Sheffield Destination Management Plan 2023 - 2028

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Executive Summary

Or Foreword – to be discussed

1. Introduction

Sheffield is at a crucial point in its development as a visitor destination. The last few years have seen enormous change and uncertainty that have impacted (and continue to Impact) on our visitor economy – the Covid pandemic, Brexit, cost of living and inflation. Yet we are emerging strongly from it. Our Outdoor City brand continues to develop, encompassing both outdoor activities and the city's independent and cultural experiences. We are generating really positive coverage with, for example, TimeOut magazine listing Sheffield in the top 20 city break destinations in Europe and Kelham Island as one of the 50 coolest neighbourhoods in the world. Our brave decision to host the Women's Euros paid great dividends and raised our profile across the continent. The Crucible's Olivier award winning production 'Standing at the Sky's Edge', about the Park Hill estate with songs by Richard Hawley, is transferring to the West End in 2024. Our city centre is experiencing transformational levels of investment which, whilst it has caused short term issues, will bring enormous lasting benefits: adding to our outstanding public spaces, improving connections and returning parts of the city to life. Sheffield is on the up.

There are other positive changes. We are collaborating with local authorities in South Yorkshire, and the South Yorkshire Mayoral Combined Authority to develop opportunities that positively impact on the city, and, following the De Bois review, Marketing Sheffield (our Destination Management Organisation) is seeking, with other South Yorkshire authorities, to be accredited as a Local Visitor Economy Partnership (LVEP) by VisitEngland.

For tourism to continue to grow in this city, we will need to demonstrate strong collective partnership, mobilising around a shared vision with a realistic but stretching action plan, so that we can bring about the change and benefits we both need and want for Sheffield.

This requires us to be holistic in our approach – co-ordinating more effectively with all the players that have a role in our visitor economy. We need to build upon the good work that is being delivered, finding ways to address the gaps, and more effectively pool resources as we grow the profile of Sheffield and the value of visitors to our great city.

This Destination Management Plan (DMP) provides a galvanising framework and the opportunity to build a better and more productive visitor economy sector for Sheffield.

2. Current Situation

IMPACTS

Approximately 18 million visitors (2019)

1.8m staying visitors and 4m bednights

Visitors spend £1.36bn in the city

Over 15,100 Full time Job Equivalents (FTEs) supported

BENEFITS

Our visitor economy:

Enhances our image and profile not just as a place to visit but also as a place to move to, invest in, or study

Supports a wide range of facilities that enhance the quality of life for our residents

Develop a sense of place and community pride amongst our residents

Supports a range of businesses (from micro to muti-national); jobs with different skills, and creates entry level employment

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2.1 The Impacts and Benefits of the Visitor Economy

Our visitors come in many guises. They could be someone coming because they have work, business or a meeting in Sheffield; an international academic coming for a conference; a football fan going to United or Wednesday; a family visiting a museum or gallery; someone visiting for a gig at the City Hall or Utilita Arena, or a competition at Ponds Forge; a shopper to Meadowhall; someone on a night out with friends, or parents visiting their student children.

These visitors impact on our city in many ways but, by the same token, our city can impact on our visitors – from our image, ease of booking, transport links, parking, shopping, culture and museums, theatres and events, bars, hotels, street cleanliness, welcome etc. Visitors take these experiences away with them and share them with others - the positive, and the negative.

These visitors bring significant benefits to our city. In 2019 (the last 'normal' year), visitors generated an estimated £1.4bn of direct and indirect expenditure to the Sheffield economy. This supported a total of 15,100 Full time Job Equivalents (FTEs).

The Economic Impact of the Visitor Economy to Sheffield - 2019				
	Visits ('000)	Visitor Days ('000)	Spend[1](£m)	% totals spend
Overnight Visitors				
Serviced	870	1,730	205	15%
Non-serviced	30	131	8	1%
Staying with friends and relatives (SFR)	900	2,117	55	4%
Total	1,799	3,978	267	20%
Day Visitors	16,122	16,122	1,099	80%
All Visitors	17,921	20,099	1,366	

1. Direct and indirect/induced expenditure.

This expenditure spreads far and wide – from the city centre to our local high streets, and from direct spend on hospitality, retail, and entertainment, through the supply chain and - via the people employed in the sector - into numerous other areas. Because visitors bring new money into the city, the overall size of the local economy benefits and grows.

The visitor economy is not just about spend – it also:

- Enhances our image and profile – not just as a place to visit but also as a place to move to, work in, invest in, or study;
- Supports a range of businesses (from micro to muti-national), jobs with different skills and creates entry level employment;
- Develops a sense of place and pride among our communities and residents;
- Supports a wide range of facilities that enhance the quality of life for our residents. This can include shops and high streets, restaurants, galleries, theatres, attractions, walks and trails, events and festivals.

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2.2 Our Offer

By the end of 2023, with three new hotels opening, we will have over 3,500 hotel bedrooms in the city. In addition, in 2022 it is estimated that we had a monthly average of just over 1,000 Airbnb lets comprising 680 whole units and 329 private rooms.

In terms of performance, occupancy in our hotels was similar in 2022 to other UK cities but our rates tended to be slightly below average. Positively, both occupancy and rates have recovered to pre-Covid levels.

The following table outlines a series of the primary potential experiences for Sheffield and its offer in each of these.

