,185	£10,244,085	Residential streets @ 15 m ROW width
Informal Open Spaces	23,320			23,320	£15	£349,800	£52,470	£402,270	Water's edge; pathways, lighting, benches, signage
Waterway Improvements (River Don)		600 m		600	£170	£102,000	£15,300	£117,300	Pathway
Waterway Improvements (Canal)		1,400 m		1,400	£290	£406,000	£60,900	£466,900	Pathway; Boardwalk
Community & Linear Parks	56,230			56,230	£5	£281,150	£42,173	£323,323	Landscape, play areas, park furniture, lighting, etc.
Squares & Plazas	14,490			14,490	£150	£2,173,500	£326,025	£2,499,525	
Sub-total								£14,053,403	
DEVELOPMENT PARCELS	210,830								
Residential	135,120			676	£90,000	£60,804,000	£9,120,600	£69,924,600	moderate urban density @ 50 units/hectare
Retail (New)	8,070	8,070 m2	8,070	8,070	£700	£5,649,000	£847,350	£6,496,350	cafes, restaurants, sports-themed retail
Leisure:	61,340			61,340					50% coverage; 75% of devel/mt; destination venue
Destination Leisure		10,000 m2	10,000	10,000	£1,200	£12,000,000	£1,800,000	£13,800,000	
Hotel		1,000 m2	8,000	160	£70,000	£11,200,000	£1,680,000	£12,880,000	
Institutional	6,300	1,575 m2	3,150	3,150	£1,500	£4,725,000	£708,750	£5,433,750	assume 25% coverage; 2 storeys avg
Sub-total								£108,534,700	
TOTAL								£149,731,783	

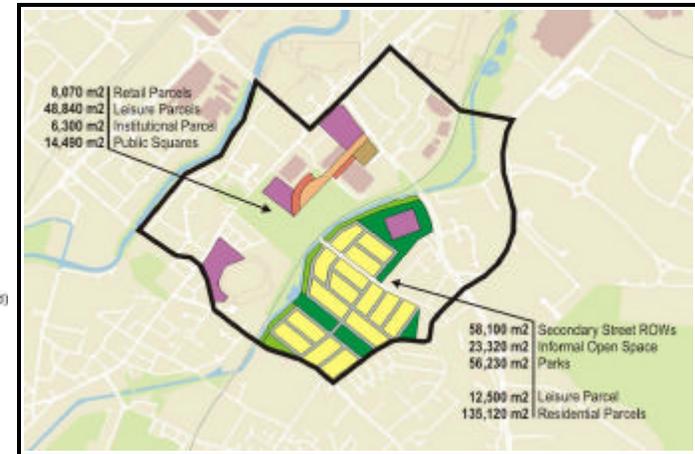
NOTE:

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 Retail defined as A1 and A3 uses

Indicative Construction Costs

Exclusions:

- All fees/VAT/Surveys
- Fitting out of retail
- CAT2 office fit-out
- Hotel FF&E
- Relocation costs
- Inflation



