

# **Meeting: Culture and Leisure Sub-Committee**

**Date: 28 November 2017**

## **Title: Delivering an effective cultural offer**

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**Service:** Environment, Housing and Leisure

**Wards affected:** All

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### **1 Purpose of Report**

To present Culture and Leisure Sub-Committee with findings relating to the scrutiny of events spend and delivery in North Tyneside, South Tyneside and Sunderland Councils.

### **2 Recommendations**

- a) In order to sustain events delivery and support tourism into North Tyneside the circa £100k currently provided through the Service Improvement Fund should be consolidated as part of the core events budget;
- b) In North Tyneside a survey of the arts and tourism sectors should be undertaken in order to gain more detailed information on ways in which added value can be increased and support can be more targeted.
- c) The Sub Group to analyse the outcomes of the industry surveys alongside a range of market intelligence gathered throughout the year including events and visitor surveys. The findings will generate future recommendations for action.

### **3 Details**

At its meeting on 24<sup>th</sup> January 2017 the Cultural Development Plan Sub Group agreed to investigate the following question:-

“How can the Council deliver an effective cultural offer in a shrinking financial environment?”

Given the breadth of the activities which make up the cultural offer, it was agreed that the Sub Group would focus upon the impact of culture:-

- a) As it relates to the Summer events programme;
- b) How this programme attracts visitors to the Borough as part of the tourism strategy;
- c) How the programme supports the local tourism economy;
- d) How the programme engages residents; and
- e) How the impact of the programme compares with neighbouring North East coastal authorities in South Tyneside and Sunderland.

It is agreed that the programme would aim to assess:-

- a) The strategic approach of each of the three Councils;
- b) The implementation of each Summer events programme;
- c) The financial expectations relating to income and expenditure in each area;
- d) The response of business and residents in each area; and
- e) The impact upon the tourism economy in each area.

In focusing upon the Summer programme the study would allow the Sub Group time to contribute towards the budget and financial planning framework discussions for 2018/19.

#### **4 Information**

Inevitably, given the ongoing changes in local authority structures and service configurations, comparisons of spend are not straightforward. While it has not been possible to gain detailed information relating to all aspects of the study brief outlined on 24<sup>th</sup> January 2017, the report does provide some basis for comparison across the three authorities, based upon the delivery of key events over the summer period.

Taking each aspect of the brief in turn.

##### **a) The strategic approach of each of the three Councils**

Each Council has an overarching Council Plan which contains objectives to support the local economy, attract visitors to the area and engage with residents. In each area events are seen as a key tool to meet these objectives. In North Tyneside the second aim of *Visit North Tyneside*, the Council's tourism strategy 2014-21 pledges to

*Develop and deliver a high quality engaging year round events programme.*

The details of activities are to be found on the [www.visitnorthtyneside.com](http://www.visitnorthtyneside.com) website as well as in a range of social media and print publications.

In South Tyneside there is no evidence of a written strategy but the range of events and activities on offer is available at [www.visitsouthtyneside.co.uk](http://www.visitsouthtyneside.co.uk)

In Sunderland there is a different approach with events being integrated into the wider strategy for the City, *The Sunderland Strategy 2008 - 2025*, of which Culture is one of the cross cutting themes. In this regard there is a pledge that:-

*The Sunderland Partnership is committed to ensuring that culture is developed to bring economic benefit to the city, help people develop new skills and support the provision of jobs as well as creating a lively economy.*

Information on the events on offer is available at <http://www.seeitdoitsunderland.co.uk/>

##### **b) The implementation of each Summer events programme**

Each Council organises a number of events across the summer, which constitute their core offer for residents and visitors. These will vary to some extent from one year to the next but the programme for 2017 gives a sense of the style and approach across the three Councils.