Experiences	Our Product
Business - including conferences	We have a range of venues – our universities, hotels and a number of more unusual venues like the City Hall, Cutler's Hall, the Showroom Workstation, and Sheffield Cathedral.
Active - outdoor and fitness related activities	A differentiator for us as a city is the range of outdoor activities in and around the city (with part of the Peak District National Park in the city boundaries) – captured in our Outdoor City brand. Climbing / bouldering is a particular strength with indoor and outdoor opportunities. Other activities include mountain biking, road biking, walking and water sports.
Performance and entertainment - includes visiting Sheffield for theatre, concert, show, or a watching a sporting event	A real strength for Sheffield with a huge range of different type of venues including Sheffield City Trust facilities (Ponds Forge, English Institute of Sport (EIS), Sheffield City Hall, and the Utilita Arena), and Sheffield Theatres (notably the Crucible and Lyceum Theatres). We also have our sporting teams (Utd, Wednesday and the Steelers) and our music scene (with the Leadmill and other venues).
Events	We have a year round events programme that caters for a variety of interests and audiences and includes Tramlines, World Snooker, DocFest, Off the Shelf, Cliffhanger, Sheffield Walking Festival, Festival of the Outdoors and Sheffield Food Festival – to name a few.
Discovery and enrichment - our heritage and cultural attractions, stories, tours and trails	We have a strong portfolio of museum and cultural attractions. These include those run by Sheffield Museums (e.g. Millennium Gallery, Graves Gallery, Kelham Island Museum) but also the National Videogaming Museum, and National Emergency Services Museum.
Universities – friends/family	Our Universities are a major asset for the city – generating trips from students' parents and friends.
Social fun - fun trip with a group of friends or partner	We have Meadowhall for shopping and a huge range of restaurants, bars and pubs, and clubs and venues - some dispersed but some concentrated in particularly areas – e.g. Ecclesall Road and Sharrow Vale Road, Heeley, Kelham Island.

Experiences	Our Product
Surrounding destinations and product	Sheffield is brilliantly located. We are on the edge of the Peak District, which is readily accessible by bus / train with sightseeing and outdoor activities (see above). There are also a number of significant attractions in the surrounding area (e.g. Cannon Hall Museum, Park and Gardens, Yorkshire Wildlife Park and Magna Science Adventure Centre).

2.3 Current Delivery Arrangements

The visitor economy is complex and has many players invested in it to differing degrees.

Our lead visitor economy organisation (i.e. the Destination Management Organisation) is **Marketing Sheffield**. This is part of Sheffield City Council's Economic Development and Culture directorate. Marketing Sheffield has a remit wider than the visitor economy with responsibility for the broader development of Sheffield's place brand to a variety of audiences – i.e.
T**rade** (Business), **Talent** (attraction, retention and development), and **Tourism** (business and leisure visitors).

In addition to its investment in Marketing Sheffield, the Council has an involvement and financial investment in other parts of the visitor economy. This includes:

- **Major Events Team** -The Council's in house team bids for, secures and manages major sporting events, organises/curates community events and provides a coordination (safety & licensing) service for event organisers.
- **Sheffield Theatres Trust** – which operates three theatres: the Crucible, the Lyceum and the Tanya Moiseiwitsch Playhouse.
- **Sheffield Museums** - which operates six of Sheffield's galleries and museums including the Millennium Gallery, Abbeydale Industrial Hamlet, Graves Gallery, Kelham Island Museum, Shepherd Wheel Workshop and Weston Park Museum.
- **Sheffield City Trust** which operates a range of sport, leisure and entertainment venues including Ponds Forge, English Institute of Sports (EIS), IceSheffield, Sheffield City Hall, Utilita Arena and a number of leisure centres and golf courses.
- **Business Sheffield** – is the council's dedicated business support team. They work with numerous hospitality and related businesses and manage the Economic Recovery Fund (ERF) which supports groups of businesses in specific areas to improve their environment and trading potential.
- **Culture Business Development** - The support and coordination provided to the cultural sector through the council's Head of Culture Business Development.
- **Other Facilities** – The council directly manages the Winter Garden and Sheffield Botanical Garden.

Reflecting our product offer, our private sector is also complex and includes our hotels, attractions, tours, conference venues, bars and restaurants, cinemas, nightclubs and music venues, our high streets and retail, outdoor operators…. Some of these are wholly visitor focused, others are more on the periphery.

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There are also a number of visitor economy related partnerships (or others representing multiple organisations) across the city – these include the Business Improvement District, the Hoteliers Association, the Chamber of Commerce, the Property Association, the Culture Consortium and Culture Collective. Beyond the city, there is regular visitor economy liaison with neighbouring South Yorkshire Authorities (Barnsley, Doncaster and Rotherham) and with the Mayoral Combined Authority. We work with Visit Britain and Visit England on national and international promotional activities, and development campaigns (like the Discover England Fund).

3. Strengths, Challenges and Opportunities

3.1 Our Strengths

As a destination, we have considerable strengths:

- Our year round programme of events (in its widest sense) includes our sport, music (small and large), and media events, conferences, theatre, and University related (open days, graduation). These are a huge asset for the city and a key driver of overnight business – both weekday and weekend.
- Linked to this our event venues for both sport and culture are a real strength and, in some cases, nationally unique.
- Our compact and visitor friendly city centre with a great range of public spaces, hotels, galleries, and restaurants.
- The range of things to do in (and beyond the city) – our outdoors, our free museums and galleries like the Millennium Gallery and Weston Park, and Meadowhall (one of the north's largest shopping centres).
- Our location – we have great road and rail links to the city with direct links to most of the UK's major conurbations making us accessible for short breaks and conferences. Public transport within the city (particularly our tram system) and beyond is good.
- Our proximity to the Peak District.
- An experienced DMO team with good marketing collateral (e.g. Welcome to Sheffield website), an established conference bureau and Ambassador Programme, and wider expertise in the city on events organisation. Allied to these there is goodwill and positivity amongst stakeholders, a sense of momentum and improvement across key partners.

3.2 Our Challenges

However, we do face a number of challenges:

- We lack sizable purpose built (or dedicated) conference facilities which limits the events we can bid for. Some of our primary event venues need refurbishment and modernisation to move forward in the future.
- As a destination, our short break offer does not necessarily have the depth and appeal of other cities. We lack a high profile attraction with national status and pull.
- While we have good hotel accommodation, we do not have a range of boutique / high end city centre hotels.

