

PROSPERITY AND ECONOMIC DEVELOPMENT SCRUTINY COMMITTEE

12th MAY 2010

TOURISM AND MARKETING IN SUNDERLAND TASK AND FINISH GROUP FINAL REPORT

Report of the Prosperity and Economic Development Scrutiny Committee

STRATEGIC PRIORITIES: Attractive and Inclusive City
Prosperous City

CORPORATE PRIORITIES: CI01 – Delivering customer focussed services
CI03 – Efficient and effective council
CI04 – Improving partnership working to deliver
'One City'

1. Purpose of Report

1.1 To receive the draft final report from the Committee's Task and Finish Group with regard to Tourism and Marketing in Sunderland.

2. Introduction

2.1 The Prosperity and Economic Development Scrutiny Committee, at its meeting on 17 June 2009, agreed that a Task and Finish Group be established to undertake an investigation into Tourism and Marketing in Sunderland

2.2 The Scrutiny Committee also agreed for the Task and Finish Group to establish its own terms of reference and to report back to the Prosperity and Economic Development Scrutiny Committee as appropriate.

2.3 The Task and Finish Group's working method for this piece of work was seen to have the advantage of:

(a) Progressing the investigation more quickly and outside of the confines of the Committee's formal meetings; and

(b) Allowing for greater investigation of the issue by Members.

3. Aim of the Task and Finish Working Group

3.1 The overall aim of the Task and Finish Working Group was to explore Sunderland City Council's approach to Tourism and Marketing within the city and across city boundaries.

4. Terms of reference

4.1 The agreed terms of reference for the review were:

- (a) To examine Sunderland City Council's role and responsibility in marketing the city to potential visitors;
- (b) To ensure the requirements of Sunderland are represented through its profile at a local, sub-regional and regional basis;
- (c) To explore the Festivals and Events Programme in Sunderland; and
- (d) To review opportunities for improving tourism signage in Sunderland.

5. Membership of the Task and Finish Working Group

5.1 The membership of the group consisted of Councillors Michael Mordey (Chair) Richard Bell , Kath Rolph and Paul Dixon (until January 2010).

6. Methods of Investigation

6.1 The following methods of investigation were used for the review:

- (a) Desktop research;
- (b) Verbal evidence from Tyne and Wear Area Tourism Partnership;
- (c) Verbal evidence from representatives of the Regional Development Agency;
- (d) Verbal and Written evidence taken from Council Officers;
- (e) Verbal evidence taken from Group Catering and Event Manager and Chief Executive of Sunderland Association Football Club.

6.2 A full detail of the evidence gathering is contained within **Appendix 1**.

7. Setting the Scene

National Context

7.1 Tourism is one of the largest industries in the UK , accounting for 2.7% of UK Gross Added Value and worth approximately £86.3 billion in 2007.

This comprises of overseas visitors spending £18.2 billion and domestic tourists spending £67.6 billion. There are an estimated 1.45 million jobs directly related to tourism activity in the UK .

7.2 The National Tourism Network consists of:

- (a) Visit Britain - The national tourism agency responsible for marketing Britain Worldwide and developing the visitor economy;
- (b) Visit England - responsible for the promotion of England;
- (c) ONE North East Tourism and Culture Team- responsible for the strategic leadership, co-ordination and marketing of tourism activity for North East England;
- (d) Area Tourism Partnership Tourism Tyne and Wear - a partnership of Sunderland City Council, Newcastle City Council, Gateshead Council, North Tyneside Council and South Tyneside Council and Newcastle/Gateshead Initiative; and
- (e) Other Partners - such as education providers, tourism businesses, Business Link and training providers.

7.3 National Strategies:

- (a) Visit Britain has produced a Britain Marketing and 2012 Games Global Strategy 2010-13. This is a 3-year global marketing strategy and builds on the strong regional strategies that have been implemented in recent years. The marketing strategy for the 2012 Games is fully integrated. Global campaigns centre around 5 core themes: dynamic, classic, luxury, generation Y, gay and lesbian.
- (b) Visit England have produced A Strategic Framework for Tourism in England 2010-2020. The four key objectives are:
 - (i) To increase England's share of global visitor markets;
 - (ii) To offer compelling destinations of distinction;
 - (iii) To champion a successful thriving tourism industry. The National Skills Strategy for the hospitality, leisure travel and tourism sector in England plays an important role in achieving this objective;
 - (iv) To facilitate greater engagement between the visitor and the experience.