Key events across the three Council areas for 2017 were as follows:-

### North Tyneside

- Tynemouth Food Festival, Tynemouth Priory & Castle – 13<sup>th</sup> & 14<sup>th</sup> May
- Big Local Carnival, Spanish City Plaza – 26<sup>th</sup> & 2<sup>nd</sup> May
- Whitley Bay Proper Food & Drink Festival, Spanish City Plaza – 17<sup>th</sup> & 18<sup>th</sup> June
- Wallsend Festival, Wallsend town centre and parks – 1<sup>st</sup> & 2<sup>nd</sup> July
- Mouth of the Tyne Festival, Tynemouth Priory & Front Street – 5<sup>th</sup>-9<sup>th</sup> July
- Summer Festival 22<sup>nd</sup> July – 3<sup>rd</sup> September
- Whitley Bay Sandcastle Competition, Whitley Bay beach – 23<sup>rd</sup> July
- Whitley Bay Classic Car Show, The Links – 17<sup>th</sup> September

### South Tyneside

- Proper Food & Drink Festival, Bents Park – 27<sup>th</sup>-29<sup>th</sup> May
- Jarrow Festival, various locations in Jarrow – 27<sup>th</sup> & 28<sup>th</sup> May; 4<sup>th</sup> June
- Whitburn Festival, various locations in Whitburn - 10<sup>th</sup>, 21<sup>st</sup>, 23<sup>rd</sup>-25<sup>th</sup> June
- Summer Parade, Town Hall to sea front/Bents park – 1<sup>st</sup> July
- Proms in the Park, South Marine Park – 2<sup>nd</sup> July
- KT Tunstall, Bents Park, 9<sup>th</sup> July
- Busted, Bents Park – 16<sup>th</sup> July
- Louisa Johnson, Jedward & 5 After Midnight (all X Factor), Bents Park – 23<sup>rd</sup> July
- Sister Sledge, Bents Park – 30<sup>th</sup> July
- Great North Run, finishes on seafront – 10<sup>th</sup> September

### Sunderland

- Seaburn Classic Car Show, Seaburn Recreation Park – 11<sup>th</sup> June
- Active Sunderland Big Bike Race, starts & finishes at St Peter's, 11<sup>th</sup> June
- Sunderland International Air Show, Roker & Seaburn sea fronts – 21<sup>st</sup>-23<sup>rd</sup> July
- Festival of Fun, Sunderland Museum & Winter Gardens – 22<sup>nd</sup> July-3<sup>rd</sup> August
- Craft & Food Fayre, Sunderland Museum & Winter Gardens – 19<sup>th</sup> August

#### c) The financial expectations relating to income and expenditure in each area

This is perhaps the most difficult area for comparison. Some events are direct Council spend, others are delivered in partnership at no direct cost to the Council. The structure of each local authority is such that events spend can be part of a leisure and tourism portfolio, a public health agenda or as a key regeneration outcome. In reality it is usual that all of these objectives are essential, in whichever service area events delivery is located.

Based upon controllable spend for each Council relating to events delivery, the three areas breakdown as follows:-

### North Tyneside

Events Unit	103,818
Mouth of the Tyne Festival	17,001
Heritage Events	5,696
Tynemouth Station	18,053
<b>Total</b>	<b>144, 568</b>

## **South Tyneside**

Magic Festival	4,500
Summer Festival	25,320
Special Events	55,800
Winter Wonderland	48,000
Events General	147,430
<b>Total</b>	<b>281,050</b>

## **Sunderland**

<b>Events</b>	<b>1,076,437</b>
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The core budget for events shows a clear differentiation across the three authorities. In North Tyneside the core budget was supplemented in 2017 by £101k from the Service Improvement Fund, in order to assist in the delivery of Mouth of the Tyne Festival and the Summer and Winter festival programmes. However, even with this additional support, funding remained significantly lower than in the other two Councils in the comparison.

Some added value is gained in North Tyneside through the use of the arts budget to support key activities in the Borough, in order to increase their leverage to access other funding sources. The Whitley Bay Film Festival, the Iron Age literary festivals and a range of theatre productions, including those to commemorate WW1, have benefitted from relatively small financial contributions from the Council, which have helped lever in resources from Arts Council England, Heritage Lottery Fund and others.

A wide range of literary events and activities delivered through the library service, including high profile author events in 2017 with David Walliams and Julian Clary, are also delivered outside of the core events budget programme.

Cross promotion of events and activities with key partners such as Tyne and Wear Archives and Museums (TWAM) and SMG Europe, who run Playhouse, Whitley Bay, adds to the sense that North Tyneside 'punches above its weight' in relation to its arts and events programme.

While it is not possible to make direct financial comparisons it is fair to assume that some of the above factors will also apply in Sunderland and South Tyneside.