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- Negative, but temporary, impacts of major regeneration schemes like the Heart of the City.
- Resourcing for the visitor economy (particularly at Marketing Sheffield and for events development) are less than most of our competitor cities. Our private sector is relatively small and finding sustainable funding to grow the visitor economy is a challenge moving forward.
- Allied to resourcing challenges (and as we emerge from Covid working arrangements), our partnership and co-ordination at the local, sectoral, strategic and delivery levels could be better.
- Historically low levels of investment from Arts Council England and, until recently, a relatively fragmented cultural sector.
- Our 'Outdoor City' overall brand is extremely effective for attracting investment, talent (to both live and work in Sheffield) and students to the city. For the visitor economy message it provides 'added value' rather than being the core attractor.

3.3 Our Opportunities

Looking forward, we have a number of exciting opportunities:

- Our distinct areas and neighbourhoods. We have a rich diversity of areas - examples include Hillsborough, Sharrow Vale, Abbeydale Rd, Broomhill, Kelham Island and Crookes – there is an opportunity to further develop and integrate these within the visitor economy to enhance our leisure offer.
- Further development of the National Museum of Videogaming and Graves Gallery. Both of these have huge potential to increase their visitor facilities, size and appeal to enhance our overall leisure offer.
- More integrated working with Meadowhall (one of the north's premier shopping destinations) as a part of the city's offer.
- Our Ambassador Programme which both has the potential to be grow and be developed further to not only attract more conferences but also other events (e.g. sporting events).
- Our major city centre developments like the Castlegate development (including the Harmony Works Music Education Centre), the Heart of the City development (uniting Fargate and The Moor into a single city centre and a fresh offer) and other developments with a number of these coming to completion in late 2024.
- Developing better strategic partnerships – e.g. a South Yorkshire LVEP – and securing increased but sustainable resources.
- Our music heritage and contemporary music scene, and a potential bid for UNESCO City of Music Status.

4. Our Strategy

4.1 Our Vision

Our 10-year vision is to sustainably grow the visitor economy in Sheffield; to deliver increased business levels and yield for our stakeholders but also to transform people's perceptions of our rich and diverse city.

We will further develop our events programme – continuing to attract premier events and conferences to Sheffield but also develop our own vibrant programme of distinctly Sheffield events. We will strengthen our position as a leisure destination – building on our Outdoor City Brand and developing our distinctive offer – and work closely together to maximise our collective impacts.

4.2 Aims and Objectives

This Destination Management Plan, and the investment that goes with it, has two primary **aims**:

- To use the visitor economy to continue to develop Sheffield's brand and image and enhance our appeal to a range of audiences.
- To drive overnight business to the city – focusing particularly on our shoulder months when our occupancies and rates could be improved.

A third (underlying) aim is to:

- Enhance the quality of life and social value of the visitor economy for residents of Sheffield.

This will be achieved through the delivery of five **objectives**:

- Objective 1: Diversify and strengthen our events programme;
- Objective 2: Grow our conference market;
- Objective 3: Develop our city breaks offer
- Objective 4: Develop a world class, competitive product;
- Objective 5: Manage our visitor economy effectively.

4.3 Strategic Drivers

Underpinning these aims and objectives, there are a number of strategic drivers. These include:

Sustainability – we are the Outdoor City. Sustainability is not only part of our brand but needs to be a fundamental part of the way we approach developing our visitor economy. Elements of this will include prioritising value over volume (through encouraging a greater length of stay and spend), encouraging efficient use of energy among businesses and visitors, and spreading visitor benefits through the city's economy and communities.

Partnerships – the delivery of this plan will need to be undertaken in partnership with a range of public and private sector organisations – both tourism and non-tourism bodies, within Sheffield as well as with our partners in the wider South Yorkshire sub-region, reaching out nationally and internationally.

Resources – at present, the resources to deliver an ambitious growth plan are not well enough developed or co-ordinated across our city. Collectively we need to harness and use our existing resources more effectively and look to develop new resources to enable us to compete with other destinations and grow our visitor economy.

Accessibility, Inclusivity & Innovation– We will seek to make our events, marketing, communications and partnership working accessible to all our communities and stakeholders. We will also seek to better represent Sheffield's diversity across all programmes. Our ways of working will be kept under review and we will seek innovative ways of delivery.

4.4 Markets and Propositions.

We have many markets and different types of visitors. The core ones that we will proactively focus on:

Market Group	Description
Sheffield Events	We have some excellent Sheffield owned events – e.g. Tramlines, Festival of the Outdoors, Off the Shelf, DocFest – that generate business for the city. We need to build on this and further develop our portfolio to help build our brand and develop reasons to visit in the off-season.
'Bid for' Events	We have brilliant venues (e.g. the Arena, Ponds Forge, EIS, our theatres) that attract a range of events. These vary enormously in their appeal – some have wide appeal and large audiences; others are much more niche (and sometimes lower profile). They are however all important to us – generating visits and profile – and we need to continue to work hard to maintain and grow this element.
Conferences	Focusing on multi-day conferences that are attracting national (and international) delegates. Our Ambassador Programme is vital to success.
City breaks	While events are our main driver of overnight business, increasing our city breaks business is important to increase our weekend demand, and enhance our image We have great opportunities to further develop our city breaks business focusing on our revitalised city centre, vibrant neighbourhoods, music heritage, the outdoors and proximity to the Peak District but this will take time to come to fruition.
Visiting friends and relatives	Our VFR market (particularly those generated by our universities) is a secondary, but important, audience. The focus is less on developing reasons to visit but more on maximising their enjoyment of the city and their positive impacts in it.

