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MediaCityUK at Salford Quays: A sustainable, transit oriented development

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The Cultural Economy and Media Cities

The cultural economy is a key player in the processes of globalization in urban centres. Cultural production clusters form local nodes in the global networks of large media groups. Global media are centred on cities of world importance such as London, New York, Paris and Los Angeles (Krätke and Taylor, 2004). Europe has the largest number of media cities with a high global connectivity because of its cultural diversity and distinct regional cultures in its large number of nation states.

The Media City model is an inter-organisational fusion of media, creative and knowledge industries, featuring innovation, connectivity, talent, technology, and academia. This 21st century knowledge and media revolution is potentially as important for urban development and employment as the industrial revolution was 200 years ago.

A contemporary urban regeneration strategy is to create new World Media Cities in urban centres of regional or national significance. (Knowles, 2012; Mould, 2014).

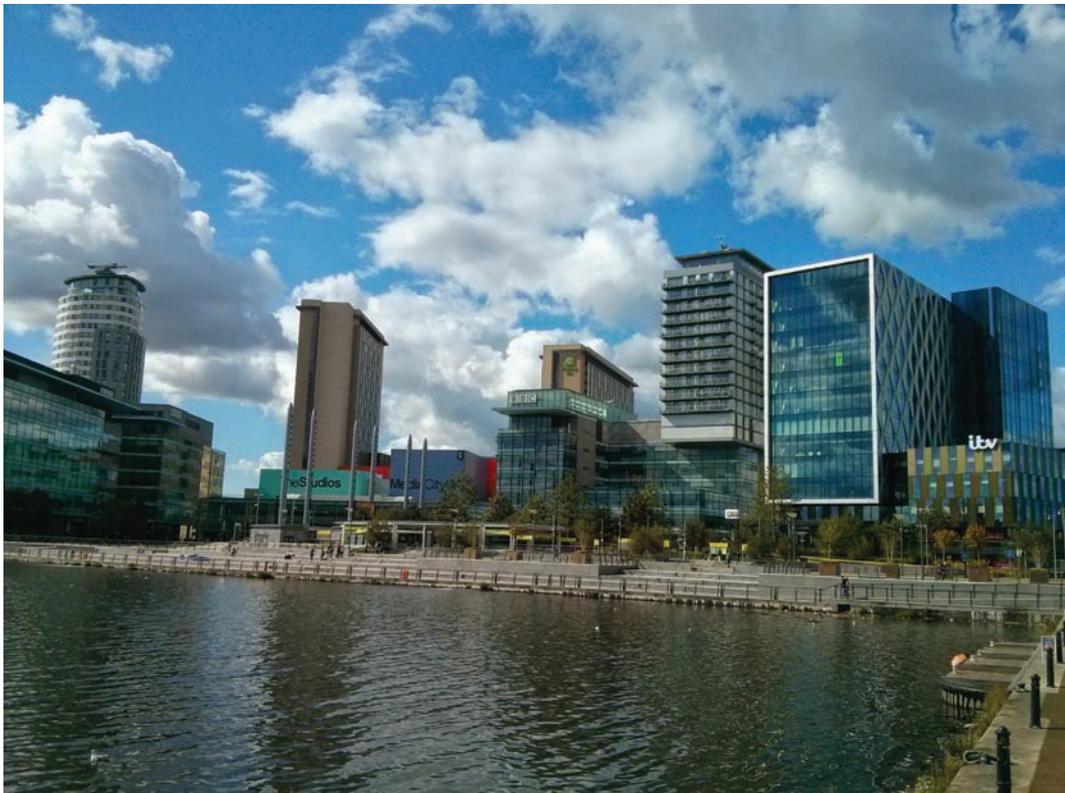


Figure 1: MediaCityUK (Photograph by Andrew Binder).

Examples include:

- Salford: MediaCityUK, which is Europe's largest purpose-built Media City;
- Copenhagen, Denmark: DR (Danmarks Radio) Byen;
- Singapore: Media 21 and Fusion Media;
- Seoul, South Korea: Digital Media City.

MediaCityUK at Salford Quays

MediaCityUK is a two-phase, 81 hectare (200 acre) mixed-use property development by Peel Media, part of Peel Group, one of the largest private sector companies in the north of England (Figure 1). The Peel Group also owns the Manchester Ship Canal, Liverpool John Lennon Airport, and part of the Trafford Centre (regional shopping mall), which it developed and owned outright until 2015.