Local context

7.4 There are approximately 9 million visitors to Sunderland each year, spending approximately £331 million and 6,100 people being employed in the visitor economy.

8. Findings of the Task and Finish Group

Sunderland City Council's role and responsibility in marketing the city to potential visitors.

8.1 Sunderland has a large proportion of day visitors, making up 84% of the visitor profile, a further 12% are Visiting Friends and Family (VFR) with the balance of 4% of visitors staying in serviced and non-serviced accommodation. This reflects that Sunderland has very limited visitor accommodation for such a large city.

8.2 With respect to the visitor market, STEAM¹ (Scarborough Tourism Economic Activity Monitor) provides local authorities with the best evidence of the overall impact that visitors can make to a local economy as shown in Table 1. STEAM is not designed to provide a precise and accurate measurement of tourism in a local area, but rather to provide an indicative base for monitoring trends :

Table 1: STEAM Statistics for Sunderland.

| Analysis by Sector of Expenditure | | | |
|--|---------------|---------------|-----------------|
| (£'s millions) | 2008 | 2007 | % change |
| Accommodation | 9.73 | 10.72 | -9 |
| Food & Drink | 82.86 | 85.67 | -3 |
| Recreation | 29.52 | 30.62 | -4 |
| Shopping | 51.47 | 53.29 | -3 |
| Transport | 38.17 | 39.50 | -3 |
| Indirect Expenditure | 83.90 | 86.98 | -4 |
| VAT | 37.06 | 38.47 | -4 |
| TOTAL | 332.71 | 345.25 | -4 |

The Council's Tourism Manager is working to set future targets and these will be included in the new Destination Management Plan.

¹ STEAM is now well established and is used widely as an economic impact study model by tourism organisations and local authorities across the UK. It approaches the measurement of tourism at the local level from the supply side which has the benefit of immediacy and relative inexpensiveness

- 8.3 The average visitor spend in 2008 was £29.18 per visit for day visitors and £125.07 for overnight visitors. In Tyne and Wear the average visitor spend for 2008 was £29.79 for day visitors, and £170.83 for overnight tourists. It is important to increase visitor spend as well as encouraging more tourists to visit Sunderland for longer periods of time.
- 8.4 At a local level there are a number of exciting activities underway and the future for the city looks positive. The City Council has undertaken a range of promotional activities including:
- (a) The C2C improvement plan;
 - (b) Wearmouth-Jarrow is a candidate for UNESCO World Heritage Site status. As part of the process to achieve World Heritage Site status two documents need to be produced to submit to UNESCO. These detail why Wearmouth-Jarrow is deserving of World Heritage Site status, and what management plans will be in place to protect and preserve the site. These documents are in draft until the final submission and were the subject of extensive public consultation from April-June 2009. The documents will be submitted in 2010;
 - (c) The Sunderland Visitors Guide which is produced annually to provide an informative guide to Sunderland's attractions, events and visitors services;
 - (d) **www.visitsunderland.com** is an online source of information to the city's attractions, events and accommodation;
 - (e) The award winning Sunderland Tourist Information Centre (TIC) offers a high quality service to the general public. The TIC is currently securing links with VisitBritain, ensuring that Sunderland TIC becomes a nationwide partnership aimed at promoting excellence and world-class customer service;
 - (f) Sunderland is a member of CityBreaks, a partnership which promotes and markets 16 cities across England;
 - (g) The Council's tourism team have been pro-actively working towards the World Cup Host City Bid 2018. Sunderland has been chosen alongside 11 other cities to be included in the bid to bring the World Cup to England for the first time since 1966. A successful bid for England would mean qualifying matches during the World Cup finals would be played at the Stadium of Light. It is estimated that

staging games in Sunderland could bring tens of millions of pounds to the North East and leave a lasting legacy for decades to come;

- (h) The Sunderland Seafront is a very important asset to the overall tourism product of the city and wide public consultation was held to produce a Seafront Regeneration Strategy;
- (i) A research proposal is being drawn up to secure English Heritage funding to enable maritime heritage locations within Sunderland to be catalogued within a database;
- (j) The tourism team have lead on the initial stages of developing a city wide Legible City project, which is a strategic approach to developing city-wide information and way-finding solutions in the built environment;
- (k) The team have recently produced new city mapping as part of the city centre quick win programme;
- (l) Proactive work is also carried out alongside the events team to ensure that the event product is suitable for the wider visitor market;
- (m) Various campaigns have been produced in partnership within Tourism Tyne and Wear.