Sheffield Made – there are great things, people and creativity going on in Sheffield. These can and should add to our visitor offer. We need to celebrate and build on our diversity, our neighbourhoods, our culture and music and link these to our offer and brand.

Brand – we will continue to use our Outdoor City brand across all channels and markets, whilst recognising it has more relevance for some than others. For visitors we need to communicate the breadth of our offer – our culture, diversity, music, food as a core proposition with the Outdoor City adding value as our differentiator.

4.5 A Phased Approach

We need to be realistic. We cannot achieve everything we want to at once. This DMP will be delivered and developed in three broad phases that reflect the reality of the challenges we face:

- **Phase 1: Foundations** (2023-2025). The plan will focus on continued recovery from the Covid-19 pandemic and cost of living issues, delivering our major city centre capital schemes, enhancing our partnerships (both in the city but also in the wider South Yorkshire sub-region), relationships and co-ordination, and beginning to develop more sustainable funding and resources.
- **Phase 2: Development and Capacity** (2026-2027). We will consolidate our partnerships, deliver sustainable funding streams, enhance our delivery and activities particularly in events and conferences, continue to develop our offer and look to maximise the opportunities of our re-developed city centre.
- **Phase 3: Growth** (2028-2031). Towards the plan's end we will consolidate from the first two phases and begin to deliver real growth, and grow our city breaks markets.

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5. Objectives and Priorities for Action

The following sections outline our objectives. For each objective we outline the rationale for why this is important and the longer-term aspirations and needs. We also outline some of the action areas that will be taken forward in during the DMP period.

5.1 Objective 1: Diversify and Strength our Events Programme

Rationale and Approach

Events are fundamental to Sheffield's visitor economy. Participants and organisers in sports events fill our hotel bedrooms and restaurant tables. Attendees to cultural events, including trade/industry events (such as DocFest and the Children's Media Conference), also contribute massively to business levels across the city. Events support our brand and profile, and typically enhance the quality of life for our residents by providing opportunities to be involved.

We have an outstanding asset base for hosting sports events with some unique facilities at a national level. We have a strong track record of welcoming sporting events at both national and international levels, including the World Snooker Championships. We have specialisms in ice-based sport, para sport and our recent hosting of the Women's Euros has elevated our reputation and profile. Nevertheless, these events can sometimes be invisible to our residents, we are not maximising their impact at a local level, and we sometimes have gaps in our events calendar.

Our home grown cultural events range from Tramlines to the Chamber Music Festival. We have a particularly strong music offer with acts at venues like the Utilta Arena, City Hall and Leadmill attracting visitors. Literature is celebrated by Off the Shelf, and both DocFest and the Children's Media Conference are key events in the international media calendar.

Moving forward, we will look to build on this success by widening the partnership that we have to bid for events. This partnership will include the variety of people from the City Council, City Trust and other organisations that are responsible for bidding for and organising events and also visitor economy businesses (particularly hotels) to identify periods of capacity which can be addressed by attracting suitable events. We will focus on a more even balance of 'home grown' and 'bid for' events which are owned elsewhere, and a balance of different event types that enhance our brand and offer (sports, culture, media and gaming, and outdoors). Our Conference Ambassador Programme offers an opportunity to help with this (see objective 2 – below).

This will require further investment in our own events programme; we will look to utilise monies from the UK Shared Prosperity Fund for this in the short term.

We will seek to maximise the opportunities for enhancing the visibility and social value of events both for participants/delegates/spectators but also our residents (and other wider audiences) through PR, content capture and city dressing/welcome (where funds permit). We need to define and deliver this in a city-wide events approach.

Action Areas

The following table summarises key areas for action in the foundations period and into the development period:

Action area	Description	Phase
Events Approach	Establish a clear events approach that identifies criteria (ROI, asset optimisation, timing, strategic fit, brand fit, growth capability etc.) for supporting/commissioning events, potential new events and partnership/delivery mechanisms.	Foundation
Strategic Events Group and Event Bidding	Widen event bidding/planning partnership to include key stakeholders (venues, funding and delivery partners, and the Hospitality Association)	Foundation (and beyond)
Big Idea	Work with partners to identify and bid for the next major event to build on the Women's Euros success	Foundation (and beyond)
Signature Events	Arising from the events approach develop one or two Sheffield owned signature events.	Foundation / Development
Cultural events	Enhance the cultural events programme - identifying growth opportunities for existing events in the first instance and supporting new events.	Foundation (and beyond)
Events visibility	Investigate affordable opportunities to enhance the visibility and social value of events – e.g. through capturing content from participants and spectators for digital dissemination	Foundation (and beyond)
Ambassadors	Investigate the opportunity for expanding the Conference Ambassador Programme into attracting other events	Foundation (and beyond)

5.2 Objective 2: Grow our Conference Market

Rationale and Approach

In 2019, there was an estimated 21,600 conferences in Sheffield. These were attended by over 1.2 million business event visitors. Delegates (and accompanying partners) accounted for an estimated spend of £141.8m at venues and in the local destination. We host some major conferences particularly linked to our academic institutions and sector specialisms. Smaller residential and day conferences are an important source of business for our hotels and venues. This is a high spending market – one that we can reach and influence. It brings other benefits – in terms of profile, prestige and potential inward investment.

Our conference bureau promotes our conference offer; our Ambassador Programme has been running for over 15 years and has been a success story. The programme has around 300 academics and medical professionals and has generated almost £30 million in additional conference business for the city. We will continue to develop and use our Ambassadors to bid for conferences and promote the city and our venues to organisers. There is the potential to grow the Ambassador Programme both in scale (both across the city but also potentially across South Yorkshire) and coverage to attract new and wider interests (such as Ambassadors in the sports, media and gaming) and will seek to secure resource and investment to expand the scheme.

