

# ENVIRONMENT AND ATTRACTIVE CITY SCRUTINY COMMITTEE

20 SEPTEMBER 2010

## SUNDERLAND 'THE PLACE' POLICY REVIEW 2010/11: SCENE SETTING REPORT

### REPORT OF THE CHIEF EXECUTIVE AND EXECUTIVE DIRECTOR OF CITY SERVICES

**Strategic Priority: SP5 - Attractive and Inclusive City**

**Corporate Priorities: CIO1 – Delivering Customer Focused Services, CIO4  
– Improving Partnership Working To Deliver 'One City'**

#### **1. Purpose of the Report**

- 1.1 The purpose of this report is to provide a background and overview to the Scrutiny Committee in relation to the policy review into Sunderland 'the Place'. A supporting presentation will be given at the Scrutiny Committee by the Lead Officers of the review.

#### **2. Background**

- 2.1 At its meeting on 17 June 2010 the Scrutiny Committee agreed to focus on Sunderland 'the Place' as its Policy Review for 2010/11 and at its last meeting of 12 July 2010 it agreed the aim of the review and its Terms of Reference. It was agreed that members of the Scrutiny Committee would receive a scene setting report at its September meeting to introduce the review and begin to take evidence.
- 2.2 This report contributes principally to the following terms of reference for the review;
  - (a) To explore what it means to have a strong sense of place, how important this is for Sunderland, and what benefits this may bring;
  - (b) To gain an understanding of the current activity being undertaken within the City Council and across partner organisations with regard to developing a sense of place

#### **3. Definition and Context**

- 3.1 Place identity can be described as;

*“a cluster of ideas about place and identity in the fields of geography, urban planning [and] design, landscape architecture, environmental psychology and....sociology”*

- 3.2 The concept of place identity deals with the interaction between the question of who we are and where we are, and how our local environment, including geographical location, ethnic traditions, family heritage, and educational background influence our lives. Having a sense of belonging to a place increases feelings of attachment and ownership, self esteem and happiness.
- 3.3 Strong place identity makes a key contribution to a city's brand. Qualities such as people's experience of the city; people's belief in the city; what the city stands for; and what kind of people inhabit the city are all elements that characterise a city and give it defining and distinctive qualities.
- 3.4 Place identity is a cross cutting issue, and is influenced by the legible city agenda; the street scene; behaviours of customers and residents, the retail offer; facilities; marketing; advertising and the role of the media.
- 3.5 A thriving and sustainable visitor economy impacts on the economic and social well being of local people and their environment. It is vital that safe and attractive places are created and maintained for local people and visitors, but protects the distinctive character and traits that makes a place unique. A strong sense of place attracts tourism, worth £115 billion to the UK economy each year, as well as inward investment business location and or expansion.

#### **4. Perceptions of Sunderland as a Place**

- 4.1 Sunderland is a city rich in history and heritage. Over recent years the city has seen significant investment in leisure, business and tourism activity, and is positioned as an emerging destination.
- 4.2 A survey undertaken in 2008 looked at the perceptions of Sunderland by potential visitors and found that around two thirds of people don't consider Sunderland as a holiday or short break destination, whilst only 10% of people would personally consider a visit to the city.
- 4.3 A significant minority of people do not know what Sunderland represents, invariably associating Sunderland with football, cars and ship building.
- 4.4 Within the local media Sunderland is positively represented as a city; however this is less so in the wider region and to an even lesser extent nationally. Negative messages about the city emerge on a small scale, the top issues being around crime, health, education and the economy. Positive messages coming through the media focus strongly around Sunderland AFC; the Sunderland Empire; Sunderland University and Nissan.
- 4.5 In 2007, 857 residents of Sunderland were asked questions about how they perceive the city now and how they expect it to be in 15 years

time. Table 1 indicates the top words/phrases chosen to describe Sunderland now and how it could be in the future. Whilst perceptions of Sunderland now were mixed, perceptions were more positive in terms of how people think Sunderland will be in the future and the most commonly associated words were clean, prosperous and safe.

<b>Currently</b>	<b>%</b>	<b>15 years time</b>	<b>%</b>
Friendly	49	Clean	42
Down market	46	Prosperous	38
Dirty	40	Safe	37
Busy	38	Welcoming	36
Mundane	34	Environmentally friendly	34
Dull	34	Cultural	30
Grey	31	Friendly	30
		Lots to do	30

Table 1: Community Spirit: Priority Issues Survey 2007

4.6 Residents were asked to describe Sunderland now and in the future in their own words and the most popular responses are shown in Table 2. There is a sense of optimism for the future as to how Sunderland might be as a place.