MediaCityUK is located at Salford Quays at the head of the Manchester Ship Canal, on part of the site of the former Manchester Docks Pier 9

in Salford and at Trafford Wharf in the Trafford Park Industrial Estate immediately across the Ship Canal (Figure 2). Whereas most of the former Manchester Docks in Salford were bought by Salford City Council for a peppercorn sum in the mid-1980s, in derelict condition for transformation into a private financed post-industrial, mixed-use waterfront redevelopment, Pier 9 was retained by the Manchester Ship Canal Company for later development (Law, 2001).

Transit Oriented Development

MediaCityUK is a good example of a planned transit oriented development (TOD), a term used to describe the focussing of employment, activity sites including retail and leisure, housing, education and public services around heavy or light rail stations served by frequent and high quality rail services (Figure 3) (Knowles, 2012).



Figure 2: Salford Quays location (drawn by Andrew Binder using a Google Maps background).

Development of MediaCityUK

In 2004 the BBC (British Broadcasting Corporation) agreed to decentralise part of its national operations to the North West of England to reduce its London dominance. 18 initial sites were reduced to a shortlist of four sites:

- Manchester – Quay Street near Granada Studios;
- Manchester – Whitworth Street;
- Salford – part of Manchester Docks Pier 9 (owned by Peel), the only part of Salford Quays remaining undeveloped;
- Salford – Greengate.

The Salford Quays site was chosen in June 2006 subject to the BBC's Licence Fee settlement from central Government. The four key partners in this Media City project were Peel Group, Salford City Council, and the Government created Central Salford Urban Regeneration Company and Northwest Regional Development Agency.

Vision and Ambition

The vision was to develop a Media City to compete globally with new Media Cities in Copenhagen, Singapore and Seoul. The ambition was for MediaCityUK to become the pre-eminent media centre in the world. It was envisaged as a world class hub for innovation and content creation, with up to 15,000 jobs and £1 billion added to the regional economy within 5 years. Infrastructure investment included over 20 million metres of fibre-optic cable installed.

Outline Phase 1 planning permission (15 hectares/36 acres) was granted in October 2006 for media studio, office space, residential and retail development. Detailed planning permission was granted in May 2007. All non-residential buildings would be owned by and leased from Peel Group. Neighbouring sites at Trafford Wharf, Lowry Plaza and Broadway are also now badged as part of MediaCityUK (see Table 1). In the future, a larger Phase 2 site of up to 66 hectares (164 acres) may be developed next to Phase 1.



Figure 3: MediaCityUK: a Transit Oriented Development (drawn by Andrew Binder using a Google Maps background).

Table 1: MediaCityUK's Tenants, Locations & Activities.

Tenant & year	Locations	Activities
BBC from 2010	Quay House, Bridge House & Dock House	Sport; Children's; Learning; Radio 5 Live; Future Media & Technology. BBC Breakfast. BBC North West Television. Radio Manchester. BBC Philharmonic Orchestra.
University of Salford 2011	Orange Tower	Digital learning, teaching & research.
ITV Granada from 2012	Orange Tower, Trafford Wharf	Offices & studios, Coronation Street & studios (2013).
Satellite Information Services 2007-14	Pie Factory*, Blue Tower & Trafford Wharf	Digital services (from 2007), Headquarters (from London, 2012), Teleport transmission (2014)
The Studios 2011	The Studios	7 High Definition Studios – amongst Europe's largest – and 2 Audio Studios, including BBC Philharmonic Orchestra.
40+ small media companies	Pie Factory *2007 & The Greenhouse 2011	Media service, casting & camera hire companies.
Vision+Media	Pie Factory* 2009	Funding, access to finance, skills and talent development – relocated to Pie Factory in 2009.
Media Enterprise Centre – renamed The Landing	Blue Tower	Flexible office space, specialist training facilities & advice, games industry centre, research hub & community groups facility.
Digital World Centre	1 Lowry Plaza (near Lowry Retail Mall)	Serviced Office Rentals (2004).
Offices	Blue Tower, White Tower, Quay West at Trafford Wharf	Various companies.
Oasis Academy MediaCity UK	King William St. (off Broadway**)	Former Hope High School: September 2012.
UTC@MediaCityUK	100-102 Broadway (next to Pie Factory*)	University Technical College (creative, media & music industries) September 2015.
Apartments	The Heart & Number One	378 Apartments.
Holiday Inn	Holiday Inn	Hotel.
Retail	Various	Booths Supermarket and space for bars, cafes, restaurants & shops.