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While we have a variety of venues, our larger capacity ones tend to be multi-functional – either sporting venues e.g. Ponds Forge and Ice Sheffield or others, such as Sheffield City Hall and Sheffield Arena. They are not always available for conferences. Dedicated (and purpose built) conferencing spaces tend to be smaller – typically in hotels and the two universities (both of which offer substantial conference space).

An additional venue and dedicated availability and capacity (with associated exhibition space) would strengthen our offer and provide an opportunity for the city to bid for larger conferences. New hotel developments might increase the number of venues but will not diversify the offer.   A purpose-built centre (either dedicated or a good multi-purpose venue – see above) would enhance the offer but its potential viability needs to be assessed.

Action Areas

Action area	Description	Phase
Conference Bureau	Continue with the current programme activity focusing on strong partnerships and relationships, the Ambassador Programme, conference bidding and city marketing.	Foundation and beyond
Ambassador Programme	Expand the size (and dimensions) of the programme recruiting new members, focussing on known areas of academic expertise e.g. sports and exercise medicine	Foundation / Development
Conference Venue	Investigate the feasibility of a purpose-built centre (medium sized) (possibly new build or development of an existing venue)	Foundation

5.3 Objective 3: Develop our City Breaks Offer

Rationale and Approach

City breaks will be a key part of our market mix. A strong city breaks proposition will increase our wider profile, increase weekend occupancy and yield and also enhance our appeal and the spend of event based and VFR visitors, as well as the potential for repeat visits and recommendations.

We have lots of good leisure product and recently received (in Timeout) the accolade of a top 20 city break destination in Europe. New city centre capital and public realm projects are transforming our city but are not quite there yet. As such, our current proposition does not necessarily have the depth or profile of other competitor cities.

There are however opportunities to further develop our offer, and this is our priority during the Foundation phase of this plan (and beyond).

Many of our visiting businesses are owner managed and the experience in the city is a real and authentic one – not a series of bland brands. We need to build on the concept of Sheffield Made – utilising and developing our existing creative culture and talent more.

Our neighbourhoods /distinct areas are an opportunity and work is already undergoing in a number through the city's Economic Recovery Fund. Some of these have strong potential visitor appeal – examples include Kelham Island (already a well-developed area), Ecclesall Road, Sharrow Vale Road, London Road, Abbeydale, Crookes and Walkey - and we should look to develop and integrate them more into the wider city visitor offer.

We have a really exciting music and cultural scene (and heritage) that is not necessarily visitor orientated and we need to integrate this more into our profile and offer. This could be supported by an UNESCO City of Music bid. Our outdoor offer (our climbing, mountain biking and walking) is also a key strand and one that the Outdoor City brand has helped to integrate. We, however, need to position the city centre and Meadowhall as complementary offers – with different but valuable experiences.

However for wider audiences, we lack a signature attraction and critical mass of day time product. Developing a major attraction is a long term aspiration for the city and there are two exciting opportunities. The National Videogame Museum has a unique offer and market but suffers from a less than central site and space constraints. There are opportunities to improve this which would strength the offer. Another exciting existing facility with huge potential is Graves Gallery. This is in an excellent location but requires investment. With re-development, the Gallery would increase the appeal of our cultural offer (see objective 4).

Our destination website (Welcome to Sheffield) is an excellent foundation from which to promote our city, and this could be enhanced by the development of further content and itineraries on our offer.

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Completion of our city centre developments in late 2024 and early 2025 creates huge opportunities for a 'moment in time' launch of the city. By the Development phase of this DMP, we will be seeking to generate more resource streams that will enable pro-active city breaks promotion. We will develop more campaign related activity – possibly based around niche (or special interest) audiences, tying into (and mutually reinforcing) our events programme (e.g. Festival of the Outdoors and climbing breaks).

We will also explore opportunities for joint marketing narratives, content and / or campaigns with our neighbouring South Yorkshire destinations. This could be based on a range of elements – themes (like industrial heritage), markets (e.g. day visiting families, international), events or celebrations, sport, times of the year (e.g. what to do in summer) or a mixture.

Action Areas

Action area	Description	Phase
Welcome to Sheffield	Continue the development of the Welcome to Sheffield website to include more content, particularly itineraries.	Foundation and Beyond
Neighbourhood improvement programme	Continue the work started under the Economic Recovery fund around high streets – working with business to ensure they are visitor facing, but also ensuring areas have appeal to visitors in terms of distinctive offers (food, boutiques shopping antiques etc) and a sense of place (signing and public realm).	Foundation / Development
UNESCO City of Music	Investigate and develop a UNESCO City of Music Bid (Creative Cities Network)	Foundation / Development
Heritage development	Maximise the securing of new collections at Kelham Island and other enhancement works at key sites	Foundation / Development
National Videogame Museum	Explore options for further development of the National Videogame Museum	Foundation / Development
Moment in Time	Maximise the impact of the late 2024 completion of several major capital projects (Heart of the City etc.) through publicity and animation.	Development
Pro-active city breaks campaigns	Develop pro-active city marketing campaigns	Development and Beyond
South Yorkshire opportunities	Explore joint South Yorkshire opportunities	Foundation and Beyond

5.4 Objective 4: Develop a World Class, Competitive Product

Rationale and Approach

Objective 3 (above) identifies areas where we can potentially improve our offer to attract leisure breaks without major capital investment. However, capital investment will be important for the city.

Our wider city offer is of equal importance – the hotels, bars, restaurants, retail all make a huge contribution to any visit. Sense of place, the urban realm, our welcome and transport and orientation are also key for all visitors – whether they are visiting for conferences, events, leisure, or to see friends / relatives.

We have a good and varied accommodation stock in the city centre and surrounding area with additional capacity coming on stream in the near future. We would benefit from a more diverse offer (particularly in terms of boutique hotels), but demand and feasibility would need to be explored. This type of feasibility work could potentially be explored across the South Yorkshire area.