<b>Now</b>	<b>Mentions</b>	<b>15 years time</b>	<b>Mentions</b>
Dirty/unclean	129	Clean	218
Friendly	89	Safe/safer	177
Unsafe	77	Prosperous	128
Getting better/improving	62	Green	92

Table 2: Community Spirit: Priority Issues Survey 2007

4.7 In terms of what Sunderland could be like, residents aged 18-24 and 25-34 were more inclined to choose green, safe and welcoming. Residents aged 25-54 were more likely to select prosperous than those aged 18-24 and those aged 55+.

## 5. Policy Background

5.1 Place identity is cross cutting and as such a number of key policies and governance arrangements contribute to this issue, including:-

- Sunderland Strategy 2008-2025
- Economic Masterplan (draft)
- Statutory Development Plan and emerging Local Development Framework
- Sunderland Destination Management Plan (draft)
- Legible City
- Sunderland's Brand Strategy
- Sunderland City Marketing Partnership
- Responsive Local Services Project

- Tourism Offer
- Retail Offer

5.2 The shared vision set out in the Sunderland Strategy 2008-2025 states that by 2025:

***Sunderland will be a welcoming, internationally recognised city where people have the opportunity to fulfil their aspirations for a healthy, safe and prosperous future.***

### ***Economic Masterplan***

5.3 The proposed vision for the Economic Masterplan is for Sunderland to be ‘An entrepreneurial University City at the heart of a low carbon regional economy’. This vision is supported by five aims of which the development of a strong sense of place and of city identity is key to achieving;

**Aim 1 ‘A new kind of university city’** We want Sunderland to be a vibrant, creative and attractive city, with a strong learning ethic and a focus on developing and supporting enterprise, with the University of Sunderland at its heart.

**Aim 2 ‘A national hub of the low-carbon economy’** We want to use the opportunities offered by new low-carbon technologies to stimulate economic activity in Sunderland. This Aim emphasises the city’s national potential and the need to showcase projects such as electric vehicles.

**Aim 3 ‘A prosperous and well-connected waterfront city centre’** The city centre is important to Sunderland and the wider region. It will fulfil its purpose only when more people work in it and more people spend time and money there. The city’s position on the waterfront is an important part of its sense of place and enhances Sunderland city centre’s distinctive role in the region. Connectivity is both external, to improve the city centre’s credentials as a business location, and internal, to make it better and easier to enjoy.

**Aim 4 ‘An inclusive city economy – for all ages’** We want to improve opportunities for people of all ages and sections of the community, targeting unemployment in particular. “Inclusive” means not just physical accessibility to the city’s economic centre but addressing social exclusion. Sunderland should also concentrate on tackling the decline in the number of younger people working and living in the city.

**Aim 5 ‘A one city approach to economic leadership’** We want to improve economic leadership in the city.

### ***Statutory Development Plan and emerging Local Development Framework.***

5.4 The statutory development plan for Sunderland comprises the saved policies of the Unitary Development Plan and Alteration No. 2 (Central Sunderland) both of which, among other things, highlight the importance of the city centre as the commercial heart of the city as a whole and its higher order role as a civic, cultural, educational and

transport hub. Alteration No.2 specifically identified and allocated the large scale regeneration areas including Vaux, Sunnyside, Holmeside, Stadium Village and St Peters Bonnersfield.

- 5.5 The significance of the city centre in the planning context and in the delivery of the Economic Master Plan is also set out in the emerging Core Strategy of the Local Development Framework. This confirms that the city centre will be the main location for "town centre" development which as well as retailing will include offices, leisure, entertainment, food and drink, arts, culture and tourism facilities.
- 5.6 The city centre as a place will be significantly shaped by the statutory development plans and their associated guidance documents, planning frameworks and masterplans including for each of the major regeneration sites and by overarching guidance such as the Urban Design Strategy. All of these strategies, policies and guidance will form the basis for influencing investment decisions, in both the public and private sectors and in determining planning applications for new development in the city centre.