*near Broadway Metrolink stop; **near Anchorage Metrolink stop

MediaCityUK's Tenants

MediaCityUK's tenants include six large and over 40 small media companies, three educational institutions, retail and hotel facilities and residential accommodation (Table 1).

The key, 'anchor' tenant is the BBC, which employs more than 2,500 people in Quay House, Bridge House and Dock House (Table 1) (Figures 1 and 3).

From 2010, the BBC relocated five departments and 1,800 jobs from London, although most of their previous job holders declined to move to the north of England. The BBC also relocated its North West Regional Television Centre and Radio Manchester from Oxford Road, Manchester, the BBC Philharmonic Orchestra and BBC Breakfast. In 2014/15, the BBC's move to MediaCityUK in Salford added £277m to the UK's economy in terms of Gross Value Added (GVA) (KPMG, 2015).

The second 'anchor' tenant is the University of Salford, which created digital learning, teaching and research facilities in three floors of the Orange Tower for up to 1,500 students and staff from October 2011, including TV and radio studios, media and performance labs, post production facilities and a living lab (Table 1) (Figures 1 and 3). However there was criticism that the reported £2.25 million annual rent until 2020 impacted negatively on staffing and facilities in the rest of the University on its main campus 2 km away at The Crescent in Salford.

Independent Television Company ITV/ Granada eventually decided in 2012 to relocate to seven floors of the Orange Tower at MediaCityUK from Quay Street in Manchester to become the third 'anchor' tenant (Table 1) (Figures 1 and 3). ITV's Coronation Street production set and offices later moved from Manchester to a new purpose-built 3.2 hectare/7.7 acre site at Trafford Wharf in 2013.

Satellite Information Services were the first of many independent, private sector media and

creative companies to relocate to or set up at MediaCity UK, providing digital services from 2007, relocating their headquarters from London in 2012 and setting up a nine earth station broadcast teleport at Trafford Wharf.

The Studios building opened in 2011, adjacent to the three BBC buildings providing seven high definition studios, amongst the largest in Europe (Table 1) (Figures 1 and 3). More than 40 small, private sector, media companies located in the converted and extended Pie Factory (an old bakery) from 2007 and in The Greenhouse building from 2011. Vision+Media relocated to the Pie Factory in 2009, providing funding, access to finance, skills and talent development. The Blue Tower and White Tower provide substantial and flexible office space.

In addition to the University of Salford's new digital campus, two more educational facilities have opened at MediaCityUK. Oasis Academy MediaCityUK opened in September 2012, replacing the former Hope High School in Salford, and UTC@MediaCityUK, a new University Technical College specialising in creative, media & music industries, opened in September 2015 (Table 1).

The Heart and Number One residential tower blocks provide MediaCityUK's on site living accommodation, whilst the Holiday Inn Hotel, Booths Supermarket and various cafes and restaurants and the pre-existing Lowry Retail Mall provide hotel and retail services respectively (Figure 1).

Media Facilities and Functions

Media facilities and functions are therefore provided at nine different sites within MediaCityUK (Table 2).

Table 2: Media Facilities and Functions at MediaCityUK

Building	Facilities & Functions
Pie Factory	Three sound stages for drama productions and commercials.
The Greenhouse	Converted offices for small media and creative industries companies.
Quay House	BBC's 12,500 sq. m. main building – broadcasting <i>BBC Breakfast, Match of the Day, North West Tonight, Songs of Praise, Question of Sport, Radio 5 Live, Radio Manchester & File on 4</i> .
Bridge House	BBC producing: <i>Blue Peter, CBBC, CBeebies, Dragon's Den, Mastermind & Bitesize</i> .
Dock House	<i>BBC Research & Development; Religion & Ethics; Radio 6 Music; some Radio 4 programmes produced.</i>
The Studios	7 HD studios.
Orange Tower	University of Salford media studios, teaching and research on first three floors. ITV Granada offices and studios on seven floors.
Coronation Street	Outdoor set and production facilities and offices at Trafford Wharf.
Teleport	Satellite Information Services nine earth station broadcast. Transmission facility at Trafford Wharf.