New city centre capital and public realm projects will help to transform our city centre. City centre developments such as Heart of the City and the Fargate improvements need to provide sufficient opportunities for leisure businesses, animation and event infrastructure, and retail that complements Meadowhall.

Our city centre is compact, pedestrian friendly, and easy for visitors to navigate. However, much of our potentially interesting product lies beyond the city centre - our neighbourhoods (see 'Rationale' above), Meadowhall, the River and Canal and our outdoor offer. This is more difficult for potential visitors, and we need to improve orientation and sense of place for these areas through a combination of online information and signing (both directional/orientation and welcome). Promoting the ease of using public transport in (and beyond) the city is an on-going priority.

Major capital developments that could impact positively on our offer include a dedicated conference facility (see objective 2) and a major re-development of Graves Gallery (objective 3) possibly into a broader cultural resource. Some of event venues (such as the Utilita Arena and Ponds Forge) also require significant capital investment to ensure they remain competitive in the future.

Action Areas

Action area	Description	Phase
Visitor orientation	Ensure that city centre public realm works, especially Steel and Gold routes, contain visitor friendly infrastructure and/or wayfinding signage.	Foundation / Development
Accommodation Study	Potential South Yorkshire study to assess accommodation development needs and opportunities, and potential future interventions.	Development / Growth
Graves Gallery	Feasibility into costs, options and business models	Foundation / Development
Events infrastructure	Develop an investment strategy for our key events infrastructure	Foundation and beyond
Conference Facility	Subject to feasibility and options, seek to develop an appropriate facility	Development / Growth

5.5 Objective 5: Manage our Visitor Economy Effectively

Rationale and Approach

Our visitor economy is complex. It involves many players in private, public and third sectors. Co-ordinating our activities and developing partnerships is a key priority for the delivery of this DMP. There are numerous partnerships that link to the visitor economy – the Hospitality Association, the Culture Collective, the Cultural Consortia and others. These are at different stages of development and, while we have good informal networks within and beyond the City, we need to move this to another level through the development of more formal groups – ideally a Sheffield Visitor Economy board, a South Yorkshire Destination Group or Partnership and a strong events partnership (see objective 1). A wider network that meets regularly (two to three times a year) and brings visitor economy players together is also needed to help improve networking, co-ordination, communication and relationships.

As a destination we are relatively poorly resourced compared to our competitors – this impacts on our ability to attract and develop events, conferences, and short beaks. We cannot realistically grow the visitor economy without additional investment. In the short term (the Foundation phase) the visitor economy will benefit from some additional funding, but this will be temporary. In the medium term, the Council is unlikely to be able to invest further and we need to develop more sustainable resources potentially through a Visitor Levy, or Accommodation or Tourism BID or other mechanisms.

Across the city, we provide business support through different mechanisms – Business Sheffield, the Council's culture team and the Economic Recovery Fund (for High Street Improvement). However, this is rarely visitor economy focused and we need to integrate this into the visitor economy to a greater degree.

The visitor economy is often poorly positioned with Sheffield's policy framework. In our broader city and economic planning we need to think 'visitor' and understand the wider economic benefits it brings – embedding the needs of our visitors in Sheffield (and South Yorkshire) policies (with explicit linkages to culture, economic development and investment / place agendas), future developments and making the city more distinctive.

Improving our intelligence and knowledge is also key to improving our destination management. We have some good data that tracks performance on conference – data from the UK Conference and Meeting Survey and occupancy data but we need a better understanding of visitor behaviour (of different groups – event visitors, city breakers, conference delegates) and perceptions and awareness of visitors and non-visitors would be an asset for us. This is an area where we will explore joint options with South Yorkshire partners.

Action Areas

Action area	Description	Phases
Sheffield Visitor Economy board	Overarching board to steer and co-ordinate development of the city's visitor economy.	Foundation and beyond
South Yorkshire Destination Group	Partnership to co-ordinate South Yorkshire visitor economy activity and deliver potential joint initiatives (like intelligence)	Foundation and beyond

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Action area	Description	Phases
Network	Develop a network of Visitor economy players	Foundation and beyond
Resourcing	Explore plans for sustainable funding streams with possible rollout in the Development phase.	Foundation / Development
Business Support	Signpost businesses into appropriate programmes, investigate shared programmes and investigate more specific visitor economy support	Foundation and beyond
Planning/Placemaking	Embedding the tourism agenda in wider city planning and policy and licensing, delivering development schemes and ensuring we take account of visitors in future developments and our city maintenance.	Foundation and beyond
Intelligence	Continue with the current performance related research but undertake ad-hoc research into visitor characteristics and perceptions.	Foundation and beyond