8.5 Members learnt that the perception of Sunderland as a tourist destination was not strong, with research from ONE North East showing that people associate football, cars and ship building with the area. These are stereotypes that Sunderland is possibly disadvantaged by and it was recognised that it can take time to change the perception of an area. Members highlighted the positive image they have of the city and are confident that when people visit, their perceptions of the area will change.

8.6 As part of the evidence gathering process, the Group found that Sunderland was not unique in experiencing problems with perception, following consideration of the Improvement and Development Agency's case study on Dudley, an area which has also experienced problems with perception. The case study highlighted one of the most significant problems was to overcome the negative perception of the area held by local people. The Group found that to a large extent this was conditioned by the deteriorating state of the local economy and a history of industrial domination, although steps were being taken in Dudley to dispel negative perceptions by increasing awareness of the range and quality of local

attractions. In addition to this, getting local people involved as tourists, through resident open days and local events was found to be beneficial.

- 8.7 The Group reviewed The Sunderland Residents Survey 2008 and found the following services record user satisfaction levels of more than four out of five. Five indicates most satisfied:

Theatres / cinemas (86%);
Beaches (85%);
Tourist Information Centre (84%)
Events in the City (83%).

Members noted that satisfaction levels are quite high which is encouraging but there are currently no measures of residents' satisfaction with other local heritage assets and attractions.

- 8.8 Throughout the year members have reviewed strategies which contribute to Sunderland's economic development through tourism. Key strategies are the Economic Masterplan and the Seafront Regeneration Strategy. In addition to these strategies the Council's Cultural Strategy and the Heritage Strategy contribute to destination management. The Scrutiny Committee was consulted on the development of Sunderland's Destination Management Plan. This Plan will set clear aims and objectives for the development of Sunderland as a visitor destination. The Sunderland Destination Management Plan will develop an action plan for the whole partnership of businesses, individuals and organisations involved in delivering the visitor experience in Sunderland.

- 8.9 It was not clear to the working group how all of the relevant strategies are mutually supportive and although each strategy appears to have similar aspirations, there was no clear evidence available to members that delivery of the collective ambitions are closely aligned and complementary.

- 8.10 The working group would like to see a clear coordinated approach to the implementation of development strategies which contribute to the tourist potential of the city. This could be through the identification of an appropriate lead person to have responsibility for ensuring that the relevant strategies are drawn together.

Ensuring the requirements of Sunderland are represented through its profile at a local, sub-regional and regional basis.

- 8.11 The Tourism Network North East is made up of five independent organisations: ONE North East Tourism, a regional team based within the Regional Development Agency and four Area Tourism Partnerships

(ATP's). The 4 ATP's are Tourism Tyne and Wear, Northumberland Tourism, County Durham Tourism Partnership and visitTeesvalley.