***Sunderland Destination Management Plan (DMP)***

- 5.7 The purpose of the SDMP will be to set out the main challenges facing Sunderland as a visitor destination, the key markets and audiences the city attracts now and target audiences partners wish to attract in the future. It will identify gaps in the product and infrastructure to support these audiences, and an action plan for partners involved in the management, development and promotion of the city to improve Sunderland’s visitor experience.
- 5.8 The SDMP proposes a vision for Sunderland’s visitor economy that draws on its combination of city, culture and coast. It sets targets for growth and it identifies priorities and actions.
- 5.9 Table 3 shows the visitor impact in Sunderland in 2009:

<i>Visitor impact in Sunderland 2009</i>			
	<b>Staying visitor</b>	<b>Day visitors</b>	<b>All visitors</b>
Visitor Numbers	651,320	8.42 million	9.08 million
Spend	£81.76 million	£260.38 million	£342.14 million

Table 3: Source: ONE (STEAM) 2010 (provisional)

The SDMP identifies the need to increase the number of visitors to Sunderland, in particular the numbers of staying visitors who on average generate a larger spend per visit.

5.10 Within the SDMP a number of targets have been identified (see **Appendix 1**), aiming to increase the numbers of visitors and the spend per visitor. Table 4 identifies the targets (financial) for 2015 thus showing the potential financial benefits of increasing the number of visitors to the city:

Target / objective	2015 Target Spend
Increase spend per head	
Day Spend per visitor	£280 million £31.64
Overnight Spend per visitor	£85 million £130.00
Total Spend	£365 million

Table 4

5.11 Achievement of the above target would bring an additional spend of £22.86 million into the city, supporting existing businesses and encouraging the development of new businesses. As well as benefits through visitor expenditure, increased tourism also has the potential to stimulate regeneration and investment in Sunderland as a place to live, work and study.

### ***Legible City***

5.12 A Sunderland Legible City Framework has been produced which looks at how people perceive the city and what pre-visit information they will gather. Work has taken place to look at how visitors presently move around the city, what the city looks like, and what information visitors encounter to help them during their journey

5.13 A full report regarding the concept of Legible City and its implementation in Sunderland will be presented to the Environment and Attractive City Scrutiny Committee at its meeting of 20 September 2010.

### ***Sunderland's Brand Strategy***

5.14 A brand strategy was developed for the city and City Council in 2005. This strategy set out the three values that Sunderland promised through its brand:

#### *Life-enhancing*

Sunderland is striving to be a cleaner, safer and greener place to live, work, study and do business. It aims to be a place that will enhance your health, your lifestyle and your quality of life.

#### *Smart*

Sunderland is an intelligent choice, a city that is working to make technology enhance the short-term and the long-term quality of life in the city.

### *Balanced*

Sunderland is committed to a balanced and sustainable future, not seeking to emulate the regeneration stories of other cities, but rather to find a considered way forward that will give the best possible results for its citizens.

- 5.15 At the same time a new visual identity was developed for Sunderland that would reflect the brand values. This visual toolkit is used across the City Council and many of the city's partners also use elements of the branding.
- 5.16 In light of the development of the Economic Masterplan and the changing climate around business and indeed society, the time is right to revisit these values to ensure they are still current, relevant and achievable. A piece of work called the 'Sunderland Story' will refresh the brand, Sunderland's values, what the city says about itself and how it presents itself to residents, businesses, visitors and politically. This piece of work is part of the strategic 'Reputation and Influencing' programme, which will comprise a range of activities that collectively contribute to promoting Sunderland as a place, enhancing the profile at national and international levels and increase our reputation and influence at Westminster and Whitehall. The detail of this programme will be worked out over the autumn, aligned to the work around the Economic Masterplan.

### ***The Sunderland City Marketing Partnership***

- 5.17 Sunderland has a City Marketing Partners group of some 30 businesses. During 2009/10 the group produced and issued a partners' City Marketing toolkit containing photographic images and key facts plus some case studies to be used by companies promoting the city. The Partners also commissioned advertising in the airport and on regional buses to promote the city.

The Economic Masterplan will require a fresh look at how the city is promoted including the future role of Partners; work into what is needed (marketing, tourism, branding, place shaping) is being undertaken at the present time.

### ***Responsive Local Services (Streetscene)***

- 5.18 The Streetscene service contributes to the place by maintaining and improving environmental quality through the implementation of the Responsive Local Service (RLS) project of the Community Leadership Programme. Services currently in scope of RLS include street cleansing and graffiti removal. RLS has been agreed as a priority for delivery in 2010/11 by all Area Committees which receive regular updates.