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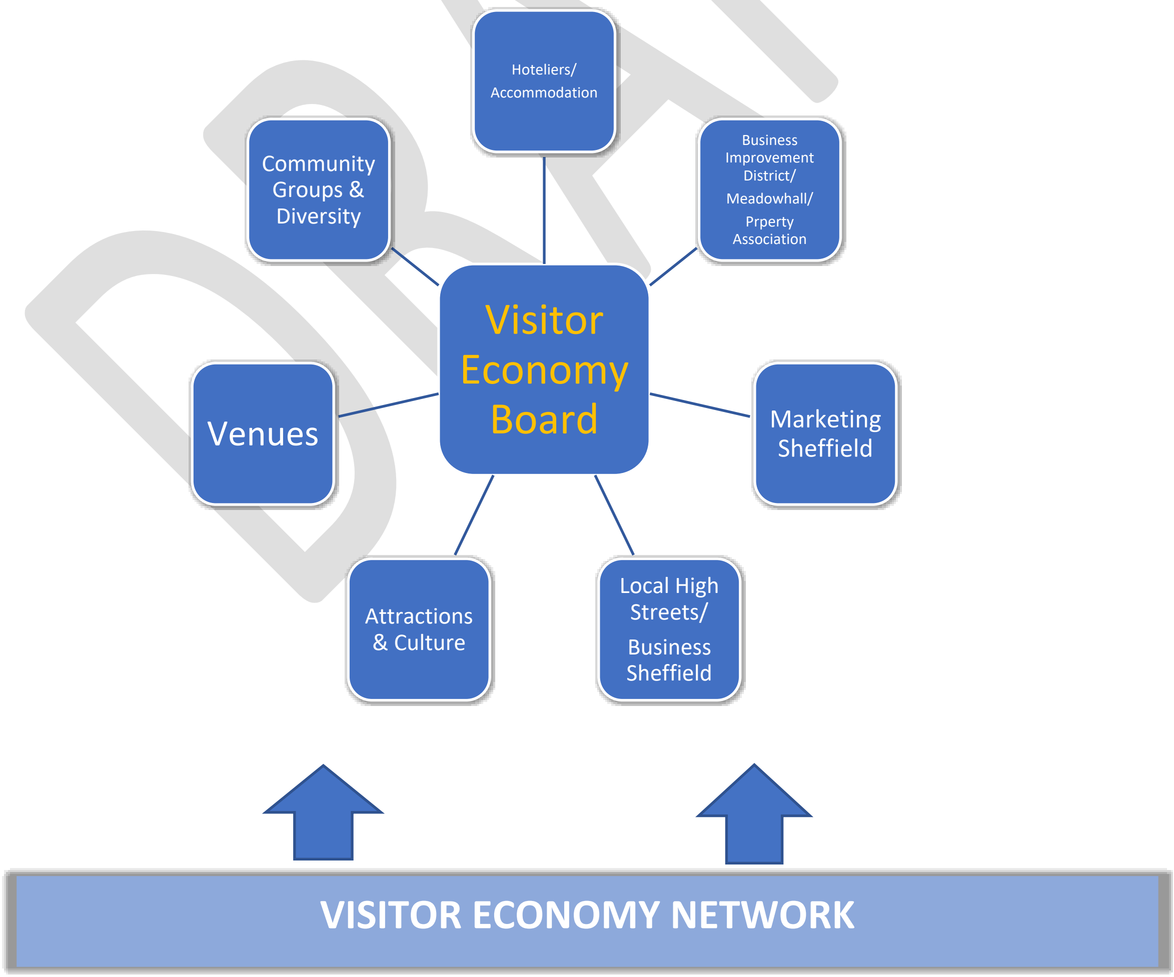
6. Implementation

6.1 Delivery Arrangements

Through the development of this DMP we have uncovered an appetite and willingness to contribute to Sheffield's visitor economy activities. We will therefore look to harness this, whilst being mindful that our stakeholders have other responsibilities and 'day jobs'. In doing so we will reinforce the 'Team Sheffield' approach which has recently worked well in the Brand partnership, our new website and campaigns with both Universities.

We will establish a **Visitor Economy Board**, a partnership of the key agencies, businesses and community stakeholders across Sheffield. Its exact form, the role of any Chair, composition and meeting frequency etc. will be determined by the membership. Members will be drawn from the attractions, accommodation, retail, venues and other sectors. Initially we envisage an informal group which could evolve into more formal structures as necessary.

The Visitor Economy Board will be representative of the wider **Visitor Economy Network** which will meet every six months. The Network's member's will be any business or stakeholder with an interest in tourism in Sheffield. Meetings will be 'events' with opportunities for networking, learning about key developments and sharing best practice. The diagram below is illustrative only.



To both oversee the management of our own events and select, bid for and secure external events we will establish a **Strategic Events Partnership**. The partnership will include: Marketing Sheffield, Key venues, Cultural representatives, Sheffield City Council, Hoteliers. Its role will be primarily strategic, commissioning events, identifying gaps in provision and ensuring the maximum economic and social impacts. Event delivery will remain with existing partners as currently. The Strategic partnership will develop and adopt a series of criteria to guide support for both locally based and external events.

Potential Event Management Structure

At a South Yorkshire level, Marketing Sheffield will work closely with Barnsley, Doncaster, Rotherham and the South Yorkshire Combined Authority under the umbrella of the anticipated Local Visitor Economy Partnership (LVEP). We will seek to identify and deliver activities which are best delivered at a South Yorkshire level (e.g. research & intelligence, product & itinerary development) and make the most of our shared & complementary assets.

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7. Action Plan

7.1 Introduction

The following section outlines an action plan. This assumes delivery will be through the Visitor Economy Board, led by Marketing Sheffield, and that some additional resources will be available, at least in the short term.

The action plan is tabular, and each project has a priority. These are as follows:

- Priority 1 = must do
- Priority 2 = high priority
- Priority 3 = medium priority
- Priority 4 = good to do but can wait

The table is broken down into the five objectives identified in Section 5, with a further split into those projects which, it is considered, can be delivered within the existing staff and financial resources of Marketing Sheffield (and other partners where appropriate), and those which will require either additional staff and/or budget to be delivered.

The level of resources that are ultimately available will determine which priorities are undertaken.

The 'who' column identifies the key organisations responsible, but others may be involved in delivery.

Abbreviations include:

BID	Business Improvement District	NVM	National Videogame Museum
CC	Culture Consortium/Culture Collective	SM	Sheffield Museums
MCA	Mayoral Combined Authority	SY	South Yorkshire partner authorities
MS	Marketing Sheffield		
SCC	Sheffield City Council		

Phases indicate when a project is likely to be undertaken.

- Found = Foundations (2023-2025)
- Dev = Development and Capacity (2026-2027)
- Growth = Growth (2028-2031)

Timescales can be brought forward (or pushed back depending on resources).

The final column identifies the potential **additional** resource (over and above existing investment) that might be required. This is an approximate order of magnitude.