- 8.12 At a sub regional level Sunderland forms part of the Tourism Tyne and Wear ATP, which brings together the expertise and efforts of all those involved in tourism delivery in Tyne and Wear. The partnership consists of Newcastle/Gateshead, Sunderland, North Tyneside and South Tyneside Councils. The vision of the Tyne and Wear ATP centres around cities, coast and culture. Cities, Coast and Culture, the Tyne and Wear Tourism Management plan 2008-2011 states that Tyne and Wear's visitor destinations will be renowned for the cultural experience, the city experience and the coastal experience they offer, attracting leisure and business visitors from all over the UK and from overseas.
- 8.13 Members were very encouraged to find that Sunderland's identity as a 'City by the Sea' fitted into the Tyne and Wear vision and the Tyne and Wear Tourism Management Plan identified many of Sunderland's assets as main components of the Tourism Tyne and Wear offer. These included the Aquatic Centre, Sunderland International Air show, Herrington Country Park and many more.
- 8.14 However, Members were concerned that Sunderland was not marketed to its full potential by the Tyne and Wear ATP and is somewhat overshadowed by the NewcastleGateshead area. Members noted that the website address for the ATP was **www.visitnewcastlegateshead.co.uk** and for Sunderland to develop as a tourist destination it is important that it is also seen as a destination in its own right, not simply an extension of Newcastle/Gateshead.
- 8.15 The Group were keen for Sunderland to work alongside lead destinations in the area and acknowledge the principle of 'dispersal' where visitors are attracted to the area by lead destinations and then spread across the region so that all areas receive some economic benefits. However, Members believed Sunderland should also receive appropriate marketing for the strong visitor products that have been identified in the Tyne and Wear Tourist Management Plan and that the website and marketing from the Area Tourism Partnership could be key to this and could encourage more people to stay in the area.
- 8.16 Members also explored the option of working with the Durham ATP. Joint working would appear to be more timely than ever in terms of the Wearmouth- Jarrow UNESCO World Heritage site application as Durham Cathedral and Castle are a World Heritage site. Durham also featured in Sunderland's World Cup Bid. Sunderland's bid has been characterised by its involvement of people, organisations and facilities from throughout the North East even as far as Cumbria. Very strong partnerships have been

- formed with Middlesbrough FC, Durham County Cricket Club, Hartlepool United FC, Darlington FC and Carlisle United FC and all are integral to the 'Sunderland offer'. The travel links with Durham are important as it offers an international airport and Sunderland has good road links with Durham.
- 8.17 Durham Heritage Coast Partnership is a partnership of authorities, agencies and community bodies with an interest in the coast in Sunderland, Durham and Hartlepool. This strengthens the links Sunderland has with Durham in terms of identity as "City by the Sea" as a unique selling point of Sunderland.
- 8.18 Further evidence to support the possibility of working with the Durham ATP can be drawn from the North East England Visitor Economy Strategy 2010-2020. The strategy is currently at consultation draft stage and identifies that the target market mix varies from area to area:-
- (a) For **Northumberland** and **Durham**, the primary targets are 'Traditionals' and 'Discoverers', within which Northumberland also has a particularly significant family market. Association conference business will also be a priority for Durham City;
 - (b) In **NewcastleGateshead**, the target for 'city break' consumer marketing activity is on younger and older adult 'Cosmopolitans' and 'Discoverers'. Association and corporate conferences will also be a priority; and
 - (c) In **Tees Valley, Sunderland, Tyne and Wear Coast**, the primary focus for marketing activity is on 'Traditionals' and family day trips. In the longer term, short break audiences will be specifically targeted but some product development is required to meet the requirements of this market. Members noted that there are possibilities of linking with Ireland when exploring the short breaks market.
- 8.19 Members highlighted the option of working with Durham to promote the attractions in Sunderland that would appeal to the Traditional's market, a target market which is shared by Sunderland and Durham.
- 8.20 The North East England Visitor Economy Strategy 2010-2020 highlighted the fact that too many different messages from destinations at different stages of development can confuse the consumer and use valuable promotional resources for little return. Members recognised that key to Sunderland's growth is to identify a consistent message and cultural identity. Members of the group supported the message of a 'City by the Sea' as important and identified the events programme as a key attractor to the area.