The mix of BBC, private and independent television and radio production and broadcasting employs several thousand people. Many of the BBC's most popular programmes and ITV's Coronation Street are produced at and broadcast from MediaCityUK.

New Transport Links and Cycling and Pedestrian Facilities at MediaCityUK

Traditional freight-oriented docklands had little need for good landward passenger transport links, and so their transformation into post-industrial mixed use waterfront developments require huge investment in new roads and public transport links. The transformation of the derelict, abandoned Manchester Docks in Salford into the post-industrial mixed-use office, residential, retail and leisure development renamed Salford Quays, required at its outset a new internal road network connecting with Trafford Road and M602 Junction 3, and a new Broadway Link Road from M602 Junction 2 and the A576 Centenary Bridge over the Ship Canal. Public transport access was initially provided by one low frequency bus route.

Salford Quays' remained only part-complete in the mid-1990s with many empty plots and buildings until private sector developers decided after the 1992/3 recession to contribute £10 million towards the cost of building a new light rail Metrolink line to enhance Salford Quays' accessibility, by connecting it to Manchester CBD and Piccadilly Railway Station in 1999 and Eccles in 2000. In the case of MediaCityUK, the construction of a Metrolink light rail extension from the Eccles line, a new MediaCity station and four additional trams was a pre-requisite for the BBC's relocation, cost £19.75 million and was 85% funded by the Government sponsored NorthWest Regional Development Agency, with Peel Media Ltd and Salford City Council providing the balance. MediaCityUK's and Salford Quays' public transport links were further improved in July 2011 by a Quays Link Metro Shuttle subsidised bus route connecting with Salford City Precinct and with rail services from Bolton, Blackburn and Wigan at Salford Crescent Railway Station. This bus link was replaced in September 2012 by Stagecoach Manchester's high frequency, 4 to 6

times hourly, commercial City Connect Route 50, which also connects with Salford Central Station, Manchester city centre and East Didsbury. The X50 bus connects Salford Quays directly twice hourly with both Manchester city centre and The Trafford Centre and the route 245 bus operates twice hourly between Altrincham and Exchange Quays.

Car access to MediaCityUK required the provision of a large multi-storey car park with 2,116 spaces. Pedestrian and cycle access was enhanced in 2013 with a new swing foot bridge across the Ship Canal, linking Media City behind Quay House to Coronation Street at Trafford Wharf, adding to various cycleways and footpaths (Figure 4).

The UK's Local Sustainable Transport Fund invested £1.2 million in developing cycle routes in Salford Quays and to Manchester city centre. Cycling was further facilitated in 2015 with a secure 300 rack Cycle Station with shower, changing and locker facilities located behind

The Greenhouse. A 2 hectare (5 acre) piazza for up to 5,000 people at the core of MediaCityUK provides a multi-use public realm, but owned and controlled by Peel Group. A Water Taxi service is planned to connect Salford Quays, via the Ship Canal and River Irwell, with Manchester city centre.

Workplace Travel Plans and Sustainable Development at MediaCityUK

The era of building urban rail lines and expecting passengers to choose to use them in large numbers without some incentives is long gone. Kevin Costner's dictum "Build it and they will come", in the classic American film *Field of Dreams*, is no longer true for urban development now that most people have the choice of using their cars.

Travel Plans are a strategy geared towards managing private vehicle demand and facilitating increased use of sustainable modes of travel, such