At this draft stage some projects (text in italics) are optional and inclusion in the existing/additional resource sections is open to challenge.

7.2 Action Plan

Project	Description	Priority	Who	Phase			Additional Resource
				Found	Dev	Growth	
Objective 1: Diversify and Strength our Events Programme							
Actions Using Existing Budgets							
Events Approach	Establish a clear events approach that identifies criteria (e.g. ROI, asset optimisation, timing, strategic fit, brand fit, growth capability etc.) for supporting/commissioning events, potential new events and partnership/delivery mechanisms.	1	SCC	●			*Primarily staff time/potential small (~£10-20k) budget*
Strategic Events Group and Event Bidding	Widen event bidding/planning partnership to include key stakeholders (venues, funding and delivery partners, and the Hospitality Association)	1	SCC	●	●	●	Primarily staff time
Big Idea	Work with partners to identify and bid for the next major event to build on the Women's Euros success	3	SCC/Events Group	●	●	●	Eventual hosting fees
Actions Requiring Additional Resources							
Signature Events	Arising from the events approach develop one or two Sheffield owned signature events.	2	Organisers	●	●		TBC
Cultural events	Enhance the cultural events programme - identifying growth opportunities for existing events in the first instance and supporting new events. Consider innovative funding approach	2	SCC/CC/Organisers	●	●	●	£50K-£100k
Events visibility	Investigate affordable opportunities to enhance the visibility and social value of events – e.g. through capturing content from participants and spectators for digital dissemination and on-street visibility	1	MS	●	●	●	£10k-£60k (if using physical infrastructure)
Ambassadors	Investigate the opportunity for expanding the Conference Ambassador Programme into attracting other events	1	MS	●	●	●	Staff time
Objective 2: Grow our Conference Market							
Actions Using Existing Budgets							

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Project	Description	Priority	Who	Phase			Additional Resource
				Found	Dev	Growth	
Conference Bureau	Continue with the current programme activity focusing on strong partnerships and relationships, the Ambassador Programme, conference bidding and city marketing.	1	MS	●	●	●	-
Actions Requiring Additional Resources							
Ambassador Programme	Expand the size (and dimensions) of the programme recruiting new members, focussing on known areas of academic expertise e.g. sports and exercise medicine	1	MS	●	●		~£50k
Conference Venue	Investigate the feasibility of a purpose-built centre (medium sized) (possibly new build or development of an existing venue)	2	SCC	●			~£30k (but with a potential future capital / revenue requirement)
Objective 3: Develop our City Breaks Offer							
Actions Using Existing Budgets							
Welcome to Sheffield	Continue the development of the Welcome to Sheffield website to include more content, particularly itineraries.	1	MS	●	●	●	-
Neighbourhood improvement programme	Continue the work started under the Economic Recovery fund around high streets – working with business to ensure they are visitor facing, but also ensuring areas have appeal to visitors in terms of distinctive offers (food, boutiques shopping antiques etc) and a sense of place (signing and public realm).	2	SCC	●	●		-
UNESCO City of Music	Develop a UNESCO City of Music Bid	2	SCC	●	●		-
Moment in Time	Maximise the impact of the late 2024 completion of several major capital projects (Heart of the City etc.) through publicity and animation.	1	MS/BID		●		Utilise launch budgets

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Project	Description	Priority	Who	Phase			Additional Resource
				Found	Dev	Growth	
Actions Requiring Additional Resources							
Heritage development	Maximise the securing of new collections at Kelham Island and other enhancement works at key sites	2	SM	●	●		TBC
National Videogame Museum	Explore options for further development of the National Videogame Museum	3	NVM/SCC	●	●		~£20-30k feasibility and development
Pro-active city breaks campaigns	Develop pro-active city marketing campaigns	2	MS		●	●	~£30-50k
South Yorkshire opportunities	Explore joint South Yorkshire opportunities	2	SY/MCA	●	●		Staff time
Objective 4: Develop a World Class, Competitive Product							
Actions Using Existing Budgets							
Visitor orientation	Ensure that city centre public realm works, especially Steel and Gold routes, contain visitor friendly infrastructure and/or wayfinding signage.	3	SCC	●	●		Influence existing budgets
Actions Requiring Additional Resources							
Accommodation Study	*Potential South Yorkshire study to assess accommodation development needs and opportunities, and potential future interventions.*	*4*	*SY*		●	●	*~£30k*
Graves Gallery	Feasibility into costs, options and business models	1	SCC	●	●		~£40k – eventual capital costs
Events infrastructure	Develop an investment strategy for our key events infrastructure	2	SCC/Partners	●	●	●	TBC
Objective 5: Manage our Visitor Economy Effectively							

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Project	Description	Priority	Who	Phase			Additional Resource
				Found	Dev	Growth	
Actions Using Existing Budgets							
Sheffield Visitor Economy board	Overarching board to steer and co-ordinate development of the city's visitor economy.	1	MS	●	●	●	-
Resourcing	Explore plans for sustainable funding streams with possible rollout in the Development phase.	1	MS	●	●		-
Planning/Placemaking	Embedding the tourism agenda in wider city planning and policy and licensing, delivering development schemes and ensuring we take account of visitors in future developments and our city maintenance.	1	SCC	●	●	●	-
Actions Requiring Additional Resources							
South Yorkshire Destination Group	Partnership to co-ordinate South Yorkshire visitor economy activity and deliver potential joint initiatives (like intelligence)	1	SY/MCA	●	●	●	Staff time
Network	Develop a network of Visitor economy players	2	MS	●	●	●	Staff time
Business Support	Signpost businesses into appropriate programmes, investigate shared programmes and investigate more specific visitor economy support	2	MS/SCC	●	●	●	Staff time
Intelligence	Continue with the current performance related research but undertake ad-hoc research into visitor characteristics and perceptions.	2	MS	●	●	●	~£20-30k

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