- 8.21 To gain an understanding of the role of Sunderland at a regional level, the Task and Finish Group received information from ONE North East (Regional Development Agency). Members were informed that the North East as a whole is still establishing itself as a tourist destination when compared to areas such as the Lake District.
- 8.22 Sunderland is classed as an 'emerging destination' along with areas such as Darlington and Yarm. It was explained that the new framework would focus on building awareness of the North East using lead destinations and then the aim would be to disperse visitors across the region. In doing so, it was felt that this would help to build emerging destinations. Information should be used to raise the profile, spending and visitor numbers in emerging destinations, where the products meet the needs of the market.
- 8.23 At a regional level the website **www.visitnortheastengland.com** is used as an important marketing tool and there is little print work produced. This highlighted the importance of emarketing for tourism. There is an activities idea generator on the website which is useful for promoting activities in the emerging destinations. The website features 63 Sunderland attractions, there were 47 events featured in Summer 2009 and 31 inspected accommodation providers. This was later compared by the group with other areas in the region. Durham City has 67 inspected accommodation providers and Newcastle upon Tyne has 58. Darlington, which is also classed as an emerging destination has 19. There is the opportunity for accommodation providers to have an enhanced entry on the website which costs £99. The Task and Finish Group learned that enhanced entry with photographs is more appealing to customers who view the website.
- 8.24 The Group highlighted the importance of marketing the whole city and not just attractions in the city centre. The Sunderland website **www.visitsunderland.com** could play a key role in this as this will allow a greater number of attractions to be promoted than traditional documents such as the Sunderland Visitors Guide. This would have the benefit of increasing the amount of attractions promoted to visitors. Members recognised that it is important to have some print work particularly when appealing to the 'Traditionals' market and to visitors and residents who do not have access to a computer. Evidence from the previously mentioned Dudley Case study highlighted the importance of engaging with all of the local community when promoting tourism as this can influence the perception of an area.
- 8.25 ONE North East highlighted a number of the strong visitor attractions that Sunderland has to offer. Sunderland Empire is the most viewed

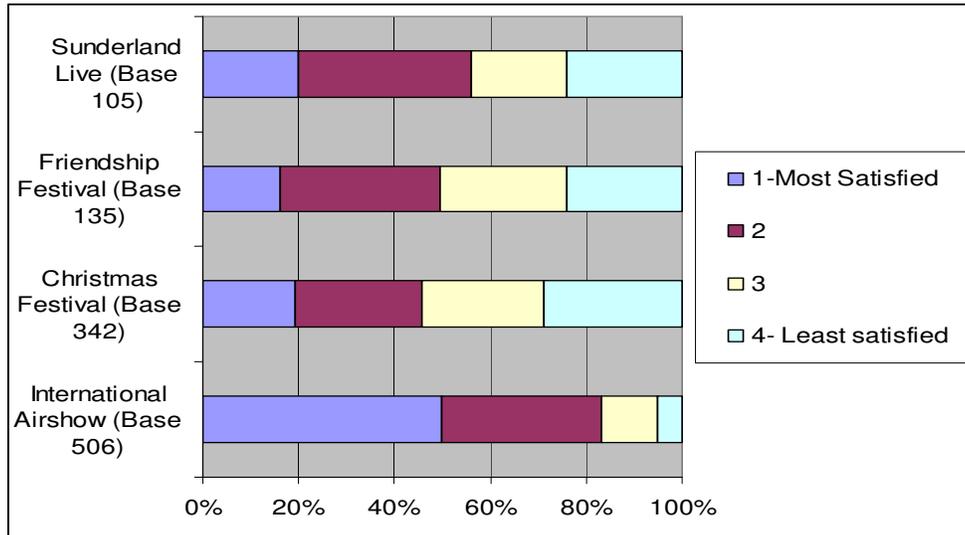
entertainment venue across the website and Sunderland International Airshow is the 2nd most viewed event.

The Festivals and Events Programme in Sunderland

- 8.26 Members, in choosing the topic of Tourism and Marketing in Sunderland have stressed the importance of ensuring that Sunderland was making the most of the strong assets that it had to offer potential visitors. Information provided by ONE North East highlighted the strength of the events programme in Sunderland. The Sunderland International Airshow was the 2nd most viewed event across the ONE North East website. (The BUPA Great North Run was the 1st) Sunderland has also recently hosted two successful music concerts at The Stadium of Light, Take That and Oasis. Pink has also announced that she will tour in 2010.
- 8.27 Sunderland clearly has some strong visitor products to be proud of, however the Group received information that Sunderland does not have any “Don’t Miss” attractions on the visitNortheastengland website. There are 10 attractions that are considered “Don’t Miss.” These include: Durham Cathedral, The Alnwick Garden and the Northumberland National Park. Taking this into account, members recognised that the varied events programme has the potential to become an alternative motivating factor to draw visitors to Sunderland. This is already happening in relation to the popular International Airshow and the Stadium concerts. Events can generate substantial numbers of visitors from outside the region and have a significant economic impact. Events can also change perceptions and the image of an area and raise a destination’s profile. If high quality events can be sufficiently promoted with local people and visitors this could have a strong influence on the perception of the area. Sunderland is recognised as having a strong events programme including the Stadium Concerts, Sunderland International Friendship Festival, Sunderland International Airshow, Octoberfest and Houghton Feast.
- 8.28 Members recognised the large numbers of visitors events such as these can bring to the region and were keen that these events were used to raise the profile of Sunderland, encourage repeat visits to the area and encourage visitors to stay in the region. Evidence was provided to the Group that lack of accommodation in the area did not hinder attendance at the events as there are a number of accommodation facilities in the surrounding areas. The positive impact of having visitors stay in Sunderland was, however identified by the group.
- 8.29 Key to encouraging repeat visits and improving the perception of Sunderland is the use of evaluation so any possible improvements can be identified. The Community Spirit survey 2009 highlighted satisfaction