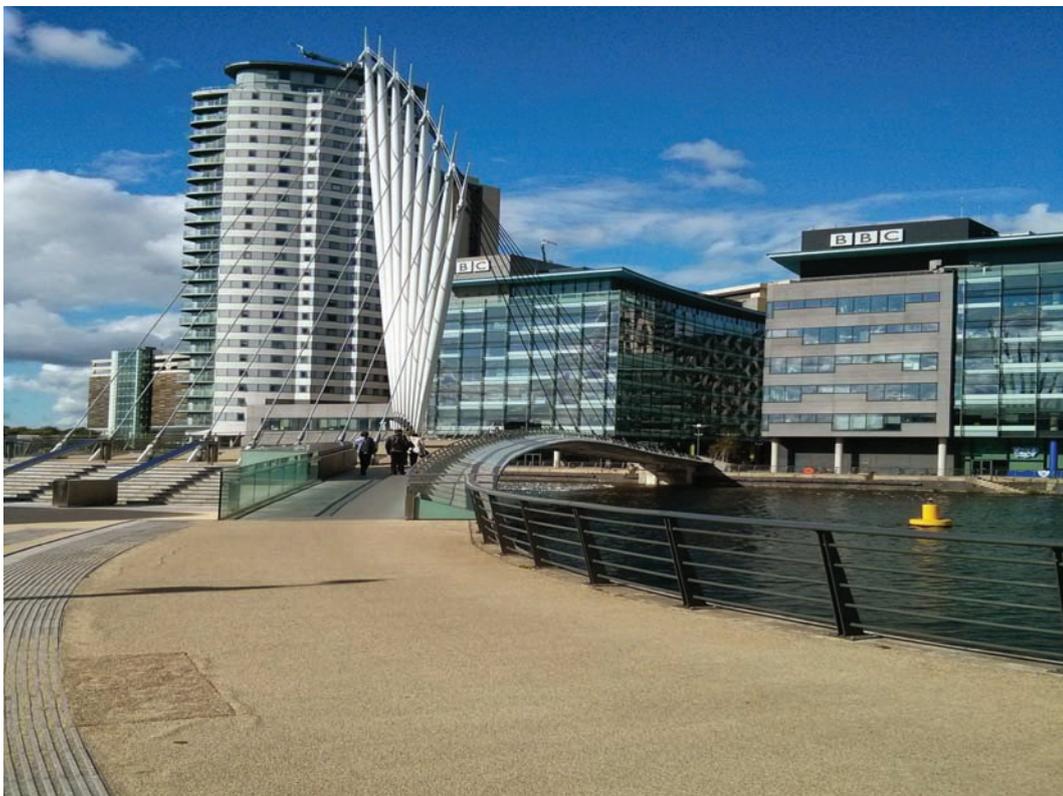


Figure 4: New bridge for pedestrians and cyclists connecting ITV new Coronation Street at Trafford Wharf with MediaCityUK across the Ship Canal (photograph by Andrew Binder).

Table 3: Modal Share for MediaCityUK Work Journeys

Mode (%)	Peel Survey November 2012	Binder BBC Survey June 2014
Metrolink light rail	23	17.7
Train heavy rail*	13	10.0
Bus	4	4.8
Taxi	1	0.4
PUBLIC TRANSPORT TOTAL	41	32.9
Cycle	14	14.9
Walk/jog	3	7.2
GREEN MODES TOTAL	17	22.1
Motorcycle	1	0.8
NON-CAR MODES TOTAL	59	55.8
Car driver	33	38.2
Car share driver	6	4.4
Car passenger	2	1.6
CAR TOTAL	41	44.2

*primary mode by train, but final part of journey mainly by Metrolink.

(Source: Binder and Knowles, 2014)

as walking, cycling and public transport use. Workplace Travel Plans emerged in the UK in the mid-1990s and became national policy in 1998 as part of the government's New Deal for Transport. However, Travel Plans are only statutory as part of planning approval for new developments or new buildings. They are a package of 'hard' and 'soft' measures (Roby, 2010), and Enoch (2012) describes them as a delivery mechanism for a package of policy instruments. Research by Cairns *et al.* (2004) showed that Travel Plans can achieve a typical reduction in commuter car use of between 10% and 30%.

MediaCityUK was envisaged as a sustainable, rather than car dependent, development location with a choice of transport modes. In addition to the provision of new light rail, bus, cycling and pedestrian links, the BBC was set a modal share target, as a condition of its planning permission, for its employees of at least 45% by non-car modes for work journeys (Binder and Knowles, 2014). This compared with an average 31% journey to work by non-car modes across Greater Manchester

in 2011 and 70% for inbound journey to work in Manchester city centre in 2010.

The BBC's non-car mode share target of at least 45% was not a challenging target and was easily achieved, as shown by Peel's site-wide baseline travel survey in November 2012 with 59% by non-car modes (Table 3).