### ***Tourism Offer***

- 5.19 In 2009/10, the Prosperity and Economic Development Scrutiny Committee undertook a detailed review into Tourism and Marketing in the city. The Scrutiny Committee concluded that Sunderland has strong tourist assets and a strong events programme, but can be somewhat overshadowed by other lead destinations within the North East. The report also concluded that the perception of Sunderland as a tourist destination could be stronger and the assets that the city does have should be maximised. The recommendations were accepted by Cabinet on 24<sup>th</sup> June 2010.

### ***Retail Offer***

- 5.20 City centres are widely recognised as critical drivers of city economic competitiveness. They provide not only a concentration of business, retail, leisure and institutional activity but are often the preferred location for knowledge businesses, advanced business services and high quality urban tourism assets. They are the focus for consumption by city residents and visitors and reflect the lifestyle of a city. Importantly, city centres promote external messages regarding city identity and investment opportunity.
- 5.21 The main retail provision for Sunderland is focussed in the city centre (the third largest retail centre in the North East region). The Galleries at Washington is next in Sunderland's retail hierarchy, and there are important district centres at Houghton, Hetton, Doxford Park, Concord, Southwick Green and Sea Road, which primarily serve local needs, supported by numerous shopping parades within the residential estates. Out of town retail parks are provided at Pallion Riverside, North Hylton, the Peel Centre and at Roker and large free standing supermarkets at Grangetown, Silksworth, Doxford Park and Seaburn. There are also a number of large free standing "bulky goods" superstores including those at Trimdon Street west of the city centre and Armstrong in Washington.
- 5.22 Most of the multiple retailers present in the city centre are within the middle and, more frequently, the lower end of the retail spectrum. It has a range of mainstream comparison retail multiples but lacks the presence of high-end profile retailers and quality national café/bar/restaurant fascias. Several independent upmarket eating and drinking establishments have recently opened in the city centre, particularly in the Sunnyside area.
- 5.23 The city centre is mirroring national trends in terms of rising vacancy rates and a subdued demand from national retailers for new accommodation.
- 5.24 Accessibility to the city centre by car and by public transport is very good. The physical factors of the city centre are considered to be quite strong, such as the compact city centre, accessibility and covered shopping.



## ***Performance Indicators***

- 5.25 The performance indicators relevant to this review are;
- NI1 - % of people who believe people from different backgrounds get on well together in their local area
  - NI2 - % of people who feel that they belong to their neighbourhood
  - NI3 - Civic participation in the local area
  - NI3 - % of people who feel they can influence decisions in their locality
  - NI5 - Overall / general satisfaction with local area
  - NI23 - Perceptions that people in the area treat each other with respect and dignity
  - NI110 - Young people's participation in positive activities
  - NI119 - Self-reported measure of people's overall health and wellbeing

## **6. Conclusion**

- 6.1 The report marks the beginning of the evidence gathering for the Committee's policy review into Sunderland the Place. Having a city which has a strong identity and sense of place is a vital part of achieving the vision set out for the city and incorporates many elements of activity across the city Legible City agenda; Street Scene, the behaviours of customers and residents, the, retail offer, facilities, marketing, advertising and the role of the media.

## **7. Recommendations**

- 7.1 Members are recommended to accept this report and to consider which elements of the current activities being carried out in the city they wish to take evidence on as part of the review.
- 7.2 Members are also asked to agree that all members will be invited to take part in task and finish activities, to focus on specific work within the review that lends itself to that way of working.

## **8. Background Papers**

- Sunderland Strategy 2008-2025
- Draft Sunderland Economic Masterplan
- Draft Sunderland Destination Management Plan 2010 - 2015
- Marketing North East England (Final Report) – Arkenford Ltd for One NorthEast (January 2007)
- Place Survey Tracker 2009 – BMG Research (2010)
- Priority Issues Survey 2007
- Regional Visitor Survey 2008 Final Report Tyne and Wear – mruk research for One North East (October 2008)
- Tourism and Marketing in Sunderland – Policy Review of the Prosperity and Economic Development Scrutiny Committee (June 2010)
- Experian GOAD survey (April 2008)

- Management Horizons Europe (MHE) UK Shopping Index (2008)
- Sunderland City Centre Consumer and Business Perception Study, conducted by The Retail Group, March 2008

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