levels with events but also identified a need to advertise events in a better manner.

Figure 1: Satisfaction with events, Community Spirit Spring survey 2009. Respondents were asked to rate events on a scale of 1 to 4 with 1 being the most satisfied and 4 being least satisfied.



- 8.30 There are high levels of satisfaction with the International Airshow and this was seen as a key event which could be developed in order to encourage longer visitor stays in the area. If the Airshow was enhanced by possibly including events on the Friday night this could encourage people to stay for a short weekend break rather than a day visit.
- 8.31 Members were informed that part of the strategic vision is to develop Sunderland's position as a leader in event delivery. This could involve hosting National and Regional events. The group highlighted the impact events can have on Community Cohesion and suggested this should be included in the strategic vision. All events from surrounding areas should be promoted. Events are classified as signature, medium or local events. The group noted that it is important to promote all events including those from surrounding areas and especially those which are unique and make Sunderland distinctive.
- 8.32 The Group was informed of the importance of attracting high quality events of international significance to the city as well as enhancing events of local significance. This may enable these events to become high profile events in the future. The Christmas Festival was highlighted as an area for growth. The Christmas Festival is categorised as a 'signature' event but opportunities for improvement were apparent including a suggestion of

- moving the location of the market to create better links with the winter ice rink.
- 8.33 Connecting spaces in a better way was a theme that kept emerging in evidence received. The city offers a wide range of attractions. The medium and local attractions when considered individually may not have the pulling power to draw visitors in. When linked together they potentially form a tourist trail of significance.
- 8.34 For example, Washington has its own very distinctive and individual range of heritage assets and activities, and varying in the methods and ways in which they are currently managed and delivered. There is added value in collaboration between heritage sites such as Washington Old Hall, Bowes Railway, Washington F Pit Museum and the church locations.
- 8.35 The North East Visitor Economy Strategy 2010-2020 explains it is widely acknowledged that the success of awareness campaigns is closely linked to the development of a credible and easily understandable proposition. Trying to appeal to everyone or to claim to offer 'something for everyone' almost always results in poor returns on investment. That is why so much attention is paid by companies to distinguishing their brand and their unique selling proposition (USP) from all others in the marketplace. The events programme in Sunderland and the identity of a "City by the Sea" is a unique selling point of Sunderland. Members noted the importance of delivering a consistent message and ensuring that the same messages are marketed.

Events at the Sunderland Stadium of Light

- 8.36 Evidence showed the positive impact the events at the Stadium had in terms of raising the profile of the city and this was acknowledged by members. A site visit was subsequently arranged and members met with the Chief Executive Officer and Group manager of SAFC.
- 8.37 Members asked about how successful the recent concerts at the Stadium had been and were informed that in terms of financial success they could have potentially made a loss however the club were keen to pursue hosting the concerts as they recognised the impact these type of events can have in promoting the city. Members also noted the positive impact these events can have on the local economy.
- 8.38 Members queried if there was a positive future in terms of hosting events at the Stadium. They were informed that the Football Club were confident that they would continue to host music concerts over the coming years and had already secured Pink to perform this year. The events that have

been hosted were successful which increases the promoter's confidence in using the venue in the future.