Lower Don Valley
Masterplan Framework
Area and Cost Calculations

Urban Strategies Inc.
 September 22, 2004

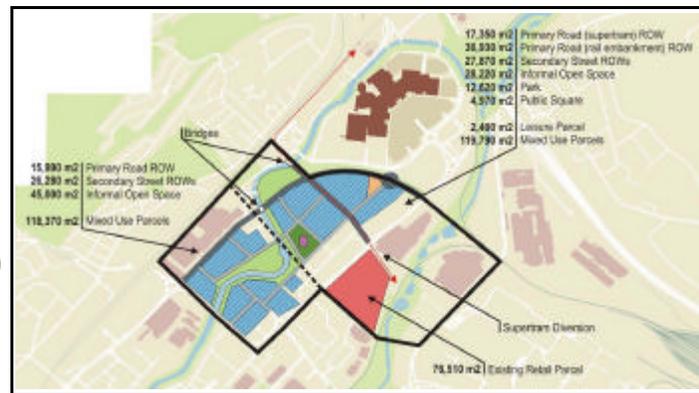
DISTRICT C

	LAND AREA (m2)	FOOTPRINT/ DIMENSION	GFA (M2)	No. OF UNITS	UNIT COST	COST	15% CONTINGENCY	TOTAL	ASSUMPTIONS
TOTAL AREA	512,150								
Site Preparation & Remediation				512,150	£60	£30,729,000	£4,609,350	£35,338,350	
Flood Protection						£2,600,000	£390,000	£2,990,000	
Relocation of Non-conforming Uses						£0	£0	£0	
Sub-total								£38,328,350	
PUBLIC REALM	195,080								
Primary Street ROW (Forgemasters)	15,990 m2			533	£4,000	£2,132,000	£319,800	£2,451,800	Widening of Brightside Lane @ 30 m ROW
Primary Streets ROW	17,350			578	£4,000	£2,312,000	£346,800	£2,658,800	Boulevard @ 30 m ROW exclusive of supertram rail
Bridge 1	650			1	£1,500,000	£1,500,000	£225,000	£1,725,000	Extension of Brightside Lane northward
Bridge 2	1,190			1	£2,500,000	£2,500,000	£375,000	£2,875,000	Extension of Boulevard with Supertram ROW
Supertram Diversion				1	£25,000,000	£25,000,000	£3,750,000	£28,750,000	Supertram rail from canal to Multi-modal Interchange
Primary Streets ROW	30,930			884	£5,000	£4,420,000	£663,000	£5,083,000	Landscaped boulevard on rail embankment @ 35 m ROW
Secondary Streets ROW (F'masters)	26,280			1,314	£3,000	£3,942,000	£591,300	£4,533,300	Local streets @ 20 m ROW width
Secondary Streets ROW	27,870			1,393	£3,000	£4,179,000	£626,850	£4,805,850	Local streets @ 20 m ROW width
Informal Open Spaces (F'masters)	45,000			45,000	£15	£675,000	£101,250	£776,250	
Informal Open Spaces	28,220			28,220	£35	£987,700	£148,155	£1,135,855	Water's edge: pathways, lighting, benches, signage
Community & Linear Parks	12,620			12,620	£5	£63,100	£9,465	£72,565	Landscape, play areas, park furniture, lighting, etc.
Waterway Improvements (F'masters)		650 m		650	£170	£110,500	£16,575	£127,075	
Waterway Improvements (River Don)		450 m		450	£170	£76,500	£11,475	£87,975	Pathway
Waterway Improvements (Canal)		700 m		700	£290	£203,000	£30,450	£233,450	Pathway: boardwalk
Squares & Plazas	4,970			4,970	£150	£745,500	£111,825	£857,325	High quality hard & soft surfaces, lighting & furniture
Sub-total								£56,173,245	
DEVELOPMENT PARCELS	317,070								
Retail (Improvements to Existing)	76,510	25,500 m2		25,500	£450	£11,475,000	£1,721,250	£13,196,250	reconfigured retail mall
Leisure	2,400	2,400 m2	4,800	4,800	£1,500	£7,200,000	£1,080,000	£8,280,000	health and fitness facilities
Mixed Use (Forgemasters site):	118,370								
Retail		7,500 m2	7,500	7,500	£1,200	£9,000,000	£1,350,000	£10,350,000	50% bldg footprint coverage
Office		51,685 m2	51,685	51,685	£1,350	£69,774,750	£10,466,213	£80,240,963	50% bldg footprint coverage
Residential		3,000 m2	12,000	150	£90,000	£13,500,000	£2,025,000	£15,525,000	
Mixed Use:	119,790								
Retail		3,000 m2	3,000	3,000	£700	£2,100,000	£315,000	£2,415,000	convenience retail, cafes & restaurants
Residential		28,450 m2	170,700	2,130	£90,000	£191,700,000	£28,755,000	£220,455,000	50% footprint coverage: 6 storeys @ 80 m2/unit (gross)
Office		28,450 m2	56,900	56,900	£1,350	£76,815,000	£11,522,250	£88,337,250	50% footprint coverage: 2-storey avg office developments
Sub-total								£438,799,463	
TOTAL								£533,301,058	