Metrolink light rail was the most popular public transport mode (23%) for journeys to work, with cycling (14%) well above the less than 2% local and national average, but possibly somewhat inflated by survey sample response bias. Heavy rail (train) users (13%) cannot access Salford Quays and MediaCityUK directly so the final part of their journey is made with another mode, mainly Metrolink light rail. Binder's 2014 on-line survey of BBC employees at MediaCityUK showed similar modal shares to Peel's 2012 site-wide survey, with a 55.8% non-car mode share and a similar 14.9% cycling share (Binder and Knowles, 2014). Mode share by car was probably inflated as the BBC provided 800 free car park spaces for the first three years. Bus share is much higher for University of

Salford students and staff who have free use of the bus link between the University's Salford Crescent campus and Salford Quays and MediaCityUK.

Despite its Workplace Travel Plan, BBC at MediaCityUK has lower levels of sustainable travel than its previous Central Business District sites in London and Manchester (Table 4).

Non-car mode share for the journey to work declined from 91% to 66% amongst BBC staff who transferred from London to MediaCityUK, but this still represents a much higher use of non-car modes than ex Manchester Staff (66% down to 49%), new BBC staff at MediaCityUK, and the Greater Manchester average (31%). It is also close to the Manchester city centre average of 70% of journeys to work by non-car modes. In London car park charges are much higher and the BBC is located within the Congestion Charging Zone, both disincentives to use cars. Ex London BBC staff are therefore much more used to using

non-car modes, and especially public transport, and possibly have lower levels of car ownership. Cycling has increased to higher levels for ex London and ex Manchester BBC employees than for new employees but for all three groups is much higher than the UK or Greater Manchester average of less than 2% (Table 4). A much higher percentage of female employees at BBC MediaCityUK choose cars for their journey to work (53%) than male employees (34%), choose to cycle less (11% compared with 20%) and choose trains less (4% compared with 19%) (Binder and Knowles, 2014). Modal choice varies amongst different age groups. 52% of under 29s chose cars, compared with 40% of 30-39s, 80% of 40-49s and 60% of over 50s. 20% of 30-39s chose to cycle whilst tram and train use was around 30% for all age groups. Reasons for these gender and age group differences are being explored in further research.

Table 4: BBC staff modal choice for journey to work in London, Manchester & MediaCityUK, Salford.

Mode (%)	ex-BBC London			ex-BBC Manchester		
	London	MediaCityUK	Change	Manchester	MediaCityUK	Change
Tube	55	0	-55	0	0	0
Rail	22	8*	-14	19	9*	-10
Tram	0	27	+27	10	11	+1
Bus	4	8	+4	14	6	-8
Taxi	0	0	0	0	1	+1
PUBLIC TRANSPORT	81	42	-39	43	27	-16
Cycle	6	16	+10	14	18	+4
Walk	4	8	+4	9	3	-5
GREEN MODES	10	24	+14	23	21	-1
Motorcycle	0	0	0	1	2	+1
NON-CAR TOTAL	91	66	-25	67	49	-17
Car Driver	8	29	+21	27	42	+15
Car Share driver	0	2	+2	1	4	+3
Car Passenger	0	2	+2	4	3	-1
CAR TOTAL	8	33	+25	32	50	+18

*primary mode by train, but final part of journey mainly by Metrolink. Figures are rounded to the nearest whole number. (Source: Binder and Knowles 2014).

Conclusion

MediaCityUK has established Salford as a global media centre. It has been a strong catalyst for change and Phase 1 is now almost complete. MediaCityUK is a successful Transit Oriented Development, and KPMG (2015) describe it as a 'hub for firms with creative and digital capabilities'. It provides around 10,000 jobs in the media, creative and knowledge industries and supporting services. 80% of employees at MediaCityUK are in skilled jobs in journalism, production management, digital and technical roles (KPMG, 2015).

Although it has easily met the Workplace Travel Plan sustainability target of more than 45% of journey to work trips by non-car modes by

BBC employees, required as part of its planning approval, MediaCityUK's site-wide level of 59% by non-car modes remains well below the levels achieved in Manchester and London city centres. MediaCityUK's transport sustainability should increase with the building of a new Metrolink line serving Trafford Park Industrial Estate and the Trafford Centre retail mall, with a stop at the Imperial War Museum North across the footbridge from MediaCityUK, and the wider range of bus services and cycle facilities. However more 'soft' measure incentives to use non-car modes will be needed for MediaCityUK and Salford Quays to become as sustainable as Manchester city centre. MediaCityUK's success as a global media centre can be further enhanced if Phase 2 is developed.



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