- 8.39 The group noted that additional music concerts and events would significantly enhance the strong events programme which is already in place. A reference was made to the Place to Play review completed by the Culture and Leisure Review Committee 2008/09. The report reviewed music venues as part of Sunderland City Council's Music Strategy. In this review recommendation 5 stated: "To continue to ensure that music plays a prominent part in festivals and flagship events and that relationships with the local music scene are further enhanced." An update regarding this recommendation was reported to the Sustainable Communities Scrutiny Committee in December 2009 and this stated that discussions were underway with regard to the involvement of music across festivals and events in 2010-11.

Tourism Information in Sunderland.

- 8.40 Members recognised the importance of signage in promoting tourist attractions and explored Sunderland City Council's policy for brown tourism signage. The policy was written in June 1996 and was completed in line with Department for Transport guidance. Brown and white signs are there to enable visitors to find facilities easily and safely.
- 8.41 Before a brown tourist sign can be erected, there are criteria that must be met. It is required that the organisation has signed the England Tourist Board (ETB) Visitor's Charter and is signed up to the Visitor Attraction Quality Assurance Service (VAQAS). There is a cost to install the sign which is typically £500. There are also further maintenance costs. Only a small number of queries have been received by Sunderland City Council regarding brown tourism signage.
- 8.42 Members acknowledged that brown and white tourism signage is not the only option available to adequately sign attractions in an area but believe that signage in Sunderland is an issue that needs to be addressed. There does not appear to be consistency in relation to signage and Members particularly noted that signage to the coast was not adequate. This is significant when considered in relation to Sunderland's identity as a 'City by the Sea'. Members also noted that there was not a sign for Peshaw Monument from the A19.
- 8.43 Members noted that a link must be made with the Legible City project. The legible cities project focuses on moving people around a space using a variety of resources, including information provided prior to the visit and maps as well as adequate signage. Sunderland needs to look at ways of

making the city more legible for visitors as well as residents in order to encourage people to stay longer and in essence, visit more often and spend more in the city. Good signage will help raise residents' awareness of their local visitor attractions too. Currently investigations are taking place with regard to resources in order to develop the strategies and guidelines required to implement a successful project. It is also included within the Economic Masterplan Aim 3 as a key project.

9. Conclusions

9.1 The Task and Finish Working Group concluded:-

- (a) That Sunderland has strong tourist assets, a reputation for the warmth of its welcome to visitors and a particularly strong events programme which should be a major motivating factor to draw visitors to Sunderland;
- (b) That Sunderland has the unique selling point of being a 'City by the Sea' and that there was also the potential for music to become a unique selling point. Sunderland's Stadium of Light events were seen as an example of where the city was leading the way in the region hence it was felt that there were increased opportunities for Sunderland to build upon the success of such music events;
- (c) That Sunderland was somewhat overshadowed by some of the lead destinations across the North East region. Whilst it was necessary to establish and maintain links with lead destinations, it was equally of importance that the Sunderland product was marketed to its full potential in its own right;
- (d) Although Sunderland has an interesting tourism product, it is not considered to be as strong as some destinations such as Edinburgh and York. Encouragingly there are individual strong aspects and offers in Sunderland which can be packaged and developed to offer a stronger proposition.
- (e) That the perception of Sunderland as a tourist destination could be stronger and efforts should be made to address this. Perceptions of the city are drawn from many areas including housing, levels of deprivation, news stories, jobs and businesses.
- (f) That based on the evidence received, it was clearly apparent that there was a lack of visitor accommodation across the city; and

- (g) That the existing signage around the city was neither clear nor consistent and should be improved to direct visitors to key attractions

10. Recommendations

10.1 The Prosperity and Economic Development Scrutiny Committee has taken evidence from a variety of sources to assist in the formulation of a balanced range of recommendations. The Committee's key recommendations to the Cabinet are as outlined below:-

- (a) That all council-wide strategies relevant to building Sunderland's profile as a visitor destination be consistent with their key messages and complement the future development of the city's Destination Management Plan;
- (b) That the identification of an appropriate champion / lead officer and the creation of a partnership to market the city as a destination be further explored;
- (c) That the City Council develops stronger links with Durham Area Tourism Partnership to ensure that opportunities for joint working are fully explored, building upon the shared strengths of the two areas;
- (d) That a 'whole city' approach to the marketing of attractions and events be adopted to be delivered through the Sunderland Marketing Partnership;
- (e) That, in light of the difficulties in the current economic climate, innovative approaches to developing the accommodation offer within Sunderland together with maximising the existing use of accommodation be further explored;
- (f) That a review of the existing tourist information and signage across the city be undertaken to ensure a clear and consistent approach is adopted;
- (g) That building upon Sunderland's strengths, particularly the success of the city's events programme, further opportunities are identified to enhance the existing events programme and promote the quality and warmth of Sunderland's welcome to visitors, with the aim of increasing the number of visitors and length of time they stay; and

- (h) That in order to develop the Sunderland offer a full review of assets is undertaken, to assess the current demand and usage, with a view to identifying how they can be further developed.