NOTE:
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 Retail defined as A1 and A3 uses

Indicative Construction Costs

Exclusions:
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**Lower Don Valley
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DISTRICT D

	LAND AREA (m2)	FOOTPRINT/ DIMENSION	GFA (M2)	No. OF UNITS	UNIT COST	COST	15% CONTINGENCY	TOTAL	ASSUMPTIONS
TOTAL AREA FOR SITE PREPARATION	328,150								
Site Preparation & Remediation				328,150	£60	£19,689,000	£2,953,350	£22,642,350	
Flood Protection						£1,925,000	£288,750	£2,213,750	
Relocation of Non-conforming Uses						£0	£0	£0	
Sub-total								£24,856,100	
PUBLIC REALM	22,290								
Supertram Extension				1	£5,000,000	£5,000,000	£750,000	£5,750,000	Supertram rail extended to Rotherham; new stop for Tinsley
Secondary Streets ROW	6,950			348	£3,000	£1,044,000	£156,600	£1,200,600	Service road @ 20 m ROW
Link Road						£15,000,000	£2,250,000	£17,250,000	
Informal Open Spaces	10,280			10,280	£15	£154,200	£23,130	£177,330	Landscape: pathways, lighting, benches, signage
Waterway Improvements (River Don)		1,300 m		1,300	£170	£221,000	£33,150	£254,150	Pathway
Waterway Improvements (Canal)		1,200 m		1,200	£290	£348,000	£52,200	£400,200	Pathway: boardwalk
Squares & Plazas	5,060			5,060	£150	£759,000	£113,850	£872,850	High quality hard surfaces, lighting & feature elements
Sub-total								£25,905,130	
DEVELOPMENT PARCELS	305,860								
Residential	1,000	1,000	12,000	150	£110,000	£16,500,000	£2,475,000	£18,975,000	12 storeys @ 80m2/unit (gross)
Structured Parking	42,640	42,640 m2	85,280	2,840	£8,000	£22,720,000	£3,408,000	£26,128,000	1,420 spaces X 2 levels = 2,840 spaces
Retail (New)	11,600	11,600	11,600	11,600	£850	£9,860,000	£1,479,000	£11,339,000	street-related; pedestrian street-oriented
Leisure:	92,790								
Casino			29,880	29,880	£1,200	£35,856,000	£5,378,400	£41,234,400	
Conference Centre			2,040	2,040	£1,400	£2,856,000	£428,400	£3,284,400	
Hotel			12,730	250	£70,000	£17,500,000	£2,625,000	£20,125,000	
Car Park			12,080	400	£2,000	£800,000	£120,000	£920,000	400 spaces
Office	3,600	3,600	25,600	25,600	£1,350	£34,560,000	£5,184,000	£39,744,000	4 storeys hgt: 2 storeys above market retail
Prestige Office	69,390	11,565	80,955	80,955	£1,500	£121,432,500	£18,214,875	£139,647,375	20% of development parcel (footprint): 7 storeys avg
Mixed Business & Industrial	84,840	16,970	33,940	33,940	£1,000	£33,940,000	£5,091,000	£39,031,000	20% of development parcel (footprint): 2 storeys avg
Sub-total								£340,428,175	
TOTAL								£391,189,405	

NOTE:

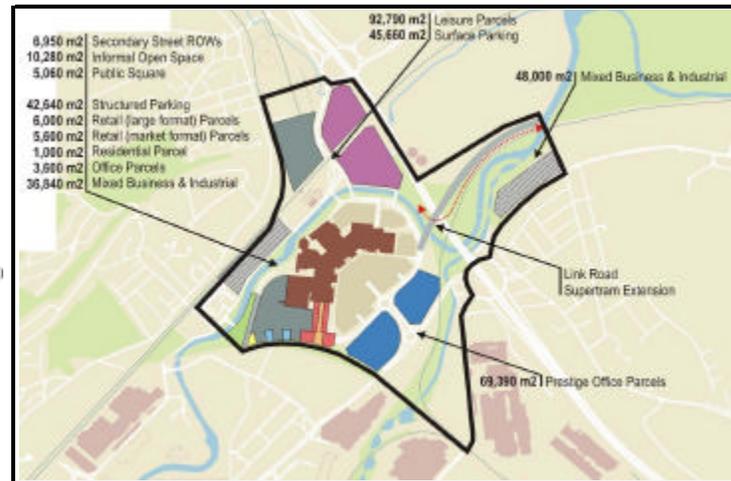
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Retail defined as A1 and A3 uses

Indicative Construction Costs

Exclusions:
All fees/VAT/Surveys
Fitting out of retail
CAT2 office fit-out
Hotel FF&E
Relocation costs
Inflation

Legend

- Residential
- Retail
- Leisure
- Institutional
- Office
- Mixed Use
- Prestige Office
- Mixed Business & Industrial
- Dedicated Parking
- Public Realm (squares & plazas)
- Public Realm (water's edge, non-structured)
- Public Realm (community & linear parks)
- Primary Streets
- Secondary Streets
- Supertram Extension/Extension
- Bridge



Air Quality Approach

Part of the Lower Don Valley lies within the M1 Air Action Zone (AAZ), an Air Quality Management Area declared by Sheffield City Council under the Local Air Quality Management Regime introduced by the Environment Act 1995. It has been declared for exceedence of the nitrogen dioxide (NO₂) national air quality objective to be achieved by the end of 2005. The AAZ covers an area of just under four square kilometres adjacent to the M1 around Junctions 34N and 34S, and includes Meadowhall and Tinsley. Approximately 5,000 people live and work within the AAZ.

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

A working draft Action Plan has been produced in collaboration with the M1 Corridor Clean Air Partnership, a stakeholder group involving local industry, residents, businesses and others. It identifies a number of options for the improvement of local air quality.

The Action Plan reinforces and supports the Local Transport Plan and other city-wide strategies. It also “seeks to identify and maximise opportunities to secure air quality improvements as well as social and economic benefit through the promotion of good practice”. In addition the Action Plan “is designed to promote environmental quality rather than to inhibit development”.

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

- Improving public transport
- Introducing new traffic controls
- Providing additional transport infrastructure
- Promoting the use of cleaner vehicles
- Introducing stronger controls of industrial combustion and process emissions (environmental management systems)
- Embracing national guidelines and standards for environmental performance

The transportation and movement strategy for the Masterplan has taken on board many of the recommendations contained within the Action Plan as indicate in the table overleaf.

Table 1: Contribution of the Masterplan to the Recommended Options in the Air Quality Action Plan (AQAP) for Sheffield

Package N ^o	Brief Description of package	Identified Measures	
		AQAP	Masterplan
1	<u>Improving public transport</u> Step-change in urgency and priority needs to be given to the implementation of existing public transport proposals	Measures to improve bus transport	The feasibility of Park & Ride is being investigated to move car based motorway and local journeys to buses. This will require good bus routes to ensure that journey times are favourable compared to the car.
			A dedicated bus service to be provided throughout the masterplan area
			The concept of a high quality public transport route using a new Spine Road is being developed.
		Individual marketing to encourage modal shift	Include information on sustainable transport modes in new home owner's pack.
		Extension of supertram	Facilitates re-routing of supertram to encourage patronage to improve viability of extension.
2	<u>Transport infrastructure</u> The AQAP recognises the changes in infrastructure currently being implemented, and that they are generally complementary.	To investigate further pedestrianisation and cycles routes in the city centre	Through integrated land use journey lengths should be shortened to encourage sustainable transport modes.
3	<u>Traffic control</u> The use of variable message and other signing to reduce wasted car miles	Alter delivery times to avoid the most congested periods	Use of 'Green Delivery Plans' to be encouraged for commercial users.
		Improved co-ordination of road works and signing	N/A except during construction work, when disruption will be minimised
		Explore potential for additional traffic control measures	As part of the masterplan intelligent transport systems (ITS) will be investigated, including the use of VMS.
4	<u>Cleaner Vehicles</u> Current in-use emission testing is undertaken and cleaner fuels and vehicles are promoted.	Minimum emission standards for vehicles used by Sheffield City Council, and encourage their adoption by Council services provides	N/A