### **d) The response of business and residents in each area**

In 2016 Norma Wilburn Associates carried out a survey of visitors to the coast on behalf of North Tyneside Council. The only comparative with South Tyneside and Sunderland is a survey of visitors to the Durham Heritage Coast.

It is difficult to extract a range of meaningful comparisons between the two. The North Tyneside visitor survey is carried out during the summer and is specifically targeting people outside the borough. The Durham Heritage Coast survey was conducted in the winter and is targeted at all visitors.

There were 425 surveys carried out in North Tyneside with 633 respondents to the Durham Heritage Coast survey, with 204 completed in South Tyneside and 217 in Sunderland (the remaining 212 in Durham).

Both South Tyneside and Sunderland carry out visitor surveys at the seafront, which ask profile information, spend details and also satisfaction levels. Both contracted NGI to carry out the survey and provide a report. Some other destinations did the same so there was some saving for fieldwork costs.

The nature of the surveys means that there is no consistency across the majority of questions asked and, where there are common questions, the answers are hard to compare e.g. the use of different age ranges.

Specific work carried out in North Tyneside, around the 10k Road Race and Mouth of the Tyne Festival for example, show high levels of positive public response. In relation to the Mouth of the Tyne Festival in particular, survey outcomes suggest a significant boon for the local business economy due to the increased footfall over the period of the festival.

#### e) The impact upon the tourism economy in each area

The industry standard for the tourism sector is the Scarborough Tourism Economic Assessment Model (STEAM), which is used to calculate the impact and benefits of tourism across a local authority area. While the model has its critics, it is nevertheless the one which local authorities in the North East use and the one which provides some trend data for the sector.

The most recent data available for the region for the three local authorities is as follows:-

#### STEAM 2015 comparison

	North Tyneside	South Tyneside	Sunderland
<b>Day visitors (000's)</b>	5,027 (-6%)	5,575 (+3%)	7,298 (-4%)
<b>Overnight visitors (000's)</b>	508 (0)	388 (+3%)	704 (+2%)
<b>Overnight visits by nights (000's)</b>	1,218 (+1%)	956 (+3%)	1,653 (+4%)
<b>Direct expenditure (£)</b>	203.48 (-4%)	205.96 (+3%)	287.07 (-1%)
<b>Overall expenditure (£)</b>	271.54 (-4%)	275.56 (+3%)	383.09 (-1%)
<b>Employment</b>	3,598 (-5%)	3,559 (+2%)	4,949 (-3%)

The recently published STEAM 2016 figures for North Tyneside show:-

- 5.7 million people visited North Tyneside in 2016. This was up by 3% on 2015.
- The number of day's visitors spent in the destination also rose by 3% to 6.44 million visitor days.
- Visitor expenditure in North Tyneside now stands at £212 million, up by 3% on the previous year.
- The number of people directly employed in tourism in North Tyneside in 2016 stood at 2,893 up by 2% on 2015.

When indirect employment in the supply chain is taken into account, total employment stands at 3,668 again up by 2%.

- The number of overnight visitors to North Tyneside now stands at 506,000, with these visitors spending 1.23 million nights (+1%) in the destination.
- Overnight visitors had an economic contribution of £85.2 million, up by 2% on 2015.

- Day visitor levels have also risen by 3.6% to 5.2 million, with expenditure levels rising by the same rate to £198 million.
- The Food and Drink sector still accounts for 29% of all expenditure and 31% of employment in the tourism sector.
- 81% of all visits to North Tyneside are day visits, with these visitors accounting for 70% of expenditure.
- The economic impact of tourism to the local economy is estimated at £283m

The most recent data for the Mouth of the Tyne Festival (2017) suggests that spend in the local economy, over the weekend of the festival is somewhere between £1.5m – £2m. This is a huge benefit to local business, as well as significantly raising the profile of the Borough as a destination.

## **5 Conclusions**

The difference between the approach of the three local authorities to events delivery makes some areas of direct comparison difficult. However, it is possible to draw some conclusions in order to support the recommendations based on the deliberations of the Sub Group as follows:-

- a) Trend data assessed through the STEAM model does not indicate significant differences in visitor levels in spite of differences in events spend;
- b) Across all three local authorities it is clear that events and the wider tourism offer are a significant part of the local economy and should be given greater priority in the deliberations of the North East LEP and in relation to North of Tyne devolution.