11. Acknowledgements

- 11.1 The Group is grateful to all those who have presented evidence during the course of the review. We would like to place on record our appreciation in particular of the willingness and co-operation we have received from the below named:-

Karen Marshall, Tourism Development Manager, Sunderland City Council

Jane Hall, Assistant Head of Culture and Tourism, Sunderland City Council

Tania Robinson, Head of Marketing, One North East

Cath Hindle, Tourism Co-ordinator, Tourism Tyne and Wear

Ian Pearson, Acting Traffic and Road Safety Manager, Sunderland City Council

Zoe Channing, Assistant Head of Culture and Tourism Arts and Creative Development

Steve Walton, Chief Executive Officer, SAFC

Gary Hutchinson, Group Catering and Events Manager, SAFC

12. Background Papers

- 12.1 The following background papers were consulted or referred to in the preparation of this report:-

Visit Britain: Britain Marketing and 2012 Games Global Strategy 2010-13.

Visit England: A Strategic Framework for Tourism in England 2010-2020.

IDeA: Dudley case study

The Sunderland Residents Survey 2008, Sunderland City Council

Cities, Coast and Culture, the Tyne and Wear Tourism Management plan 2008-2011

North East England Visitor Economy Strategy 2010-2020 Consultation Draft

Community Spirit Spring Survey 2009, Sunderland City Council
The Seafront Regeneration Strategy- Sunderland City Council

Economic Masterplan, Sunderland City Council

Music Strategy, Sunderland City Council

Report of the Executive Director of City Services, Sunderland Destination Management Plan and Regional Update

A Place to Play- A Review of Music Venues in Sunderland, Culture and Leisure Review Committee Sunderland City Council

The City of Sunderland Tourism Signing Policy, Sunderland City Council

13 Glossary

Traditionals

This is a mainstream market whose members are self-reliant and hold more traditional values.

Discoverers

Independent of mind, this is the least likely group to worry about what others might think and like exploring new, more adventurous destinations.

Cosmopolitans

Independent, active risk-takers who seek both intellectual and physical challenges.

Signature events

High Regional/National Profile which attract large numbers. Examples include Oktoberfest, Remembrance Weekend and Shine.

Medium events

Relevant to local communities and have a significant local profile. Examples include markets and the Spring Festival.

Local events

Community led with a direct link to the cultural strategy. Examples include events at Market Square and Sunnyside Gardens,

**COUNCILLOR MICHAEL MORDEY
CHAIR OF THE TOURISM AND MARKETING TASK AND FINISH GROUP
PROSPERITY AND ECONOMIC DEVELOPMENT SCRUTINY COMMITTEE**

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Evidence gathering

| Date | Evidence gathered |
|--------------------------------|---|
| 11 th November 2009 | <p>Regional, sub-regional and local tourism activity.</p> <p>Meeting with Karen Marshall, Tourism Development Manager, Sunderland City Council</p> |
| 18 th November 2009 | <p>Regional Tourism Activity</p> <p>Presentation from ONE North East, Regional Development Agency. Representative from Tyne and Wear ATP also present.</p> |
| 2 nd December 2009 | <p>Review of Brown Tourism Signage</p> <p>Meeting with Ian Pearson, Acting Traffic and Road Safety Manager, Sunderland City Council</p> |
| 10 th February 2010 | <p>The Events Programme in Sunderland.</p> <p>Presentation from Zoe Channing, Assistant Head of Culture and Tourism, Sunderland City Council</p> |
| 17 th March 2010 | <p>Site visit to the Stadium of Light</p> <p>Meeting with Steve Walton, CEO and Gary Hutchison, Group catering and events manager, SAFC</p> |