Package N ^o	Brief Description of package	Identified Measures	
		AQAP	Masterplan
		Minimum emission standards for buses, taxis, delivery vehicles, refuse collection vehicles etc operating in the M1 AAZ	N/A Commercial users to be encouraged to adopt through Green Travel and Delivery Plans
5	<u>Reducing emissions from the M1</u>	Reduce speeds to that optimal for low NO _x emissions	N/A – Highways Agency issue
		Use Variable Message Signing	N/A – Highways Agency issue
		Change road system around Tinsley and Binsworth	The masterplan will support changes to the local road system
		The Council and operators to develop an action plan for reducing the impacts of HGV's on the community	N/A Use of 'Green Delivery Plans' to be encouraged for commercial users.
6	<u>Control of industrial combustion and process emissions</u>	Encourage the adoption of environmental management systems	N/A
7	<u>Planning issues and eco-efficiency</u>	Green procurement policy for public sector	N/A
		Expand Sheffield's existing district heating system	The feasibility of CHP/district heating will be investigated
		Travel Plans for significant employers	Travel planning will be encouraged
		Establish Environment Co-ordination Office to promote greater environmental efficiency in Sheffield	N/A
		Revise current guidance on air quality and land use planning	N/A
8	<u>National government</u>	Green procurement policy for UK public sector	N/A
		Environment performance of individual plants to be more publicly available.	N/A
		Improve building standards	N/A
		Report on practicality of substantial improves to domestic energy efficiency.	N/A
		Review competition policy wrt to public transport provision	N/A
		Clarify position wrt to a national congestion charging system	N/A
		Establish central environmental improvement website.	N/A
		Make funds available for improving non-road transport sources of air pollution.	N/A

* the identified measures have been abbreviated; for full details see the action plan.

The table shows that many of the measures recommended are not relevant to the master plan. It is also clear that many of these measures are long term and are focused on improving environmental performance through reducing energy consumption, reflecting the difficulty in delivering the significant improvements required to reduce emissions by the required amount whilst not adversely impacting on the economic development of the area.

Few measures within the Action Plan will directly affect the major issue of emissions from lorries using the M1 and surrounding areas. The need to reduce HGV pollution in the M1 AAZ suggests that commercial occupiers within the master plan area should be encouraged to adopt a 'Green Delivery Plan'.

Other measures included within the masterplan to complement the Action Plan are:

- ~~///~~ Provision of an extensive network of cycling and walking routes.
- ~~///~~ Providing opportunities for internet ordering and home working through the provision of broadband connection in all new homes.
- ~~///~~ Promotion of alternatives to car uses such as car clubs, walking and cycling
- ~~///~~ Using local reclaimed and recycled materials where practicable to reduce transport requirements (construction materials accounts for 30% of road freight in the UK). Where this is not practicable to bring these materials to the site by rail.
- ~~///~~ Promotion of the use of locally grown food and other local produce to reduce transport requirements

Flooding Strategy Summary

A major feature of the study area is the River Don which flows in a north easterly direction through the area.

Large parts of the study area are within the 1 in 100 year (1% per annum) indicative floodplain (IFM) of the River Don as currently defined by the Environment Agency.

Current planning guidance, in particular PPG25 – ‘Development and Flood Risk’ seeks to restrict development in the floodplain with a ‘sequential test’ applied that supports development in areas of least flood risk over those in areas of greater risk.

Strict application of the sequential test to the study area would constrain the masterplan to a significant degree and therefore a range of solutions to the flooding issue will be required.

There are also flooding problems in the River Don catchment downstream of Sheffield in Rotherham and Doncaster. One of the primary aims of the masterplan will be to ensure that there will be no derogation in the flooding situation either upstream or downstream of the study area.

The EA have recently produced the Don Catchment Flood Model (May 2004) which was commissioned as a flood risk mapping study to improve on the IFM for the Don Dearne and Ea Beck and develop a modelling tool for use in simulating the effects of storage and river regulation in the Lower Don catchment.

This model does not include the floodplain within the study area in great detail as there were considered to be no flood storage areas in this reach of the River Don.

The approach to the flooding issues within the study area will need to ensure the following:

- The true extent of the existing floodplain is determined and agreed.
- Changes to the floodplain arising from the masterplan do not result in increased flooding downstream.
- Options for flood alleviation to be considered, possibly in combination are:
 - Flood defences, such as those already being implemented at Meadowhall.
 - Floodplain management, i.e. providing floodplain storage in areas such as landscaping or vehicle parking.
 - Flood alleviation measures to reduce flood levels in the study area such as channel improvements, or a bypass channel.
 - Wider scale options such as providing flood storage outside the study area

Flooding is a complex multi-regional issue that will require high-level input from a variety of partners to produce a satisfactory solution.

APPENDIX A:

Locational Criteria for Regional Casinos

Large casinos with gaming areas and associated entertainment, leisure, hotel and other components (including back of house and associated service facilities) in excess of 100,000 square feet (10,000m²) are major urban elements and must be located with care to maximise benefits and minimize negative impacts.

Locational criteria can be summarised as follows:

1. *Minimise traffic impact*

Casinos and other large leisure destination uses have traditionally been strongly car-oriented. Greater traffic generation occurs in the mid and late evenings, and although off-peak, can represent significant volumes. Such traffic activity is best routed as soon as possible to major arterials and motorways.

2. *Optimise shared-use of parking*

The large casinos can generate significant parking demands. Prudent land-use planning suggests a location adjacent to existing parking whose use profile is compatible with that generated by the casino. The connection between the casino and its parking must be safe, secure and obvious. Much casino activity takes place late at night and it is important to create an environment designed to combat any nuisance. Opportunities for multi-storey parking must be maximised.

3. *Good transit accessibility is highly desirable*

If casino patrons are to utilise transit, it must be high quality, readily available and demonstrably safe at the times they will want to use it. Casino employees are likely to use transit and care must be taken to ensure a service that corresponds to their working hours.

4. *Easy servicing is essential*

Casinos and their associated uses generate high servicing requirements and associated vehicle activity must have ready access to arterial roads and motorways.

5. *Casino links to shopping, hotels and conference centre uses should be fostered.*

Many casinos do not generate significant pedestrian activity to adjacent urban areas. The strongest traditional linkages are with hotel and conference centre uses, high quality shopping, cinemas, restaurants and other leisure activities.

6. *Casinos are typically “loud” urban buildings and impacts on adjacent residential areas should be minimised.*

Casinos in other countries tend to be characterised by extravagant signage and dramatic architecture and site features. Whilst a more restrained image may be compatible with a casino’s core business, some opportunity for an appropriately bold presentation would typically be required. Care must be taken not to expose adjacent residential or prestige urban districts to inappropriate signage.

7. *Casino sites should be of adequate size and dimension to accommodate functional requirements.*

Large casinos generally consist of one and two-storey floor plates of between 100,000 and 200,000 square feet in size (10,000 to 20,000m²) containing the gaming area, associated retail, restaurant and entertainment activities, and the support services along with a significant, immediately associated parking area. Hotels form the vertical element of the complex. Resulting area requirements are, therefore, large and generally in excess of eight to ten acres.

8. *Casinos can benefit adjacent areas as employment opportunities.*

Large casinos are major employers and the local training and provision of this work force is one of the strongest sustainable benefits a casino can bring to any area. The specialised skills and job attitude required necessitate well-thought out training programmes.